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Table of Contents

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

Alma September 2014 Release Highlights

Acquisitions

- Reopen a Closed/Canceled PO Line

  It is now possible to reopen a PO line that has been closed or canceled. PO lines can be reopened from the individual PO line or using an automated process.

- Tab Content Indicator in License Management Screens

  On the License Details pages, the Inventory and Amendments tabs will have a blue indicator if the tab contains content. If the tab does not contain content, the icon remains gray.

Resource Management

- Support Duplicate Bibliographic Records in the Same Import Load

  The metadata import process now identifies duplicate bibliographic records in the same load and will attach additional information from these records (such as order and inventory data) to a single bibliographic record. This enhancement caters to situations in which vendors provide bibliographic records per item/order in the same file.

- Title Authorities Support

  Alma now provides full support for title authorities. Mapping for the bibliographic 490$a and 440$a (obsolete) and an F3 lookup for these fields in the Alma MD Editor has been added. The 490$a (and 440$a) lookup is pulled from the authority headings 130$a and 430$a.

Fulfillment

- Updates to the Digitization Department Workflow

  This great new feature allows staff members (with the Fulfillment Services Operator role) to create library initiated digitization requests (in addition to the already existing option of placing requests for patrons.) A Remote Digital Storage workflow is now configurable in the Digitization Profile Rules, in addition to Document Delivery and Deposit options. The workflow ends without triggering a deposit or document delivery action; rather the operator will manage storing the digitized content at a remote storage outside of the system.

- Enabling Integration with the Dematic Automated Storage Retrieval System (ASRS)

  Alma can now communicate with the Dematic Automated Storage Retrieval System. When items are moved into the Dematic managed storage, Alma can send messages to the Dematic remote storage so that it can update its database of inventory. In addition, Alma can send a message to the Dematic remote storage whenever a request is created, so that the system can automatically pull the proper bin off the shelf and supply the requested item.

Resource Sharing

- Personal Delivery Support for Resource Sharing Requests

  It is now possible to send resource sharing items to a patron instead of to the resource sharing library. When personal delivery is configured in the relevant TOU, you can select to have physical or physical non-returnable requests sent directly to a patron's personal delivery address (home or office).

- Placing a Resource Sharing Request From the Network or Community Zone

  This feature allows for creating a resource sharing borrowing request from a Network or Community Zone.

Analytics

- Fields Added to the Requests Details Dimension

  The following fields have been added to the Requests Details dimension under the Requests subject area: Managed by Library (latest step); Managed by Unit (latest step); Managed by Desk (latest step); Status (latest step)

- Statistical Categories Added to the Shared User Details Dimension

  We are happy to announce these much anticipated new fields under the shared users dimension. This new addition will allow for report creation and filtering based on advanced user information typically stored in the statistical category fields.

- New Industry Statistics Dashboard

  An Industry Statistics dashboard has been added to Alma Analytics. The dashboard contains sample reports that can be used as a basis for creating reports that need to be sent to library organizations such as ARL and SCONUL.

Collaborative Networks and Multi-Campus Institutions

- Order Electronic Resources Negotiated and Managed in the NZ by Member

  This feature allows individual members to purchase electronic resources that are negotiated and managed for them by the central office in the Network Zone

- Ability to localize a CZ record in a Network Zone catalog

  For collaborative networks, this enhancement allows the NZ institution to create a local copy of a CZ record, to enrich it, and also determine which member institutions have inventory associated with this bibliographic record.

- Ability to Restrict Fulfillment Network Services

  When utilizing a Fulfillment Network, it is possible to configure unexposed or hidden user groups for institutions in the network. These users will not be found when searching for a user in a linked institution and cannot therefore receive walk-in services at a linked institution.

Alma Interface Updates

- Enhancements to Drop-Down Lists

  Several enhancements have been made to the drop-down lists available throughout the Alma interface—for example, the font of the results list has been improved to provide more readable results; the auto-complete feature displays results that contain the searched text in the middle of the results and not just the beginning.

Data Services

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

Note that with the September release, the Community Zone includes the BIBSYS Bare (BIBSYS Autoritetsregister) global name and subject authority file.

In addition, the CZ is now enriched with bibliographic records from Springer (as of September 1st)

New Electronic Collections Added to the Alma CKB

The following packages were added to the Alma CZ during the period 27-July-2014 through 24-August-2014:

- McGraw Hill Ebook Library Business Collection
- McGraw Hill Ebook Library Business Skills
- McGraw Hill Ebook Library Career Advice
- McGraw Hill Ebook Library Entrepreneurship & Small Business Management
- McGraw Hill Ebook Library Finance & Investing
- McGraw Hill Ebook Library Human Resources & Training
- McGraw Hill Ebook Library Leadership & Management
- McGraw Hill Ebook Library Process Management
- McGraw Hill Ebook Library Real Estate
- McGraw Hill Ebook Library Sales & Marketing
- McGraw Hill Ebook Library Engineering and Computing Collection
- McGraw Hill Ebook Library Chemical Engineering
- McGraw Hill Ebook Library Civil Engineering
- McGraw Hill Ebook Library Computing
- McGraw Hill Ebook Library Consumer Computing
- McGraw Hill Ebook Library Electrical and Electronic
- McGraw Hill Ebook Library Industrial Engineering
- McGraw Hill Ebook Library Mechanical Engineering
- McGraw Hill Ebook Library Sustainability Engineering

- McGraw Hill Ebook Library TAB DIY/ Hobbyist Electronics
- McGraw Hill Ebook Library Medical Collection
- McGraw Hill Ebook Library Nursing
- McGraw Hill Ebook Library Primary Care
- McGraw Hill Ebook Library Student Study Aids Collection
- McGraw Hill Ebook Library AP Study Guides
- McGraw Hill Ebook Library DEMYSTIFIED Self-Teaching Guide: Education
- McGraw Hill Ebook Library DEMYSTIFIED Self-Teaching Guide: Technical and Science
- McGraw Hill Ebook Library DEMYSTIFIED Self-Teaching Guides: Health Professions
- McGraw Hill Ebook Library Schaum's Course Outlines
- McGraw Hill Ebook Library School & Career Exams
- McGraw Hill Ebook Library Open University Press Collection
- McGraw Hill Ebook Library Nursing Education
- McGraw Hill Ebook Library Professional Nursing
- McGraw Hill Ebook Library Understanding Public Health
- McGraw Hill Ebook Library USMLE First Aid
- McGraw Hill Ebook Library DEMYSTIFIED Self-Teaching Guides: Business and Economics
- Emerald Engineering Backfiles
- Emerald Accounting and Finance eJournal Collection
- Emerald Business, Management and Strategy eJournal Collection
- Emerald HR, Learning and Organization Studies eJournal Collection
- Emerald Information and Knowledge Management eJournal Collection
- Emerald Marketing eJournal Collection
- Emerald Property Management & Built Environment eJournal Collection
- Emerald Public Policy and Environmental Management eJournal Collection
- Emerald Tourism and Hospitality eJournal Collection
- Emerald Education eJournal Collection
- Emerald Vulnerable Groups eJournal Collection
- Emerald Criminology / Forensic Psychology eJournal Collection

- Emerald Learning / Intellectual Disability eJournal Collection
- Emerald Mental Health eJournal Collection
- Emerald Management First 60
- Emerald Management First 120
- Emerald Management First 175
- Emerald Management First 200
- Emerald eJournals Premier
- Emerald Operations and Logistics and Quality eJournal Collection
- Emerald Library Studies eJournal Collection
- Taylor & Francis Fresh Journals Collection
- Taylor & Francis Fresh Social Science and Humanities
- Taylor & Francis Fresh Science & Technology
- Taylor & Francis New Launch Free Trial
- Taylor & Francis SSH New Launch Free Trial
- Taylor & Francis S&T New Launch Free Trial
- CRKN Sage Collection 2014
- McGraw Hill Access Anesthesiology
- McGraw Hill Access Pediatrics
- Proquest PAO Periodicals Archive Online Collection 3.1 New Platform
- Proquest PAO Periodicals Archive Online Collection 3.2 New Platform
- Proquest PAO Periodicals Archive Online Collection 3.3 New Platform
- Proquest PAO Periodicals Archive Online Collection 3.4 New Platform
- Proquest PAO Periodicals Archive Online Collection 3.1 Update New Platform
- Proquest PAO Periodicals Archive Online Collection 3.2 Update New Platform
- Proquest PAO Periodicals Archive Online Collection 3.3 Update New Platform
- Proquest PAO Periodicals Archive Online Collection 3.4 Update New Platform

Note: No new external search resources were added for the September release.

Link Resolver “Get It Now” Service from Copyright Clearance Center

Description

Effective with the September release, libraries can offer the Get it Now service provided by CCC (Copyright Clearance Center) using their Alma Link Resolver. This service allows staff users to order scholarly articles for a set list of publishers through CCC and receive the articles within minutes.

CCC collections are now available in the CZ (Community Zone) for activation.

Note: Testing access to CCC Get It Now services (using the test access action in the staff search results) will not lead the staff user to an article because the electronic resource from which test access is performed is at the journal level.

Technical Instructions

The following roles can manage electronic resource activations:

- Electronic Inventory Operator or Repository Manager
- Electronic Inventory Operator Extended (required for delete operations)

To activate CCC Get It Now electronic collections:

1. In the Community tab, perform a repository search for electronic collections that contain the **CCC Get It Now** keywords.
2. In the results, click the **Activate** link for the collection that you want to activate.

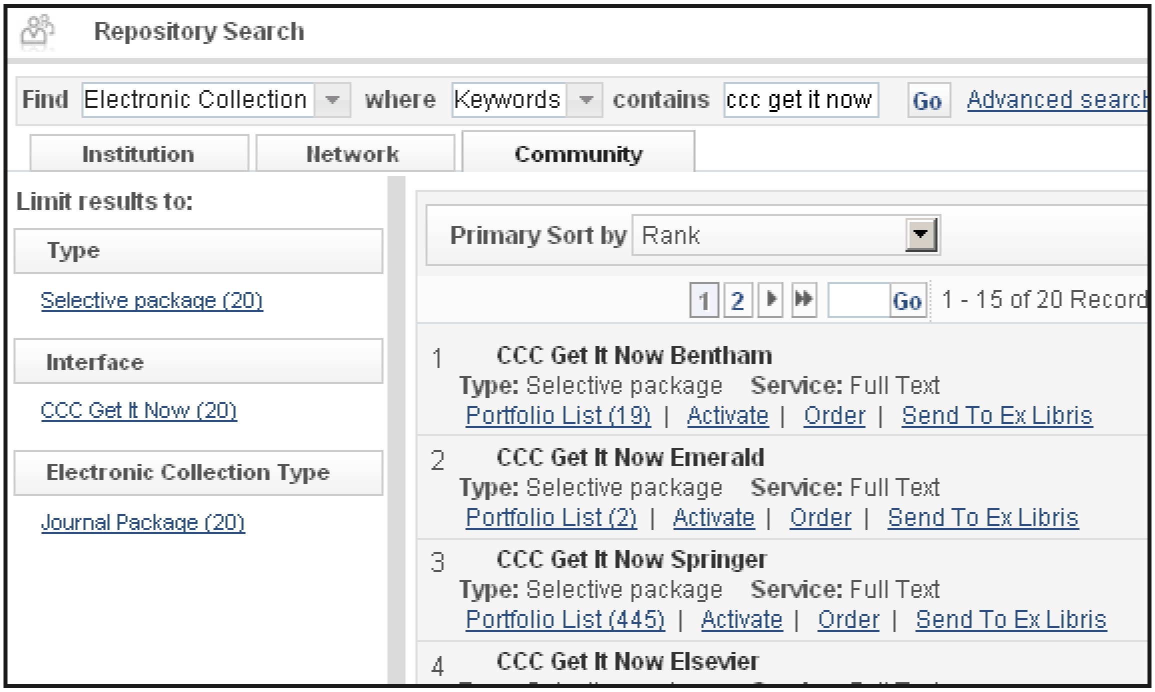


Figure 1 - Results for CCC Get It Now Electronic Collections

3 On the Activation Wizard: Electronic Collection and Services Setup page (Step 1), configure the local electronic configuration information and full-text service parameters and click **Next**.

4 On the Activation Wizard: Linking Information page (Step 2), configure the linking parameters as required by your Get It Now service and click **Next**.

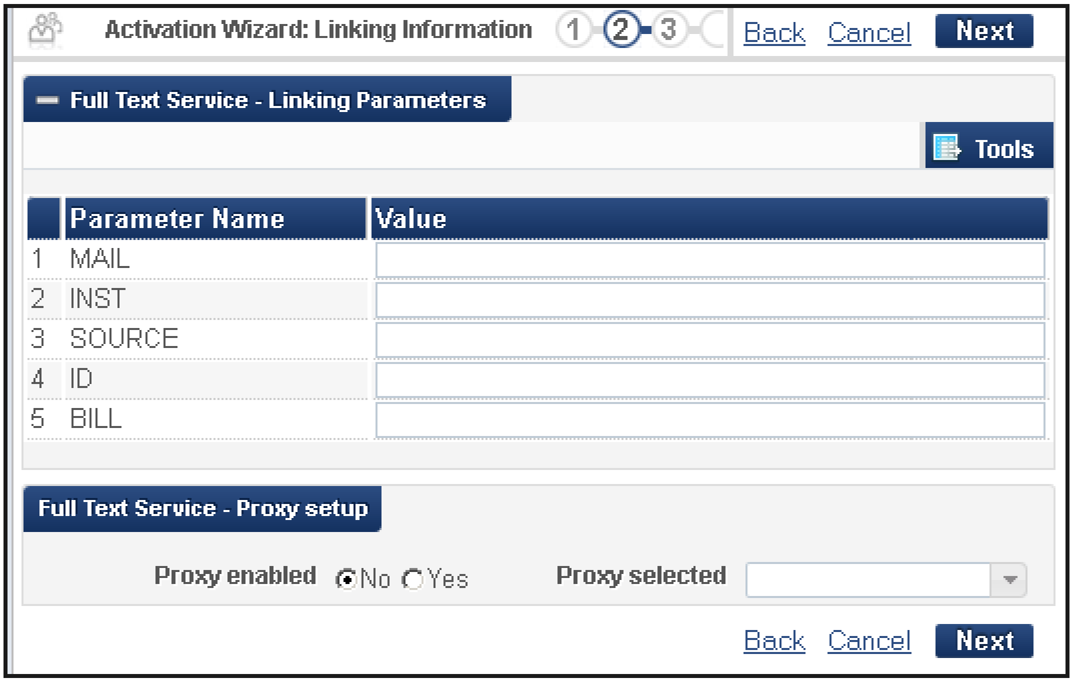


Figure 2 - Enter Linking Parameters for CCC Get It Now

5. On the Activation Wizard: Select Activation Method page (Step 3), specify the activation method and click **Next**.
6. On the Activation Wizard: Activation Summary page (Step 4), review your collection activation selections and click **Activate**.

Alma Show Me How and Videos

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

Alma Show Me How – September

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 September release, the following Show Me How scenario is available:

   - Reopen Closed/Canceled PO Lines via Process

   The following Show Me How pop-ups are available:

   - New: Reopen a PO Line
   - New: Available For Indication

Alma Videos – September

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

- Search by Available For Groups
- Reopen a Closed/Canceled PO Line
- Export Electronic Portfolios in TXT Format
- Inter-Library Loans Personal Delivery
- Order E-Resources Negotiated and Managed in the NZ by Member
- Analytics: Industry Statistics Dashboard
- Analytics: User Statistical Categories
- Analytics: Managed By Fields for Requests

Particular Issues to Note

The following issues should be noted:

- Alma now takes into account time differences based on Daylight Savings Time when the data center has a different DST policy than the institution. Until now, jobs would run at a different time when DST was in effect. Now, jobs run at the same time regardless of DST.
- German is now available for both the staff Alma user interface and the patron-facing user interface (notifications, self-check machine messages, Primo Get It, View It, and My Account). To enable working with Alma in German, you must activate the German language by selecting the appropriate check mark in the InstitutionLanguages mapping table's **Enabled** column (**Administration > General Configuration > Configuration Menu > General Configuration > Institution Languages**) and clicking **Save**. Note that once German is enabled, all patrons whose preferred language is defined as German will be exposed to Alma patron-facing interface elements in the German language.

Acquisitions

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

Reopen a Closed/Canceled PO Line

Description

This improvement for Alma's September release allows an Acquisitions user to reopen a PO line that has been closed or canceled. Closed PO lines have completed a full acquisitions workflow (order and payment) and, on completion, have been closed. Canceled PO lines have been started but not completed.

Closed or canceled PO lines can be reopened from the individual PO line or using an automated process.

Technical Instructions

The following roles can reopen a closed or canceled PO line:

- Acquisitions Operator
- Acquisitions Manager

To reopen a closed or canceled PO line from the PO line:

1 From the Alma menu, open the PO line search (**Acquisitions > Purchase Order Line > Search for PO Line**.)

2 Enter `closed` or `canceled` in the **Find** field and click **Go**.

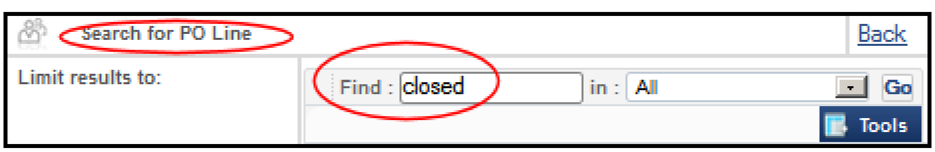


Figure 3 - Search for Closed or Canceled PO Lines

Results for PO lines with the status of Closed are returned (see below). A filter for Status also appears in the left column of the page. At the footer of every closed entry is a link to **Reopen** the PO line.

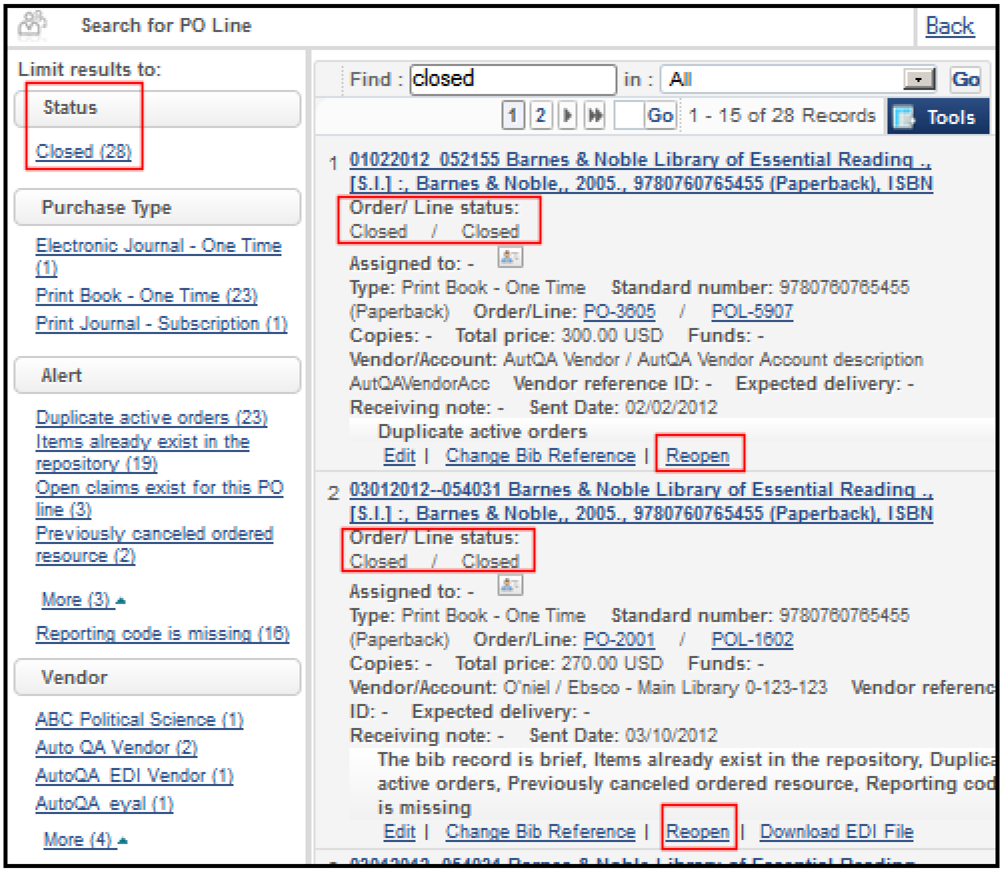


Figure 4 - Search Returns for Closed or Canceled PO Lines

3 Click **Reopen** for the PO line you want to open.

If a closed or canceled PO line does not contain inventory, Alma posts a confirmation message so you can opt out of the action.

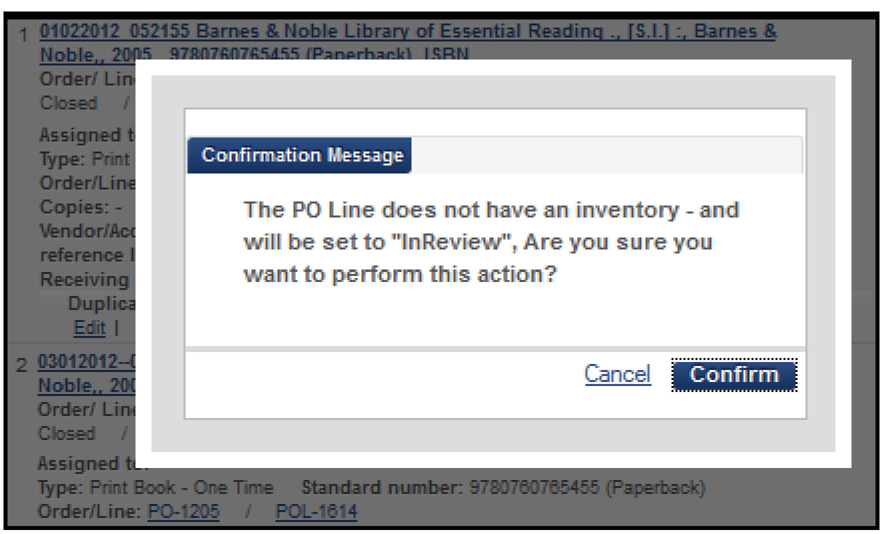


Figure 5 - Confirmation Message for No Inventory

To continue opening the PO line without inventory, click **Confirm**. (If you click **Cancel**, the PO line remains canceled or closed.)

The Search for PO Line page refreshes with a note that the PO line you reopened has been updated with a status of **In review**. It no longer appears on the **closed** results page.

4 To open the PO line, conduct a new search using the **In Review** status or the **PO line number** links.

The PO line opens with a status of **In review**.

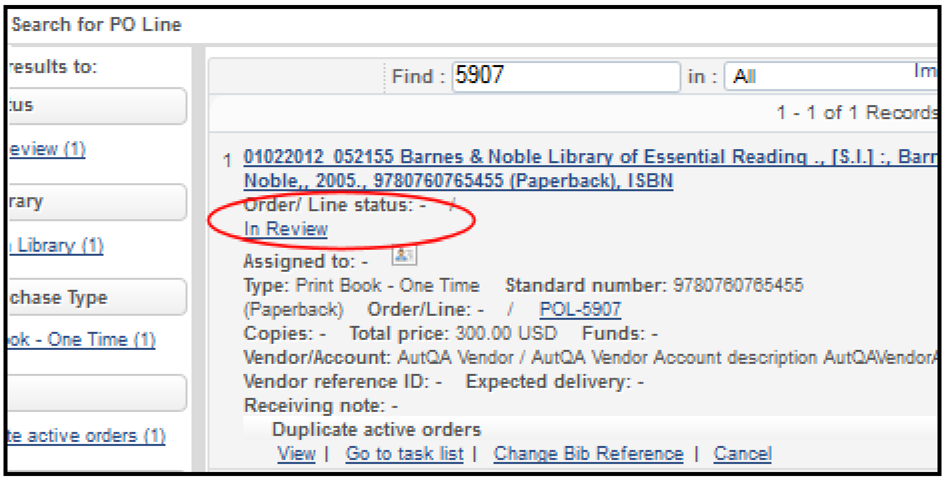


Figure 6 - In Review Status

5 To work with the PO line, follow the procedures you would for any PO line with the status of **In review**. See the *Alma Acquisitions Guide* or online help for details.

To reopen a closed or canceled PO line using process automation:

1 Create a PO line set of closed/canceled PO lines that you want to reopen.

2 From the Alma menu, select **Manage Jobs > Run a Job**.

3 Select the **Update PO Lines Workflow** job and click **Next.**

4 Select the PO Line set you have just created and click **Next.**

5 Select **Reopen closed/cancelled PO Lines** and click **Next**.

6 Set the job name and click **Next.**

7 Select the **Reopen closed/cancelled PO Lines** parameter. This option reopens closed or cancelled PO lines and sets them to **In Review**.

8 Enter a schedule for the job, review details, and run the job. To view the results, go to **Administration > Manage Jobs > Monitor Jobs** and open the job's report.

Tab Content Indicator in License Management Screens

The September 2014 release of Alma includes a continuation of the content indicator located next to the tab label as previously used for Notes and Attachments. Now, on License Details pages, the Inventory and Amendments tabs also contain a bright blue indicator if the tab contains content. If the tab does not contain content, the icon remains gray.

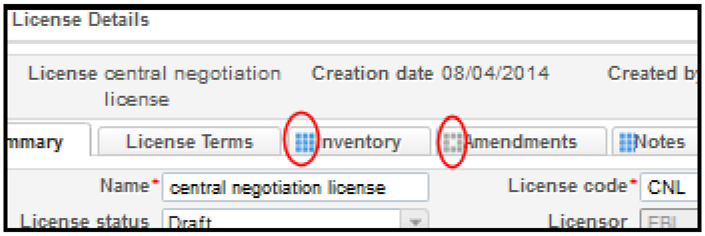


Figure - License Details Page with Content Indicators

Other Acquisitions Enhancements

- The status of invoices on the Waiting for Payment task list was **Sent to ERP**. Since not all institutions work with ERP systems, this status has been changed (for all such invoices) to **Waiting for Payment**.

Resource Management

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

Fine Tune Matching Process - Ignore Records Linked to Community Zone

Description

Various processes in Alma (such as the following) use record matching before adding records to the institution's catalog:

- Metadata import
- OCLC Connexion matching
- Linking IZ (Institution Zone) records to NZ (Network Zone) records

Previously, Alma matched incoming records with any record that exists in the catalog and also with bibliographic records that link to CZ bibliographic records. To fine tune the matching process, Alma now allows you to indicate at the institution level whether to consider matching records that are linked to the CZ (Community Zone). The **ignore_cz_records** customer parameter has been added to specify this type of matching.

Note: If the ignore_cz_records parameter is set to **True** (that is, Alma disregards CZ records for any matching in the system), the **Unlink bibliographic records from Community Zone** and **Disregard matches for bibliographic CZ linked records** options in the import profile's **Match Profile** tab (**Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles > Match Profiles**) will not be available.

Technical Instructions

The following roles can configure the call number mapping rules:

- Cataloging Administrator
- General System Administrator

To ignore CZ records during import:

1 On the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**) click **Other Settings** under **General**.

The CustomerParameters page opens.

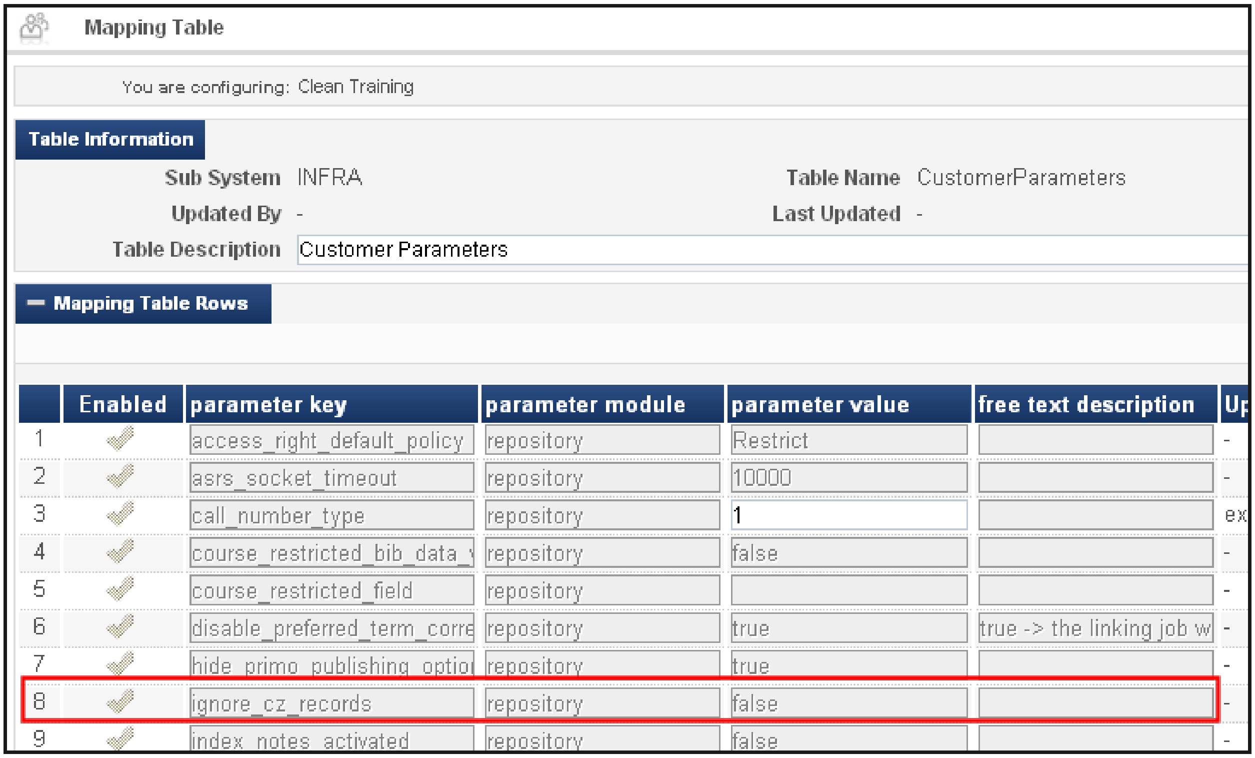


Figure 7 - CustomerParameters Mapping Table Page

2 For the **ignore_cz_records** mapping row, set the **parameter value** field to **true**.

3 Click **Save**.

Support Duplicate Bibliographic Records in the Same Import Load

The metadata import process has been enhanced to identify duplicate bibliographic records in the same load and to attach additional information from the duplicate records (such as creation of order and inventory) to a single bibliographic record. Previously, a separate record was imported for each duplicate record. This enhancement has been added for situations when vendors provide bibliographic records per item/order in the same file.

Export Portfolios in Text Format

Description

This enhancement allows you to export electronic portfolios in the TXT format in order to integrate with external third parties that do not support other formats.

Technical Instructions

The following role can export electronic portfolios:

- Repository Administrator

To export a set of electronic portfolios in the TXT format:

1. Create a set of electronic portfolios.
2. On the Run a Job – Select Job to Run page (**Administration > Manage Jobs > Run a Job**), select **Export** from the **Type** drop-down filter, select the **Export Electronic Portfolios** job, and click **Next**.

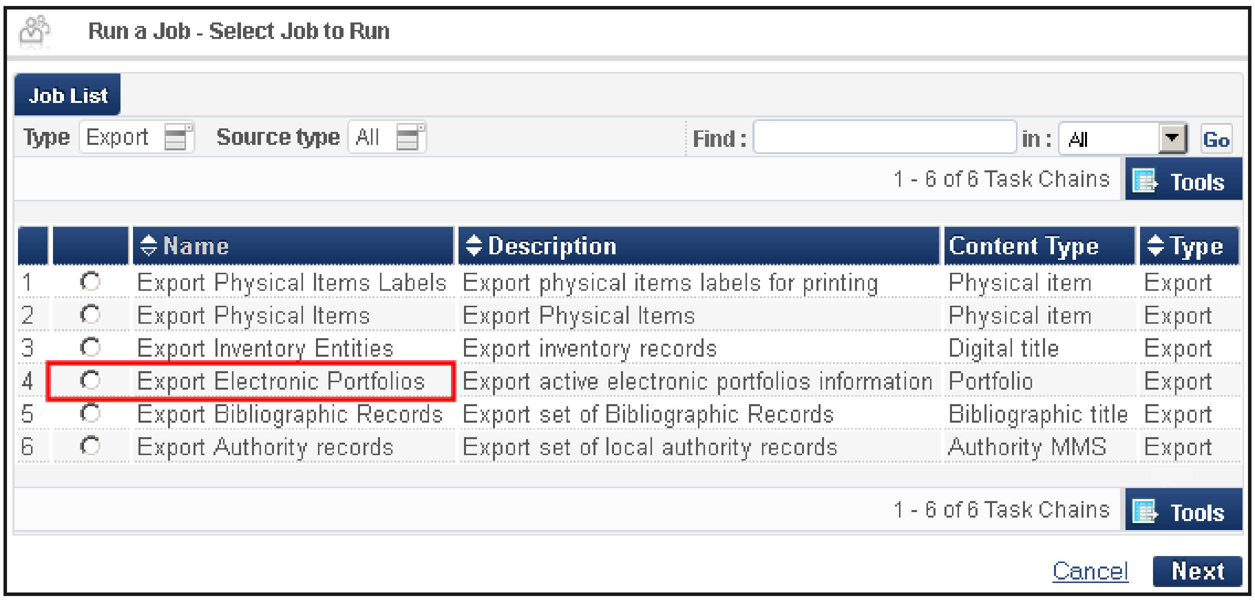


Figure 8 - Select Job to Run

3. On the Run a Job – Select Set page, select the set you created in the first step and click **Next**.
4. Enter the following parameters on the Run a Job – Enter Task Parameters page and click **Next**:
   - **Output format** – Specify **TXT schema**.

- **Number of records in file** – Specify the maximum number of records allowed in an output file: **One File**, **1000**, **5000**, or **10000**.
- **Export into folder** – Specify the export folder: **Private** or **Institution**.
- **FTP configuration** – Select the FTP configuration.
- **Subdirectory** – Select the subdirectory on the FTP server.
- **Export only active portfolios** – Select the **Yes** option to export only active portfolios.
- **Alma Link Resolver base URL** – Enter the base URL for the Alma Link Resolver using the following format and inserting your institution's information where indicated:

  ```
  http://<Primo_host_server:port>/openurl/<Primo_institution_code>/
  <Primo_view_code>?
  ```

  If you are unfamiliar with your base URL for the Alma Link Resolver, contact Ex Libris Support for assistance.

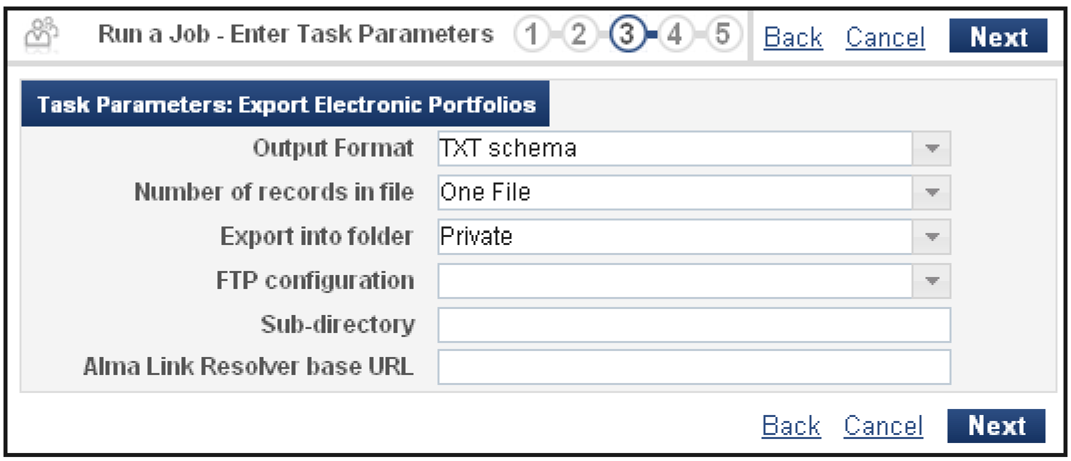


Figure 9 - Enter Task Parameters Page

5 On the Run a Job – Job Details and Schedule page, schedule the job and click **Next**.

6 On the Run a Job – Review and Confirm page, review the job details and click **Submit**.

Handle Delete Authorities during Metadata Imports

This enhancement allows you delete authority records that have been marked for deletion (which is indicated by a **d**, **s**, or **x** in the fifth position of the record's LDR) during MD imports. For example, the following record has the fifth position set to **d**:

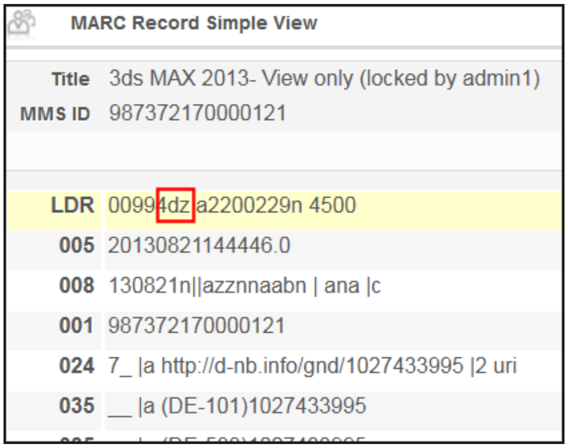


Figure 10 - Record Marked for Deletion

Title Authorities Support

Alma now provides full support for title authorities (both global and local authorities). Previously, Alma has provided Name and Subject Headings authority support and the following bibliographic fields are mapped to the authority headings:

- 130 – Main Entry – Uniform Title
- 630 – Subject Added Entry – Uniform Title
- 730 – Added Entry – Uniform Title
- 830 – Series Added Entry – Uniform Title

In the September release, Alma has added mapping for the bibliographic 490$a and 440$a (obsolete) and an F3 lookup for these fields in the Alma MD Editor. The 490$a (and 440$a) lookup is pulled from the authority record 130$a and 430$a.

With the F3 lookup, you are provided the option to select your preferred series statement from a predefined list that is displayed in the MD Editor. The system does not do automatic linking/preferred term correction as part of the authorities daily processing for the 490$a/440$a since the 490$a/440$a series statement represents the information (the way that a series is named) on the book itself. (Refer to http://id.loc.gov/authorities/names.html for more information.) However, you can do an F3 lookup in the MD Editor for the 490$a/440$a series statement and optionally **Select** the preferred authorities to update the bibliographic 490$a/440$a. Refer to the example below.

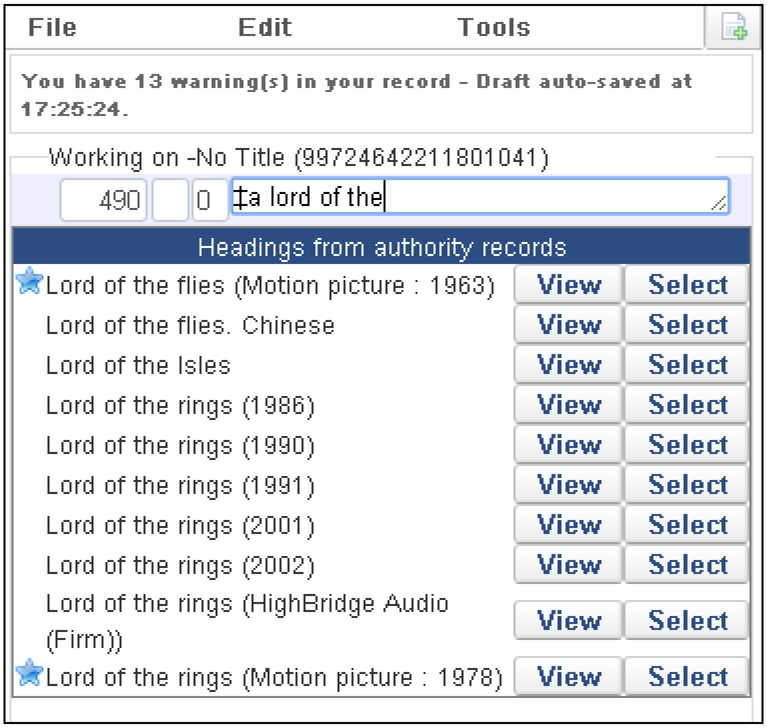


Figure 11 - F3 Lookup for 490$a

Also in the September release, the 830 has been corrected to map to the Name Headings. Previously, it was incorrectly mapped to the Subject Headings.

OR Operator Added to the Normalization removeField Consequence

The removeField consequence in Alma's normalization rules has been enhanced to use the pipe (|) operator in the rule element as a regular expression (regExp) operator to indicate the Boolean OR. Refer to the example below.

```
rule "remove 866 except for the 866s that have 0 or 99 in subfield 8"
when
(TRUE)
then
removeField "866" if (not exists "866.8.0|99")
end
```

Figure 12 - Pipe Enhancement Example

In cases where the pipe symbol may be part of the value compared, you need to use four backslashes (\\\\) as the escape string. Refer to the example below.

```
rule "remove 866 except for the 866s that have 0|99 in subfield 8"
when
(TRUE)
then
removeField "866" if (not exists "866.8.0\\\\|99")
end
```

Figure 13 - Pipe Enhancement Example

Re-Indexing Update

A full re-indexing of the repository bibliographic records (physical and electronic) is being completed in August. The re-indexing process includes the following:

- 774 field was added to the list of indexed fields as follows:
  - All subfields were added to the Keywords search
  - s and t were added to the Title index
  - w was added to the Other System Number index
  - a was added to the Names index
  - u and x-z were added to the Standard Number index
- 780$a, $s, $t, and 785$a to the title index
- 043 additional physical form available note
- 530 geographic area code
- 852 $b indexed to a field called *Sublocation*
- 852 &c indexed to a field called *Shelving location*
- 852 $h indexed to a field called *Classification part*
- Holdings indexes:
  - 583 added to the index
  - Suppressed/not suppressed

- Inventory indexes:
  - Added keyword search for the portfolio internal description
- 09X fields indexed (local call number09X)

  To customize the 09X indexes, click **Search Indexes** in the **Search Configuration** section (**Resource Management > Resource Configuration > Configuration Menu**) to specify the following:

  - Be enabled
  - Use in the simple search
  - Use in the advanced search
  - Change the index order of the index

  If you would like to change the index label, click **Customize Indexes Labels** in the **Search Configuration** section (**Resource Management > Resource Configuration > Configuration Menu**) to update the index description.

  Refer to the original announcement in the Alma August 2014 release notes for more information.
- Original item creation date (for migrated items) added to physical item details (instead of Alma creation date) that will be visible in the physical item subject area of Analytics

Record Lock Enhancement

Description

With the September release, you now have the flexibility to set the maximum amount of time that a record can be locked and, thus, eliminate the possible challenges faced with records locked for extended periods of time and unavailable for processing. You can now configure the amount of time that a record is locked by setting the `working_copy_locked_timeout` configuration parameter in **Other Settings** in the **General** section (**Resource Management > Resource Configuation > Configuration Menu**). A record has a locked status until the user working with the record in the MD Editor does a **Release** or **Save and Release** or the setting for the new `working_copy_locked_timeout` parameter has expired. The default setting for `working_copy_locked_timeout` is one hour.

With this enhancement, the Repository search results will no longer present the **Locked By** statement; but rather, the **Locked by** statement (refer to the examples below) will be displayed (when relevant) in the MD Editor. Previously, the Repository search results displayed a row with the label **Locked By**: followed by the name of the user that had the record locked (other than the user viewing the search results); and the **View** action link option appeared in the list of actions below the search results.

Figure 14 – Previous Locked By Example

Effective with the September release, the search results for a locked record display the **Edit** action (instead of **View**) and the locked notation for the record is displayed in the MD Editor view of the record instead of the search results.

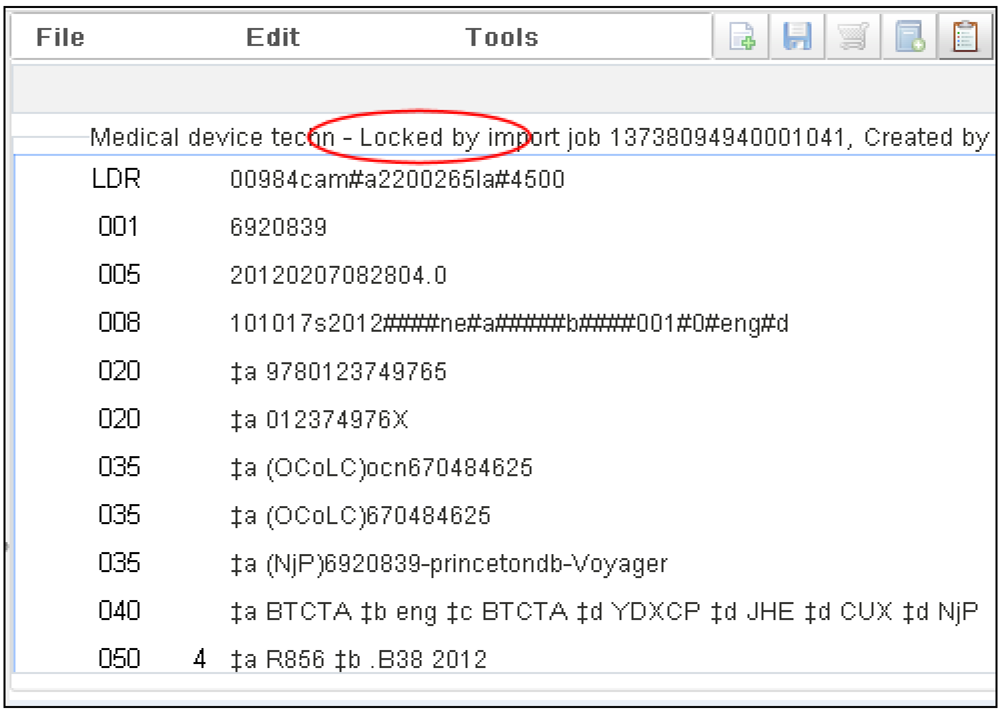


Figure 15 - MD Editor Locked By Notation

With this enhancement, several customer-reported issues related to locking/unlocking records have been resolved.

Technical Instructions

The following roles can configure the local holdings fields:

- Catalog Administrator
- General System Administrator

To configure `working_copy_locked_timeout`:

1. From the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**), click **Other Settings** in the **General** section.
2. Locate the `working_copy_locked_timeout` parameter and click **Customize**.
3. Enter the number of hours in the **Parameter Value** cell that you want the bibliographic record to be locked. The amount you specify can be up to 9999 and excludes 0.
4. Click **Save**.

Holdings Local Field Support

Description

With the September release, support for local holdings fields 9XX, X9X, and XX9 and 883 has been added to Alma. Similar to local bibliographic fields, you can configure Profile Details for the holdings fields (**Cataloging section > Metadata Configuration > MARC21 Holdings**).

Technical Instructions

The following roles can configure the local holdings fields:

- Catalog Administrator
- General System Administrator

To configure Profile Details for local holdings fields:

1. From the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**), click **Metadata Configuration** in the **Cataloging** section.
2. Click the **MAR21 Holding** profile link. The Fields tab on the Profile Details page opens.

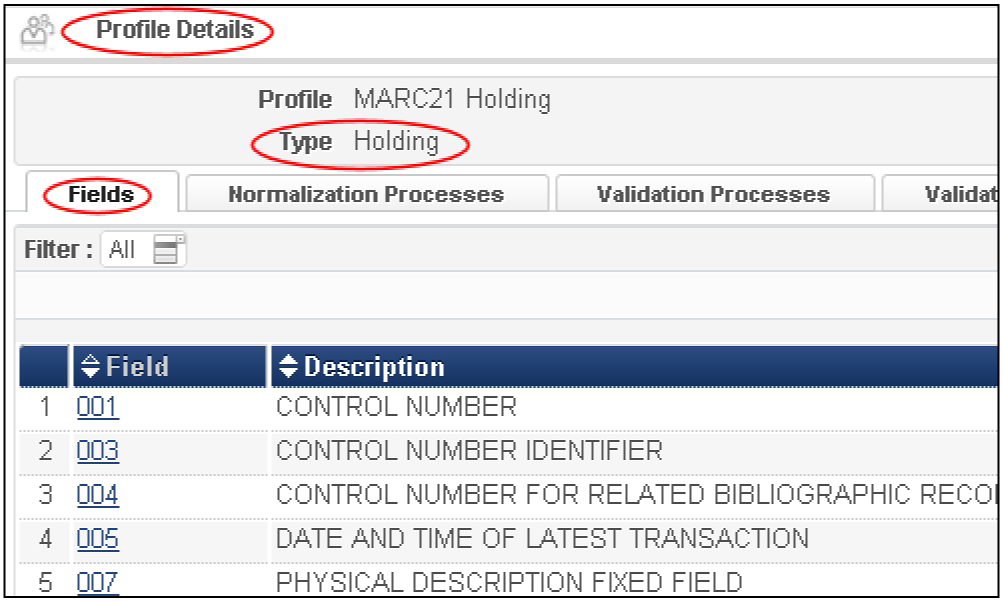


Figure 16 - Fields Tab on the Holdings Profile Details Page

3 Use the **Filter** to easily access the fields you want to configure, or use the **Find** option to locate one specific field.

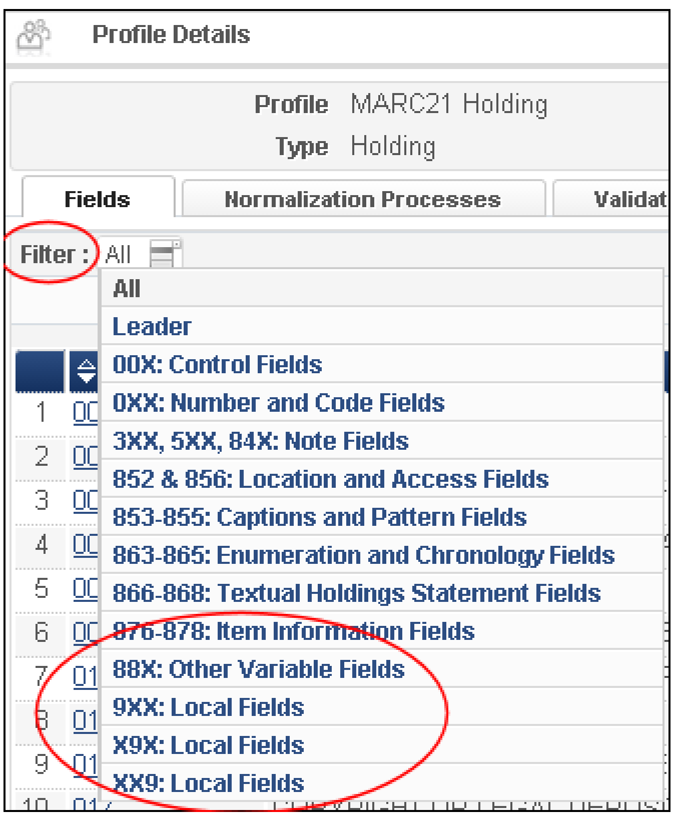
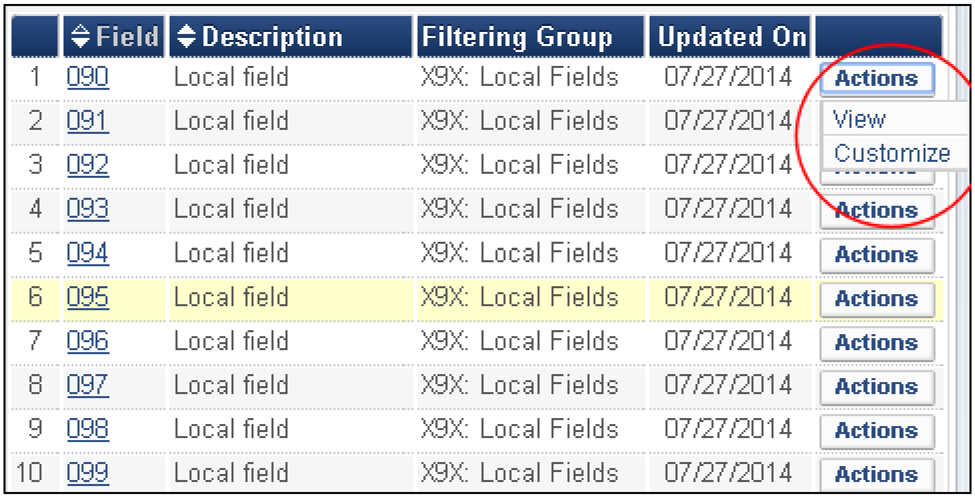


Figure 17 – Holdings Profile Details Page Filter

The 9XX filter displays all the 9XX fields. The X9X filter displays all the X9X fields that are not part of the 9XX list. The XX9 displays all the XX9 fields that are not part of the 9XX or X9X list.

Figure 18 - Holdings Profile Details Page Find Option

4 For the field/row you want to configure, select **Actions > Customize**.



	Field	Description	Filtering Group	Updated On	
1	090	Local field	X9X: Local Fields	07/27/2014	Actions
2	091	Local field	X9X: Local Fields	07/27/2014	View
3	092	Local field	X9X: Local Fields	07/27/2014	Customize
4	093	Local field	X9X: Local Fields	07/27/2014	Actions
5	094	Local field	X9X: Local Fields	07/27/2014	Actions
6	095	Local field	X9X: Local Fields	07/27/2014	Actions
7	096	Local field	X9X: Local Fields	07/27/2014	Actions
8	097	Local field	X9X: Local Fields	07/27/2014	Actions
9	098	Local field	X9X: Local Fields	07/27/2014	Actions
10	099	Local field	X9X: Local Fields	07/27/2014	Actions

Figure 19 - Customize Local Holdings Field

The Field Details page opens. On this page, you can customize subfield and indicator characteristics like mandatory or repeatable.

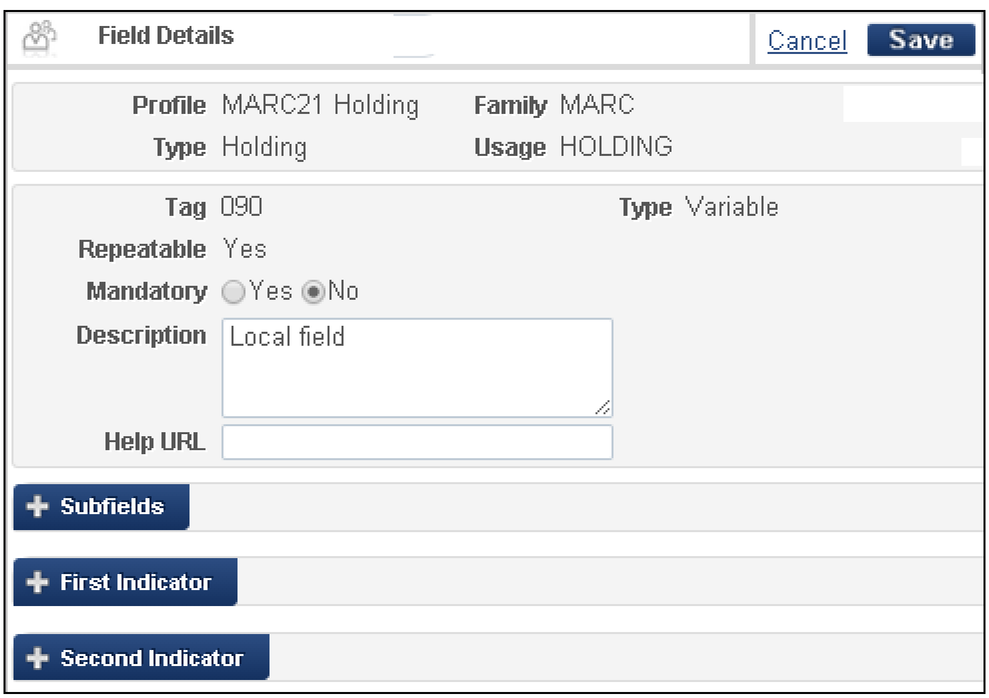


Figure 20 - Field Details Page

5 Click the plus (+) symbol to expand the Subfields, First Indicator, and Second Indicator sections.

6 Customize your field settings and click **Save**.

Other Resource Management Enhancements

- Indexing of subfields a, b, c, and d of the holdings record 541 field is being added to Alma. This will be available with the next re-indexing run scheduled for December.
- A blank or # character is now allowed in the MARC bibliographic field 690 second indicator.
- Relations defined between bibliographic records will be visible immediately. You will not have to wait until a nightly system job is run in order to view defined relations. Note that this change is scheduled to take place during the month of September.
- The following events have been added for incoming Z39.50 search queries:
  - Search query (RPN format)
  - Client IP
  - Number of hits

  The incoming data is logged according to the search query and IP address. Note that these events can be used in Analytics reports.
- In the MD Editor, a new operation icon, **Add Portfolio**, is available. This operation is equivalent to the menu operation **Tools > MARC21 Bibliographic > Add Local Portfolio**, and can also be triggered by using the short key **Alt + O**.
- The following two fields have been added to import profile configuration:
  - **Default item policy** – A drop-down list in the Inventory tab (for print) that presents item policies from which you can choose to set a default.
  - **License** – Enables you to choose a license in the Inventory tab (for electronic).
- **Created by** and **Update by** information is now displayed in the Electronic Collection Editor/Electronic Portfolio Editor's **New Info** icon (in the Context section).
- The **Electronic collection is free?** field is now properly populated. If at least one of the services is not free, the e-collection is not free. If all the services are free, the e-collection is marked as free.
- The **Electronic material type** drop-down list was added to the New Portfolio page.
- The **Last harvesting date** (by Google Scholar) is now displayed on the Google Scholar profile editing page.

- In order for links to Primo from the RSS feeds published from a Network Zone member to find the target record in Primo, members must delete the data source name (from Primo) in the **rss_discovery_url** customer parameter (that is, remove **INST** from the last part of the URL). For example, the **rss_discovery_url** customer parameter should be as follows: **any,contains@@ALMA_IND@@**. For more information on this parameter, see the *Alma Resource Management Guide* or Alma online help.

Fulfillment

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

Updates to the Digitization Department Workflow

Description

This feature enables staff members with the Fulfillment Services Operator role to create library initiated digitization requests. This is in addition to the already existing option to place patron initiated requests on behalf of the requesting patron. Furthermore, a **Remote Digital Storage** workflow option is now configurable in the Digitization Profile Rules, in addition to the already supported **Deposit** and **Document Delivery** options. Configuring this workflow option ends the digitization workflow without triggering a deposit or document delivery action. At this stage, the digitization operator stores the digitized content at a remote storage location outside of the system.

Technical Instructions

The following role can utilize the digitization department enhancements:

- Fulfillment Services Operator

The following role can define digitization profile rules:

- Fulfillment Administrator

To enable remote digital storage for a request:

1. On the Digitization Workflow Rules List page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Digital Fulfillment > Digitization Profile Rules**), click **Add Rule**. The Digitization Workflow Setup page opens.

Figure 21 - Digitization Workflow Setup Page

2 In the **Name** field at the top of the page, assign a name for the workflow.

3 In the **Input Parameters** section, select input parameters as follows:

   a In the **Name** field, select **Request Initiator**.

   b In the **Operator** field, select an operator.

   c In the **Value** field, select from the following options:

   - Patron Digitization
   - Course Related Digitization
   - Resource Sharing Related Digitization
   - Staff Digitization

   These options enable you to define separate rules for course related digitizations, resource sharing related digitizations, and other digitization requests placed by staff.

4 In the Workflow Setup section, select **Remote Digital Storage**.

5 Click **Save**. The rule displays on the Digitization Workflow Rules List page and indicates that when the input parameters are met, a digitization request must be delivered by **Remote Digital Storage** (that is, the digitized file is stored outside of Alma in a remote location).

To create a staff digitization request for repository items:

1 On the Repository Search page (**Resource Management > Search and Sets > Repository Search**), click **Request** for a search result. The Create Request page opens.

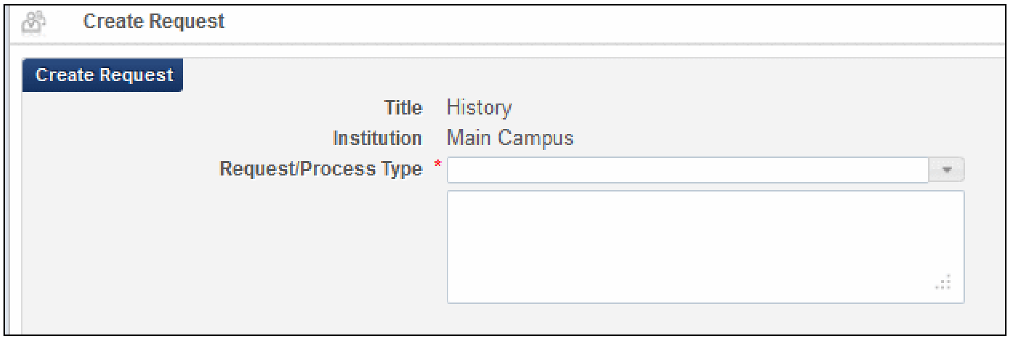


Figure 22 - Create Request Page

2 In the **Request/Process Type** field, select **Staff digitization request**. The page refreshes.

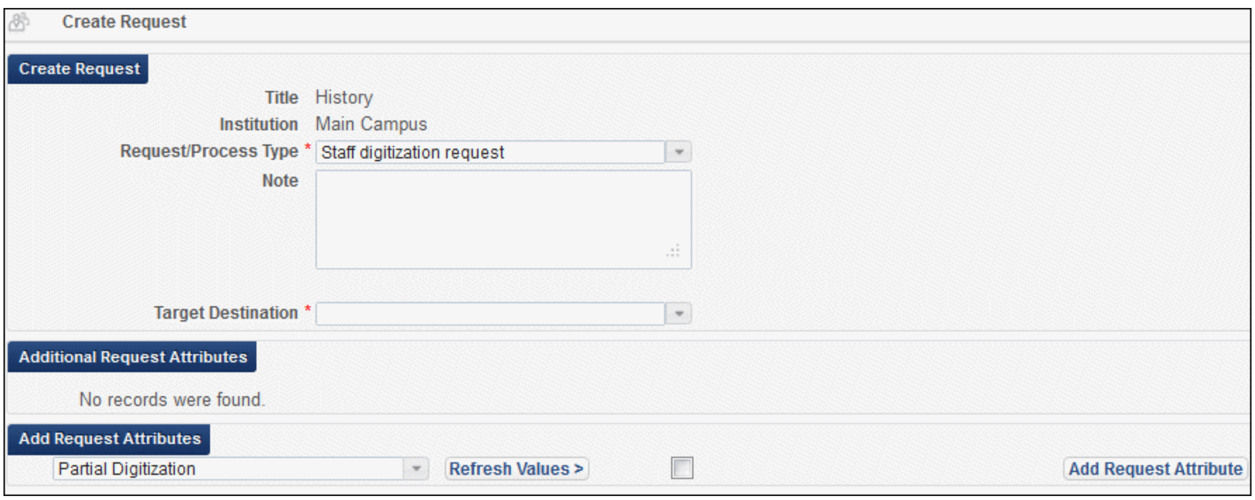


Figure 23 – Create Request Page - Refreshed

3 In the **Target Destination** field, select the department to receive the digitization request.

4 Click **Submit**.

The item is picked from the shelf and moved to a digitization department for processing by digitization staff, as is done for patron initiated requests.

To process a staff digitization request for remote storage:

1 Place a staff digitization request, as described in the previous procedure.

2 On the Scan In Items page (**Fulfillment > Resource Requests > Scan In Items**), scan the digitized item. The **Request/Process type** column displays **Staff Digitization Request**.

3 On the Items in Department page (**Fulfillment > Resource Requests > Manage In Process Items**), locate your item where **Status = Digitization**.

4 After processing the digitization request, select **Actions > Next Step**. The item's status changes to **Remote Digital Storage**.

5 After processing remote storage of the digitized content, select **Actions > Remote Digital Storage** to complete the request.

Enabling Integration With the Dematic Automated Storage Retrieval System (ASRS)

Description

An Automated Storage and Retrieval System (ASRS) is a system for storing library resources using special cost-effective storing techniques, and based on an automated system which is used whenever a resource needs to be retrieved from the storage.

The ASRS utilizes an automated retrieval machine and a special integrated software control system to provide fully automated high density media archiving.

The Automated Remote Storage must be notified each time items are added or removed from the remote storage. Alma sends messages to the remote storage so that the ASRS can update its own database of inventory stored in the remote storage.

In addition, Alma sends a message to the remote storage whenever a request is created, so that the ASRS system can automatically pull the proper bin off the shelf and supply the requested item.

As of this release, full integration is supported between Alma and the Dematic ASRS.

To activate the Dematic ASRS integration, the following conditions must be met:

- An Integration Profile is defined for the Dematic ASRS
- A Remote Storage facility is defined for the Dematic ASRS and is linked to the Integration Profile
- The Dematic ASRS locations are linked to a Remote Storage facility that has been defined for the Dematic ASRS
- The items stored at the Dematic ASRS system belong to one or more dedicated Dematic ASRS locations
- Stunnel is configured to facilitate communications between Alma and the Dematic ASRS

The Technical Instructions section below provides procedures that describe the Dematic ASRS functionality and required configurations, as follows:

- Requesting a Dematic ASRS Item
- Updating Dematic ASRS Inventory
- Configuration for Dematic ASRS including:
  - Configuring an Integration Profile
  - Configuring Stunnel — Encodes/decodes Dematic ASRS messages. For details on general Stunnel configuration, see https://developers.exlibrisgroup.com/alma/integrations/selfcheck/stunnel
  - Configuring Remote Storage
  - Configuring Locations

Configuration must be invoked before an ASRS request can be completed.

Technical Instructions

The following role can configure ASRS functionality:

- General System Administrator

The following role can place requests for remote storage items:

- Fulfillment Services Operator

To request a Dematic ASRS item:

1 On the Repository Search page (**Resource Management > Search and Sets > Repository Search**), perform a search for a title or item whose location is connected to remote storage, or whose integration profile has a type of ASRS Remote Storage.

2 Click **Request** to place a request. If an ASRS item is available to fulfill the request, the item's **Process Type = Requested** on the Repository search page.

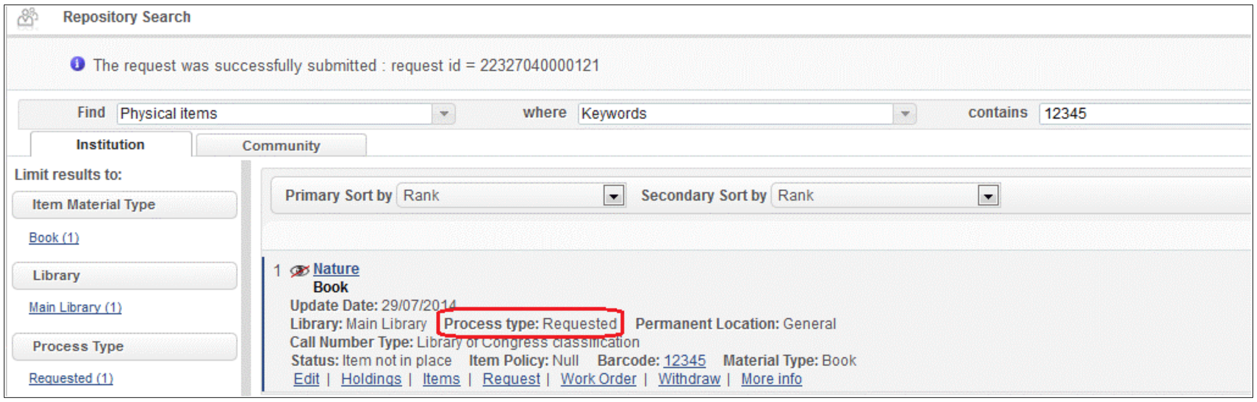


Figure 24 - Repository Search Page — Process Type = Requested

3 The request displays on the Resource Request Monitoring page (**Fulfillment > Resource Requests > Monitor Requests & Item Processes**) with **Workflow Step = Request Communicated to Storage**.

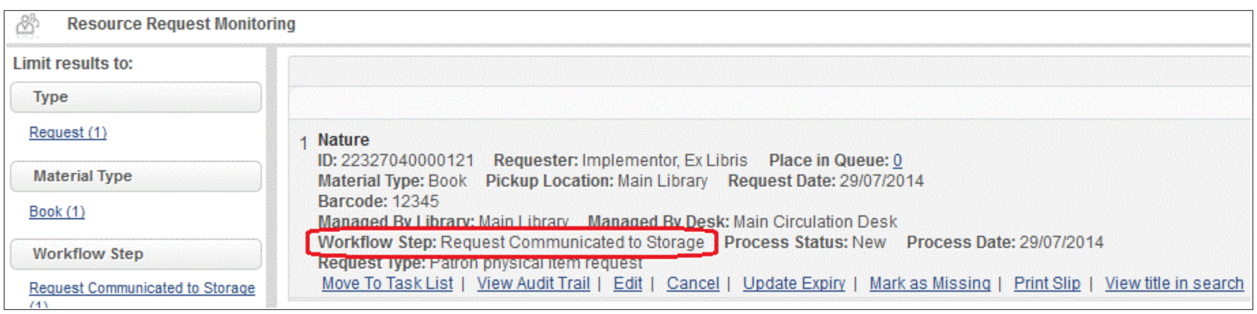


Figure 25 - Resource Request Monitoring Page- Workflow Step = Request Communicated to Storage

If the Dematic Interface installed on the ASRS server supports outgoing messages from the ASRS to Alma and the ASRS sends a Request Filled (RF) message response, the Process Status on the Resource Request Monitoring page changes to **ASRS Approved**.

Note: Process Status = ASRS Approved displays only when the Dematic ASRS message indicates that the request can be fulfilled and the item can be provided. If the Dematic ASRS system indicates that the request cannot be fulfilled, the request is either sent back to the request queue with the item marked as **Missing**, or is canceled. See the following example.

For example:

If the Dematic interface has been configured to respond with an RF message for every request placed by Alma, the message's Status Code will reflect whether the request can be supplied by the Dematic ASRS, or, if not, why it cannot be fulfilled.

The **Status Code** field of the RF message indicates whether the request can be fulfilled.

- If Status Code is **000** — Request can be fulfilled, and ASRS sends the item to Alma
- If Status Code is not **000** — Request cannot be fulfilled and is either sent back to the request queue or is cancelled

The following Status Codes trigger a **Missing** item: 002, 003.

The following Status Codes indicate that the item cannot be fulfilled but do not trigger a **Missing** item: 006, 007.

1 When the item arrives at the institution, it is scanned into Alma and is transited (if necessary) and placed on the Hold Shelf until the requesting patron picks up the item.
2 When the patron returns the item, the item's status and process type depend on the **Define as In Transit to Remote Storage at Return** setting, as configured in Remote Storage Configuration:
   - If this setting is selected — **Process Type = In Transit to Remote Storage** and **Status = Item Not in Place**.

     When the item arrives at the remote storage location, the **Process Type** is removed and the Dematic ASRS sends an Item Return (IR) message to Alma which changes the **Status** to **Item in Place**.

     Select this setting when the Dematic ASRS can send an Item Return (IR) message.
   - If this setting is not selected — When patron returns the item, **Status = Item in place**.

     When the customer's system does not support sending an Item Return (IR) message from the ASRS to Alma, do not select this setting.

When an ASRS system needs to be automatically updated by Alma with the addition or removal of items from the remote storage facility, the Inventory Remote Storage Update job must be activated (see the following procedure).

To run the inventory job to update the ASRS with inventory changes:

1 On the External System page (**Administration > General Configuration > Configuration Menu > External Systems > Integration Profiles,** click **Add Integration Profile**), configure a remote storage integration profile, as described in the **Configuring Integration Profiles** section of the *Alma Administration Guide* or Alma online help.
2 On the **Actions** tab, select from the following options:

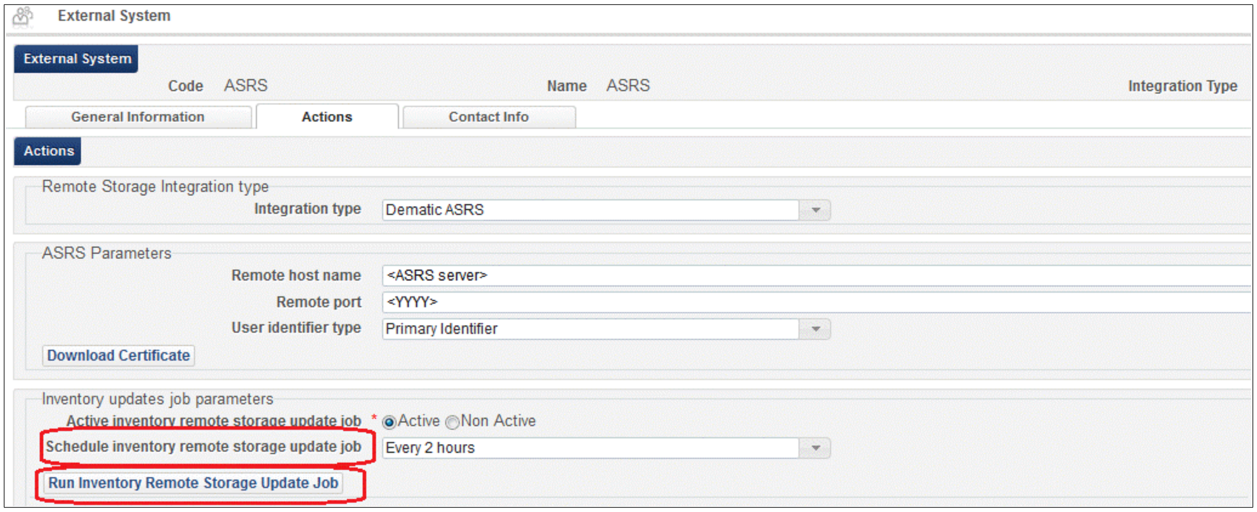


Figure 26 - External System Page - Actions Tab

- To schedule the Inventory Remote Storage Update Job to run automatically, select the interval to run the job in the **Schedule inventory remote storage update job** field, and click **Save**.

  Scheduled jobs are displayed on the Monitor Jobs page, on the **Scheduled** tab (**Administration > Manage Jobs > Monitor Jobs**), with the following name:

  Inventory Remote Storage Update <Integration Profile Name>

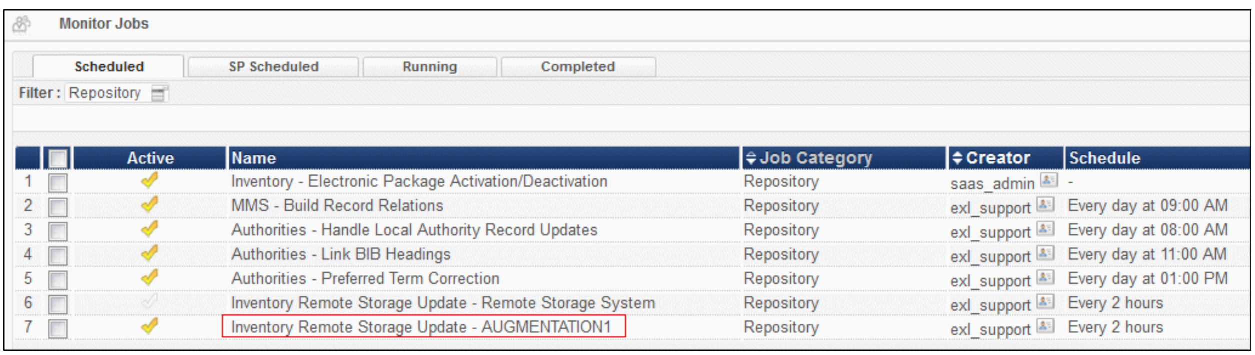


Figure 27 - Monitor Jobs Page — Inventory Remote Storage Update Job

- To run the Inventory Remote Storage Update Job manually, click the **Run Inventory Remote Storage Update Job** button.

  The job's output displays on the Job Report page (on the **Monitor Jobs > Completed** tab, select **Actions > Report**).

To configure an integration profile for Dematic ASRS:

1 Configure an Integration Profile, as described in the **Configuring Integration Profiles** section of the *Alma Administration Guide* or Alma online help.

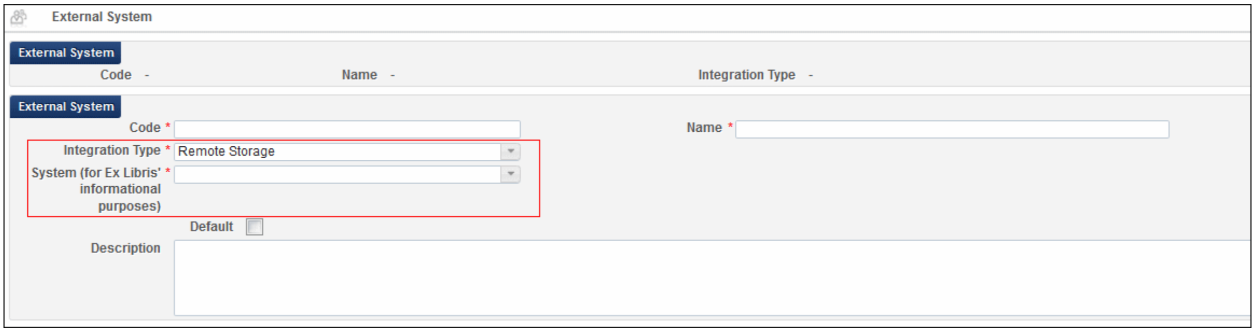


Figure 28 - External System Page — Page 1

- In the **Integration Type** field, select **Remote Storage**.
- In the **System (for Ex Libris informational purposes)** field, select **Dematic ASRS**.

2 Click **Save** to open page 2 of the configuration wizard.

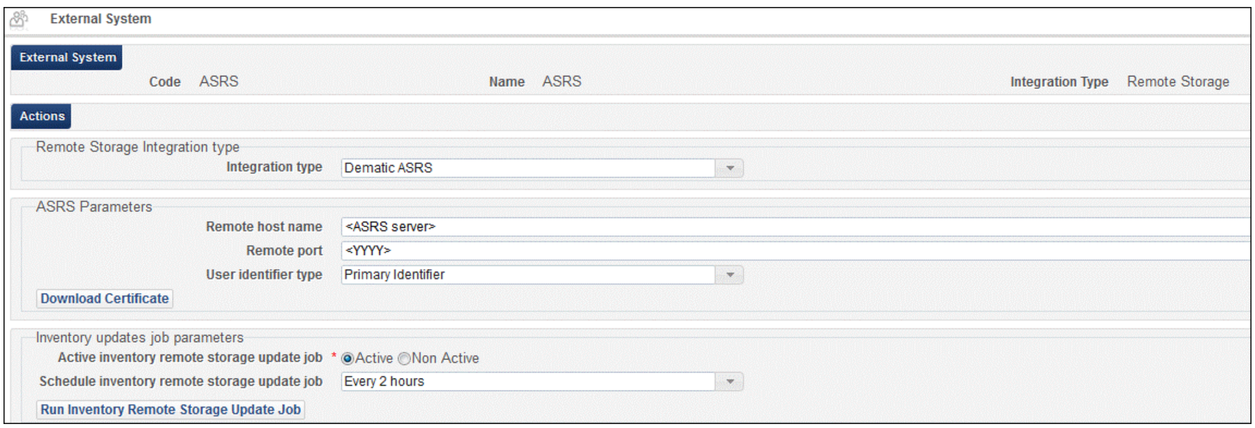


Figure 29 - External System Configuration Page — Page 2

3 Configure the fields as follows:

- **Integration type:** Select **Dematic ASRS**
- **Remote host name**: Insert the Dematic ASRS host name, which is the same value as the hostname in the **Alma Incoming** entry in the Stunnel configuration's **Connect** field.
- **Remote port**: The local port that receives messages from Alma. This value is the same port as in the **Alma Incoming** entry in the Stunnel configuration's **Accept** field.
- **Active inventory remote storage update job**: Select **Active**
- **Schedule inventory remote storage update job**: Select the relevant scheduling for the inventory job to run the job automatically

4 To run the job manually, click the **Run inventory remote storage update job** button.

To configure Stunnel:

1 Download Stunnel (https://www.stunnel.org/downloads.html) and install it on the machine on which ASRS is being configured.

2 Edit the configuration within Stunnel, as follows:

a Navigate to **Stunnel Menu > Configuration > Edit Configuration**. The configuration page displays.

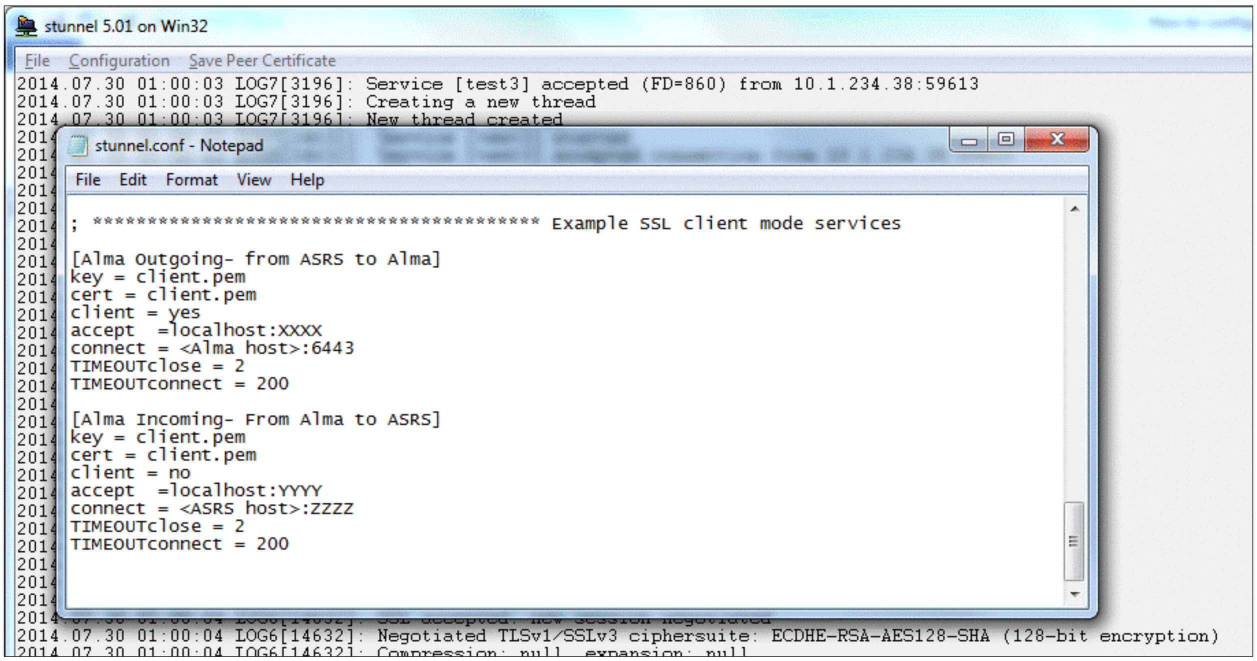


Figure 30 - Stunnel Configuration

b Configure the parameters as depicted in the image above:

[Alma Outgoing- from Dematic ASRS to Alma section**]**

- key = client.pem //File name for the certificate
- cert = client.pem
- client = yes
- accept =localhost:XXXX // Stunnel machine – receive messages from localhost in XXXX
- connect = <Alma host>:6443 //Alma server – sends the message to Alma in 6443
- TIMEOUTclose = 2
- TIMEOUTconnect = 200

[Alma Incoming- From Alma to Dematic ASRS section**]**

- key = client.pem
- cert = client.pem
- client = no
- accept =localhost:YYYY // Stunnel machine- same port in Integration Profile.
- connect = <ASRS host>:ZZZZ //Dematic ASRS server
- TIMEOUTclose = 2
- TIMEOUTconnect = 200

Customize the XXXX, YYYY, ZZZZ ports, as follows:

- **XXXX**: The port to which the Dematic ASRS system sends its messages (Stunnel is listening on this port)
- **YYYY**: The local port that receives messages from Alma
- **ZZZZ**: The local port that receives messages in the ASRS system

Note: The **YYYY** port must be open on the library's firewall.

The diagram below illustrates the information flow from the Dematic ASRS to Alma and back using the Stunnel.

Figure 31 - Stunnel ASRS/Alma Flow

3 Download a certificate, as follows:

  c On the External System page's Actions tab **Administration > General Configuration > Configuration Menu > External Systems > Integration Profiles,** select **Actions > Edit** for an Integration Profile), click **Download Certificate**.

  d Save the certificate in the Stunnel directory.

4 Reload Stunnel configuration by selecting **Configuration > Reload Configuration** on the Stunnel menu. If configuration is successful, the **Configuration successful** message displays in the Stunnel log as shown in the illustration below.

```
2014.07.29 17:45:24 LOG6[3196]: Loading cert from file: C:\Program Files (x86)\stunnel\client.pem
2014.07.29 17:45:24 LOG6[3196]: Loading key from file: C:\Program Files (x86)\stunnel\client.pem
2014.07.29 17:45:24 LOG7[3196]: Private key check succeeded
2014.07.29 17:45:24 LOG7[3196]: SSL options set: 0x01000004
2014.07.29 17:45:24 LOG6[3196]: Initializing service [test3]
2014.07.29 17:45:24 LOG6[3196]: Loading cert from file: C:\Program Files (x86)\stunnel\client.pem
2014.07.29 17:45:24 LOG6[3196]: Loading key from file: C:\Program Files (x86)\stunnel\client.pem
2014.07.29 17:45:24 LOG7[3196]: Private key check succeeded
2014.07.29 17:45:24 LOG7[3196]: DH initialization
2014.07.29 17:45:24 LOG7[3196]: Could not load DH parameters from C:\Program Files (x86)\stunnel\client.pem
2014.07.29 17:45:24 LOG7[3196]: Using hardcoded DH parameters
2014.07.29 17:45:24 LOG7[3196]: DH initialized with 2048-bit key
2014.07.29 17:45:24 LOG7[3196]: ECDH initialization
2014.07.29 17:45:24 LOG7[3196]: ECDH initialized with curve prime256v1
2014.07.29 17:45:24 LOG7[3196]: SSL options set: 0x01000004
2014.07.29 17:45:24 LOG5[3196]: Configuration successful
2014.07.29 17:45:24 LOG7[3196]: Closing service [test1]
2014.07.29 17:45:24 LOG7[3196]: Service [test1] closed (FD=700)
2014.07.29 17:45:24 LOG7[3196]: Sessions cached before flush: 1
2014.07.29 17:45:24 LOG7[3196]: Sessions cached after flush: 0
2014.07.29 17:45:24 LOG7[3196]: Service [test1] closed
2014.07.29 17:45:24 LOG7[3196]: Closing service [test3]
2014.07.29 17:45:24 LOG7[3196]: Service [test3] closed (FD=476)
2014.07.29 17:45:24 LOG7[3196]: Sessions cached before flush: 4
2014.07.29 17:45:24 LOG7[3196]: Sessions cached after flush: 0
2014.07.29 17:45:24 LOG7[3196]: Service [test3] closed
2014.07.29 17:45:24 LOG7[3196]: Service [test1] (FD=476) bound to 127.0.0.1:2222
2014.07.29 17:45:24 LOG7[3196]: Service [test3] (FD=700) bound to 10.1.116.119:5555
2014.07.29 17:45:24 LOG7[3196]: Signal pipe is empty
```

Figure 32 - Stunnel Log

To configure remote storage:

Follow the procedure described in the **Adding a Remote Storage Facility** section of the *Alma Fulfillment Configuration Guide* or Alma online help.

To configure a physical location for remote storage:

Follow the procedure described in the **Adding a Physical Location** section of the *Alma Fulfillment Configuration Guide* or Alma online help.

Note: Ensure that when configuring the **Remote Storage** field, you select the value of the ASRS integration profile.

Other Fulfillment Enhancements

- The Pick From Shelf Report now includes the Storage Location ID.
- Changes in a library's opening hours are not applied until you click the **Apply Changes** button.
- The Pick From Shelf report contains both the location name and code in the following format: **[Name] ([Code])**

- When paying for or waiving a fine/fee transaction, the transaction creator is either the circulation desk indicated in the **Currently at:** field or, if no circulation desk is indicated, **Not At Desk**. This is the system's behavior in each of the following instances:
  - When performed manually in the Alma user interface
  - Using the **Purge User Records** or **Bulk Fine Waiving** jobs
  - Via a user API
- A new customer parameter, **should_anonymize_request**, was added (**Fulfillment > Fulfillment Configuration > Configuration Menu > General > Other Settings**). If this parameter is set to **true** (the default option), when a request is added to the request history, the requester ID will not appear in the history details (it will be null). If this parameter is set to **false**, the requester ID will be visible.
- An additional **Barcode** column was added to the **Scan in Items** and **Change Item Information** tabs.

Resource Sharing

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

Adding a Due Date for a Temporary Item Creation Rule

Description

This feature enables you to indicate the location to which a temporary item created for fulfilling a borrowing request belongs, based on the number of days until the due date of the borrowing request. This enables locations to provide a more consistent set of due dates for patrons, even though the lenders' due dates vary.

Technical Instructions

The following roles can indicate the location to which the temporary item belongs based on the number of days until the item's due date:

- General System Administrator
- Fulfillment Administrator

To indicate the location to which the temporary item belongs based on the number of days until the item's due date:

1. On the Temporary Item Creation Rules page (**Fulfillment > Fulfillment Configuration > Configuration Menu**), select a resource sharing library in the **You are configuring:** drop down at the top of the page and select **Library > Temporary Item Creation Rules**.
2. Click **Add Rule**. The Temporary Item Creation Rule page opens.

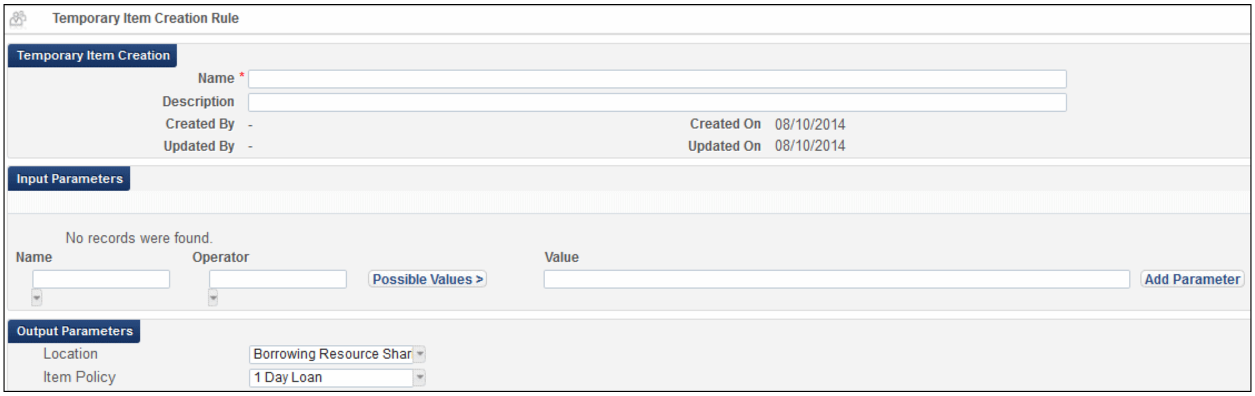


Figure 33 - Temporary Item Creation Rule Page

3 In the Input Parameters section, locate the **Name** field and select **Days Until Due Date**.

4 In the **Operator** field, select an operator.

5 In the **Value** field, select a value.

6 Click **Add Parameter**. The added value displays in the Input Parameters section.

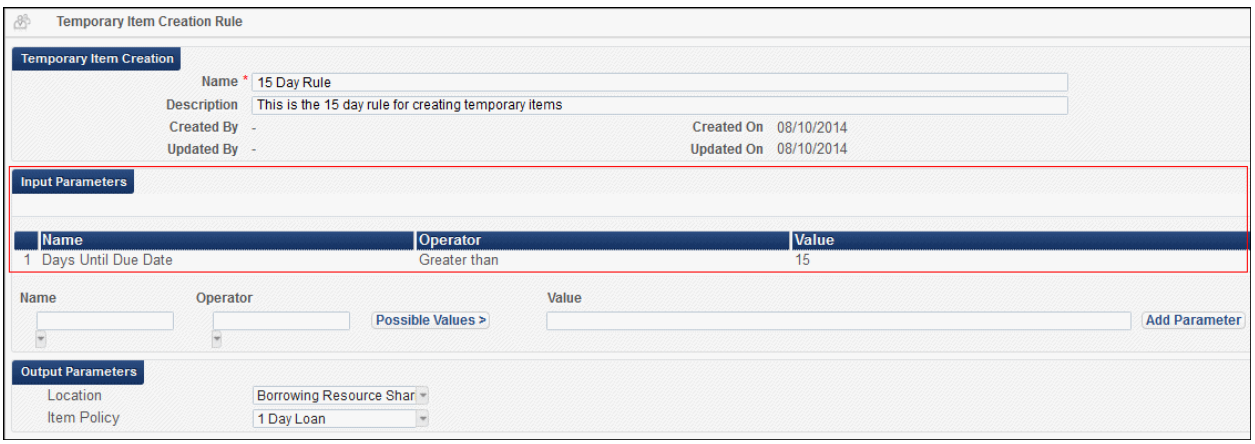


Figure 34 - Temporary Item Creation Rule Page — Input Parameters Section

7 In the Output Parameters section, select a location and item policy in the **Location** and **Item policy** fields, respectively.

In the displayed instance, the added rule indicates that if there are more than 15 days from the time of receiving the item until the due date, the item belongs to the location indicated in the **Location** field, according to the policy indicated in the **Item policy** field.

8 Click **Save**. The rule is added to the Temporary Item Creation Rules page.

Figure 35 - Temporary Item Creation Rules Page - Added Rule

Placing a Resource Sharing Request from the Network or Community Zone

Description

This feature enables creating a resource sharing borrowing request from a network or community zone. When creating a request from a repository search, you can choose results from the Network and Community tabs (in addition to the Institution tab).

Technical Instructions

The following roles can place resource sharing requests from the network or community zone:

- Fulfillment Services Operator
- Fulfillment Services Manager

To create a resource sharing borrowing request from a network or community zone:

1. On the Resource Sharing Borrowing Request page (**Fulfillment > Resource Sharing > Borrowing Requests**), select **Add > From Search**. The Repository Search page opens, displaying the Network and Community tabs.

Note: The Network tab appears only if the institution is a member of a shared network zone.

2. Enter search criteria and click **Go**. Results display on the Institution, Network, and Community tabs, as per the resources' location.

   Results on the Institution and Network tabs include the location of the resources, displayed in the **Held by:** field.

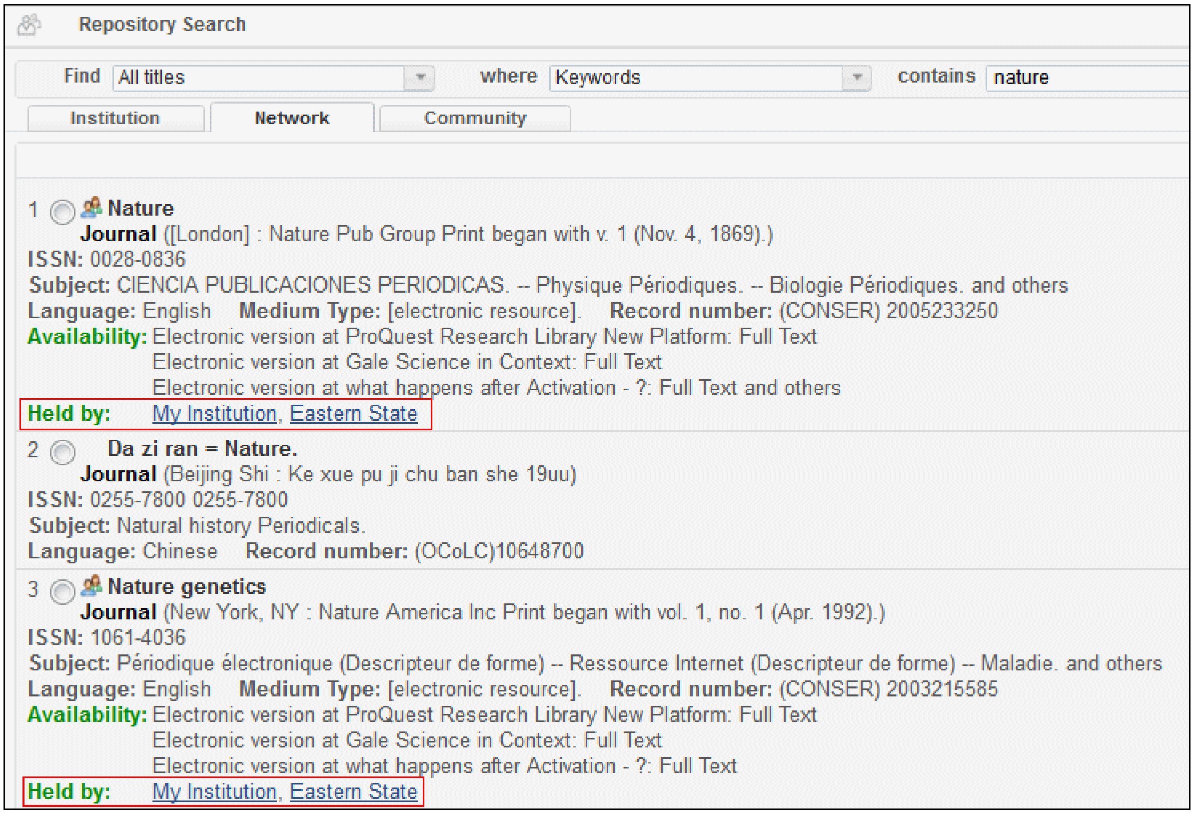


Figure 36 – Repository Search Page – Held by: field

3 Select an item and click **Select**. The Resource Sharing Borrowing Request Page General Information tab opens.

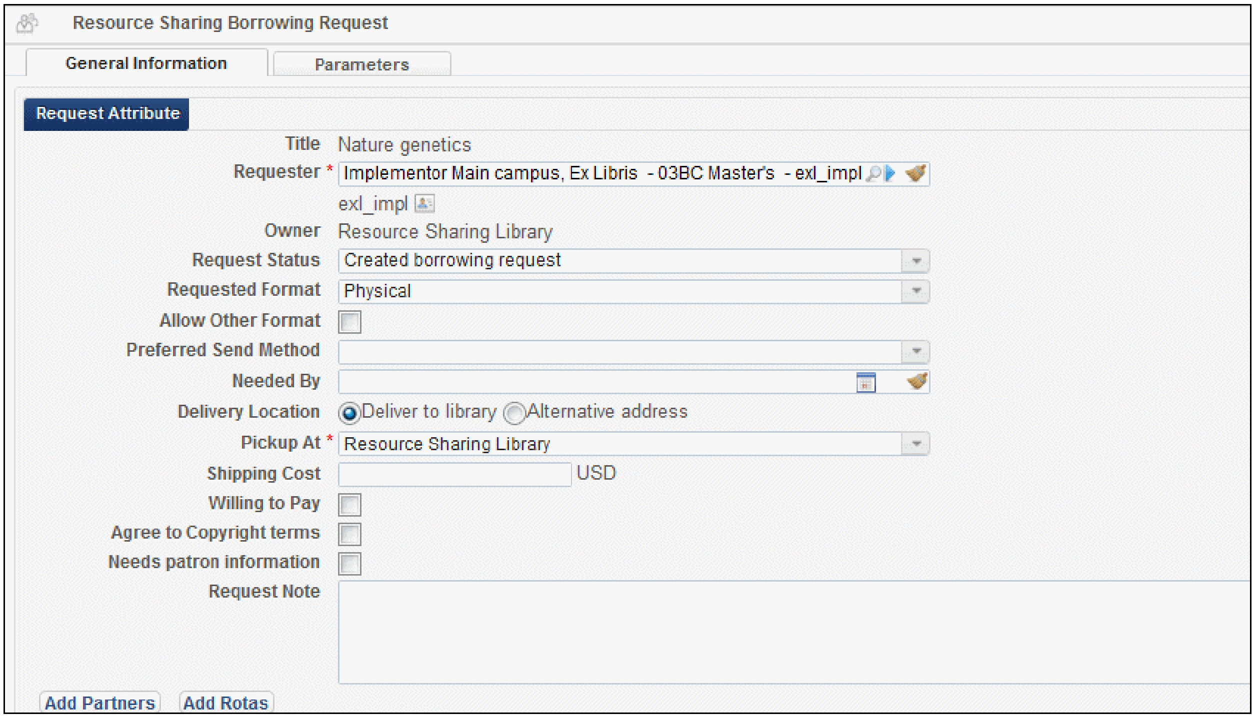


Figure 37 – Resource Sharing Borrowing Request Page – General Information Tab

4 In the **Pickup at** field, select **Resource Sharing Library**.

5 Click **Save**. The request displays on the Resource Sharing Borrowing Requests page.

6 Click **Edit**. The Resource Sharing Borrowing Request page opens.

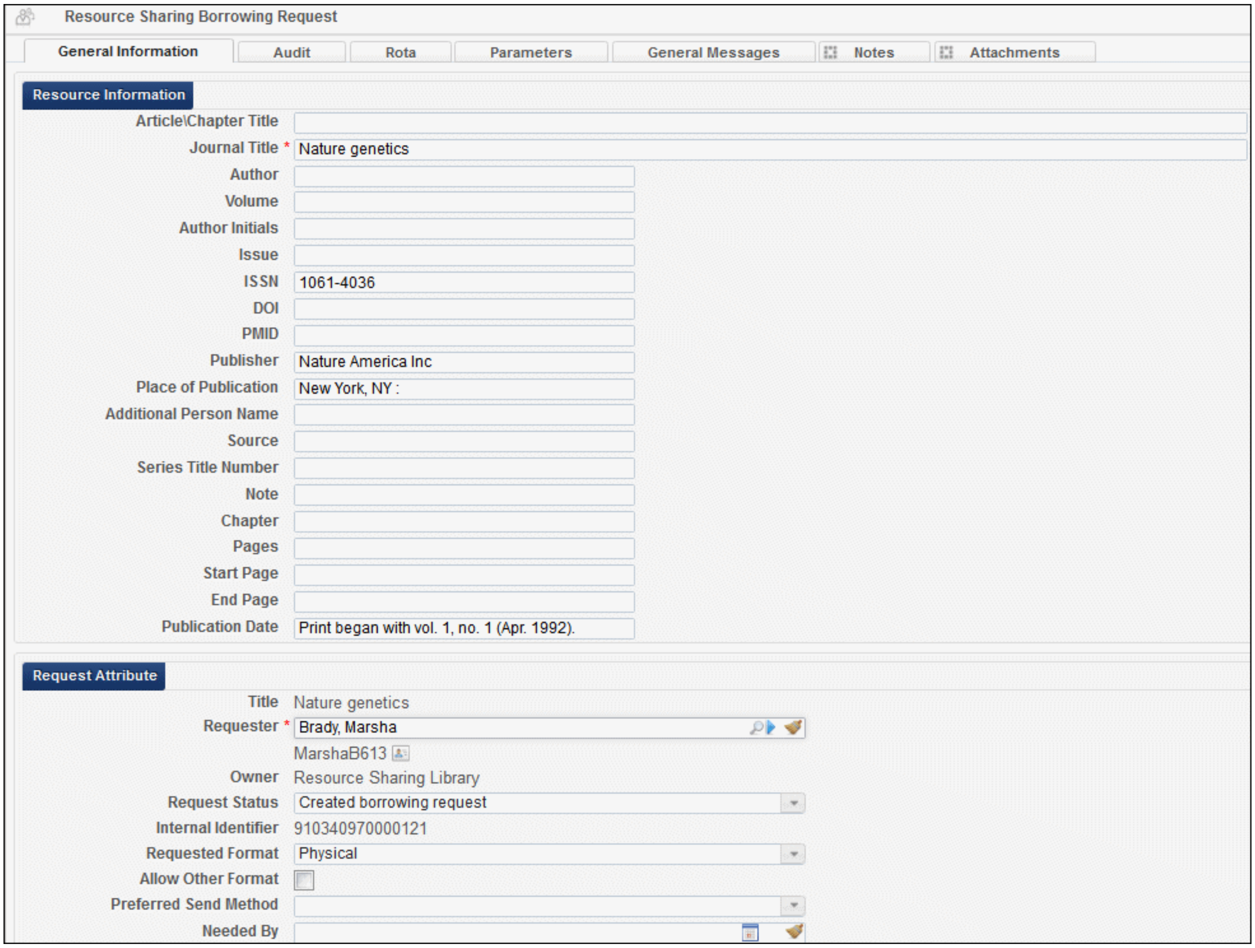


Figure 38 – Resource Sharing Borrowing Request Page

Personal Delivery Support for Resource Sharing Requests

Description

When personal delivery is configured in the relevant TOU, you can select to have physical or physical non-returnable requests sent to a patron's home or office. This is an extension of the personal delivery options for hold requests; the feature is now also valid for resource sharing borrowing requests.

Technical Instructions

The following roles can configure a TOU for a fulfillment unit:

- General System Administrator
- Fulfillment Administrator

The following roles can configure a circulation desk to support personal delivery:

- General System Administrator
- Fulfillment Administrator

The following roles can receive a resource sharing borrowing request at the patron's home or work address:

- Fulfillment Services Operator
- Fulfillment Services Manager

To configure a TOU and attach it to a fulfillment unit to support sending resource sharing items to a patron:

1 On the Terms of Use Management page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Terms of Use and Policies**), click **Add a Terms of Use** and add a Borrowing Resource Sharing Terms of Use which supports Personal Delivery.

The available Personal Delivery values are:

- **All**: Resource Sharing Requests can be delivered to a patron's home or office
- **Home**: Resource Sharing Requests can be delivered to a patron's home
- **Office**: Resource Sharing Requests can be delivered to a patron's office
- **None**: Resource Sharing Requests cannot be delivered to a patron's home or office

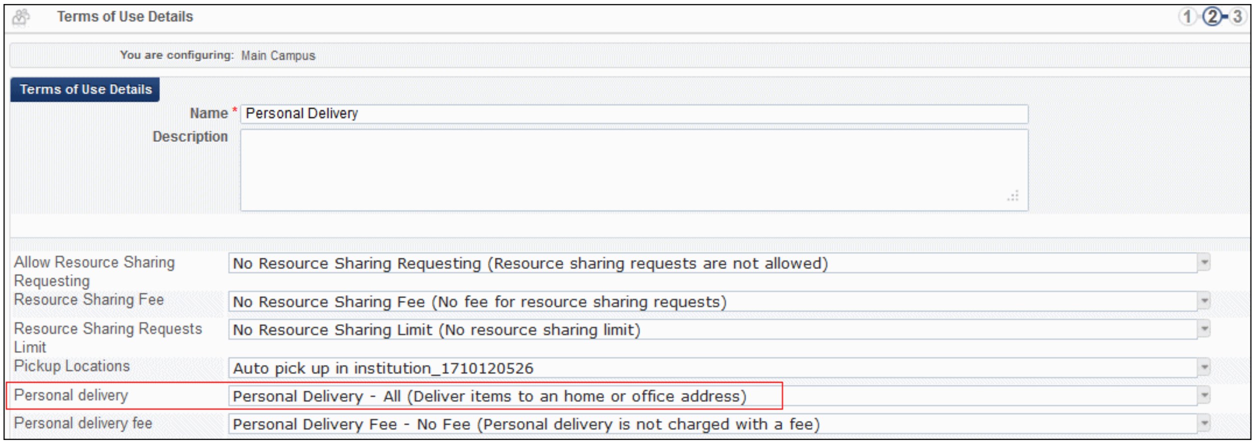


Figure 39 - Terms of Use Details Page - Personal Delivery

2 On the Fulfillment Units List page (**Fulfillment > Physical Fulfillment > Fulfillment Units**), click the **Organization Unit List** link on the top right side of the page.

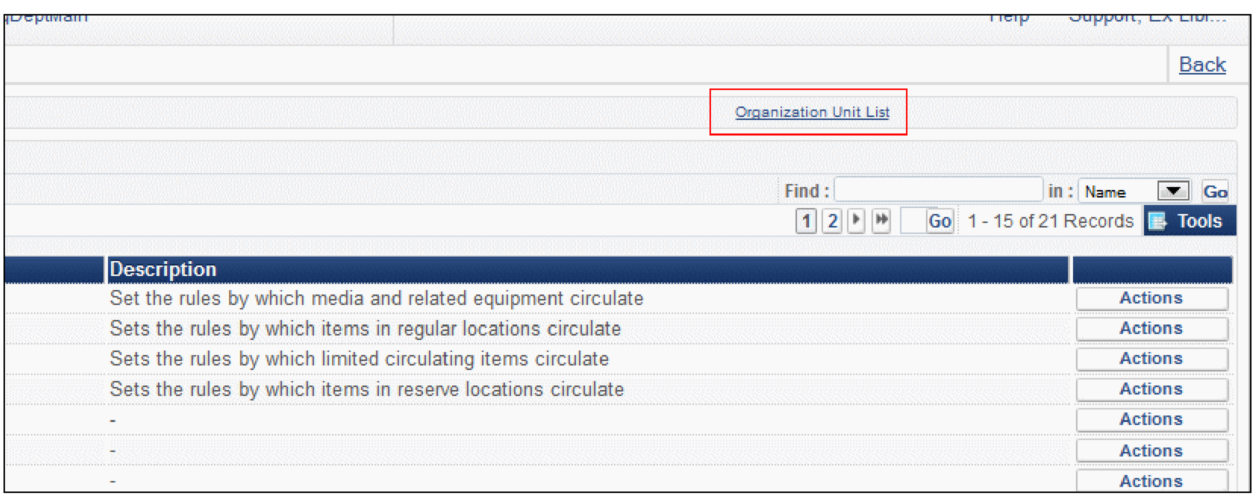
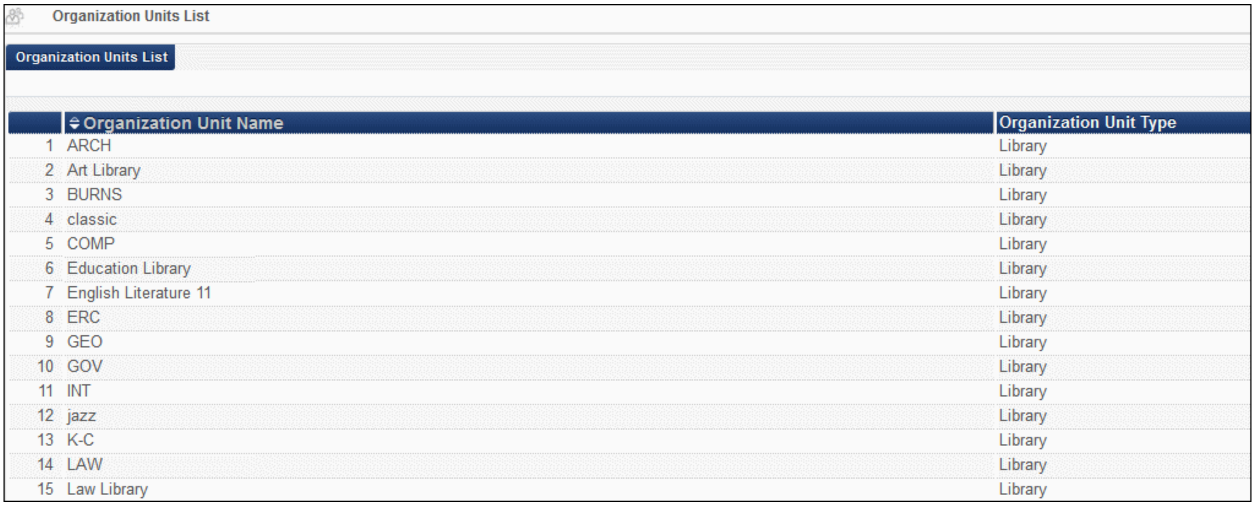


Figure 40 - Organization Unit List Link

The Organization Units List page opens.

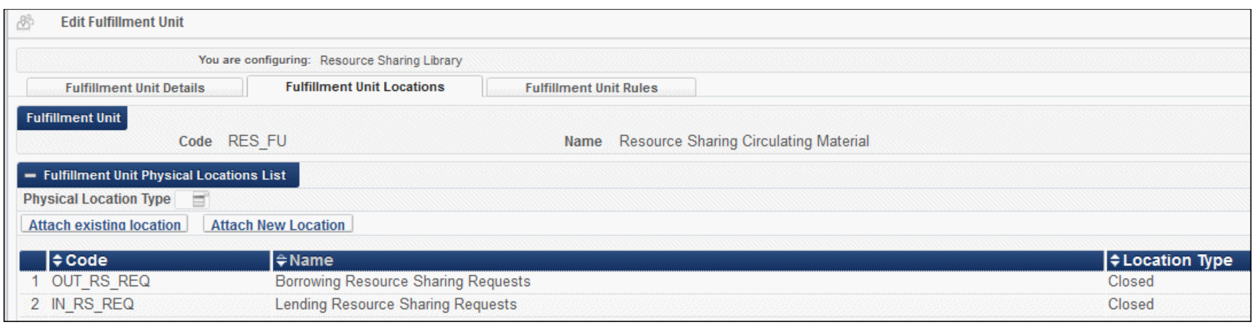


	Organization Unit Name	Organization Unit Type
1	ARCH	Library
2	Art Library	Library
3	BURNS	Library
4	classic	Library
5	COMP	Library
6	Education Library	Library
7	English Literature 11	Library
8	ERC	Library
9	GEO	Library
10	GOV	Library
11	INT	Library
12	jazz	Library
13	K-C	Library
14	LAW	Library
15	Law Library	Library

Figure 41 - Organization Units List Page

3 Locate the **Resource Sharing Library** entry and click **Choose**. The Fulfillment Units List page displays the fulfillment units associated with the resource sharing library.

4 Select **Actions > Edit** for a fulfillment unit. The Edit Fulfillment Unit page opens.



	Code	Name	Location Type
1	OUT_RS_REQ	Borrowing Resource Sharing Requests	Closed
2	IN_RS_REQ	Lending Resource Sharing Requests	Closed

Figure 42 - Edit Fulfillment Unit Page

5 Click the **Fulfillment Unit Rules** tab.

6 In the **Rule Type** field, select **Borrowing Resource Sharing** to display the resource sharing borrowing rules.

Figure 43 – Edit Fulfillment Unit Page - Fulfillment Unit Rules Tab

7 Click **Add Rule**. The Fulfillment Unit Rules Editor page opens.

Figure 44 - Fulfillment Unit Rules Editor Page

8 Configure a rule, adding the terms of use you configured in step 1 above.

9 Click **Save**. The Fulfillment Units List page displays the fulfillment unit with the updated rule.

Note: For a patron to be able to request resource sharing items for pickup at a personal delivery address, the patron must have a Home or Work address defined. A patron's address type is configured on the patron's User Details page (**Administration > User Management > Find and Manage Users**). Click the Contact Information tab and add an address in the **Addresses** section.

To configure a circulation desk to support personal delivery:

1 On the Fulfillment Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu**), select a library in the **You are configuring:** drop down at the top of the page.

2 In the **Library** section, click **Circulation Desks**. The Circulation Desks List page opens.

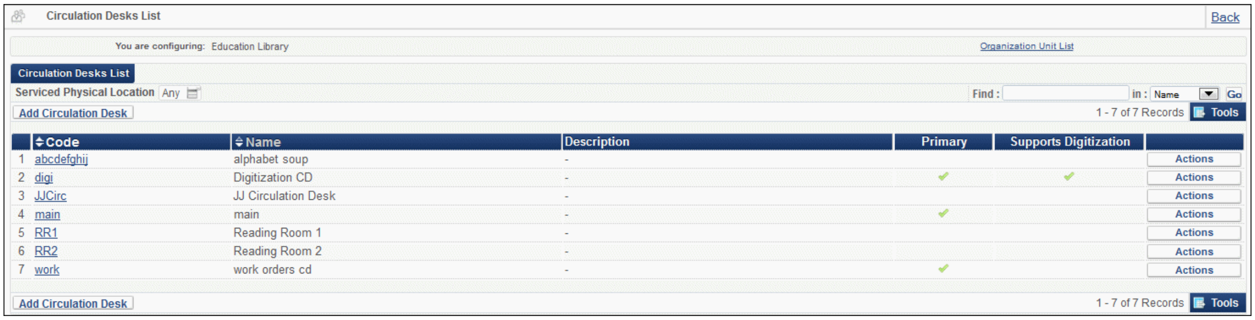


Figure 45 - Circulation Desk List Page

3 Select **Actions > Edit** for the relevant circulation desk. The Circulation Desk – General Information page opens.

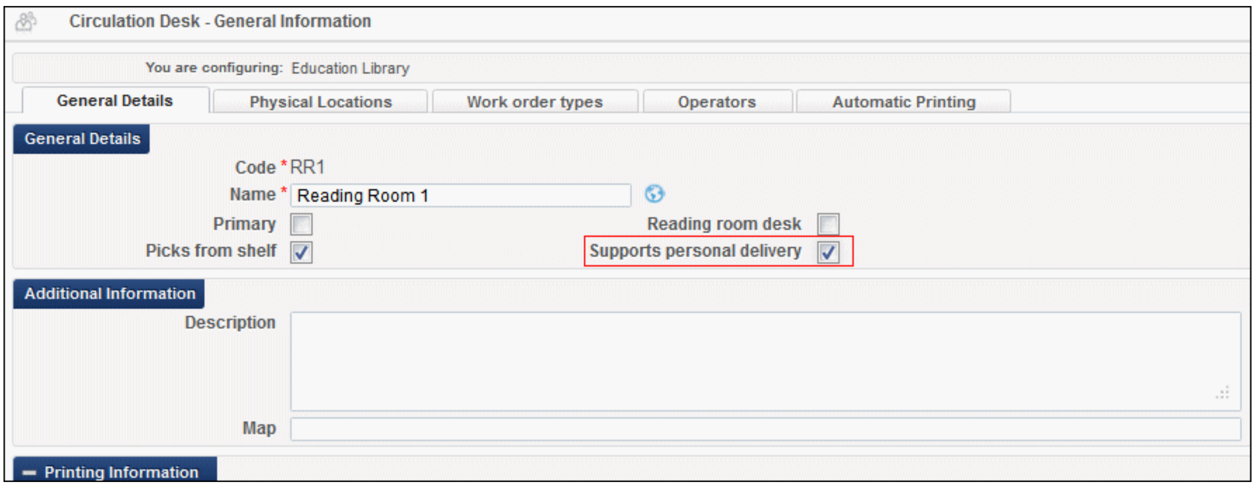


Figure 46 - Circulation Desk - General Information Page - Supports Personal Delivery

4 Select the **Supports personal delivery** check box to enable the circulation desk to support personal delivery of resource sharing requests to patrons.

Note: If personal delivery is configured for a patron and the desk at which the Receive action is performed does not have this check box selected, Alma searches for another circulation desk in the library which supports personal delivery, and the item is sent there. If no such circulation desk exists, Alma searches for a library which supports personal delivery and has a Deliver To relationship with the receiving resource sharing library. If no such library exists, the item is moved to the hold shelf.

To request and receive a resource sharing borrowing request at the patron's home or work address:

1 On the Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**), click **Add > Manually** to add a Resource Sharing Borrowing Request.

2 On the Resource Sharing Borrowing Request page, locate the **Request Attribute** section on the bottom of the page.

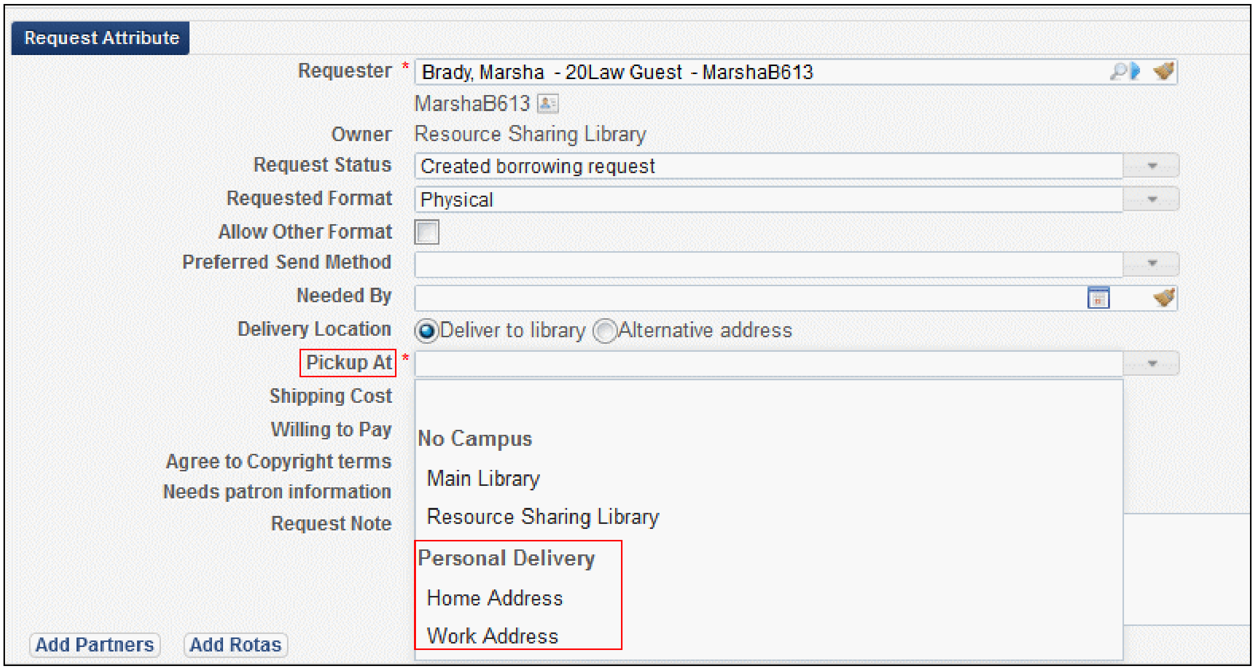


Figure 47 – Request Attribute Section — Pickup At Field Options

3. In the **Requester** field, select a requesting patron that has a home and/or work address.
4. In the **Pickup At** field, under the **Personal Delivery** option, select **Home Address** or **Work Address**. The options are displayed according to the personal delivery options configured for the TOU (see the above procedure).
5. Fill in any other relevant fields and click **Save**.
6. When receiving the requested item, open the Received Items page (**Fulfillment > Resource Sharing > Receiving Items**).

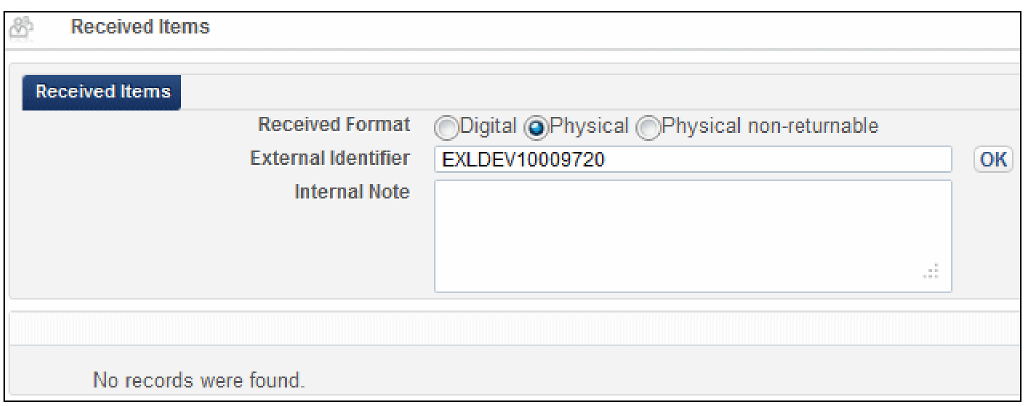


Figure 48 - Received Items Page

7. In the **External Identifier** field, enter the external identifier of an active borrowing request and click **OK**. The Received Items page dialog box opens.

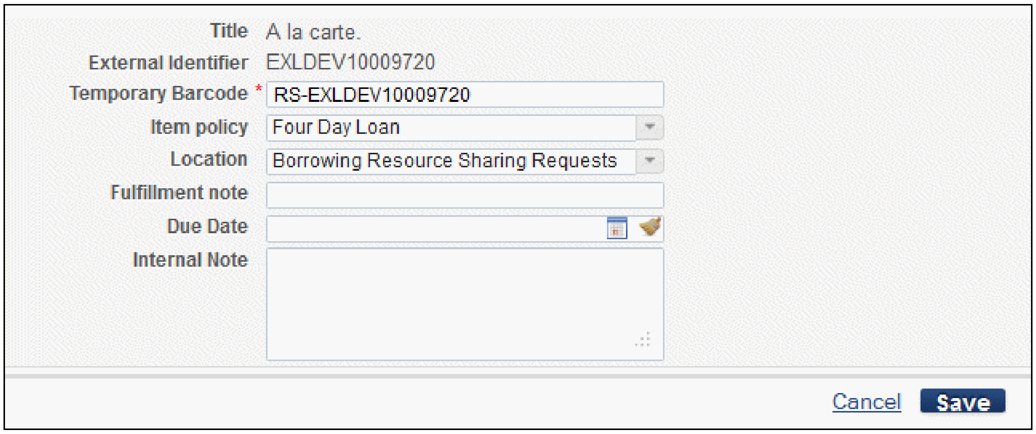


Figure 49 - Received Items Page Dialog Box

8 Modify the necessary parameters and click **Save**.

The item displays on the Received Items page with the relevant destination value, **Home Address** or **Work Address**.

You can also receive a resource sharing borrowing request in one of the following ways:

- Click **Receive** for a request on the Resource Sharing Borrowing Requests page.
- Access the Scan in Items page (**Fulfillment** > **Resource Requests** > **Scan In Items**) and scan in the item to be received.

Itemless Resource Sharing Library

Description

This feature enables creating a resource sharing library that does not handle items. This library serves as a broker for other resource sharing libraries, transferring requests from a lending library to a receiving library, without an actual inventory of items.

A resource sharing process that is managed by an itemless resource sharing library has the following special attributes:

- Items received as part of a resource sharing request process are not cataloged as temporary items.
- Shipping lending requests is possible without attaching a real inventory item to the shipped request.

All other aspects of the resource sharing process, such as the exchange of messages between the borrowing library and the lending library, are identical to the process that is managed by regular resource sharing libraries.

Technical Instructions

The following roles can create an itemless resource sharing library:

- General System Administrator
- Fulfillment Administrator

The following roles can use an itemless resource sharing library:

- Fulfillment Services Operator
- Fulfillment Services Manager

To create an itemless resource sharing library:

1 On the Organization Unit Details page (**Fulfillment > Fulfillment Configuration > Configuration Menu**), select **Resource Sharing Library** in the **You are configuring:** drop down and click **Library**.

2 Select the **Itemless** check box in the Resource Sharing Information section.

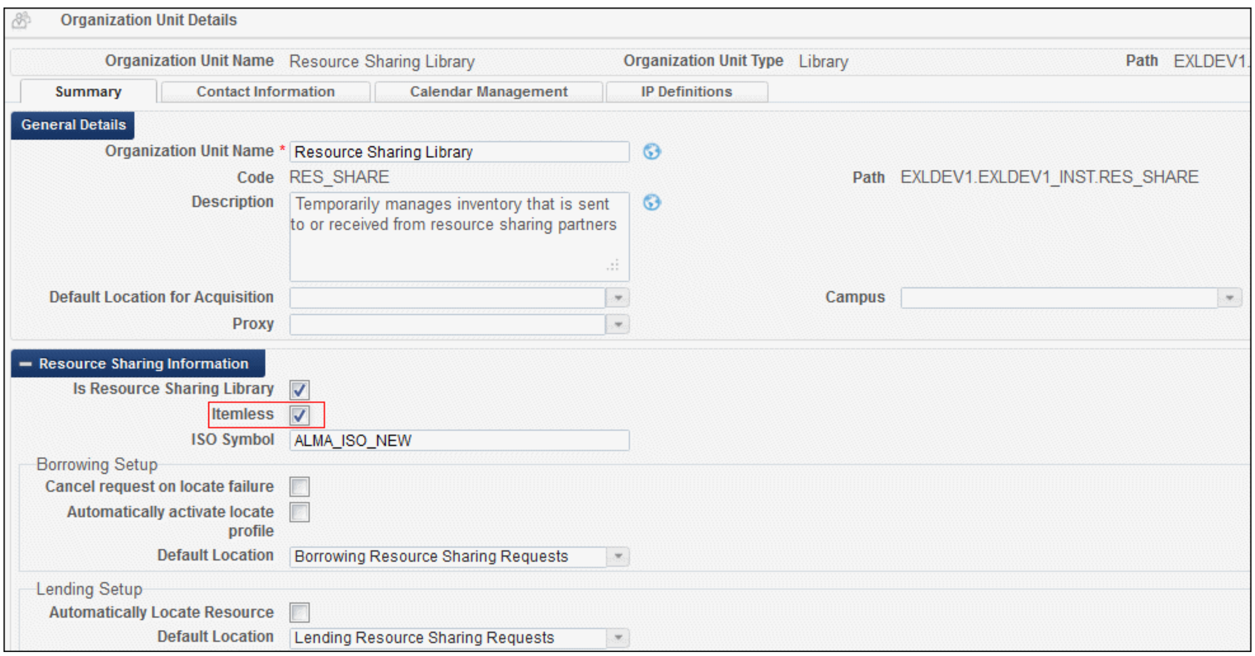


Figure 50 - Organization Unit Details Page – Itemless Check Box

The specified resource sharing library is designated as a broker for other resource sharing libraries, and does not contain any actual items.

After you create an itemless library, you can use the library as a broker for resource sharing requests.

To use an itemless library as a broker for resource sharing requests:

1 Create a resource sharing borrowing request (**Fulfillment > Resource Sharing > Borrowing Requests**, select **Add > From Search** or **Add > Manually**). Ensure that you select **Pickup at = Resource Sharing Library** and that you assign partner to the request.

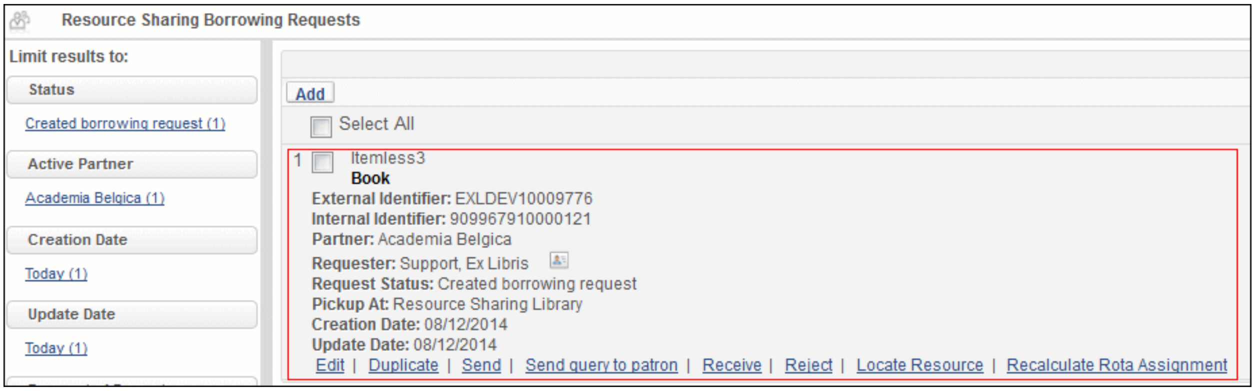


Figure 51 – Resource Sharing Borrowing Requests Page

2 Click **Send**. The **Request Status = Request sent to partner**.

3 To receive the requested resource, click **Receive** for the request. The Received Items page opens.

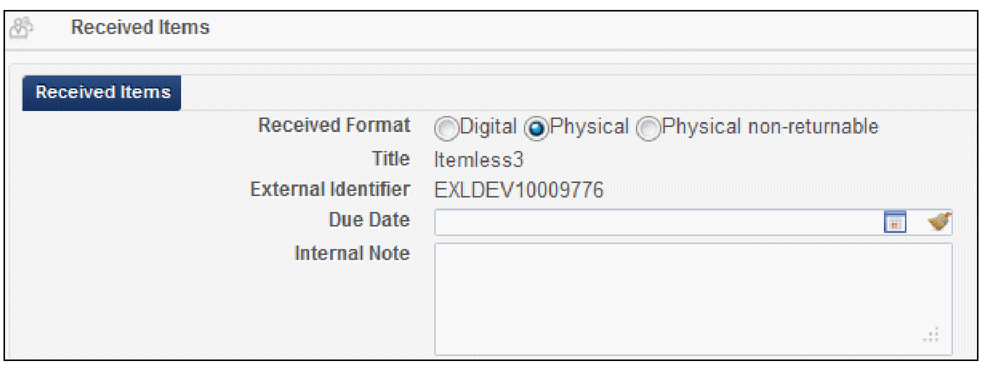


Figure 52 - Received Items Page

4 In the **Internal Note** field, enter a note to indicate information that describes the purpose for which the resource is requested. The request's status changes to **Physically Received by Library**.

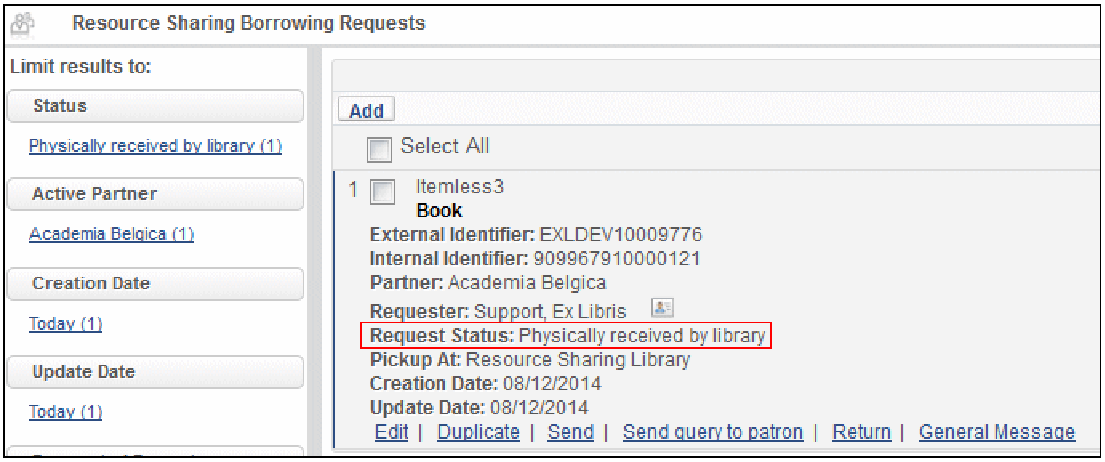


Figure 53 - Resource Sharing Borrowing Requests Page - Updated Status

To ship an itemless lending request:

1 On the Resource Sharing Lending Requests Task List page (**Fulfillment > Resource Sharing > Lending Requests**), click **Ship Item** for a request. The Shipping Items page opens.

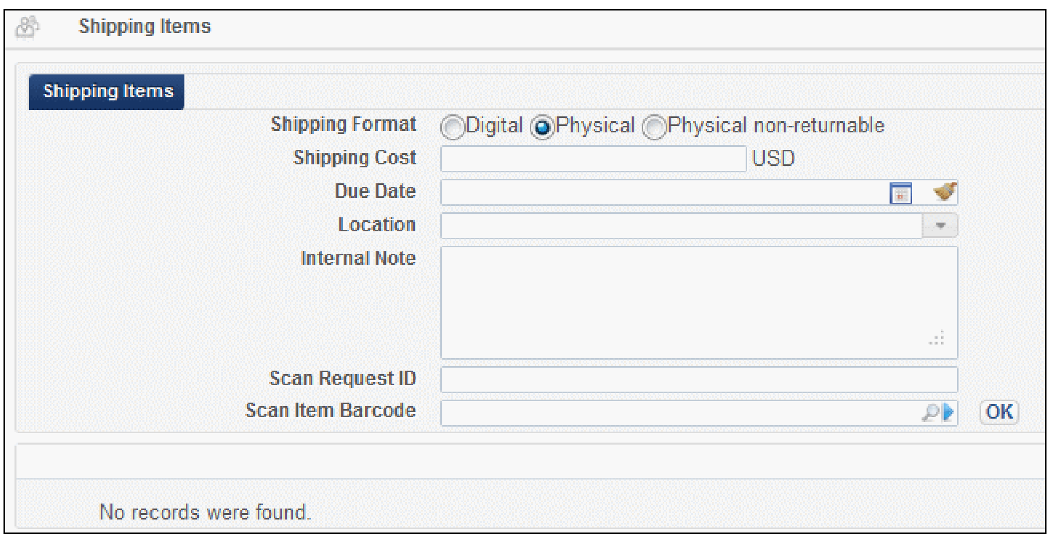


Figure 54 - Shipping Items Page

2 Complete the fields on the form. When sending an itemless request, leave the **Scan Item Barcode** field blank.

3 Click **OK** to ship the request.

Other Resource Sharing Enhancements

- It is now possible to search for resource sharing requests (on both the Resource Sharing Borrowing Requests and Resource Sharing Lending Requests pages) according to the notes in the request (select **Notes** in the **in:** drop down when performing a search).
- The Resource Sharing Borrowing Requests and Resource Sharing Lending Requests pages now display the creation and update dates.
- The **Internal identifier** field has been added and is displayed for borrowing requests of all status types, including those that were canceled or rejected. When there is no external identifier (such as for canceled or rejected requests), you can search for a request by the request's internal identifier.
- On the Resource Sharing Borrowing Requests page, the **Agree to copyright terms** check box is now optional. If you select this check box, when sending a request via ISO, the **Copyright compliance** field is set to **US:CCL**. If this check box is not selected, the **Copyright compliance** field is set to **US:CCG**. The copyright compliance is saved for the lender as a note.

Analytics

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

Fields Added to the Requests Subject Area

Description

The following fields have been added to the Requests Details dimension under the Requests subject area:

- Managed by Library (latest step)
- Managed by Unit (latest step) – this field displays the work order department
- Managed by Desk (latest step)
- Status (latest step)

These fields indicate which library, unit, and desk managed the latest step of the request and the work order status of the latest step of the request. These fields are useful mainly for active requests in order to analyze the current library\unit\desk that handles a request.

Note: Only the latest step is available, since historical data is not saved.

Technical Instructions

The Design Analytics role can access this enhancement.

To access this feature:

Select **Requests > Request Details**:

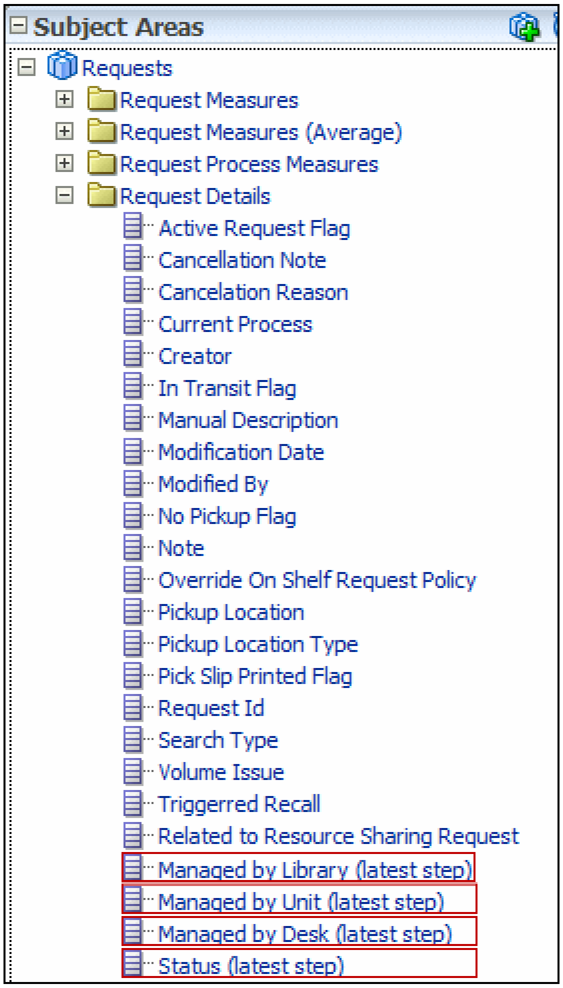


Figure 55 - Request Details - New Fields

The following is an example of a report using the new fields added in this release:

Managed by Library (latest step)	Managed by Desk (latest step)	Status (latest step)
ARCH	Default Circulation Desk	New
BURNS	Default Circulation Desk	In Process
		New
COMP	Default Circulation Desk	New
Education Library	Digitization CD	New
	main	In Process
	work orders cd	New
English Literature 11	Default Circulation Desk	New
Law Library	0210120517secondaryDesk	In Process
	0309120516secondaryDesk	In Process
	0409120516secondaryDesk	In Process
	0509120516secondaryDesk	In Process
		New
	0509121844secondaryDesk	In Process
		New
	0510120519secondaryDesk	New
	0709120516secondaryDesk	In Process
	0809120517secondaryDesk	In Process
	0909120519secondaryDesk	In Process
	1409120517secondaryDesk	In Process
	1809120519secondaryDesk	In Process
	1909120518secondaryDesk	In Process
	2108120516secondaryDesk	In Process
	3008120517secondaryDesk	In Process
	Law Circulation Desk	In Process
		New

Figure 56 - Request Details - New Fields: Report

The following illustrations highlight the source of the new Analytics fields from the Resource Request Monitoring page:

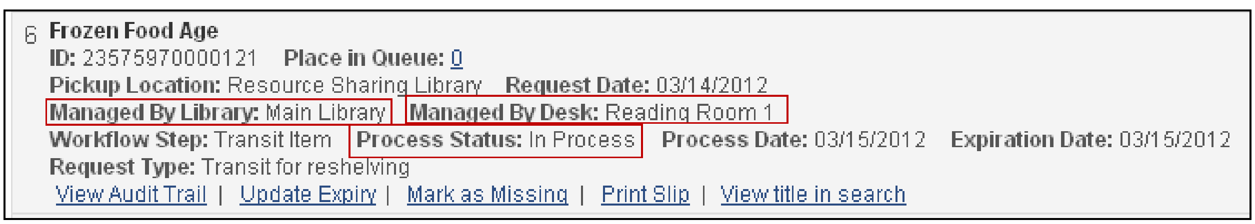


Figure 57 - Resource Request Monitoring Page

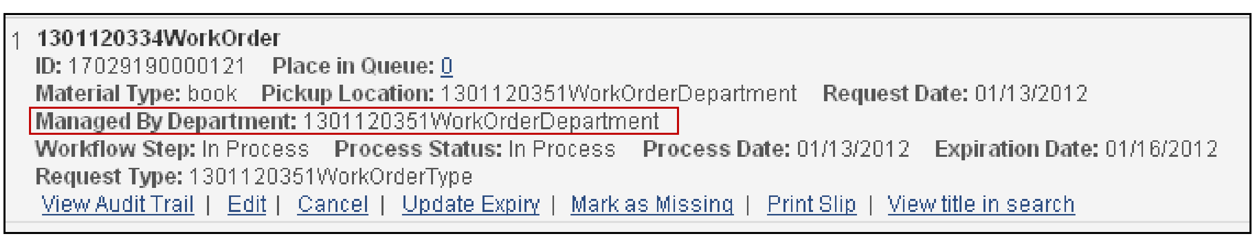


Figure 58 - Managed By Department (Unit)

Statistical Categories Fields Added to the Shared User Details Dimension

Description

User Details is a shared dimension used in almost all subject areas. In this release, five new fields have been added that allow you to map five statistical category types. This allows you to filter reports based on advanced user information typically stored in the statistical category fields.

Technical Instructions

The Design Analytics role can access this enhancement.

To access this feature:

Select, for example, **Borrowing Requests > User Details**.

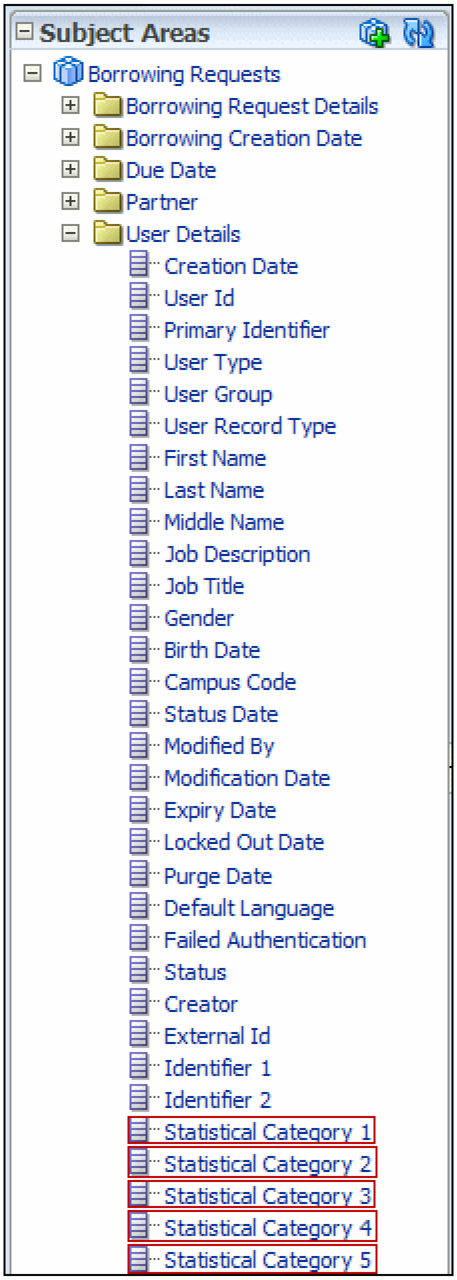


Figure 59 - User Details - New Fields

To configure statistical category types:

1 From the main menu, open the Analytics User Statistics page (**Administration > Analytics > Configuration Menu > Analytics User Statistics**). The following page opens:

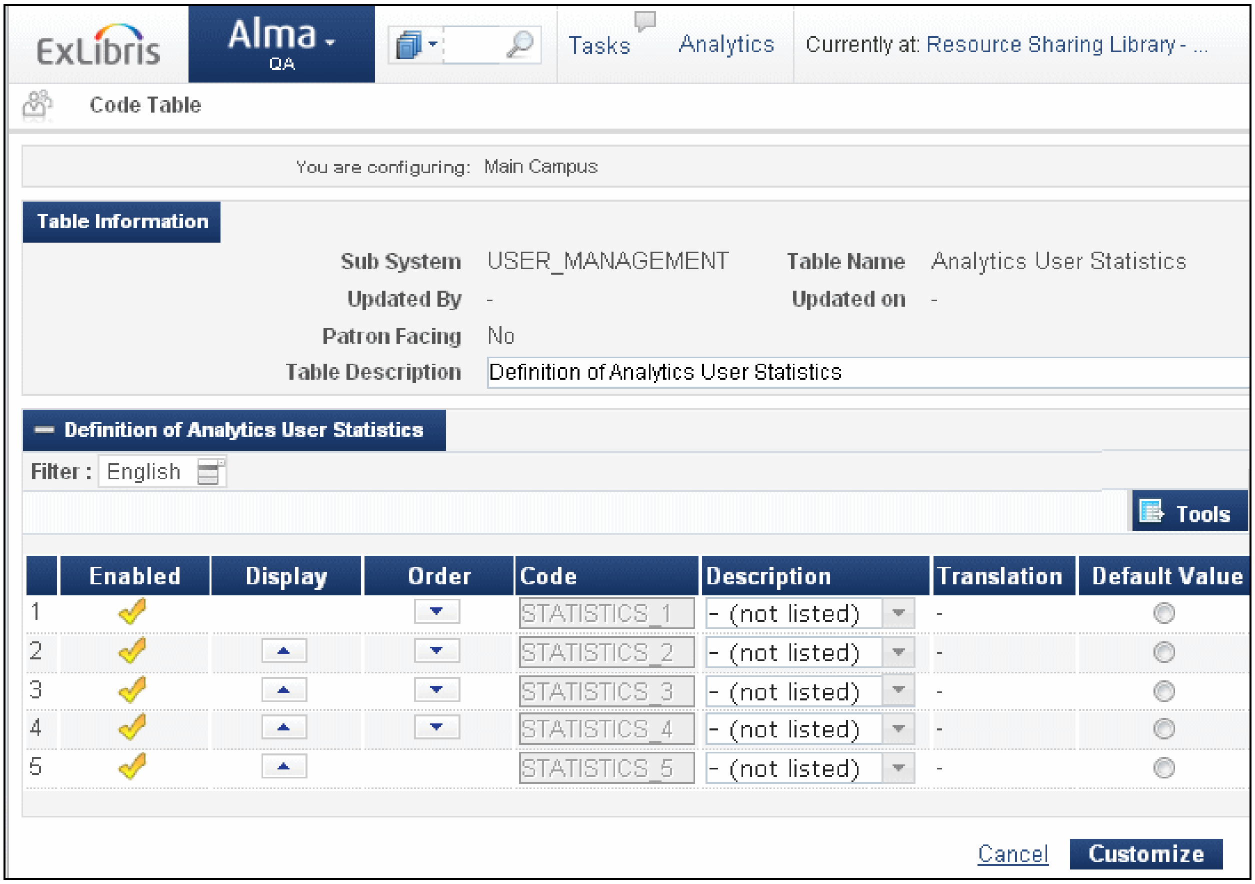


Figure 60 - Analytics User Statistics

2 For each statistic field, select from the **Description** drop-down list the statistical category type that you want to map to that field.

3 Click **Customize**.

The statistical categories of the type you mapped are displayed in reports that include the field.

New Industry Statistics Dashboard

Description

The Industry Statistics dashboard has been added to Alma Analytics. This dashboard contains sample reports that may be useful to institutions that need to send reports to library organizations such as ARL and SCONUL. The dashboard contains the following reports:

- Number of Objects
- Items Added, Items Withdrawal

- Item Count by library and Location
- Number of Loans and Renewals
- Inventory – physical inventory count
- E-Inventory – electronic inventory count
- Fulfillment – annual count of loans and renewals

Technical Instructions

The Design Analytics role can access this enhancement.

To access this feature:

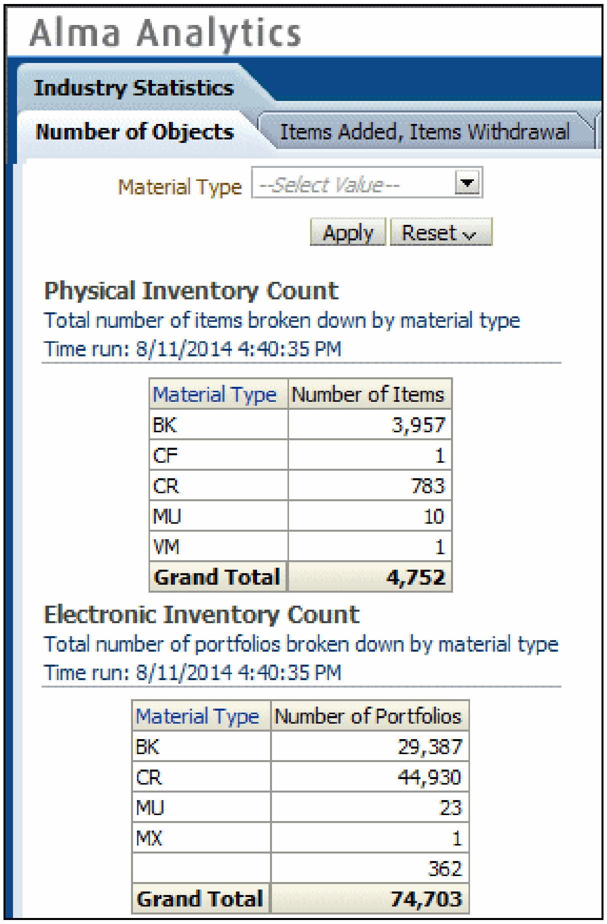
From the Alma dashboard, select **Catalog** > **Shared Folders** > **Alma** > **Industry Statistics** > **Open**.

Industry Statistics Dashboard Reports

The following is an overview of the reports under the new **Industry Statistics** dashboard.

Number of Objects

The **Number of Objects** report includes a table for physical inventory count and a table for electronic inventory count, each grouped by material type.



Alma Analytics

Industry Statistics

Number of Objects | Items Added, Items Withdrawal

Material Type --Select Value--

Apply Reset

Physical Inventory Count

Total number of items broken down by material type

Time run: 8/11/2014 4:40:35 PM

Material Type	Number of Items
BK	3,957
CF	1
CR	783
MU	10
VM	1
Grand Total	**4,752**

Electronic Inventory Count

Total number of portfolios broken down by material type

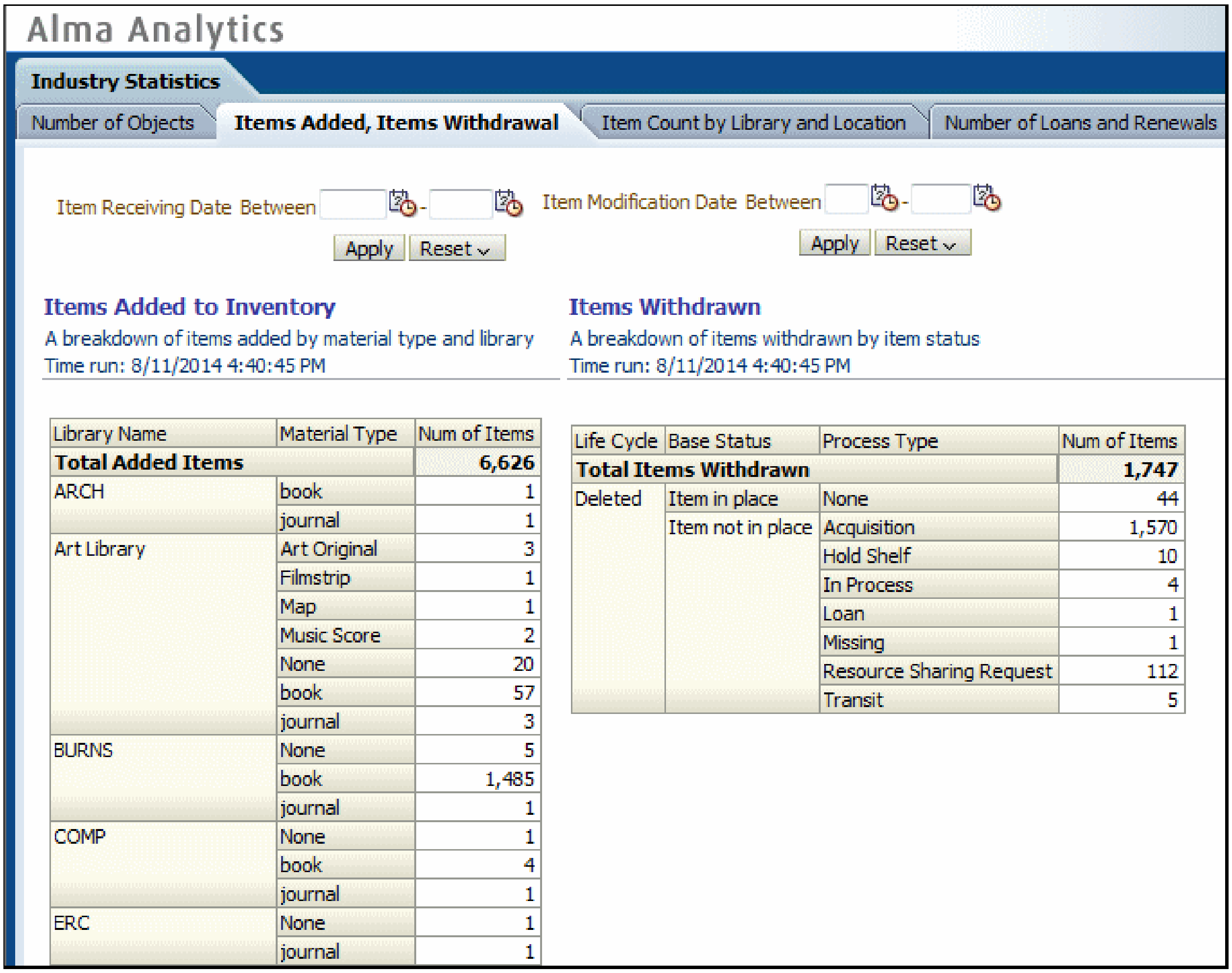
Time run: 8/11/2014 4:40:35 PM

Material Type	Number of Portfolios
BK	29,387
CR	44,930
MU	23
MX	1
	362
Grand Total	**74,703**

Figure 61 -Number of Objects

Items Added, Items Withdrawal

The **Items Added, Items Withdrawal** report is for physical inventory and includes two tables. The Items Added to Inventory logic is based on the receiving date and shows all items added in a specified period by library and material type. The Items Withdrawal logic is based on items with `life cycle = deleted` and have a modification date in a specified period (the modification date indicates the time the status was changed**.**



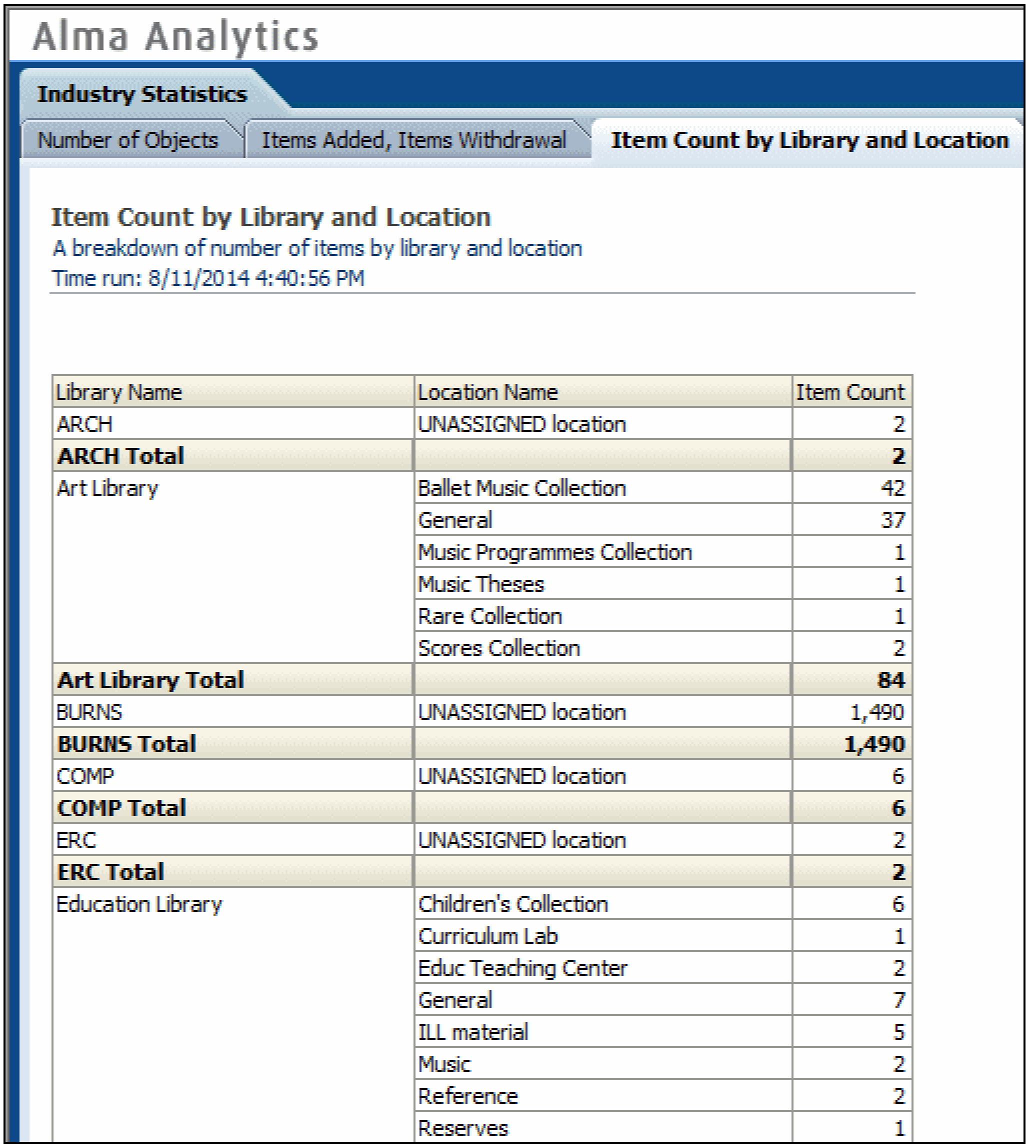
Library Name	Material Type	Num of Items
Total Added Items		**6,626**
ARCH	book	1
	journal	1
Art Library	Art Original	3
	Filmstrip	1
	Map	1
	Music Score	2
	None	20
	book	57
	journal	3
BURNS	None	5
	book	1,485
	journal	1
COMP	None	1
	book	4
	journal	1
ERC	None	1
	journal	1

Life Cycle	Base Status	Process Type	Num of Items
Total Items Withdrawn			**1,747**
Deleted	Item in place	None	44
	Item not in place	Acquisition	1,570
		Hold Shelf	10
		In Process	4
		Loan	1
		Missing	1
		Resource Sharing Request	112
		Transit	5

Figure 62 -Items Added, Items Withdrawal

Item Count by Library and Location

The **Item Count by Library and Location** report is also for physical inventory and includes a table with all items according to their library and location.

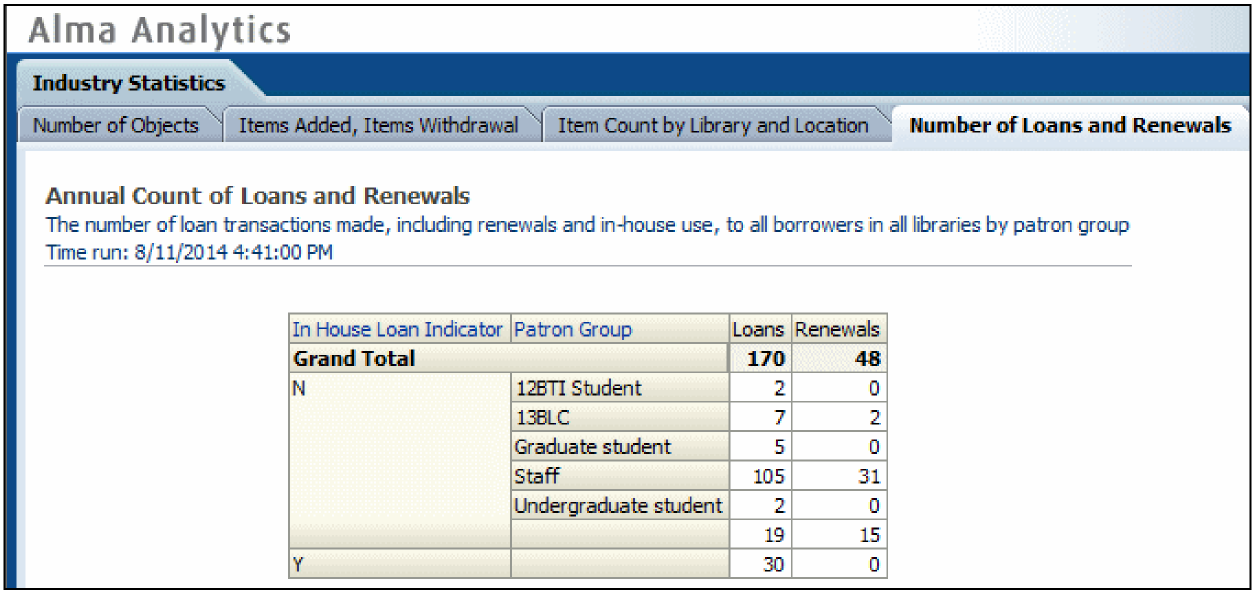


Library Name	Location Name	Item Count
ARCH	UNASSIGNED location	2
ARCH Total		**2**
Art Library	Ballet Music Collection	42
	General	37
	Music Programmes Collection	1
	Music Theses	1
	Rare Collection	1
	Scores Collection	2
Art Library Total		**84**
BURNS	UNASSIGNED location	1,490
BURNS Total		**1,490**
COMP	UNASSIGNED location	6
COMP Total		**6**
ERC	UNASSIGNED location	2
ERC Total		**2**
Education Library	Children's Collection	6
	Curriculum Lab	1
	Educ Teaching Center	2
	General	7
	ILL material	5
	Music	2
	Reference	2
	Reserves	1

Figure 63 -Item Count by Library and Location

Annual Loans and Renewals

The **Annual Loans and Renewals** report includes a table with the total number of annual transactions, including loans, renewals, and in-house loans to all borrowers of all libraries according to patron group.



Alma Analytics

Industry Statistics

Number of Objects | Items Added, Items Withdrawal | Item Count by Library and Location | **Number of Loans and Renewals**

Annual Count of Loans and Renewals

The number of loan transactions made, including renewals and in-house use, to all borrowers in all libraries by patron group

Time run: 8/11/2014 4:41:00 PM

In House Loan Indicator	Patron Group	Loans	Renewals
Grand Total		**170**	**48**
N	12BTI Student	2	0
	13BLC	7	2
	Graduate student	5	0
	Staff	105	31
	Undergraduate student	2	0
		19	15
Y		30	0

Figure 64 - Number of Loans and Renewals

Primo

The following sections describe the functions provided for Primo in the September 2014 release.

Sort Direction of Loans in My Account

Description

The **primo_loan_list_sorting** customer parameter has been added to configure the order in which loans are sorted in Primo My Account > Loans. By default, the loans are listed in descending order by due date. You may now sort them in ascending order by due date if you prefer.

Technical Instructions

The following roles can configure the call number mapping rules:

- Cataloging Administrator
- General System Administrator

To change the sort direction of the loans in My Account:

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

   The CustomerParameters page opens.

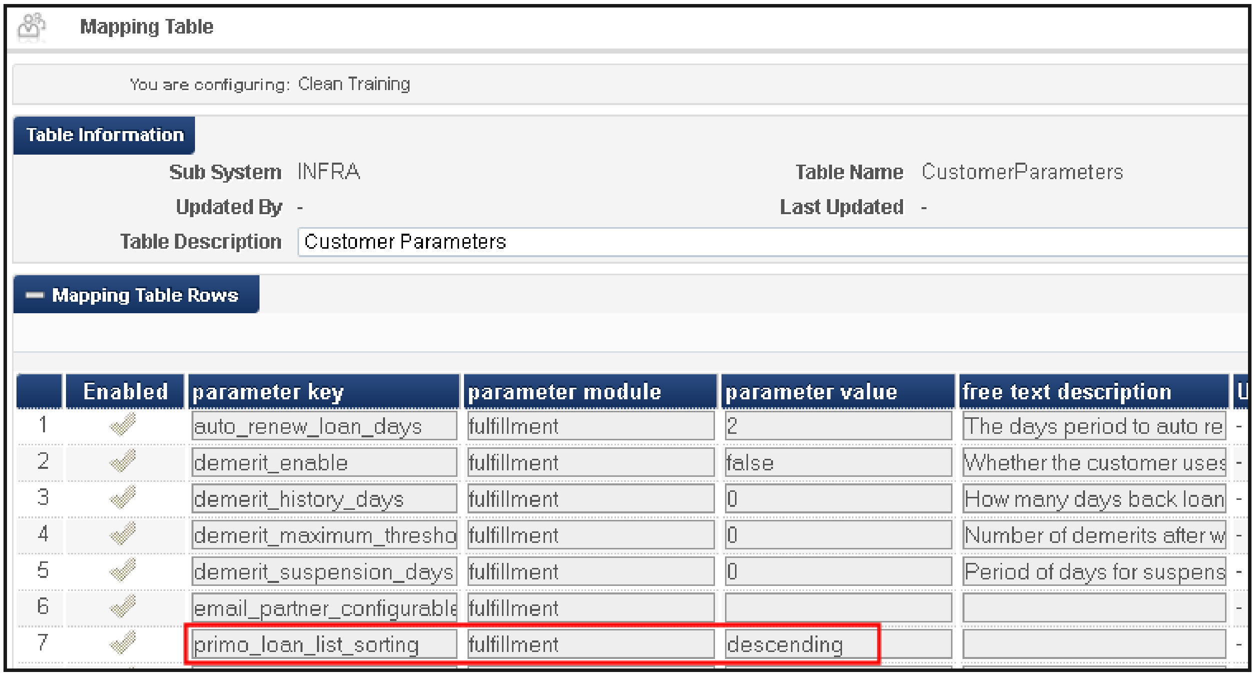


Figure 65 – CustomerParameters Mapping Table Page

2 For the **primo_loan_list_sorting** mapping row, set the **parameter value** field to **ascending** or **descending**. By default, the loans in the list are sorted in descending order by due date.

3 Click **Save**.

Other Primo Enhancements

- In the Primo Get It tab, virtual holdings (holdings of items in temporary location) now display the holdings note (field 852$z) from the permanent holdings.

Alma APIs

The following section describes the Alma API enhancements provided in the September 2014 release.

Alma RESTful APIs

For the September release, the following RESTful APIs were added:

- The Withdraw Item API:

  ```
  DELETE /bibs/{MMS_ID}/holdings/{holding_id}/items/{item_id}
  ```

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

- APIs to retrieve a list of title-level and item-level requests:

  ```
  GET /bibs/{MMS_ID}/requests
  GET /bibs/{MMS_ID}/holdings/{holding_id}/items/{item_id}/requests
  ```

  For more information on these APIs, see https://developers.exlibrisgroup.com/alma/apis/bibs

- An API to retrieve code tables:

  ```
  GET /almaws/v1/conf/code-tables/{codeTableName}
  ```

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

- The Analytics Web service was converted to a RESTful API. For information on this API, see https://developers.exlibrisgroup.com/alma/apis/analytics.

In addition, note that a patron's city, which was a mandatory field in some of Alma's forms and APIs, is now an optional field everywhere.

Collaborative Networks and Multicampus Institutions

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

Ability to Restrict Fulfillment Network Services

Description

When utilizing a fulfillment network, you can configure unexposed or hidden user groups for institutions in the network. When searching for a user in a linked institution, if the user has been configured as belonging to an unexposed group, the user does not appear in a subsequent user search. As a result, the user cannot receive walk in services at linked institutions.

Technical Instructions

The following roles can define unexposed user groups for an institution:

- General System Administrator
- User Administrator

To define unexposed user groups for an institution in a network:

1. On the Unexposed User Groups Code Table page (**Administration > User Management Configuration > Configuration Menu > Collaborative Networks > Unexposed User Groups**), locate the **Create a New Code Table Row** section.

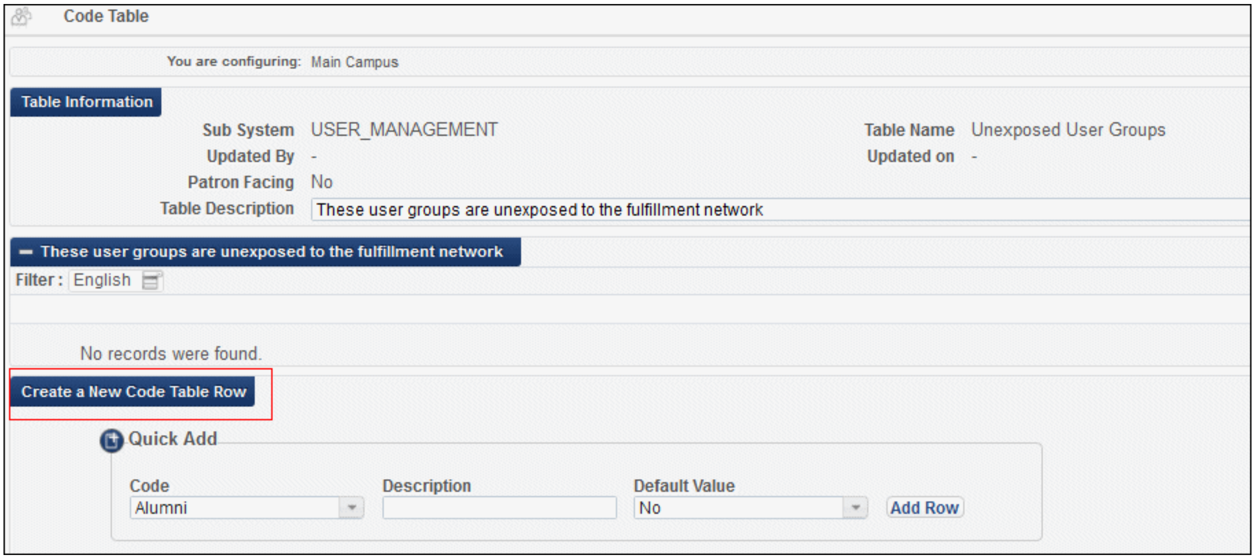


Figure 66 - Unexposed User Groups Code Table Page

2 In the **Code** field, select a code of the group whose users are to be hidden during user searches.

3 In the **Description** field, enter a description for the group.

4 Click **Add Row**. The configured value appears in the table as an unexposed group in the **These user groups are unexposed to the fulfillment network** section.

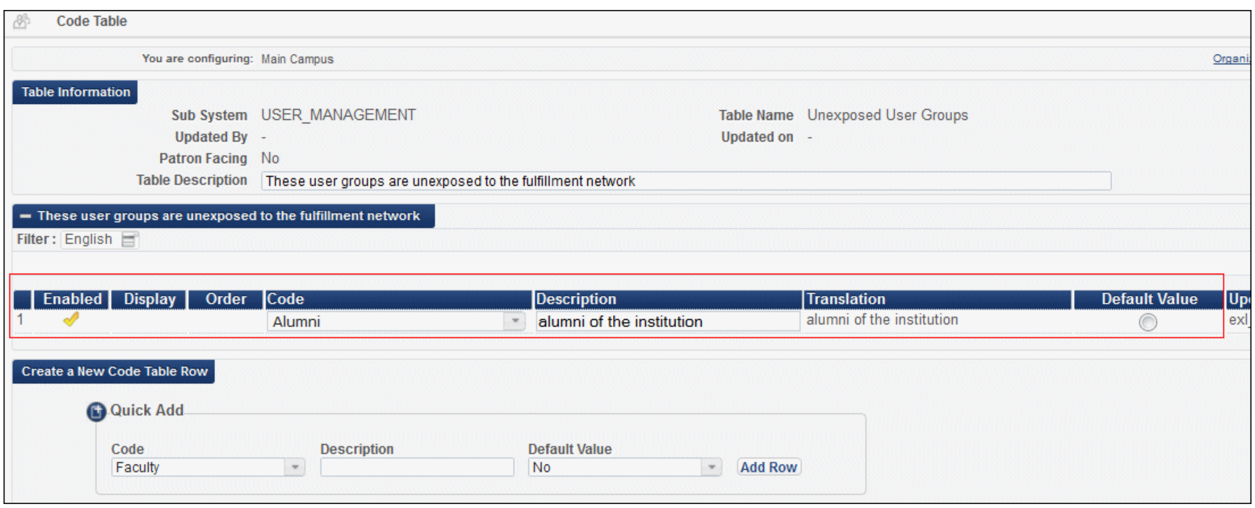


Figure 67 - Unexposed User Groups Code Table Page - Configured Value

5 Click **Save**.

To search for an unexposed user:

1 On the Patron Identification page (**Fulfillment > Checkout/Checkin > Manage Patron Services**), select **Find user in other institution**.

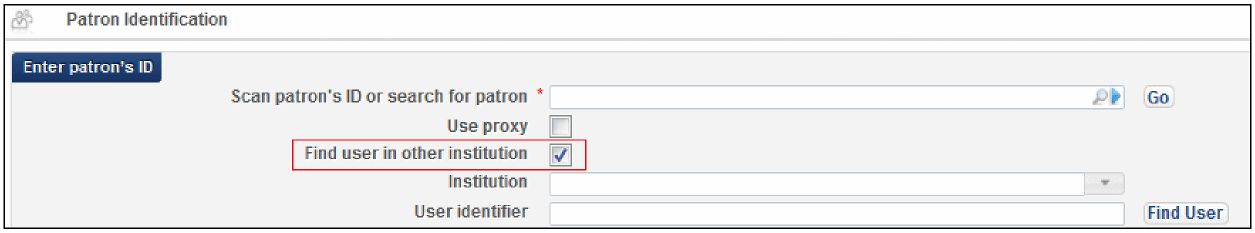


Figure 68 – Patron Identification — Find user in other institution check box

Note: This check box displays only if your institution is part of a Fulfillment Network.

2 In the **User identifier** field, enter the user's identifier and click **Find User**. If the user is part of the user group defined by the patron's home institution as unexposed on the Unexposed User Groups Code Table page, a message displays indicating that the user was not found.

Order Electronic Resources Negotiated and Managed in the NZ by Member

Description

This feature allows individual members to purchase electronic resources that are negotiated and managed for them by the central office in the NZ.

Technical Instructions

Before an institution orders an electronic resource, the central office of the NZ must create a Negotiation license and make it available to the institution. The Negotiation license must have an entry for the current member, and the resource must also be linked to the Negotiation license.

The member should be listed in the negotiation details as a member for this license.

See the *Alma Collaborative Networks (Consortia) Guide* or the online help for information on setting up a Negotiated license.

Network Zone

The following role can associate an electronic resource with a Negotiated license:

- License Manager (for the Network Zone)

To associate an electronic resource with a Negotiated license:

1 Perform a repository search for the electronic collection or portfolio you want the license to incorporate.

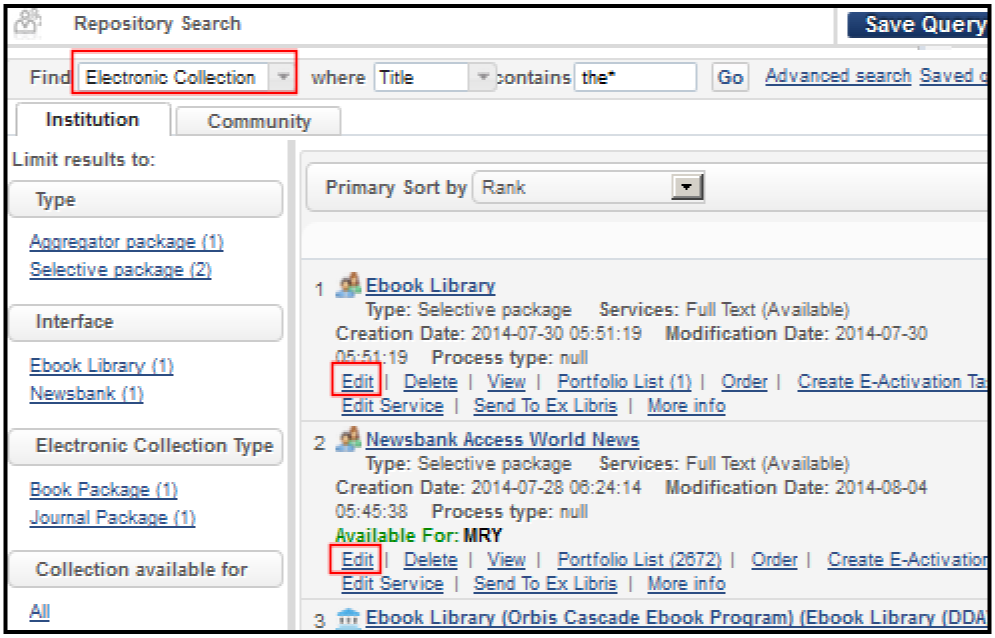


Figure 69 - Search for Electronic Resource

2 Click **Edit** for the entry you want to associate with the license. The Editor page for the electronic collection or portfolio opens (see below).

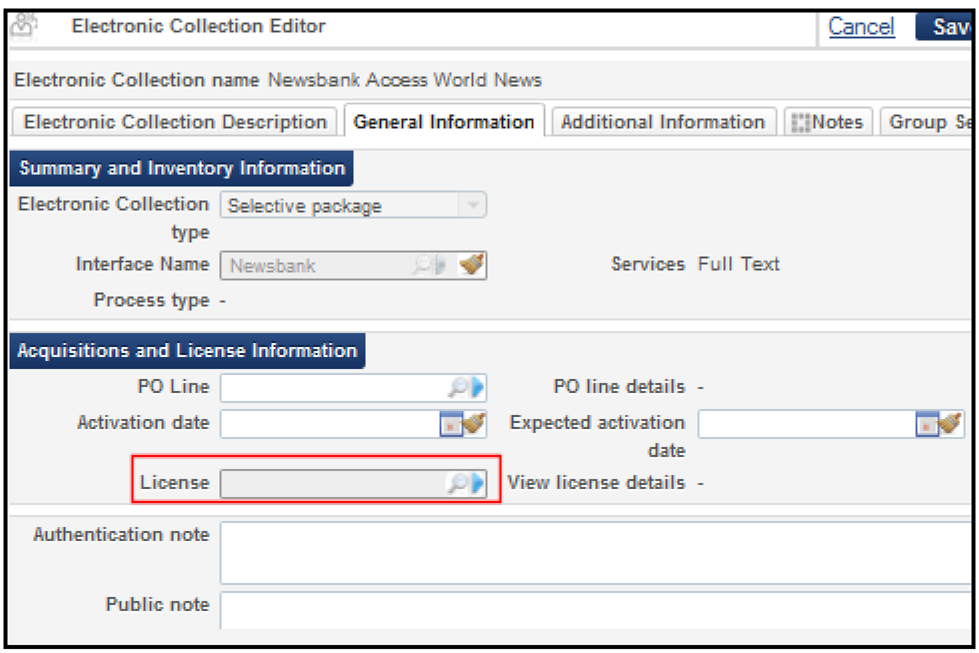


Figure 70 - License Field on General Information Tab

3 In the Acquisitions and License Information section, click the search/find icon (magnifying glass/arrow) for the **License** field. The list of all licenses opens.

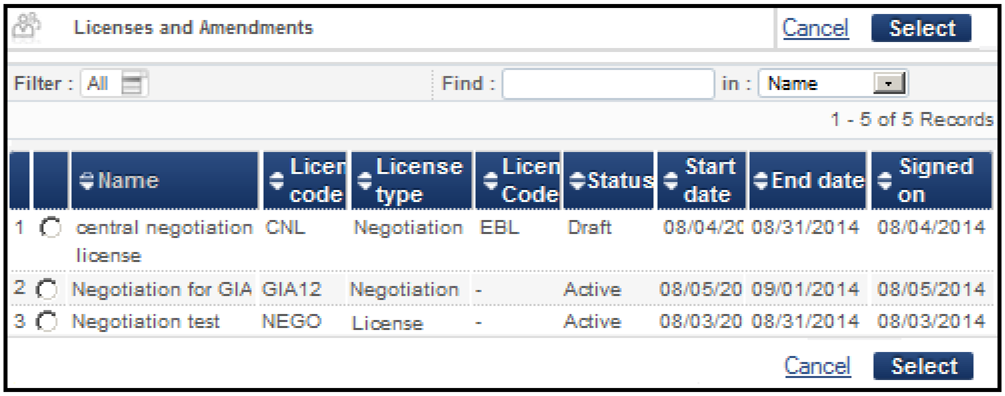


Figure 71 - Select the Negotiation License You Want to Use

4 Find the license you want to use for this resource and select its button. The license must be of the type Negotiation.

5 Click **Select**. The license you selected populates the **License** field.

6 Enter any additional information you want to enter for the Electronic Collection Editor. See the *Resource Management Guide* (Inventory chapter, **Managing Electronic Collections** section) or search the online help (using chapter or section name) for more information.

Institution Zone

The following IZ roles can license electronic resources through a Negotiated license:

- Inventory Operator or Manager (Institution Zone/Consortium Member)

To purchase a centrally negotiated electronic resource:

1 Log on to Alma as an institution that is part of a collaborative network.

2 Perform a repository search of the NZ. (The resource should be an electronic collection or portfolio, and your institution should be included in the NZ license along with the resource. This will have been set by the central office of the collaborative network.)

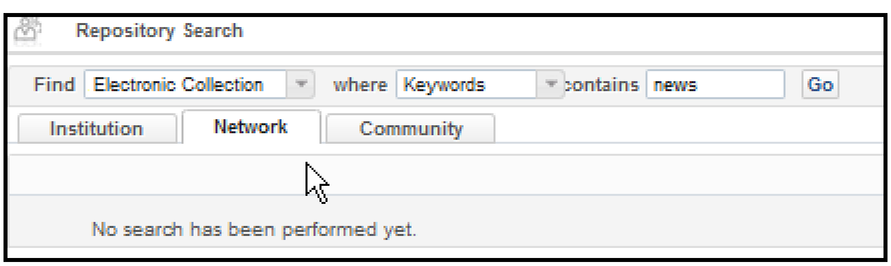


Figure 72 - Search of Network Resources

3 Find the result entry that contains the resource you want to order and click **Order**.

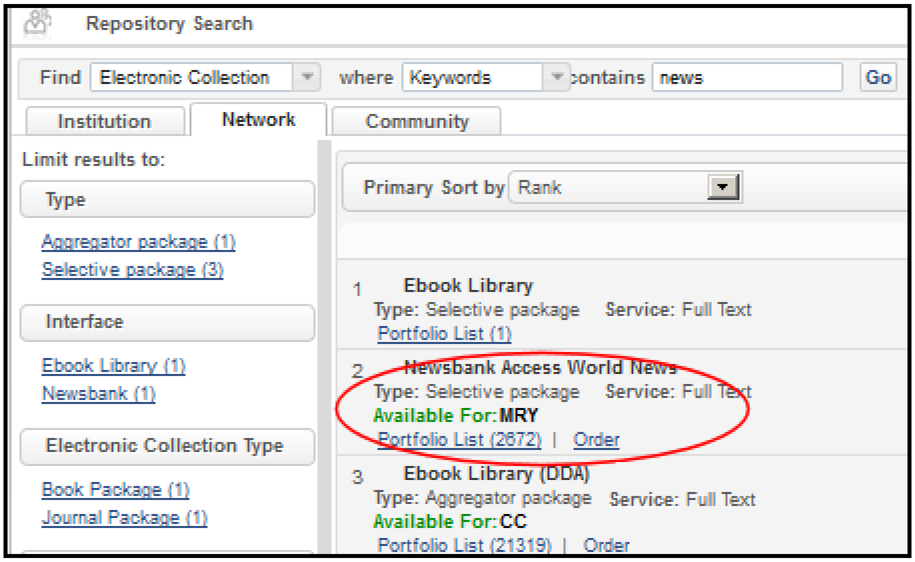


Figure 73 - Select Network Resource

Note: Your institution's name and code should appear in the Collection Available For filter list in the left column and in the Available For notation in the entry, as shown below.

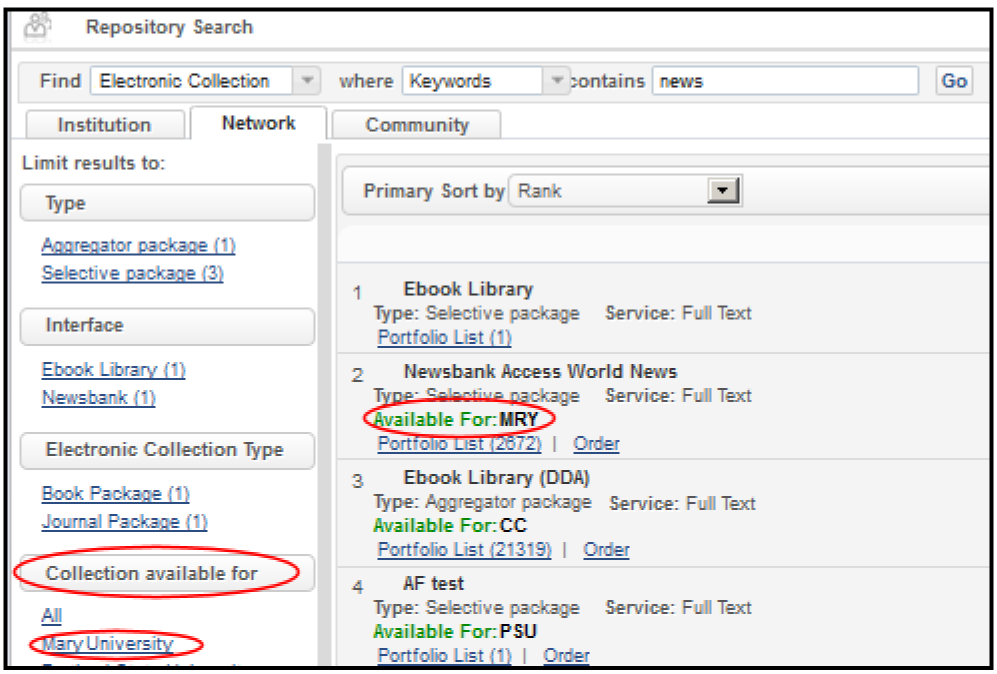


Figure 74 - Institutions That Can Order This Resource

4 Click **Order** in the resource entry.

5 The PO Line Owner and Type form opens.

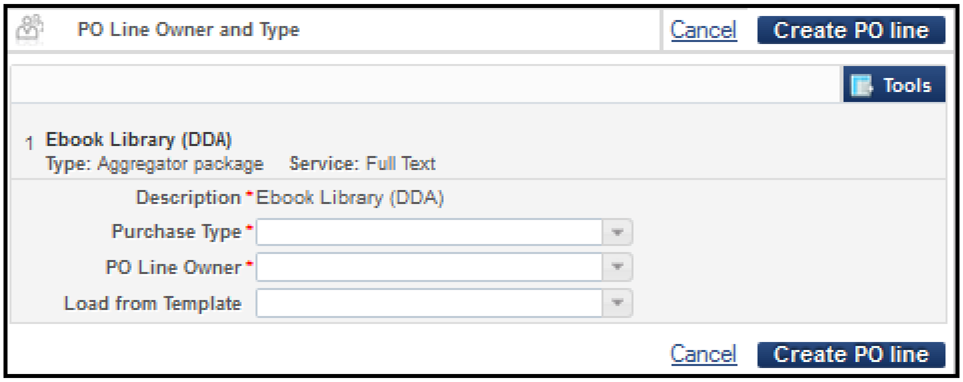


Figure 75 - PO Line Creation Form

6 Select entries for the required fields and click the **Create PO Line** button.

The system creates a purchase order for the institution. This PO is linked to the centrally managed inventory in the NZ, inventory that shows on the PO line. The inventory tab of the IZ PO line lists the NZ inventory to which the PO line is linked.

The inventory on the NZ should be **Active**. It is not editable by the IZ members.

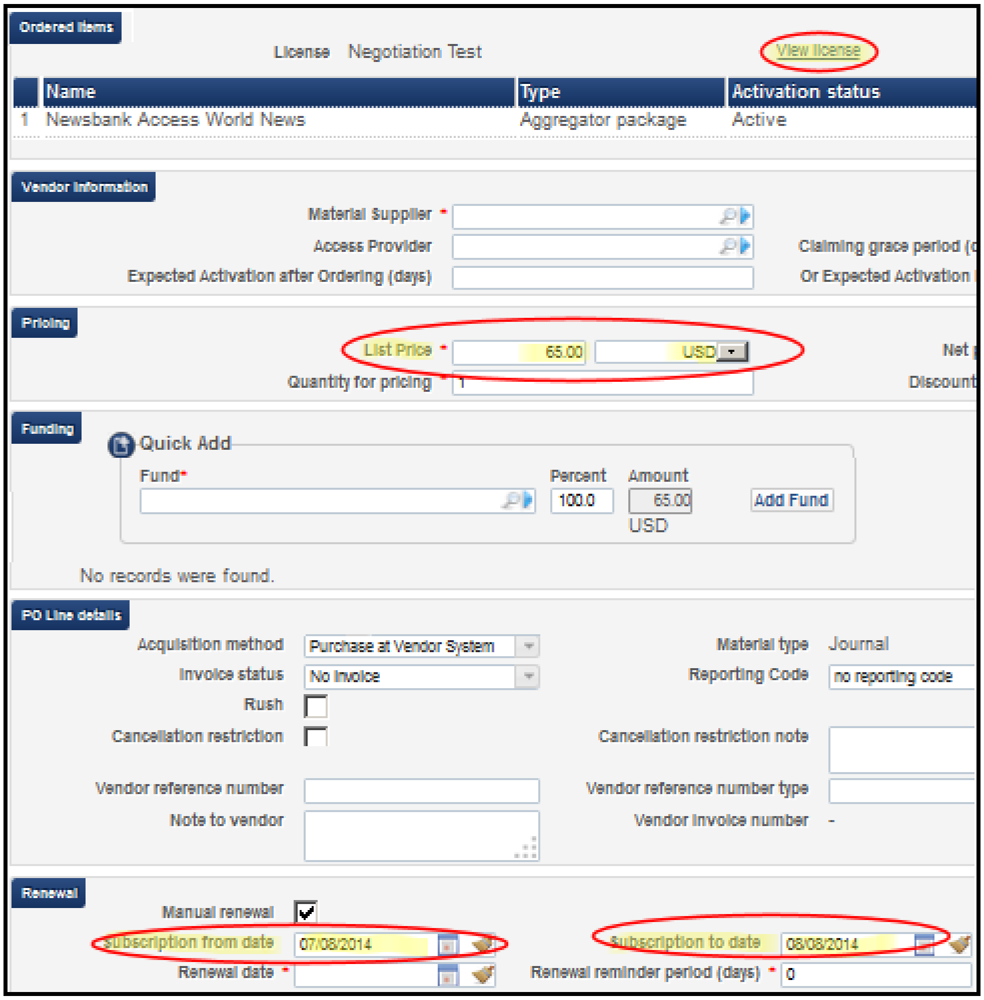


Figure 76 - Summary Tab for PO Line with Fields Populated from Negotiated License

Fields that are populated from the Negotiated license include price (as set for this particular institution), renewal cycle (also set for this institution), and subscription From and To dates. These values and those from the License Terms tab of the license can be seen by clicking the **View license** link at the top of the page.

7 Complete the PO line and submit the order. For information on how to complete a PO line, see the *Alma Acquisitions Guide* or the online help.

Enhancement to the Search and Display of Jointly Managed E-Resources

In the September release, the following Available For enhancements have been made for multicampus and collaborative network environments:

- Added Available For group details provided for each record in the repository search results for portfolios and electronic collections (refer to Available For Search Results on page 89)
- Added search attributes to the Advanced Search for Available For groups (refer to Available For Search Attributes on page 90)
- Extended the Available For facet capability (refer to Available For Facets on page 92)

With these enhancements, Alma provides a clearer view of the electronic resources' availability per campus in staff search results allowing staff to easily visualize the similarities and differences between electronic resources' availability. You now have more flexibility with your Alma Repository Search options and results to see and identify resources that belong exclusively or jointly to groups whose members can be campuses, libraries, or institutions depending on your environment's configuration (multicampus or collaborative network).

Available For Search Results

The details provided in portfolio and electronic collection search results have been enhanced to include Available For group/member/institution details.

When you do a portfolio search and group settings are configured at the portfolio level, an Available For label/row displays in the search results followed by a list of the groups that the portfolio is available for. When you point to the Available For row, a tooltip opens that identifies the members of the group(s) listed in the Available For row.

Figure 77 - Available For Group Details in Search Results

Refer to the illustration below for the portfolio-level group settings for "Procedia in vaccinology…"

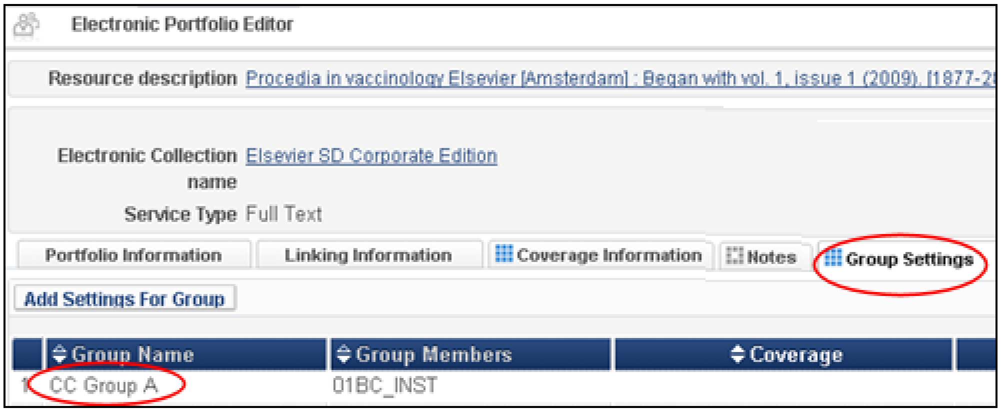


Figure 78 - Portfolio-Level Group Settings Example

When you do an electronic collection search and group settings are configured at the collection level, an Available For label/row displays in the search results followed by a list of the groups that the collection is available for. When you point to the Available For row, a tooltip opens that identifies the members of the group(s) listed in the Available For row.

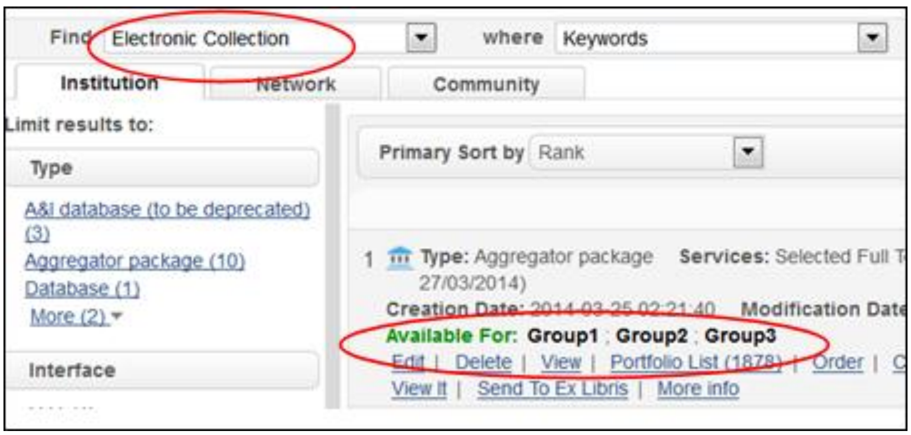


Figure 79 - Electronic Collection Available For Search Result Details

Available For Search Attributes

When doing an advanced search for an electronic collection or portfolios, the following new search attributes are available:

- Electronic collections (refer to the first illustration below)
  - Collection available for group
  - Collection available only for group
- Portfolios (refer to the second illustration below)
  - Available for group
  - Available only for group

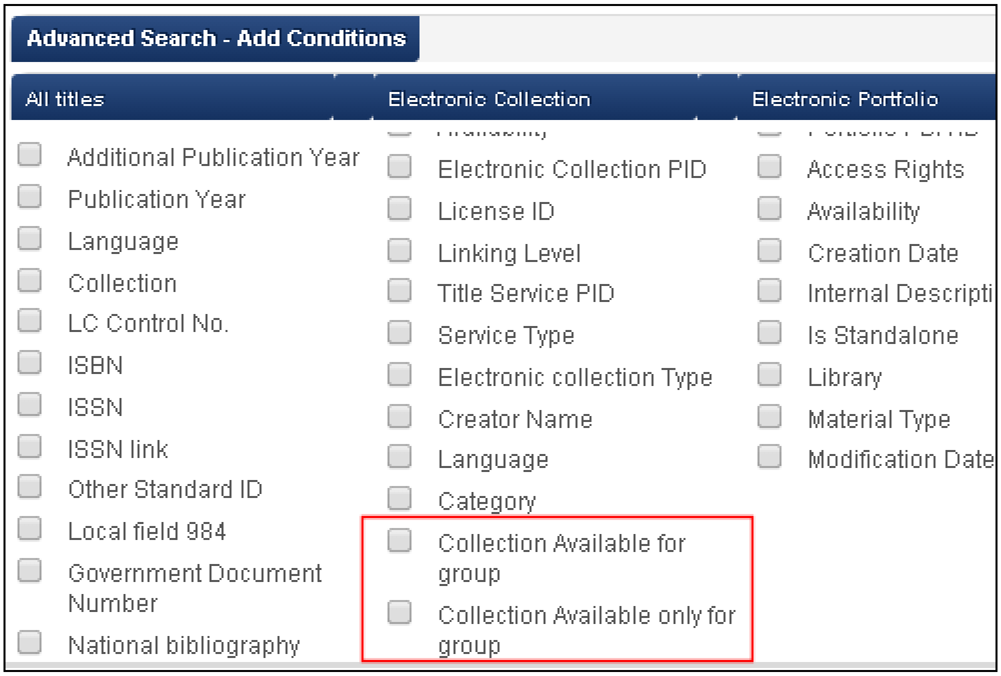


Figure 80 - Electronic Collection Advanced Search Attributes for Available For Groups

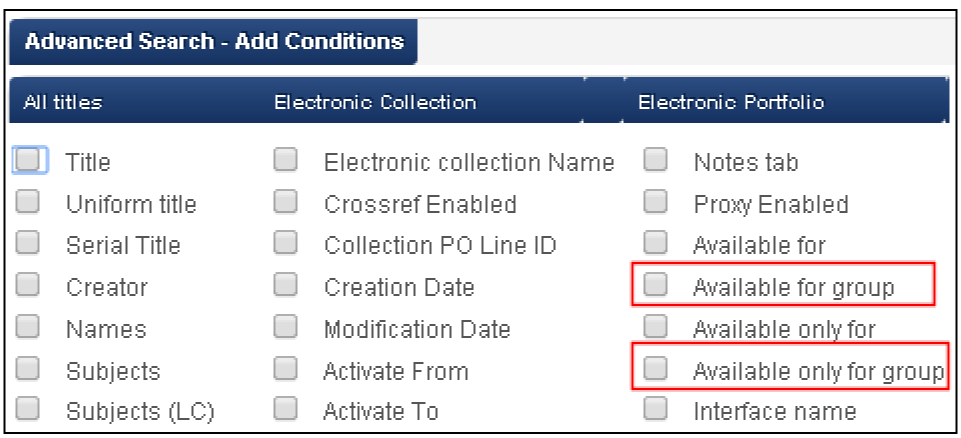


Figure 81 - Portfolio Advanced Search Attributes for Available For Groups

When you select one of the Available For group options, the drop-down list of search options provided displays a list of Available For groups.

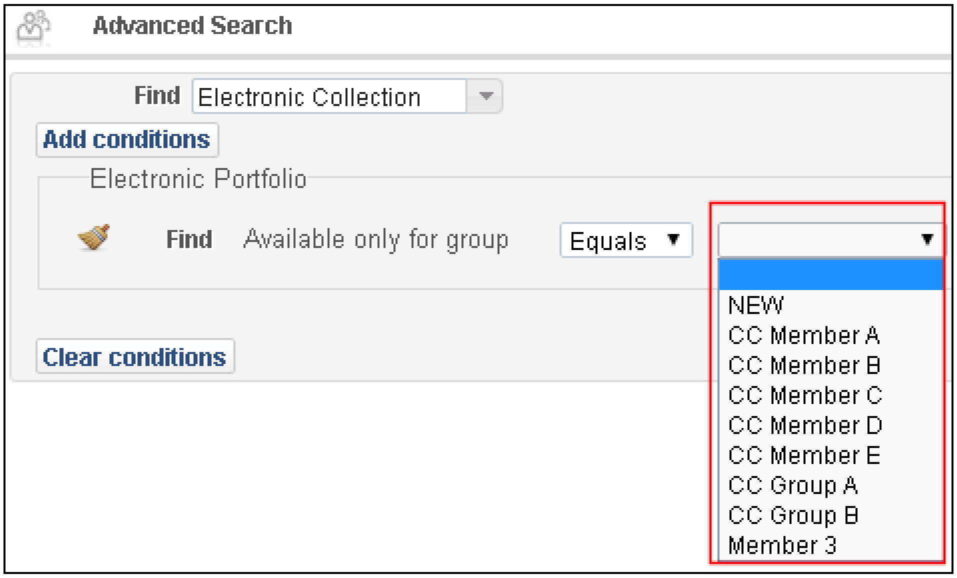


Figure 82 - Available For Group Options (Drop-Down List)

Available For Facets

The search result facets have been enhanced for Available For to include group/member-level information in a tooltip when you point to the Available For campus. This enables you to determine which groups are associated with the campus.

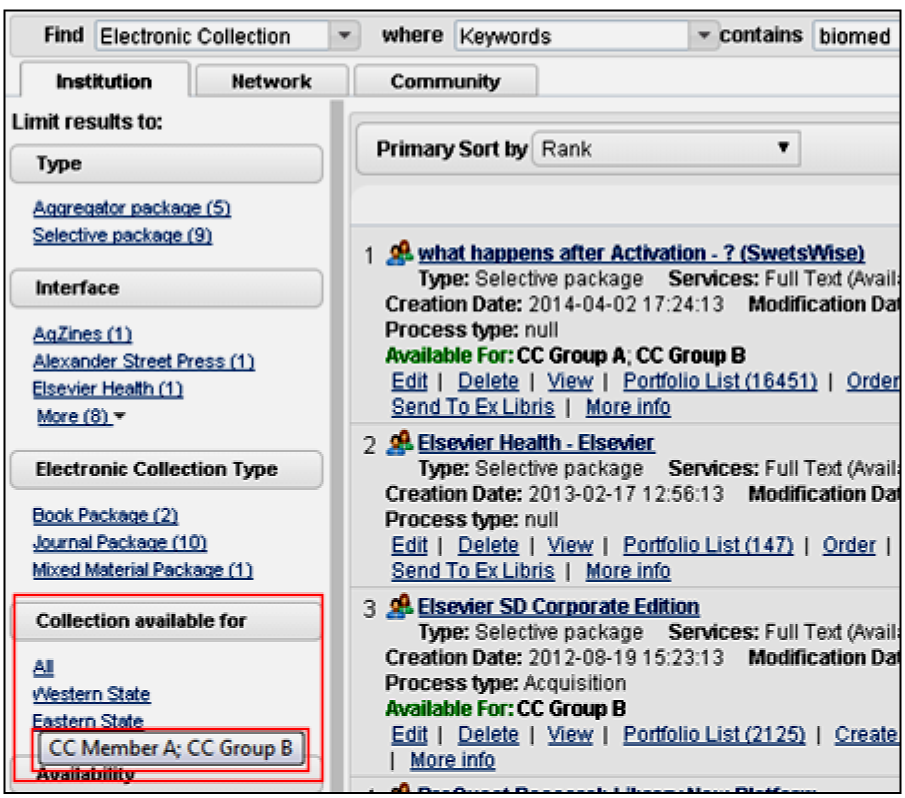


Figure 83 - Tooltip for Available For Facets to Identify Groups/Members

Copy CZ Records to NZ Catalog

Description

For collaborative networks, this enhancement allows the NZ institution to create a local copy of a descriptive record to enrich it. After the record is localized in the NZ, it will no longer receive updates from the CZ, and any member institutions that have activated this resource will benefit from the updates made to the local record in the NZ.

In the September phase of this enhancement, the **Copy to institution** option under the File menu in the MD Editor creates a local copy of the CZ bibliographic record at the NZ institution, detaches any records at the member institutions that link to the same CZ record, and links them to the enriched record at the NZ institution. After the member institutions have been linked, the **Held By** field for the record at the NZ institution will display the member institutions that have inventory for this record.

Technical Instructions

The following roles can export local authority records:

- Repository Manager or Administrator
- Catalog Manager or Administrator

To create a local copy at the NZ and link the member's inventory:

1 Perform a repository search to find the CZ record that you want to localize at the NZ institution.

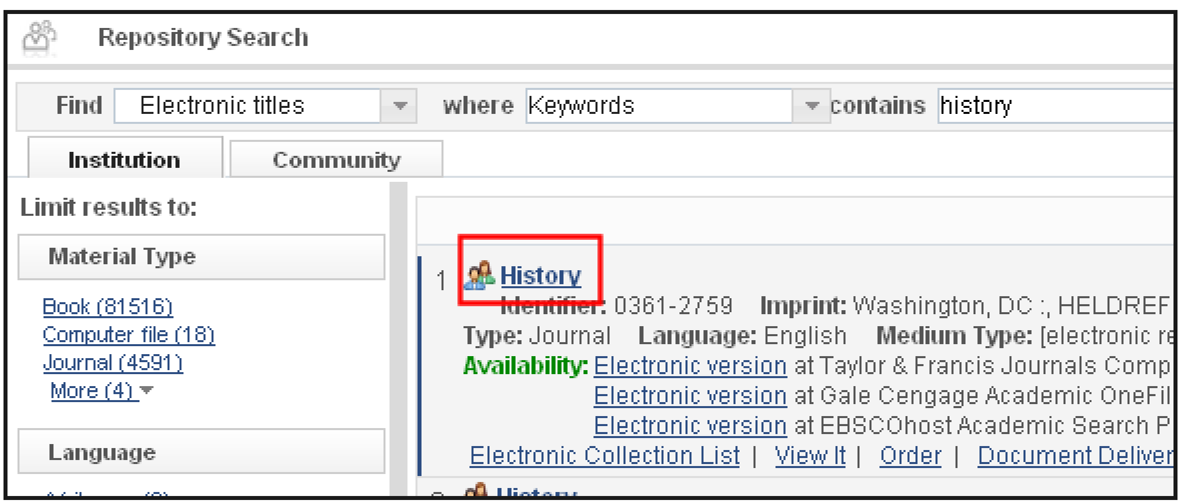


Figure 84 – Repository Search

2 Click the title of the CZ record in the search results.

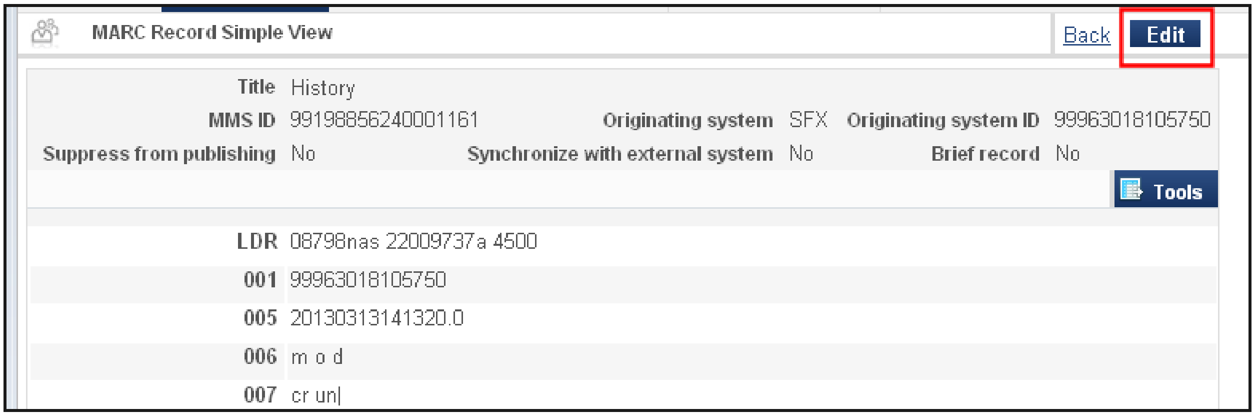


Figure 85 – MARC Record Simple View

3 Click **Edit**.

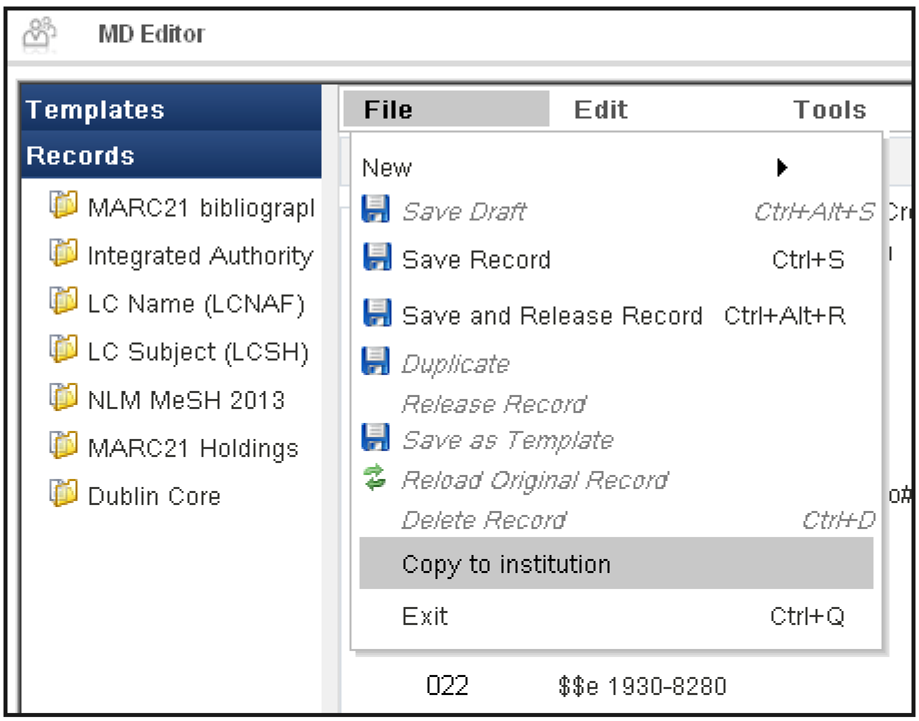


Figure 86 – MD Editor

4 Select **File > Copy to institution**.

Consortia Link Job – Phase II

Description

This enhancement allows member institutions in an NZ environment to use the **Link a set of records to the Network Zone** job to contribute bibliographic records to the NZ if matching records do not already exist in the NZ catalog.

Technical Instructions

The following role can export bibliographic titles:

- Repository Administrator

To link a set of records to the NZ:

1 Create a set of bibliographic titles.

2 On the Run a Job – Select Job to Run page (**Administration > Manage Jobs > Run a Job**), select **Metadata Management** from the **Type** drop-down filter, select the **Link a set of records to the Network Zone** job, and click **Next**.

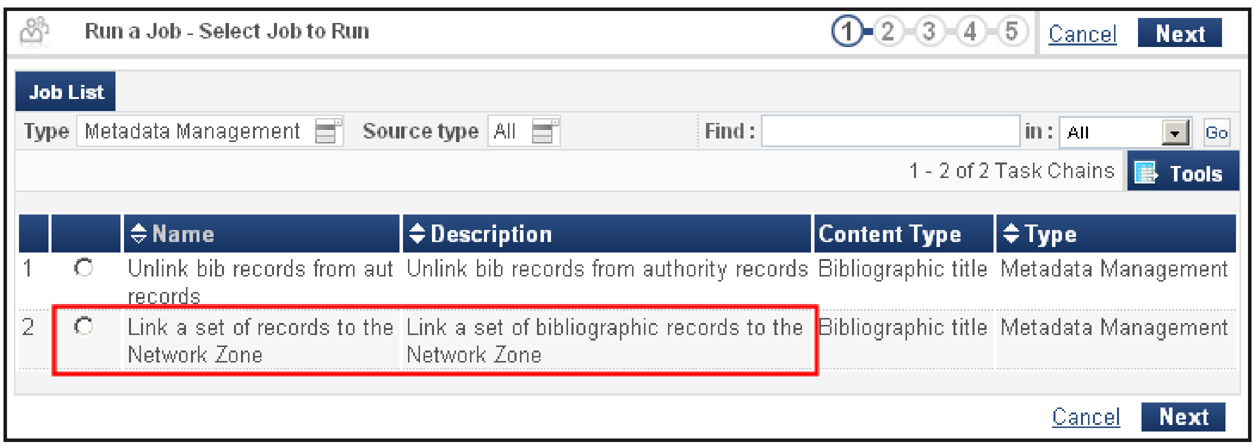


Figure 87 – Select Job to Run

3 On the Run a Job – Select Set page, select the set you created in the first step and click **Next**.

4 Depending on the mode, enter the following parameters on the Run a Job – Enter Task Parameters page and click **Next**:

- No match – This mode links all records in the set to the NZ without performing any matching:
  - **Serial match method** – Leave blank.
  - **Non-serial match method** – Leave blank.

    - **Contribute IZ records** – You must select this check box.
- Match – This mode links only the records in the set that do not match:
    - **Serial match method** – You must select a matching method from the drop-down list.
    - **Non-serial match method** – You must select a matching method from the drop-down list.
    - **Contribute IZ records** – Select this check box if you want to contribute non-matching records. Otherwise, no records are contributed to the NZ.

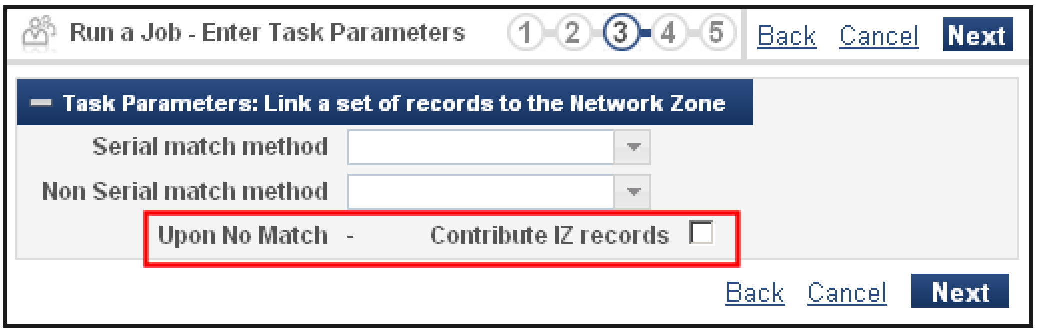


Figure 88 – Enter Task Parameters Page

5 On the Run a Job – Job Details and Schedule page, schedule the job and click **Next**.

6 On the Run a Job – Review and Confirm page, review the job details and click **Submit**.

Alma Interface Updates

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

Enhancements to Drop-Down Lists

Description

Several enhancements have been made to the drop-down lists available throughout the Alma interface:

- The font of the results list has been improved to provide more readable results.
- The auto-complete feature displays results that contain the searched text in the middle of the results and not just the beginning.

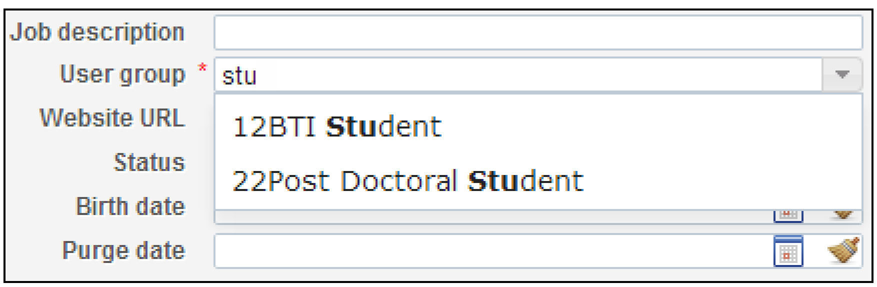


Figure 89 - Auto-Complete Example

- The result list is reduced as text is entered to display only relevant results.
- Free text can be entered into the text-box, and if there are no matching results, the message **This phrase didn't match any value** is displayed.

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.
- In the repository search, switching between tabs (for example, Institution/ Community) before your search results are completely displayed may cause errors.