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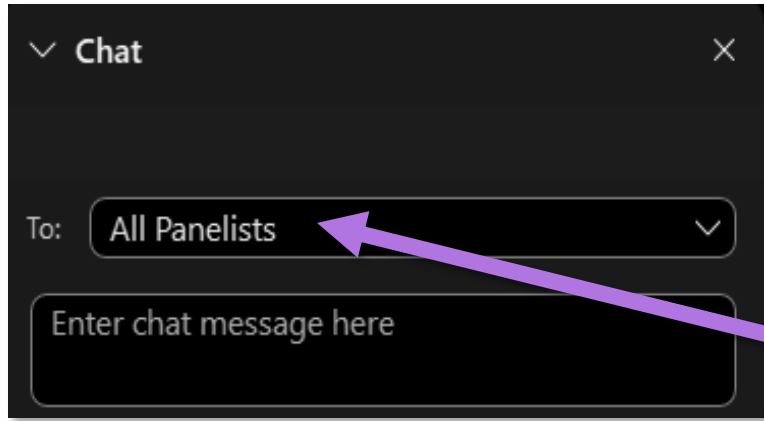
Managing Print Serials in Alma

Templates, Display Settings, and Claiming

Jenny Draeger & Rachel Bellavia – Customer Education

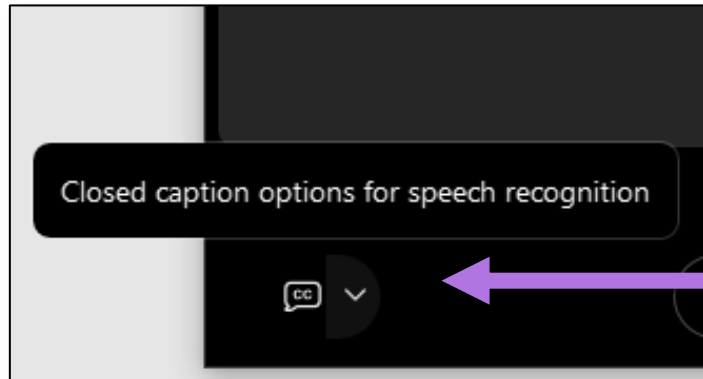
June 2024

A few points about WebEx



- Technical issues? Exit and rejoin the WebEx session.

- Submit questions via WebEx Chat: Select **All Panelists** in the **To:** dropdown menu



- Turn captions on and off in the lower-left corner of the WebEx screen

Managing Print Serials in Alma Series Schedule



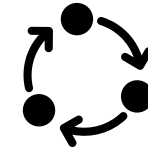
June 12/13

- Ordering and Invoicing



June 19/20

- Receiving Issues



June 16/17

- Templates, Display Settings, and Claiming



Agenda

- Prediction Pattern Templates
- Description Templates
- Item Record Sorting
- Receiving Workbench Filters
- Prevent Predicted Issues from Displaying in Discovery
- Claiming

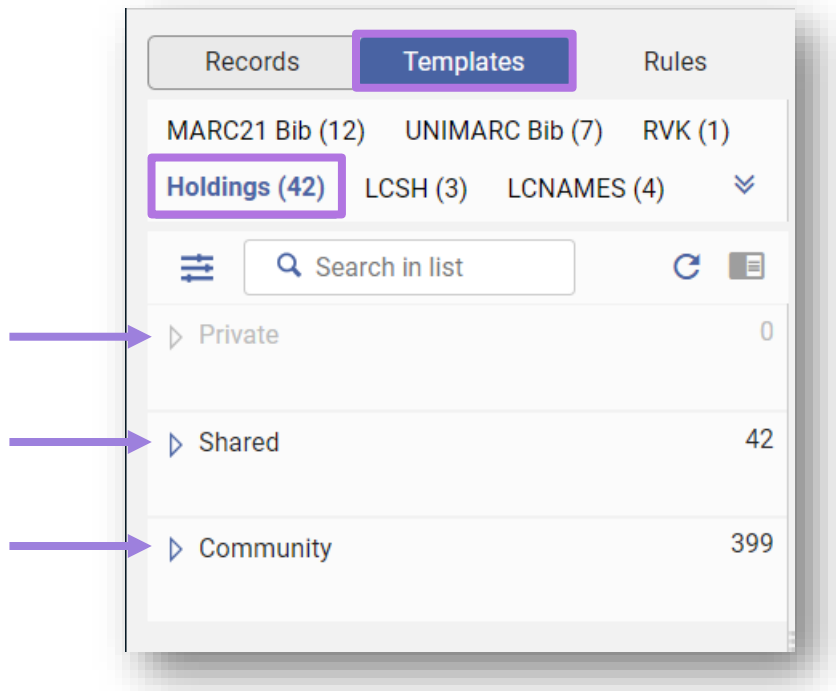
Agenda

- **Prediction Pattern Templates**
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Prediction Pattern Templates

The prediction pattern templates are found in the **Templates** tab of the MD Editor.

- Create new templates
- Edit existing templates
- Delete templates
- Duplicate templates
- Contribute templates to the Community
- View and copy templates from the Community



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Description Templates

- The text and spacing from the Description field is controlled by Description Templates when receiving issues via the **ad hoc** method

Configuration → Resources → General → Description Templates

Description Template Setup Rules

Institution Rules List

[+ Add Rule](#)  

Filter: All

	Enabled	Move Up	Move Down	Rule Name	Description	Updated By	Update Date	
1.	<input checked="" type="checkbox"/>		▼	v. no. (Year Month)	-	Draeger, Jenny	05/25/2023	⋮
2.	<input checked="" type="checkbox"/>	▲	▼	v. no. (Year)	-	Draeger, Jenny	05/30/2023	⋮
3.	<input checked="" type="checkbox"/>	▲	▼	V_NO_YR	v.:no.(yr)	Staff, Ex Libris	05/30/2023	⋮
4.	<input checked="" type="checkbox"/>	▲	▼	YR_MON	(yr:mon)	Staff, Ex Libris	05/30/2023	⋮

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Item Record Sorting

Configuration → Resources → General → Physical Items Sort Routines

- Sorting by enumeration, chronology, description, receiving date, etc.
- Set sort routines for
 - Acquisitions receiving items = Receiving workbench
 - Resource management Get It results = Discovery
 - Physical resource editor items list = list of items in Alma

Ascending- oldest on top (1 → 10)

Descending–newest on top (10 → 1)

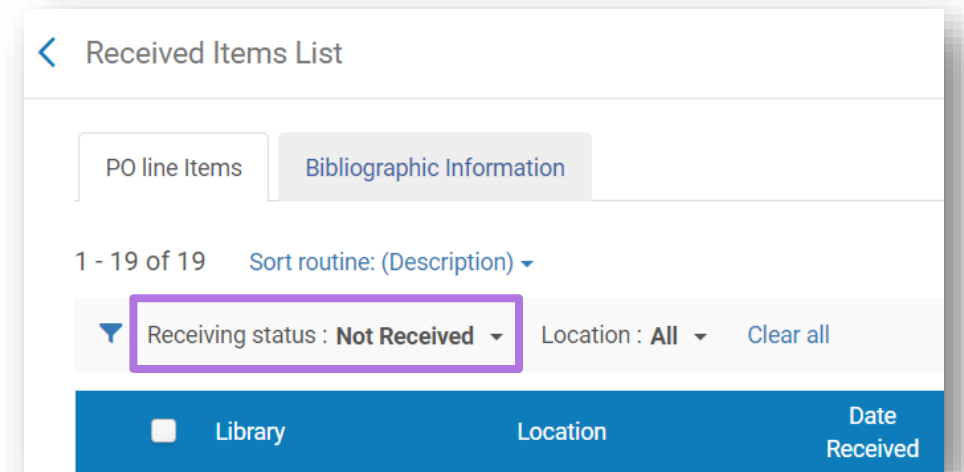
Routine available for	
Acquisition receiving items	<input type="checkbox"/>
Set as default	<input type="checkbox"/>
Resource management Get it results	<input type="checkbox"/>
Set as default	<input type="checkbox"/>
Physical resource editor items list	<input type="checkbox"/>
Set as default	<input type="checkbox"/>

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Receiving Workbench Filters

- The filters on the Received Items List are sticky.
- These filters (*Sort Routine*, **Receiving Status** and *Location*) enable users to easily re-access these workspaces when either a user leaves the screen and returns after a short while or logs in again.
- If sorting in ascending order, the next expected issue will appear at the top of the list.



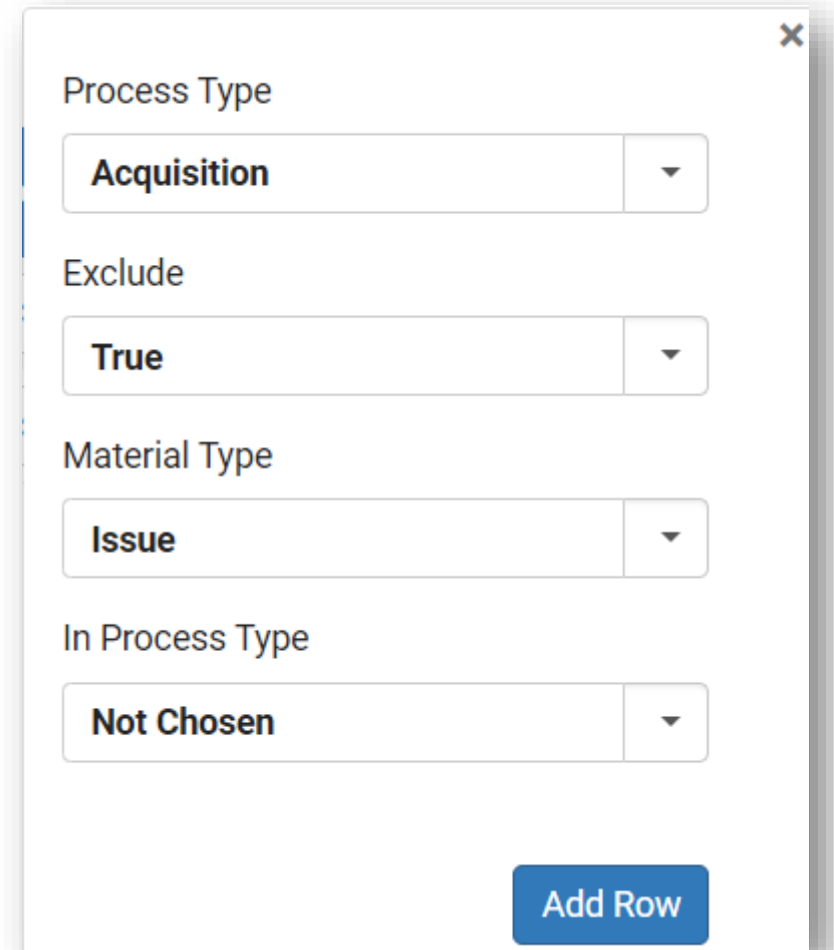
Agenda

- Prediction Pattern Templates
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- Receiving Workbench Filters
- **Prevent Predicted Issues from Displaying in Discovery**
- Claiming

Prevent Predicted Issues from Displaying in Discovery

Configuration → Discovery → Other → Exclude Process Types from Discovery Indexing

1. Click **Add Row** and fill out the conditions as shown
2. Save the settings by clicking **Add Row**
3. Click **Save** to exit the table and save the settings.



The screenshot shows a configuration dialog box with a close button (X) in the top right corner. It contains four rows of dropdown menus, each with a label to its left and a value in the dropdown:

- Process Type: Acquisition
- Exclude: True
- Material Type: Issue
- In Process Type: Not Chosen

At the bottom right of the dialog is a blue button labeled "Add Row".

Predicted Issues and Discovery

- Predicted issues that have not been received displaying in Discovery

LOCATION ITEMS

Main Library
May be available , Main Periodicals ; GV1580 .A53
from:37 2024 until:38 2025

On order until 03/11/2025 (0 requests) v.38:no.3(2025:Mar.) Loanable	▼
On order until 02/11/2025 (0 requests) v.38:no.2(2025:Feb.) Loanable	▼
On order until 01/11/2025 (0 requests) v.38:no.1(2025:Jan.) Loanable	▼
On order until 12/11/2024 (0 requests) v.37:no.12(2024:Dec.) Loanable	▼
On order until 11/11/2024 (0 requests) v.37:no.11(2024:Nov.) Loanable	▼
On order until 10/11/2024 (0 requests) v.37:no.10(2024:Oct.) Loanable	▼
Item in place (0 requests) v. 37 no. 9a (2024 Sept. Special Issue) Loanable	▼

Predicted Issues and Discovery

- Predicted issues that have not been received suppressed in Discovery

LOCATION ITEMS

Main Library
Available, Main Periodicals ; GV1580 .A53
from:37 2024 until:37 2024

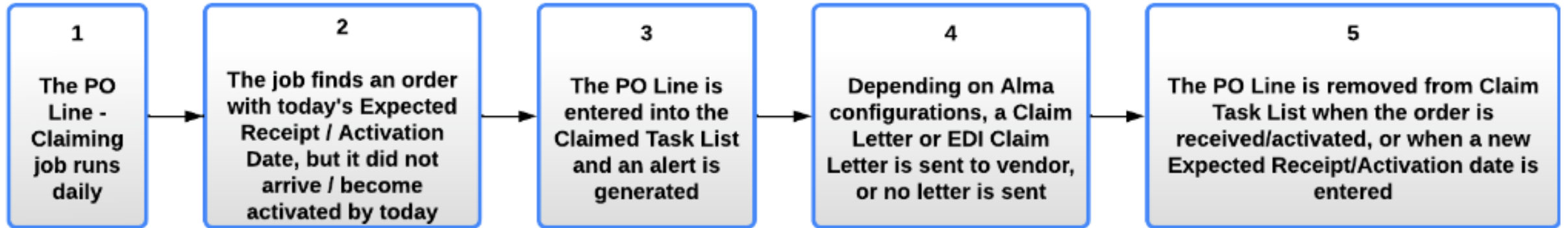
Filter and Sort icons

Item in place (0 requests) Loanable	v. 37 no. 9a (2024 Sept. Special Issue)	▼
Item in place (0 requests) Loanable	v.37:no.9(2024:Sept.)	▼
Item in place (0 requests) Loanable	v.37:no.8(2024:Aug.)	▼
Item in place (0 requests) Loanable	v.37:no.7(2024:July)	▼
Item in place (0 requests) Loanable	v.37:no.6(2024:June)	▼

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- **Claiming**

Claiming in Alma



- PO-Line Claiming job processes claims for one-time and continuous orders.
- Access claims list at **Acquisitions > Purchase Order Lines > Claims**
- Limit to Continuous PO lines by using facets

Claiming Continuous Physical PO Lines

- **Without Predicted items**

If today's date is after the Expected receiving date (calculated from the PO line) + Claiming grace period (from the PO line) then the PO line is marked **In Claim**

- **With Predicted Items**

If today's date is after the Expected receiving date (from item record) + Claiming Grace Period (from PO line) then the PO line is marked **In Claim**

Claim Notifications

- Claim notifications can be sent directly to the vendor via email or Electronic Data Interchange (EDI).

OR

- Alma can be set to place items in claim but not send a notification to the vendor You would use the claims list as your checklist to alert you to log into a vendor interface and claim an issue.

Claim Notifications Sent by Email/EDI

Configuration > Acquisitions > General > Other Settings

Auto Claim Continuous

auto_claim_co	acquisition	Y
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Y= Alma will send claims via email or EDI

- +Vendor has a defined email address

- +Email claims letter is enabled

- +Claims checked on the EDI Information tab of the vendor.

N=Alma will not send claims via email or EDI

Resources

Documentation

- Creating/Customizing a Prediction Pattern Holdings Template
- Description Templates
- Configure Description Templates to Display as Text instead of Numeric Value (courtesy of SUNY)
- Processing Claims



Ex Libris Customer Education Webinars

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- **Discover and register for upcoming sessions**
- **View recordings of previous sessions**
- **Filter and search for relevant resources**

<https://exlibrisgroup.com/webinars-explore-learn/>

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Thank You

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