



Alma December 2013 Release

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About the Alma Release Notes

Alma release notes provide you with information regarding what you need to get up and running with the new features and enhancements in the latest Alma release.

These release notes include:

- [Alma December 2013 Release Highlights](#)
- Feature/enhancement descriptions for the respective Alma components and functional areas
 - [Data Services](#)
 - [Alma Show Me How and Videos](#)
 - [Documentation Highlights](#)
 - [Particular Issues to Note](#)
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 - [Resource Management](#)
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 - [Integrations with External Systems](#)
 - [Collaborative Networks and Multi-Campus Institutions](#)
 - [Alma Resolver](#)
- [Known Issues](#)

Alma December 2013 Release Highlights

Acquisitions

- Interested User Functionality Enhancements

These enhancements provide additional functionality in Alma when working with users that are registered as Interested Users such as placing a hold request on behalf of the interested user.

Resource Management

- Improvements and Additions to E-Resource Management

The December release sees a number of enhancements related to the management of e-resources:

- Portfolio Export/Import Improvements
- Proxy Options Added to the Local Portfolio Setup and the Package Activation Wizard
- Proxy Support for OpenAthens Local Authentication
- Enhanced Filtering and Activating/Deactivating of Portfolios in a Collection
- Additional Options for Making Changes to a Set of Electronic Portfolios
- Streaming Audio Added as a Material Type
- Add a Set of Local Standalone Portfolios to a Local Package Service

Fulfillment

- Bulk Fine Waiving

This enhancement allows for waiving fines in bulk. The new Bulk Fine Waiving page allows staff users to specify a number of criteria for waiving fines in bulk.

- Bursar Export Fee Types

It is now possible to export specific fine/fee types to the bursar system.

- Self-Check Machine Extensions Support

This enhancement allows for including additional elements for each open charge in the self-check Patron Information Response message so that self-check users can view this information (if available) when requested.

- Disregard Overdue Fines for Lost or Claimed Returned Items

This new feature allows for disregarding overdue fines for lost or claimed return items. At the time the item is lost or claimed returned, the user will be charged for any lost fees if they apply. If a lost or claimed returned item is subsequently found, the user will be charged for the overdue fines that were initially disregarded, and refunded any lost fees that were charged to the user's account.

- Force "Currently at" Location Selection at Login

This configurable new option allows institutions to force users to select their current location each time they log in to Alma.

Resource Sharing

- Enhancements to Management of Rotas

Enhancements allow for configuring the conditions under which rota templates are invoked. In addition, it is now possible to manage rota templates and rota assignment rules on both the library and institution levels.

Analytics

- Addition of Physical Item Details Dimension to the Fulfillment Subject Area

This enhancement adds information regarding physical item details to the Fulfillment subject area.

- Missing Items Report

The Missing Items Report is a new report that can be created for missing items. The Items per Title column indicates the number of items/copies owned by the library that are missing.

Collaborative Networks and Multi-Campus Institutions

- Central NZ Publishing to Primo

The purpose of this enhancement is to enable a collaborative network to publish bibliographic and inventory information in a central manner directly from the NZ, replacing the need of every member to publish centrally-managed resources separately.

- Support Ability to Assign Specific Available For as Part of an EOD/Repository Metadata Import

This enhancement allows libraries to assign specific Available For groups to electronic inventory in multi-campus or collaborative network environments. Available For groups can also now be designated in EOD loads.

Alma Resolver

- Electronic Services Page (UResolver Screen) Enhanced to Include Metadata Information -

This enhancement provides additional information on the Electronic Services page (previously the UResolver Screen). Metadata information is included in the display of information on the Electronic Services page when you click **View It** for a resource in the search results list of a search.

- Enhanced Message Capability for Electronic Services

This enhancement displays a “No Full Text Services” message on the Electronic Services page when no full text services are available for the OpenURL request. The wording of this message may be customized.

Data Services

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

New Electronic Packages Added to the Alma CKB

The following packages were added to the Alma CZ during the period 18-November-2013 through 22-December-2013:

- IOS Press Book Series
- Journals@Ovid Extended Archive
- Living Books about Life
- SpringerLink Books Lecture Notes in Computer Science 2005
- SpringerLink Books Lecture Notes in Computer Science 2006
- SpringerLink Books Lecture Notes in Computer Science 2007
- SpringerLink Books Lecture Notes in Computer Science 2008
- SpringerLink Books Lecture Notes in Computer Science 2009
- SpringerLink Books Lecture Notes in Computer Science 2010
- SpringerLink Books Lecture Notes in Computer Science 2011
- SpringerLink Books Lecture Notes in Computer Science 2012
- SpringerLink Books Lecture Notes in Computer Science 2013
- SpringerLink Books Lecture Notes in Mathematics 2005
- SpringerLink Books Lecture Notes in Mathematics 2006
- SpringerLink Books Lecture Notes in Mathematics 2007
- SpringerLink Books Lecture Notes in Mathematics 2008
- SpringerLink Books Lecture Notes in Mathematics 2009
- SpringerLink Books Lecture Notes in Mathematics 2010
- SpringerLink Books Lecture Notes in Mathematics 2011
- SpringerLink Books Lecture Notes in Mathematics 2012
- SpringerLink Books Lecture Notes in Mathematics 2013

- SpringerLink Books Lecture Notes in Physics 2005
- SpringerLink Books Lecture Notes in Physics 2006
- SpringerLink Books Lecture Notes in Physics 2007
- SpringerLink Books Lecture Notes in Physics 2008
- SpringerLink Books Lecture Notes in Physics 2009
- SpringerLink Books Lecture Notes in Physics 2010
- SpringerLink Books Lecture Notes in Physics 2011
- SpringerLink Books Lecture Notes in Physics 2012
- SpringerLink Books Lecture Notes in Physics 2013
- SpringerLink Books Life Science and Basic Disciplines (German) 2005
- SpringerLink Books Life Science and Basic Disciplines (German) 2006
- SpringerLink Books Life Science and Basic Disciplines (German) 2007
- SpringerLink Books Life Science and Basic Disciplines (German) 2008
- SpringerLink Books Life Science and Basic Disciplines (German) 2009
- SpringerLink Books Life Science and Basic Disciplines (German) 2010
- SpringerLink Books Life Science and Basic Disciplines (German) 2011
- SpringerLink Books Life Science and Basic Disciplines (German) 2012
- SpringerLink Books Life Science and Basic Disciplines (German) 2013
- SpringerLink Books Mathematics And Statistics without Lecture Notes 2005
- SpringerLink Books Mathematics And Statistics without Lecture Notes 2006
- SpringerLink Books Mathematics And Statistics without Lecture Notes 2007
- SpringerLink Books Mathematics And Statistics without Lecture Notes 2008
- SpringerLink Books Mathematics And Statistics without Lecture Notes 2009
- SpringerLink Books Mathematics And Statistics without Lecture Notes 2010
- SpringerLink Books Mathematics And Statistics without Lecture Notes 2011
- SpringerLink Books Mathematics And Statistics without Lecture Notes 2012
- SpringerLink Books Mathematics And Statistics without Lecture Notes 2013
- SpringerLink Books Physics And Astronomy without Lecture Notes 2005
- SpringerLink Books Physics And Astronomy without Lecture Notes 2006

- SpringerLink Books Physics And Astronomy without Lecture Notes 2007
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- SpringerLink Books Physics And Astronomy without Lecture Notes 2010
- SpringerLink Books Physics And Astronomy without Lecture Notes 2011
- SpringerLink Books Physics And Astronomy without Lecture Notes 2012
- SpringerLink Books Physics And Astronomy without Lecture Notes 2013
- SpringerLink Books Professional and Applied Computing 2005
- SpringerLink Books Professional and Applied Computing 2006
- SpringerLink Books Professional and Applied Computing 2007
- SpringerLink Books Professional and Applied Computing 2008
- SpringerLink Books Professional and Applied Computing 2009
- SpringerLink Books Professional and Applied Computing 2010
- SpringerLink Books Professional and Applied Computing 2011
- SpringerLink Books Professional and Applied Computing 2012
- SpringerLink Books Professional and Applied Computing 2013
- SpringerLink Books SpringerProtocols 2005
- SpringerLink Books SpringerProtocols 2006
- SpringerLink Books SpringerProtocols 2007
- SpringerLink Books SpringerProtocols 2008
- SpringerLink Books SpringerProtocols 2009
- SpringerLink Books SpringerProtocols 2010
- SpringerLink Books SpringerProtocols 2011
- SpringerLink Books SpringerProtocols 2012
- SpringerLink Books SpringerProtocols 2013
- UNICEF Books
- WHEEL Oxford University Press
- 電子学術書共同利用実験

New External Resources That Are Open for Searching

This section highlights the new external resource names. The following external resources were added for this release:

- MnPALS
- CLICNET Catalog
- Te Puna Search
- University of Ottawa Library
- Laval University library

Alma Show Me How and Videos

The following sections describe Alma Show Me How and videos for the December 2013 release of Alma.

Alma Show Me How – December

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 December release, the following Show Me How scenarios are available:
 - Export and Load Local Electronic Portfolios
 - Add Interested Users to a PO Line
 - View PO Lines with Interested Users when Receiving

Alma Videos – December

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

- Portfolio Export/Import Improvements
- Interested User Enhancements
- Assign Available For Groups to a Set of Portfolios Using a Job
- Assign Available For Groups Using an Import Profile

- Linking Resource Sharing Libraries with Regular Libraries to Manage Inventory
- Managing Rota Templates per Library and Institution

Documentation Highlights

In addition to handling fixes to the documentation based on feedback we received, we have added documentation, or improved upon the existing documentation, in the following key areas since the November release:

- List of How To Documents and Presentations – We added a page to the online help (available from the main Table of Contents) that contains links to the "How To" documents and presentations that are available in the Documentation Center. These "How To"s focus on specific examples and workflows within Alma.
- Working with Relais/NCIP – This section, focusing specifically on the Relais/NCIP workflow, was added to the main Resource Sharing workflow section (under Fulfillment > Resource Sharing > Resource Sharing Workflow).
- Adding Group Settings (Available For) to Electronic Resources – This section provides both an overview and specific instructions for a complex area that has been extensively developed over the past number of months (under Resource Management > Inventory > Managing Electronic Resources).
- Alma Hotkeys/Shortcuts – Information regarding hotkeys/shortcut keys has been added to various sections, such as the MD Editor online help. Links to the areas of the documentation in which hotkey/shortcut key information can be found is available on the List of Alma Hotkeys page, accessible from the online help's Table of Contents.

Particular Issues to Note

The following issues should be noted for the December 2013 release:

- Due to roadmap re-prioritization, improvements in the following areas, originally planned for December, were rescheduled for the February release:
 - Preferred term correction and job
 - Updating of bibliographic records when authority records are updated
 - Punctuation improvements for updated bibliographic records

A full explanation of the above improvements will be available in the release notes upon their release.

In the meantime, note that the Authorities – Link bibliographic headings system-controlled job is working as reported in the November release notes.

- The indexing improvements that enable repository search enhancements will be completed by the beginning of January.
- Going forward, LDAP users who log in to Alma must do so using a secure LDAP connection. You must therefore select the **Use secure connection** check box when configuring your LDAP profile in Alma. Note that connection should be secured with a certificate issued by a recognized certificate authority (such as Comodo, Verisign, or Thawte). Self-signed certificates are not supported.

Acquisitions

The following section describes the features provided for the Acquisitions component in the December 2013 release of Alma.

VAT Code Enhancements

Description

The purpose of this enhancement is to provide the ability to create multiple VAT codes with the same VAT percentage value.

Technical Instructions

The Acquisitions Administrator role can create VAT codes.

To create VAT codes with the same value:

- 1 In the VAT Codes Mapping Table (**Acquisitions > Acquisitions Configuration > Configuration Menu > Invoices > VAT Codes**), locate the **Create a New Mapping Row** section.

Mapping Table

You are configuring: Main Campus

Table Information

Sub System ACQUISITION Table Name VATCodes_MT
Updated By - Last Updated 12/11/2013
Table Description VAT percentage codes

Mapping Table Rows

No records were found.

Create a New Mapping Row

Code Percentage
Description

Add Row

Figure 1 – VAT Code Mapping Table Page

- 2 In the **Code** field, enter a VAT code.
- 3 In the **Percentage** field, enter a numerical percentage value for the VAT.
- 4 In the **Description** field, enter a description for the VAT code.
- 5 Click **Add Row**. The VAT information displays in the **Mapping Table Rows** section.

Mapping Table

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

Table Information

Sub System

ACQUISITION

Table Name

VATCodes_MT

Updated By

exl_support

Last Updated

02/12/2013

Table Description

VAT percentage codes

Mapping Table Rows

Enabled	Code	Percentage	Description	Updated By	Last Updated
	18 Percent	18	Eighteen Percent	Ex Libris	02/12/2013
	One and Eight	18	Also Eighteen Percent	Ex Libris	02/12/2013

Create a New Mapping Row

Code

Percentage

Description

Add Row

Figure 2 – VAT Codes Mapping Table Page – With Data

Additional Decimal Places for Explicit Ratio

Description

This enhancement provides additional decimal places when configuring an explicit ratio for invoices. Instead of two decimal places, you can now configure an explicit ratio with up to six decimal places.

Technical Instructions

The following roles can configure an explicit ratio for invoices:

- Invoicing Manager
- Invoicing Operator

To configure an explicit ratio for an invoice:

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

Invoice Details

Invoice Number: 741 Unique Invoice Identifier: 507771270000121 Vendor: 0-150

Summary | Alerts | Invoice Lines | Notes | Attachments

Invoice Number: 741 Invoice Date: 30/06/2013
 Total amount: 100.00 USD Total invoice lines amount: 111.11 USD
 Vendor: 0-150 Vendor account: -
 Vendor Contact Person: - Payment method: Accounting Department
 Invoice Reference #: - Creation From: Manually
 Created By: exl_support (27/06/2013) Last Updated By: exl_support (13/11/2013)

Approval: Status: Pending Approved By: - (-)

Additional Charges
 Use Pro rata: ☐

VAT
 VAT %: 10.0 VAT Type: Line Exclusive
 Amount: 9.09 Expended from fund: ☒
 Vendor tax (local currency):

Explicit Ratio
 Foreign Currency: EUR Explicit Ratio: 1.234567 Add

No records were found.

Payment
 Prepaid: ☐
 Internal Copy: ☐

Figure 3 – Invoice Details Page

- 2 In the **Explicit Ratio** section, do the following:
 - a In the **Foreign currency** field, select a currency to which you want to convert the invoice currency.
 - b In the **Explicit ratio** field, enter a ratio by which to convert the invoice currency to the selected foreign currency. The value can have up to 6 decimal places.
- 3 Click **Add**. The ratio displays in the Explicit Ratio section.

Invoice Details Cancel Save Save and Continue

Invoice Number: 741 Unique Invoice Identifier: 507771270000121 Vendor: 0-150

Summary | Alerts | Invoice Lines | Notes | Attachments

Invoice Number: 741 Invoice Date: 30/06/2013
 Total amount: 100.00 USD Total invoice lines amount: 111.11 USD
 Vendor: 0-150 Vendor account: 0 (not listed)
 Vendor Contact Person: - Payment method: Accounting Department
 Invoice Reference #: - Creation From: Manually
 Created By: exl_support (27/06/2013) Last Updated By: exl_support (13/11/2013)

Approval: Status: Pending Approved By: - (-)

Additional Charges
 Use Pro rata: ☐

VAT
 VAT %: 10.0 VAT Type: Line Exclusive
 Amount: 9.09 Expended from fund: ☒
 Vendor tax (local currency):

Explicit Ratio
 Foreign Currency: EUR Explicit Ratio: Add

Foreign Currency	Explicit Ratio	Tools
EUR	1.234567	Delete

Payment
 Prepaid: ☐
 Internal Copy: ☐

Figure 4 –Explicit Ratio Section with Configured Foreign Currency and Explicit Ratio

You can also configure an explicit ratio on the Invoice Details page when adding a new invoice, either manually or from a PO (**Receiving and Invoicing > Create Invoice**).

Interested User Functionality Enhancements

Description

The purpose of these enhancements is to provide additional functionality in Alma when working with users that are registered as Interested Users. This includes:

- Searching for orders with interested users when receiving new material
- PO lines with interested users are indicated as such
- Placing a hold request on behalf of the interested user
- Filtering by Interested Users when managing receiving department tasks

Technical Instructions

The Invoicing Manager role can access the Interested Users enhancements.

To search for orders that have interested users:

- 1 On the Purchase Order Lines in Review page (**Acquisitions > Purchase Order Lines > Review**), click **Edit** for a PO line. The PO Line Summary page displays.

PO Line Summary [Back to PO Line](#)

Description [Constitutions of the World, Washington : SAGE Publications, 2007, 9780872895560, ISBN](#) Order/Line - / POL-55423 Status In Review
Order line type Print Book - One Time Ordering for Education Library Sent Date -

Summary Description Alerts Invoice Lines Associated PO Lines Communications Interested Users History

Ordered items

Number of items to add * 1 Library/Location [Add](#)

Receiving note

Ordering for	Location	Barcode	Receiving date
Education Library	General	bc17601	-
Education Library	General	bc17604	-
Education Library	General	bc17602	-
Education Library	General	bc17606	-
Education Library	General	bc17603	-
Education Library	General	bc17605	-

Vendor information

Material Supplier * 0-150/0-150-1 [Blackwell \(0-150/ Blackwell \(0-150-1\)](#)

Claiming grace period (days) 2 Expected receipt after ordering (days) 4

Or expected receipt date

Pricing

List Price * USD Net price 0.00 USD

Quantity for pricing * 1 Discount (%) 0.0

Funding

Fund * Percent 100.0 Amount 0.00 USD

No records were found.

PO Line details

Acquisition method Purchase Material type Book

Invoice status No invoice Reporting Code

Rush ☐

Cancellation restriction ☐ Cancellation restriction note

Identifier 9780872895560 Proposed Identifier

Vendor reference number Vendor reference number type

Note to vendor Vendor invoice number -

Figure 5 – PO Line Summary Page

2 Click the **Interested Users** tab. The list of interested users displays.

Interested Users [Back to PO Line list](#) [Save and continue](#) [Go](#)

Description [Constitutions of the World, Washington : SAGE Publications, 2007, 9780872895560, ISBN](#) Order/Line - / POL-55423 Status In Review (2013-04-25)
Order line type Print Book - One Time Ordering for Education Library Sent Date -

Summary Description Alerts Invoice Lines Associated PO Lines Communications Interested Users History Notes Attachments

Add Interested Users

Search for a user [Add User](#) ☐ Notify User ☐ Hold Item

Name	Email	Notify User	Hold item	Tools
Wright, Steve	name@alma.exlibrisgroup.com	☒	☐	Delete
Black, Shawn	name@alma.exlibrisgroup.com	☒	☒	Delete

Figure 6 – Interested Users Tab

3 In the table of interested users, select the relevant check box:

- **Notify User** — Sends the user an email when the item arrives at the library's receiving department.
- **Hold Item** — Creates a hold request on the item for the user.

Note: The **Hold Item** option displays only when working with physical items. If you select this option for more than one user, Alma randomly selects only one of the users and creates a hold request for this user once the item is received. The February release is scheduled to include functionality in which the hold request will be created upon order.

To view orders that have interested users when receiving new material:

- 1 On the Receive New Material page (**Acquisitions > Receiving and Invoicing > Receive**), select the **Orders with interested users** check box in the Find PO Lines for Receiving section.

Receive New Material

Find PO lines for Receiving

Status: All (Except CI) Locate Order Lines Vendor Find In All Orders with patron requests **Orders with interested users**

Go Shelf Ready

Receiving Settings

Received Date: 04/12/2013

Keep in Department

One Time Continuous

Waiting for Receiving PO Lines List

1 2 3 1 - 10 of 350 Records

#	Item description	Status	Locations	# Ordered	Items Received	Date Sent	Next Step	Rush	Notes	Interested Users
POL-56122	Book history. Pennsylvania State University Press. Vol. 1 (1998). 00227000. ISSN	Sent	BURNS - UNASSIGNED location (1)	1	0	23/05/2013	-			
POL-63023	Kenkyū hōkoku. Yokohama-shi. Dō Shikenjo. Ceased in 1994. 0451-3169 0451-3169. ISSN	Sent	Main Library - General (3)	3	0	28/10/2013	-			
POL-62830	POL_P_OT_2810131242. 2013.	Sent	Main Library - Microforms (1)	1	0	28/10/2013	-			
POL-5717	01022012_052155 Barnes & Noble Library of Essential Reading. [S.I.] : Barnes & Noble. 2005. 9780760765455 (Paperback). ISBN	Sent	-	3	0	23/01/2013	-			
POL-12223	01032012_034800 Barnes & Noble Library of Essential Reading. [S.I.] : Barnes & Noble. 2005. 9780760765455 (Paperback). ISBN	Sent	-	3	0	25/04/2012	-			
POL-12225	01032012_035509 Barnes & Noble Library of Essential Reading. [S.I.] : Barnes & Noble. 2005. 9780760765455 (Paperback). ISBN	Sent	-	3	0	25/04/2012	-			
POL-12228	01032012_041350 Barnes & Noble Library of Essential Reading. [S.I.] : Barnes & Noble. 2005. 9780760765455 (Paperback). ISBN	Sent	-	3	0	13/05/2012	-			
POL-12231	01032012_042313 Barnes & Noble Library of Essential Reading. [S.I.] : Barnes & Noble. 2005. 9780760765455 (Paperback). ISBN	Sent	-	3	0	17/04/2012	-			
POL-12233	01032012_043206 Barnes & Noble Library of Essential Reading. [S.I.] : Barnes & Noble. 2005. 9780760765455 (Paperback). ISBN	Sent	-	3	0	30/04/2012	-			
POL-12234	01032012_043948 Barnes & Noble Library of Essential Reading. [S.I.] : Barnes & Noble. 2005. 9780760765455 (Paperback). ISBN	Sent	-	3	0	-	-			

Figure 7 – Receive New Material Page

- 2 Enter any other relevant search criteria and click **Go**. Orders with Interested Users display in the Waiting for Receiving PO Lines List table, and are indicated with a check mark in the **Interested Users** column on the right side of the page.

Receive New Material

Find PO lines for Receiving

Status Locate Vendor In Orders with ☐ patron requests Orders with ☒ interested users

Go Shelf Ready ☐

Receiving Settings

Received Date 04/12/2013

Keep in Department ☐

One Time Continuous

Waiting for Receiving PO lines list

1 2 1 - 10 of 12 Records

#	Item description	Status	Locations	# Ordered	Items Received	Date Sent	Next Step	Rush	Notes	Interested Users
☐ POL-5703	01022012_041613 Barnes & Noble Library of Essential Reading... [S.I.] : Barnes & Noble, 2005. 9780760765455 (Paperback). ISBN	Waiting for Invoice	-	3	0	01/02/2012	-			
☐ POL-5717	01022012_052155 Barnes & Noble Library of Essential Reading... [S.I.] : Barnes & Noble, 2005. 9780760765455 (Paperback). ISBN	Sent	-	3	0	23/01/2013	-			
☐ POL-27040	01072012_064919 Barnes & Noble Library of Essential Reading... [S.I.] : Barnes & Noble, 2005. 9780760765455 (Paperback). ISBN	Ready	Main Library - General (3)	3	3	-	-			
☐ POL-38024	01082012_061939 Barnes & Noble Library of Essential Reading... [S.I.] : Barnes & Noble, 2005. 9780760765455 (Paperback). ISBN	Waiting for Invoice	Main Library - General (3)	3	3	13/08/2012	-			
☐ POL-38026	01082012_062251 Barnes & Noble Library of Essential Reading... [S.I.] : Barnes & Noble, 2005. 9780760765455 (Paperback). ISBN	Waiting for Invoice	Main Library - General (3)	3	3	25/11/2012	-			
☐ POL-38027	01082012_062529 Barnes & Noble Library of Essential Reading... [S.I.] : Barnes & Noble, 2005. 9780760765455 (Paperback). ISBN	Ready	Main Library - Music (3), LAW - UNASSIGNED location (2), Main Library - General (2)	7	2	-	-			
☐ POL-38028	01082012_062806 Barnes & Noble Library of Essential Reading... [S.I.] : Barnes & Noble, 2005. 9780760765455 (Paperback). ISBN	In Review	Main Library - General (3)	3	3	-	-			

Figure 8 – Receive New Material Page — Interested Users Column

To filter for items with interested users when managing receiving department tasks:

- 1 On the Items in Department page (**Acquisitions > Post-Receiving Processing > Receiving Department Items**), locate the **Interested Users** filter on the top left side of the page.

Items in Department

Items In Local Department

Filter : 111
Request filter All
Interested Users All

All
Items with Interested users

No records were found.

Change Status Done

Figure 9 – Items in Department Page — Interested Users Filter

- 2 Select **Items with Interested Users** to filter your search for items with interested users.

Additional Parameters in EOD File

Description

This enhancement provides the ability to set rush parameters and receiving notes on PO lines upon import of EOD files. Prior to this development, you could set the rush parameter on a PO line only through marking an individual PO line. With the December release, you can include a rush designation as well as a receiving note in the EOD file. The rush designation can be set on the import profile EOD page of a new order profile.

Technical Instructions

The following roles can access this facility:

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

To create a rush designation:

- 1 On the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**) or Acquisitions Configuration page (**Acquisitions > Acquisitions Configuration > Configuration Menu**), click **Import Profiles**. The Run Import page opens.
- 2 Click **New Order** to create a new profile, or filter the existing profiles by New Order to find the one to which you want to add the Rush designation and select it.
- 3 Click **Next**.
- 4 For a new profile, enter values in the wizard until step 7. For an existing profile, click the **PO Line Information** tab.
- 5 Enter or edit any information in the forms.
- 6 To place a rush request on orders using this profile, enter the field that the import data uses in the **Rush request** field (see [Figure 10](#)) and include the subfield in the adjacent box.

All PO lines that contain a positive indicator in the **Rush request** field/subfield receive rush order treatment. For instance, if the **Rush request** field/subfield specified here is 949 d, all imported records with one of the following values in the 949 d field are treated as rush orders.

- y
- Y

- True
- TRUE
- affirmative

Similarly, if the **Receiving note** field specified below the rush request contains data in the source file, that information is imported through the profile.

The screenshot shows the 'Import Profile Details' page for a 'New Order' profile named 'test new order'. The 'EOD General Parameters' section includes fields for 'Electronic PO Line type', 'Vendor', 'Vendor account', 'PO Line currency' (set to 'US Dollar'), 'Decimal point location' (set to '0'), and 'Acquisition Method' (set to 'Purchase'). The 'EOD mapping' section contains various fields for mapping source data to system fields, including 'PO Line field', 'Vendor Reference', 'Number field', 'List price field', 'Vendor title number field', 'Volume Part Number field', 'Po number field', 'PO Line Owner field', 'Default PO line owner', 'Map Owner', 'Fund distribution field', 'Default fund', 'Map funds', 'Reporting code', 'Interested users', 'Vendor invoice number field', 'Note field', 'Do not create electronic activation task', 'Rush request', and 'Receiving note'. The 'Rush request' and 'Receiving note' fields are circled in red.

Figure 10 – Rush Request and Receiving Note Fields on Import Profile Details Page

Other Acquisitions Enhancements

- The name of the Update Order import profile type has been changed to **Update Inventory** to better reflect its purpose: updating inventory associated with PO lines, based on the PO line reference number or vendor reference number. (URM-26472)
- The ability to map incoming note data to the Receiving note field in an Alma PO line was added to the New Order import profile.

Resource Management

The following sections describe the functions provided for the Resource Management component in the December 2013 release of Alma.

Portfolio Export/Import Improvements

Description

The purpose of this enhancement is to provide improvements for portfolio export and portfolio loader. With this release, you can now export/import the information identified below (see [Figure 11](#)).

- Export:
 - Parser parameters
 - Proxy enable (true/false), proxy selected (type of proxy), and proxy level
 - Group name (Available For) relevant to collaborative network and multi-campus environments

Multiple group names separated by a semicolon may be specified.

- Ownership (library that owns the portfolio)
 - Notes
- Import:
 - URL
 - Parser parameters
 - Proxy enable (true/false), proxy selected (type of proxy), and proxy level
 - Group name (Available For) relevant to collaborative network and multi-campus environments

This only applies when the proxy level is specified as portfolio.

Multiple group names separated by a semicolon may be specified.

Notes are appended to existing note content when imported. Duplicate note content may occur when you export notes and, subsequently, import the same note content.

U	V	W	X	Y	Z	AA	AB	AC
1	URL	PARSER PARAMETERS	PROXY ENABLE	PROXY SELECTED	PROXY LEVEL	AUTH/ELEC	OWNERSHIP	GROUP NAME
2	http://www.chi	jkey=123456789	true	PROXY	PORTFOLIO		ULINC	Member 3;
3			true	PROXY	PORTFOLIO		ULINC	
4	null		true	DEFAULT	SERVICE			
5	null		true	DEFAULT	SERVICE			

Figure 11 - Example of Portfolio Export/Import Improvements

Key to this feature for the December release, local portfolios can be loaded without an identifier such as an ISSN, ISBN, or portfolio ID (see Figure 12) using Load Portfolios from the Alma Electronic Service Editor page.

A1	ISSN									
1	ISSN	ISSN	ISSN	ISBN	ISBN	ISBN	PORTFOL TITLE	FROM_YE	TO_YEAR	FROM_V
2	0080-4401						531247002 Transaction	1872	2007	1
3	0091-7710						53124700E Journal of	1973	2009	29
4							53124701C Early scier	1996	2006	1
5	0065-0684						531247014 Proceedin	1928	1991	13

Figure 12 - Example of a Local Portfolio Loaded Without an Identifier

Technical Instructions

The Electronic Inventory Operator role can access the exported portfolio lists.

To view an example of the exported (.xls) portfolio list:

- 1 Complete a search for an electronic collection with portfolios and click **Edit Service**.

6 **JSTOR Arts and Sciences 7**
 Type: Aggregator package Services: Full Text (Available)
 Creation Date: 2013-07-02 12:47:11 Modification Date: 2013-07-02 12:47:11
[Edit](#) | [Delete](#) | [View](#) | [Portfolio List \(249\)](#) | [Order](#) |
[Create E-Activation Task](#) | [Publishing information](#) | [More info](#)
[Edit Service](#)

Figure 13 - Edit Service from the Search Results

- 2 Select the **Portfolios** tab.
- 3 Click **Export Portfolios List**.

Electronic Service Editor

Electronic Collection **JSTOR Arts and Sciences 7**
 name
 Service Type Full Text

View all services

Service Description
 Activation Information
 Linking Information
 Portfolios
 Notes
 Group Settings

Add Local Portfolio
 Add Portfolios from Community
 Add All Portfolios from Community
 Load Portfolios
 Export Portfolios List

Status All
 CZ Linking All

Find:
 In: ISSN

1 2 3 1 - 10 of 249 Records

	Availability	ID	Title	Coverage	Material Type	Action
☐		0080-4401	Transactions of the Royal Historical Society	Available from 1872 volume: 1 until 2007 volume: 17.	JOURNAL	Action
☐		0091-7710	Journal of anthropological research	Available from 1973 volume: 29 issue: 1 until 2009 volume: 65	JOURNAL	Action

Figure 14 - Export Portfolios List Button

- 4 Open the .xls file created to view the list.

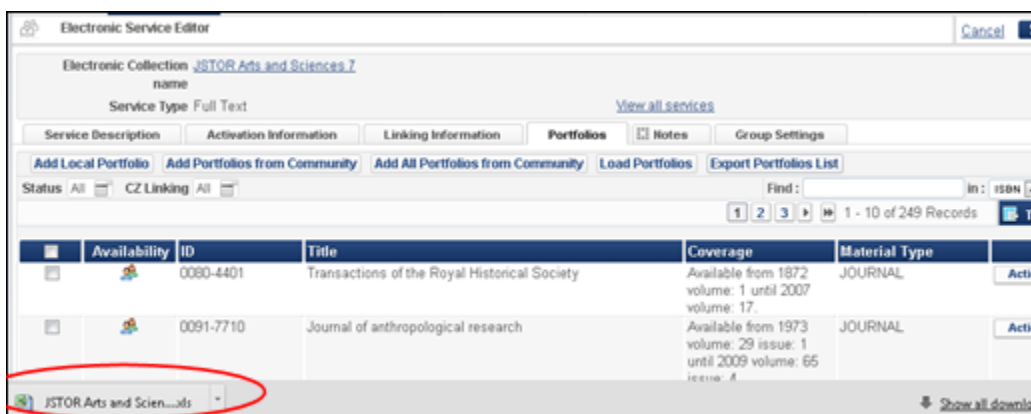


Figure 15 - Open .xls File

The exported portfolios list displays.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
	ISSN	ISSN	ISSN	ISSN	ISSN	ISSN	PORTFOL TITLE	FROM	YE TO	YEAR FROM	VC TO	VOLU	FROM	IS TO	ISSUE WARNIN
1	0080-4401						31247002 Transactions	1872	2007	1	17				
2	0091-7710						31247006 Journal of	1973	2009	29	65				
3							31247010 Early scien	1996	2006	1	11				
4	0065-0684						31247014 Proceedin	1928	1991	13	38				
5	0145-3661						31247017 Bulletin of	1945	1991						27
6	0003-1615						31247021 The Ameri	1944	2009	1	66				

Figure 16 - Exported Portfolios List Example

Proxy Options Added to the Local Portfolio Setup and the Package Activation Wizard

Description

The purpose of this enhancement is to provide additional options for specifying proxy information when creating a local portfolio or activating a new package.

Technical Instructions

The Electronic Inventory Operator role can access these new options.

To add proxy information to a local portfolio:

- 1 On the New Portfolio page (**Resource Management > Create Inventory > Add Local Portfolio**), in the Inventory Information section, enable the proxy option by selecting **Yes** and identify the proxy to be used from the **Proxy selected** drop-down list.

The screenshot shows the 'New portfolio' form with the following sections and fields:

- Descriptive Information:** Creation Type (Create new title, Use existing title), Choose Title, Title, Alternative Title 1, Alternative Title 2, ISSN, e-ISSN, ISBN, e-ISBN.
- General Information:** Portfolio Type (Standalone, Part of a Package), Package, Service, Interface Name, Library.
- Coverage Information:** Date Information (From Year, Until Year, From Volume, Until Volume, From Issue, Until Issue), Embargo/Rolling Year (Operator, Number of Years, Number of Months).
- Inventory Information:** Linking Information (URL), Proxy enabled (No, Yes), Proxy selected (Default (currently: none selected)), Availability status (Inactive, Active).
- Notes:** Authentication note, Public note, Internal description.

The 'Proxy enabled' radio button is set to 'Yes' and the 'Proxy selected' dropdown is set to 'Default (currently: none selected)'. Both are circled in red.

Figure 17 - Add Local Portfolio Proxy Options

- 2 Enter any proxy-related note content to the expanded Notes section that includes authentication and internal description notes. (The previously available General note is now labeled Public note.)
- 3 Complete the remainder of the portfolio information and click **Save**.

To add proxy information using the activation wizard for a new package:

- 1 Complete a search in the Community Zone (CZ) for the new package to add.
- 2 From the results list, click **Activate** for the package that you want to add. Page one of the activation wizard displays.

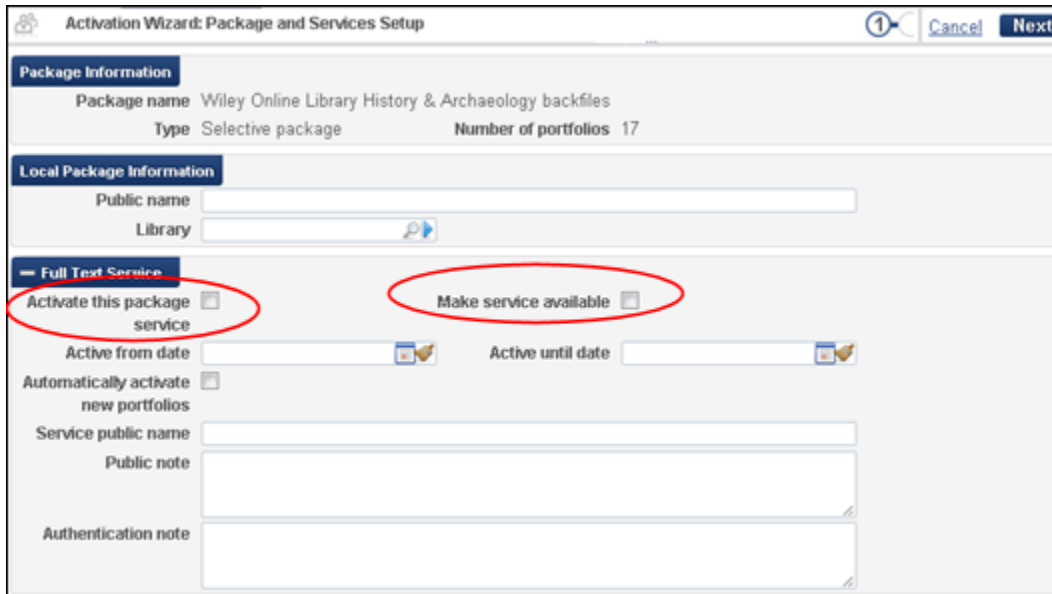


Figure 18 - Activation Wizard Page One

- 3 In the Full Text Service section, select **Activate this package service** and **Make service available**.
- 4 Click **Next**. The Activation Wizard page two displays.

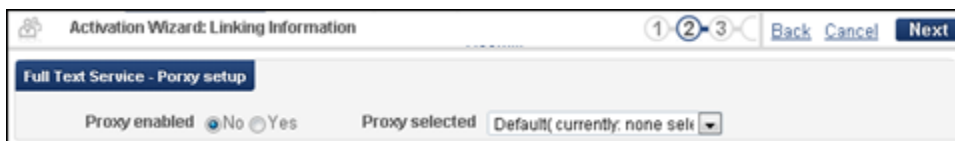


Figure 19 - Activation Wizard Proxy Setup

- 5 Enable the proxy option by selecting **Yes** and identify the proxy to be used from the **Proxy selected** drop-down list.
- 6 Complete the remainder of the wizard steps to activate the package with proxy enabled.

Proxy Support for OpenAthens LA

Description

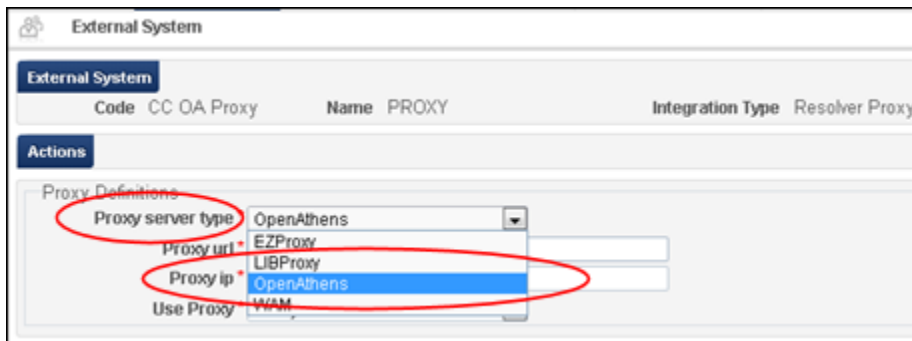
The purpose of this enhancement is to provide support for the OpenAthens LA (Local Authntican) proxy server type.

Technical Instructions

The General System Administrator role can configure this option.

To configure the OpenAthens LA proxy server:

- 1 On the General Configuration page (**Administration > General Configuration > Configuration Menu**), click **Integration Profiles** under **External Systems**. The Integration Profile List opens.
- 2 Click the **Add Integration Profile** button. The External System page opens.
- 3 For Integration Type, select **Resolver Proxy**.
- 4 Enter a name and click **Next**.
- 5 In the Proxy Definitions section, you can now select **OpenAthens** from the **Proxy server type** drop-down list.



The screenshot shows the 'External System' configuration page. At the top, there's a table with columns: Code, CC OA Proxy, Name, and Integration Type. Below this is an 'Actions' section. The 'Proxy Definitions' section is highlighted with a red circle. It contains a 'Proxy server type' dropdown menu with 'OpenAthens' selected. Below it, there's a 'Proxy ip' dropdown menu with 'OpenAthens' selected. Other fields like 'Proxy url' and 'Use Proxy' are also visible.

Figure 20 – OpenAthens LA Proxy Server Type Option

- 6 Complete the remaining proxy options and click **Save**.

Enhanced Filtering and Activating/Deactivating of Portfolios in a Collection

Description

The purpose of this enhancement is to provide more flexibility when working with portfolios in an electronic collection in the Electronic Service Editor. With the December release, you can:

- Filter the portfolio list by local or linked to the CZ
- Activate all
- Deactivate all

Technical Instructions

The Electronic Inventory Operator role can work with these new options.

To access these new options:

- 1 Complete a search for an electronic collection.
- 2 Click **Edit Service** for a specific collection. The Electronic Service Editor opens to the Activation Information tab.
- 3 Select the **Portfolios** tab. This tab contains the new options for working with portfolios.
- 4 View the **CZ Linking** filter options. These enable you to view only the local portfolios associated with the collection or only the portfolios linked to the CZ.

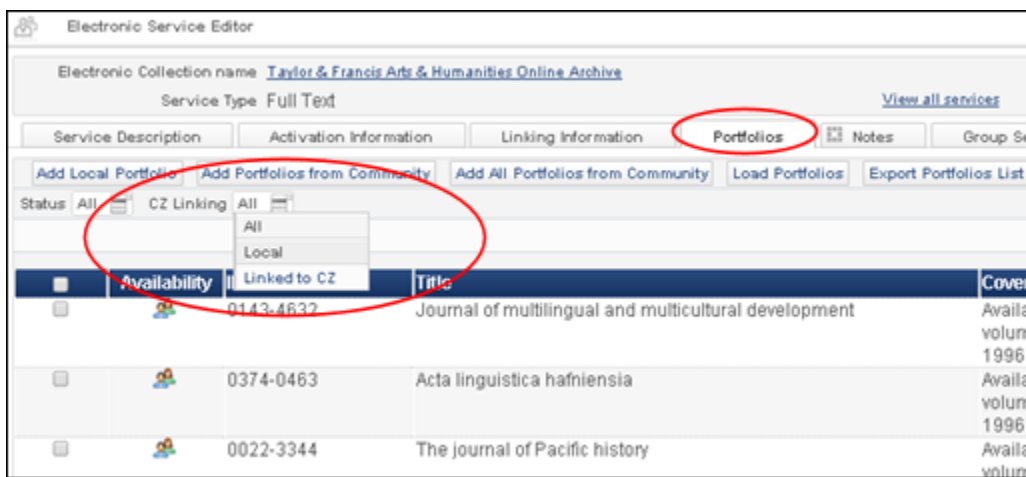


Figure 21 - CZ Linking Filter

Note: The icons in the Availability column also reflect whether the portfolio is local or from the Community Zone.

- 5 View the buttons at the bottom of the Electronic Service Editor page. The **Deactivate All** and **Activate All** buttons were previously **Deactivate All Local Portfolios** and **Activate All Local Portfolios**.

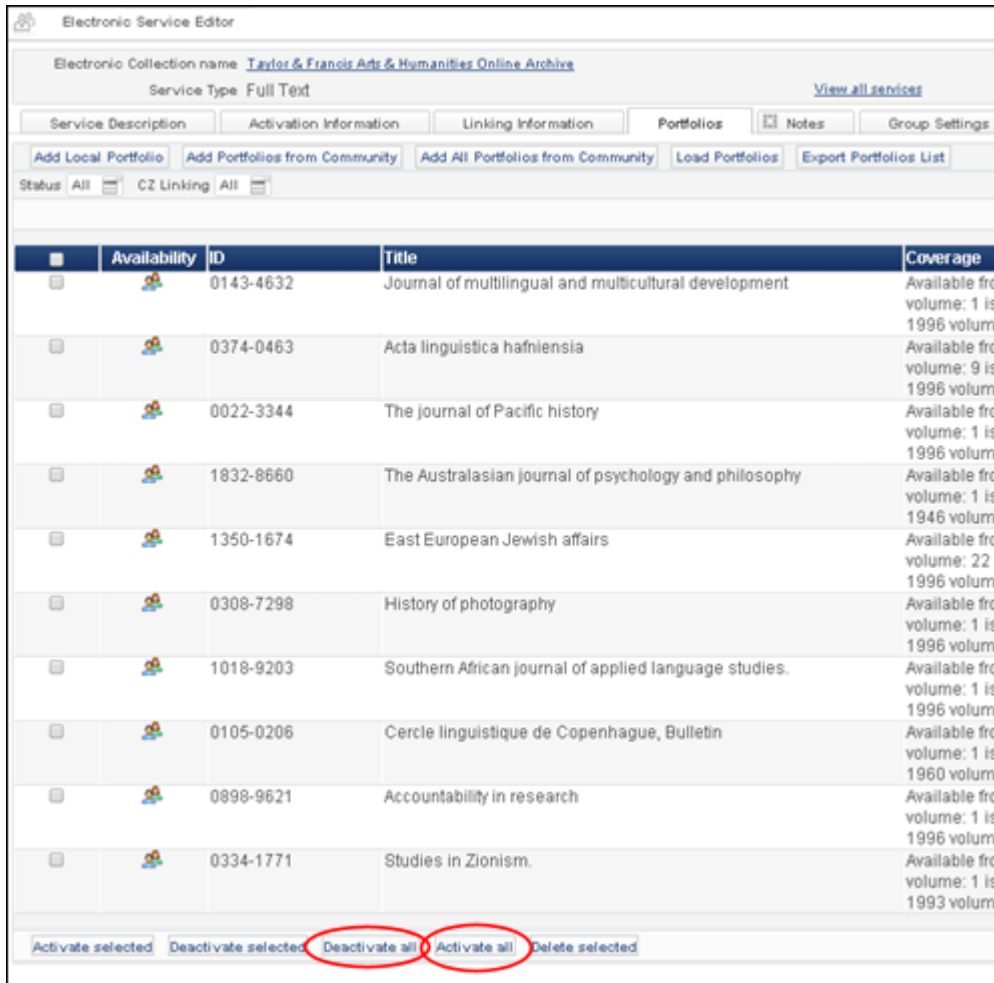


Figure 22 - Deactivate All and Activate All Options

Additional Options for Making Changes to a Set of Electronic Portfolios

Description

The purpose of this enhancement is to provide additional options for making changes to a set of electronic portfolios. With the December release, you can specify the following types of changes for electronic portfolios:

- Add Available For groups (relevant/only visible on systems configured for the Network Zone/Multicampus environments)
- Remove Available For groups (relevant/only visible on systems configured for the Network Zone/Multicampus environments)
- Change electronic material types

- Override authentication notes
- Override internal description

Note: The **Override general note** has been relabeled to **Override public note** to correspond with the label change on the Add Local Portfolio > New Portfolio page.

- Set activation dates
- Set expected activation dates

Technical Instructions

The electronic inventory operator role can access these options.

To make changes using these new options:

- 1 On the Create Job - Select Job to Run page (**Administration > Manage Jobs > Run a Job**), select **Information Update** from the Type filter.
- 2 Select the **Change electronic portfolio information** job and click **Next**.
- 3 Select a set and click **Next**. Step three of the wizard displays (see [Figure 23](#)).

The screenshot shows the 'Create Job - Enter Task Parameters' wizard, Step 3: Task Parameters: Change Electronic Portfolio Information. The interface is divided into two main sections: a list of tasks on the left and a set of dropdown menus on the right. The tasks are:

- ☐ Set interface name (for standalone portfolios)
- ☐ Set owner
- ☐ Remove 'Available For' groups
- ☐ Add 'Available For' groups
- ☐ Electronic Material Type
- ☐ Remove local coverage
- ☐ Set license
- ☐ Delete or replace url's prefix
- ☐ Enable proxy
- ☐ Set proxy
- ☐ Set availability status
- ☐ Override public note
- ☐ Override authentication note
- ☐ Override internal description
- ☐ Set activation date
- ☐ Set expected activation date

Each task has a corresponding dropdown menu on the right, all of which are currently set to 'Unconditionally'. The 'Override public note' field is highlighted with a blue border.

Figure 23 - Wizard Step Three

- 4 Select the changes you want to make using the new options (see [Figure 24](#) that highlights the new options).

Figure 24 shows the 'Create Job - Enter Task Parameters' window, specifically the 'Task Parameters: Change Electronic Portfolio Information' section. Several options are highlighted with red ovals: 'Remove \'Available For\' groups', 'Add \'Available For\' groups', 'Electronic Material Type', 'Override authentication note', 'Override internal description', 'Set activation date', and 'Set expected activation date'. The 'Remove \'Available For\' groups' and 'Add \'Available For\' groups' options have dropdown menus showing 'All', 'CC Member A', 'CC Member B', and 'CC Member C'. The 'Electronic Material Type' dropdown shows 'Book'. The 'Set activation date' and 'Set expected activation date' options have calendar icons.

Figure 24 - New Options

For the add and remove Available For options, select the check box and then select one or more groups from the list (using click, Shift+click, or Ctrl+click).

Figure 25 shows the 'Create Job - Enter Task Parameters' window, specifically the 'Task Parameters: Change Electronic Portfolio Information' section. The 'Remove \'Available For\' groups' and 'Electronic Material Type' options are checked. The 'Remove \'Available For\' groups' dropdown menu is open, showing 'All', 'CC Member A', 'CC Member B', and 'CC Member C'. The 'Electronic Material Type' dropdown menu shows 'Streaming Audio'.

Figure 25 - Selecting Groups to Remove (or Add)

You can verify your selections on the Review and Confirm page, Wizard step five (see [Figure 26](#)).

Create Job - Review and Confirm

General Information

Job Name Change electronic portfolio information - ak test1\2 - 2013-12-09 20:42

Set Information

Set ID 18923210000121
Name ak test1\2

Scheduling

Schedule As soon as possible

Task Parameters: Change Electronic Portfolio Information

No	Set interface name (for standalone portfolios)	
No	Set owner	
Yes	Remove 'Available For' groups	CC Member A,CC Member C
No	Add 'Available For' groups	-
Yes	Electronic Material Type	Streaming Audio
No	Remove local coverage	
No	Set license	
No	Delete or replace url's prefix	-
No	Enable proxy	-
No	Set proxy	
No	Set availability status	-
No	Override public note	-
No	Override authentication note	-
No	Override internal description	-
No	Set activation date	-
No	Set expected activation date	-

Figure 26 - Review and Confirm Page

- Complete the remaining run job options as usual and **Submit** the job to run.

Streaming Audio Added as a Material Type

Description

The purpose of this enhancement is to provide streaming audio as a material type that can be selected for electronic portfolios (see [Figure 27](#)).

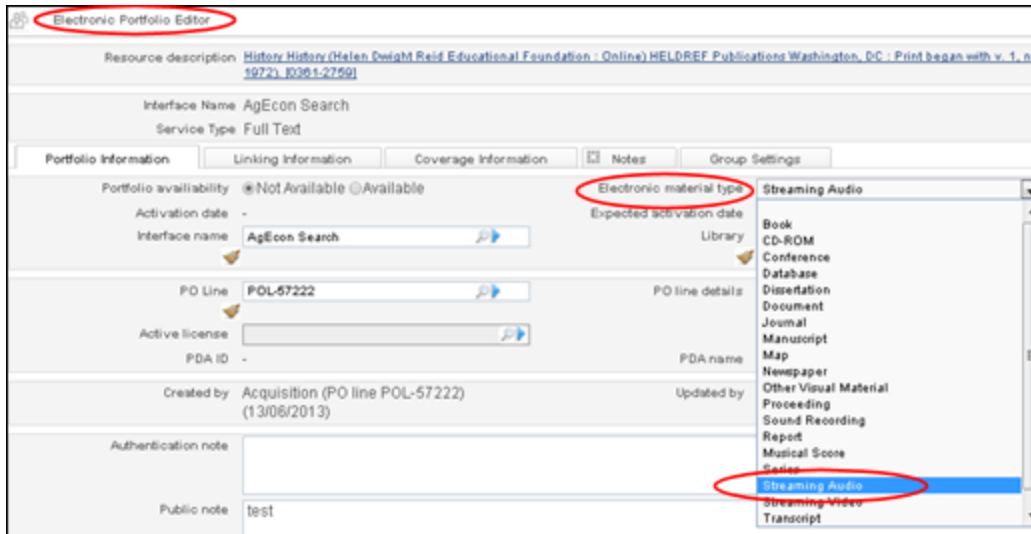


Figure 27 - Streaming Audio Material Type

Note: This is also a material type option that can be selected when making changes to a set of records processed via a job that is run (Administration > Manage Jobs > Run a Job). See Additional Options for Making Changes to a Set of Electronic Portfolios on page 34.

Add a Set of Local Standalone Portfolios to a Local Package Service

Description

The purpose of this enhancement is to provide the capability to add a set of standalone local portfolios to a local package service so that you can more easily manage portfolios. Once portfolios are grouped into a package you can use the portfolio loader capabilities to maintain the portfolios.

In conjunction with this enhancement, new indexes/advanced search options are being created in order to make it easier for you to prepare a set of portfolios (see [Figure 28](#) and [Figure 29](#)).

Note: These options are listed as “under construction” until the completion of the re-indexing process scheduled in December.

Advanced Search - Add Conditions		
All titles	Electronic Collection	Electronic Portfolio
☐ Title	☐ Electronic collection Name	☐ Proxy Enabled(under construction)
☐ Uniform title	☐ Crossref Enabled	☐ Available for
☐ Serial Title	☐ Collection PO Line ID	☐ Available only for
☐ Creator	☐ Creation Date	☐ Interface name(under construction)
☐ Names	☐ Modification Date	☐ Proxy name(under construction)
☐ Subjects	☐ Activate From	☐ Uri(under construction)
☐ Subjects (LC)	☐ Activate To	☐ Authentication note
☐ Medical Subjects (MeSH)	☐ Free	☐ Public note
☐ Series	☐ Authentication Note	☐ Portfolio PO Line ID
☐ Publisher	☐ Public note	☐ Portfolio PID
☐ LC Call Number	☐ Internal Description	☐ Portfolio Line ID
☐ Dewey decimal class number	☐ Service Authentication Note	
☐ UDC	☐ Proxy Enabled	

Figure 28 - New Electronic Portfolio Advanced Search Indexes

Advanced Search - Add Conditions		
All titles	Electronic Collection	Electronic Portfolio
☐ Language	☐ License ID	☐ Creation Date
☐ Collection	☐ Linking Level	☐ Internal description
☐ LC Control No.	☐ Title Service PID	☐ Is Standalone
☐ ISBN	☐ Service Type	☐ Library
☐ ISSN	☐ Electronic collection Type	☐ Material Type
☐ ISSN link	☐ Creator Name	☐ Modification Date
☐ Other Standard ID	☐ Language	
☐ Government Document Number	☐ Category	
☐ National bibliography number	☐ Collection available for	
☐ Publisher number	☐ Interface Name	
☐ Standard number	☐ Library	
☐ Other Custom Number	☐ Proxy name(under construction)	

Figure 29 - New Electronic Collection Advanced Search Option

Technical Instructions

The Electronic Inventory Operator role can access these new options.

To add a set of local standalone portfolios to a local package service:

- 1 Create a set of local standalone portfolios.
- 2 To add the set of standalone portfolios to an existing local package, do the following or skip to step 3.
 - a Complete a search to locate the existing local package.
 - b Click **Edit Service** and continue with step 4.
- 3 To add the set of standalone portfolios to a new local package:
 - a On the Electronic Collection Editor page (**Resource Management > Create Inventory > Add Local Package**), enter the **Public name** for the package and other details.

With the December release, you can now specify the service type (Full Text or Selected Full Text) on the Electronic Collection Editor page (eliminating additional steps to make this specification).

Figure 30 - Electronic Collection Editor Page

- b Click **Save and Continue**. The Electronic Service Editor page opens.
- 4 Select the **Portfolios** tab.
- 5 Click the new **Add from Set** button. The Add From Set page opens.
- 6 Search/select the set name (that you created/saved in step 1).

Figure 31 - Standalone Portfolios Set

- 7 Click **Submit**. A package confirmation message displays.

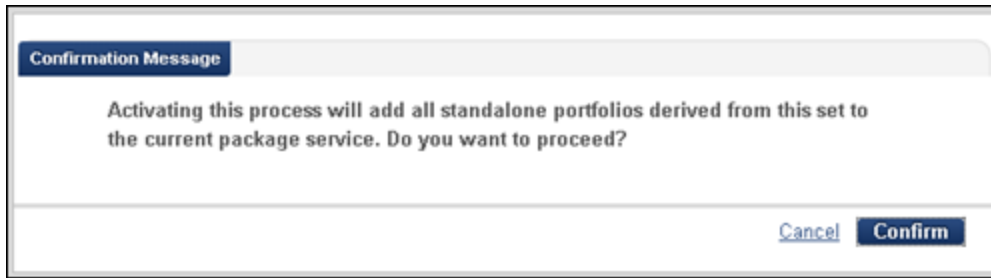


Figure 32 - Package Confirmation Message

- 8 Click **Confirm**. The Electronic Service Editor page displays with a job submitted message and a System Job Notification message is emailed with the job details.

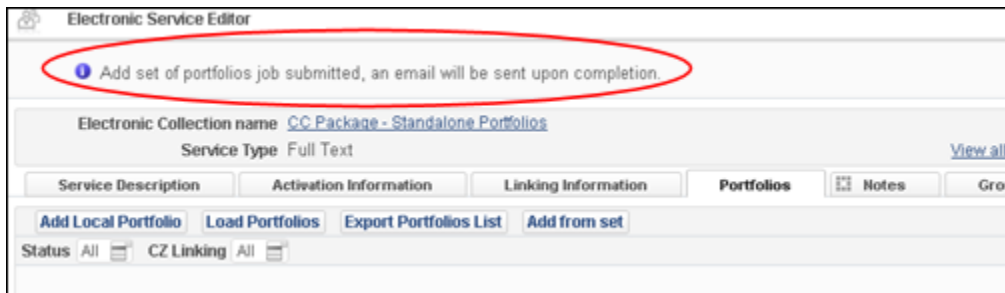


Figure 33 - Job Submitted Message

Job Report			
Process ID	2215563224330000121	Name	StandalonePortfoliosTask
Started on	02/12/2013 07:10:26 PST	Finished on	02/12/2013 07:10:27 PST
Total run time	1 Seconds	Created by	admin1
Status	Finalizing	Status date	02/12/2013 07:10:27 PST
Records processed	2	Records with exceptions	0

Figure 34 - Emailed Job Report Example

- 9 Click **Save**. The Electronic Collection Editor page displays with a package successfully updated message.

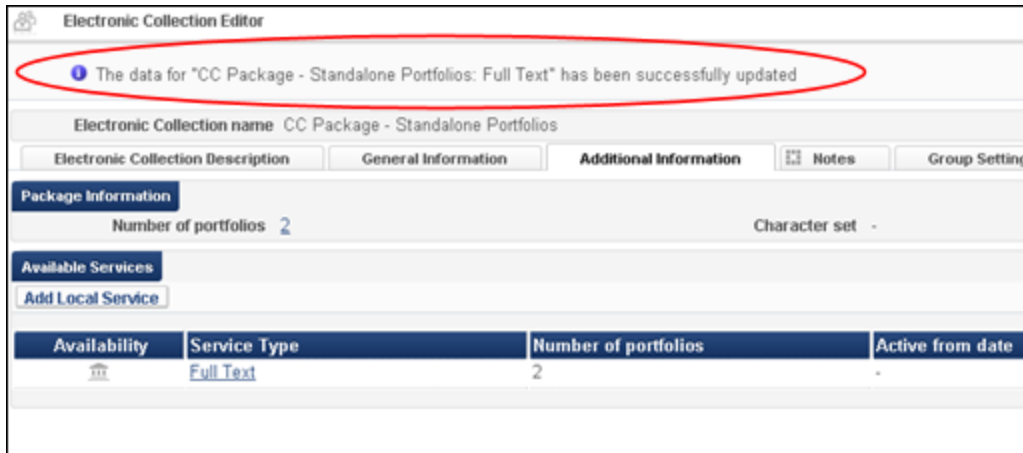


Figure 35 - Package Successfully Updated Message

- 10 Click **Full Text** and select the **Portfolios** tab to view the standalone portfolios added to the local package.

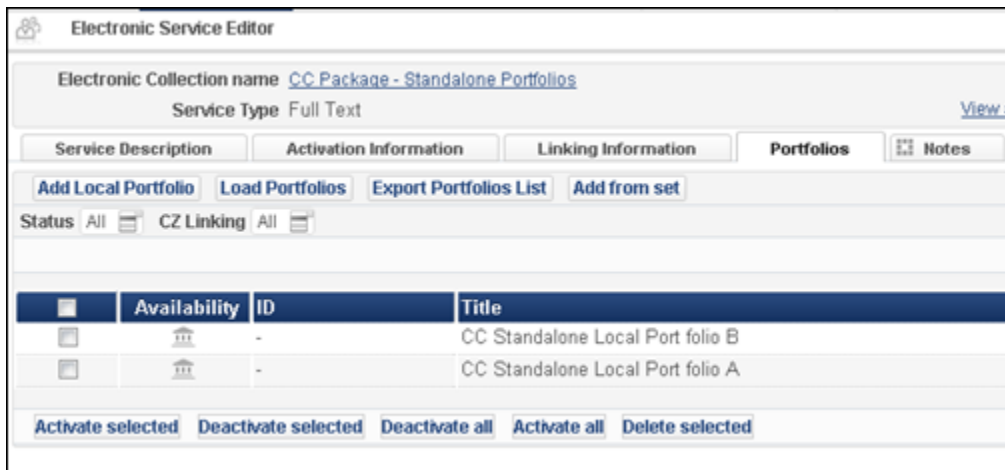


Figure 36 - Standalone Portfolios Added to Package

To remove a standalone portfolio from a local package service:

- 1 Complete a repository search for the local package containing the standalone portfolio that you want to remove.
- 2 Click **Edit Service**.
- 3 Select the **Portfolios** tab. The package contents display.

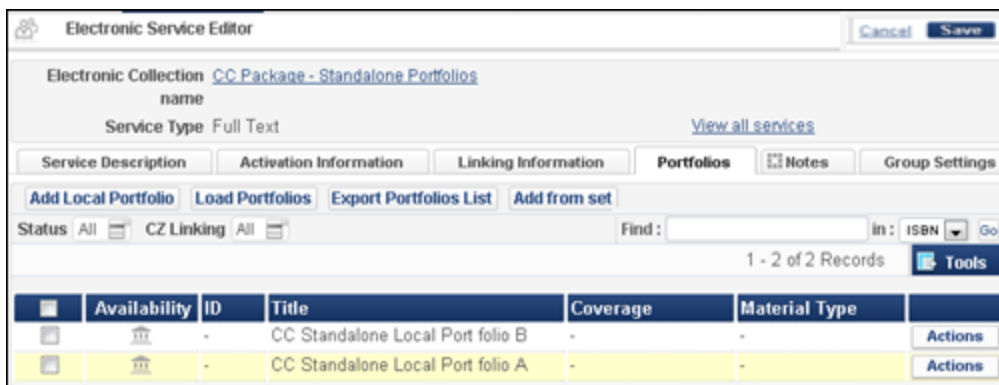


Figure 37 – List of Standalone Portfolios in the Package

- 4 Select **Actions > Remove** for the portfolio to be removed from the package reverting the removed portfolio back to a standalone portfolio.

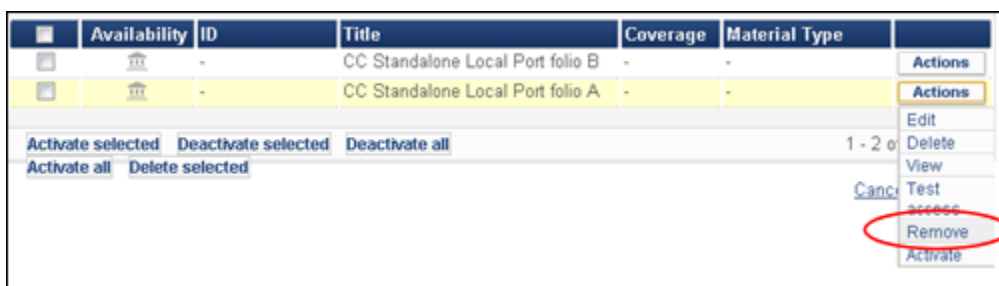


Figure 38 - Actions > Remove Standalone Portfolio

The page refreshes to display the package contents minus the standalone portfolio that was removed.

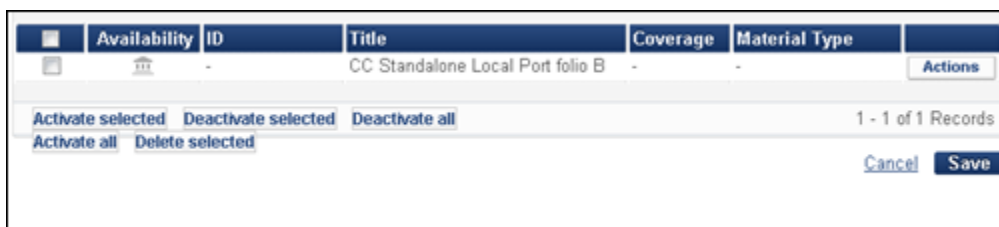


Figure 39 - Updated Portfolio List (in the Package) Minus the Removed Portfolio

- 5 Click Save.

Import Portfolio to Local Package

Description

Until now, importing electronic resources resulted in standalone portfolios in an institution's inventory. With this enhancement, it is possible to group imported electronic resources into a local package for ease of management.

Note: This functionality will be available as of the first December hot fix, on the 29th of December. The following additional functionality is planned for the February and March releases: A. The ability to update/delete portfolios that are associated with a package upon import. B. The support of multiple URLs in bibliographic records via the creation of multiple portfolios (one portfolio per URL) upon import.

Technical Instructions

The following roles can access this feature:

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

To configure the import of a single portfolio to a local package:

- 1 On the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**) or Acquisitions Configuration page (**Acquisitions > Acquisitions Configuration > Configuration Menu**), click the **Import Profile** link under **Record Import**. Select **Actions > Edit** for the Repository or New Order profile that you want to edit, and click the **Inventory Information** tab.

Figure 40 – Import Profile – Import Portfolio as Part of Local Package

- 2 Under **Profile type**, select **Part of a package**.
- 3 Select the package and service to which you want to import the portfolios. Note that once you select a package, Alma refreshes the **Service** drop-down list to display the relevant package services for the selected package.

Note: All electronic titles in the import file must belong to the same package service.

4 Click **Save**.

When the import is run, the import process adds all electronic resources in the imported file as portfolios associated with the selected package service. Each portfolio contains information corresponding to the defined mappings in the import profile Inventory Information tab (such as URL and notes).

If you want to associate an interface (the platform from which you get access to the portfolios that are part of the package) with the loaded portfolios, you must do so at the package level, via the Electronic Collection Editor.

New Parsing Routine for Label Printing

Description

This enhancement provides a new parsing routine for label printing. With the December release, Alma provides **Parse routine 8**. The new call number parsing routine for the label-printing XML is based on the existing routine 4. It specifies additional parsing rules, as described below.

Parsing Option	Parsing Routine
Parse routine 8	▪ Splits the call number at spaces, periods, and subfield i. ▪ If the character ^ is present in the call number, it is converted to a space but does not break at that point. ▪ If the number of digits after the period is more than 4, break as follows: ▪ 5 = 3, 2 ▪ 6 = 3, 3 ▪ 7 = 4, 3 Example: ▪ Call number = 363.7387403 E564 ▪ Label printed: 363 .7387 403 E564

Technical Instructions

The following roles can access this feature:

- Cataloging Administrator
- General System Administrator

To select a new parsing option:

- 1 On the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu > General**), click **Call Number Parsing**.
- 2 View the drop-down list of options for **Call Number Parsing Type**.

Table Information

Sub System INVENTORY Table Name CallNumberParsing

Updated By - Last Updated -

Table Description Call Number Parsing Type

Mapping Table Rows

Enabled	Call Number Type	Call Number Parsing Type	Updtd By	Last Upd	
✓	Library of Congress	Parse routine 3	-	-	Delete
✓	Dewey Decimal clas	Parse routine 3	-	-	Delete
✓	Shelved separately	Parse routine 6	-	-	Delete

Create a New Mapping Row

Call Number Type Dewey Decimal classifi Call Number Parsing Type Parse routine 8

Add Row

Parse routine 1
Parse routine 2
Parse routine 3
Parse routine 4
Parse routine 5
Parse routine 6
Parse routine 7
Parse routine 8

Customize

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Figure 41 - New Parsing Routine

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

Printing a Barcode and a Spine Label from BIAFLabel

This enhancement provides support for printing both a barcode and a spine label from the BIAFLabel tool. Prior to this release, users had to edit XML files to change the labeling tool output from the spine label to barcode. Now, Alma receives a template code from the labeling client, entered by the user, in a single-step solution that determines the BIAFLabel output format.

Note: This code option provides the same control for the batch job [Export Physical Items Labels](#).

The template can be set for individual items and labels using the label printer tool of your choice (BIAFLabel or any other similar tool). It can also be set by running a batch job for exported labels.

Technical Instructions

The Electronic Inventory Operator role can access this capability.

To choose a barcode or a spine label for printing a batch job:

- 1 On the Create Job – Select Job to Run page (**Administration > Manage Jobs > Run a Job**), find the batch job called **Export Physical Items Labels**.
- 2 Select the **Export** filter to narrow your selections.

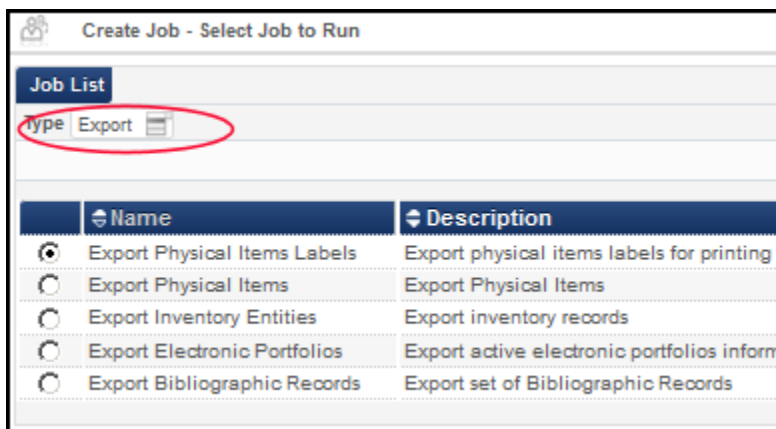


Figure 42 – Export Filter for Batch Job

- 3 Select **Export Physical Items Labels** from the list and click **Next**.
- 4 Select the set on which you want to perform the job and click **Next**. The Task Parameters step of the wizard opens.

Figure 43 – Enter Template Choice for Printing

- 5 In the **Template** field, enter 00 or 01 or any other numeric code you have configured for printing barcodes or call numbers.

Other Resource Management Enhancements

- For remote digital imports, OAI records can now contain MARC21 records in addition to DC records.
- A repository search for physical items that are in a temporary location now returns only items that are in a temporary location.
- The option to automatically activate new portfolios associated with a service is now available for selective packages in addition to aggregator packages. This option can be configured in the Activation Wizard for new services, and in the Electronic Service Editor for existing services.
- If you edit a field in a record that is related to another field in another record, the link between the records is broken when you save the edited record. Alma must run the MMS - Build Record Relations job (**Administration > Manage Jobs > Monitor Jobs – Scheduled** tab) in order for the link to be recreated. If you edit a field that is not related to a field in another record, the link between the records remains intact.
- The Export Profiles link on the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**) has been changed to **Publishing Profiles**. The profiles on the Publishing Profiles page have been renamed as follows:
 - Publish bibliographic records to Primo
 - Publish holdings to OCLC
 - Publish bibliographic records to with OCLC
 - Publish electronic records to Primo Central
 - Publish electronic records to Google Scholar
 - Publish holdings to Library of Australia

Fulfillment

The following sections describe the functions provided for the Fulfillment component in the December 2013 release of Alma.

Bulk Fine Waiving

Description

The purpose of this enhancement is to enable staff users to waive fines in bulk. The new Bulk Fine Waiving page allows staff users to specify the following criteria to waive fines in bulk:

- **Maximum fine threshold to waive** – Sets the maximum allowable fine to waive.
- **Exclude user with overdue loans** – Allows you to exclude users who have overdue loans.
- **User Group** – Specify the user groups that you want to include in the fine removal.
- **Waive fine types** – Specify the types of fines that you will allow to be waived.
- **Waiving reason** – Specify the reason for the removal of the fine. For example, you may want to waive fines accrued by your faculty.

Technical Instructions

The following roles can run this tool:

- Fulfillment Services Operator
- Fulfillment Services Manager

To waive fines in bulk:

- 1 On the Bulk Fine Waiving page (**Administration > User Management > Bulk Fine Waiving**), specify the criteria listed above in their corresponding fields. The Bulk Fine Waiving page opens.

Bulk Fine Waiving

Run Bulk Fine Waiving

Maximum fine threshold to waive *

User Group *

All
01BC Undergraduate
02College of Advancing
03BC Master's
04BC Doctoral
05BC Law Student
06BC Faculty
07BC Law Faculty

Waiving Reason *

Faculty

Exclude users with overdue loans ☐

Waive fines types *

All
Card renewal
Carrel Fee
Case Rent
Claim return fee
Damaged item fine
Digitization fee
Document delivery service

Waiving comment

Run bulk fine waiving

Refresh
1 2 1 - 10 of 11 Records
Tools

Job Id	Status	Creator	Time Started	Time Ended	Entities Finished	Entities Failed	
530300030000121	Completed	exl_impl	21/11/2013 12:52 GMT	21/11/2013 12:52 GMT	0	0	View Report
530299990000121	Completed	exl_impl	21/11/2013 12:52 GMT	21/11/2013 12:52 GMT	0	0	View Report

Refresh
1 2 1 - 10 of 11 Records
Tools

Figure 44 – Bulk Fine Waiving Page

- Click **Run bulk fine waiving**. A bulk job is added to the list at the bottom of the page. Click **Refresh** to monitor the progress of the job.
- Click **View** next to the bulk job to display a detailed report. The Job Report page opens.

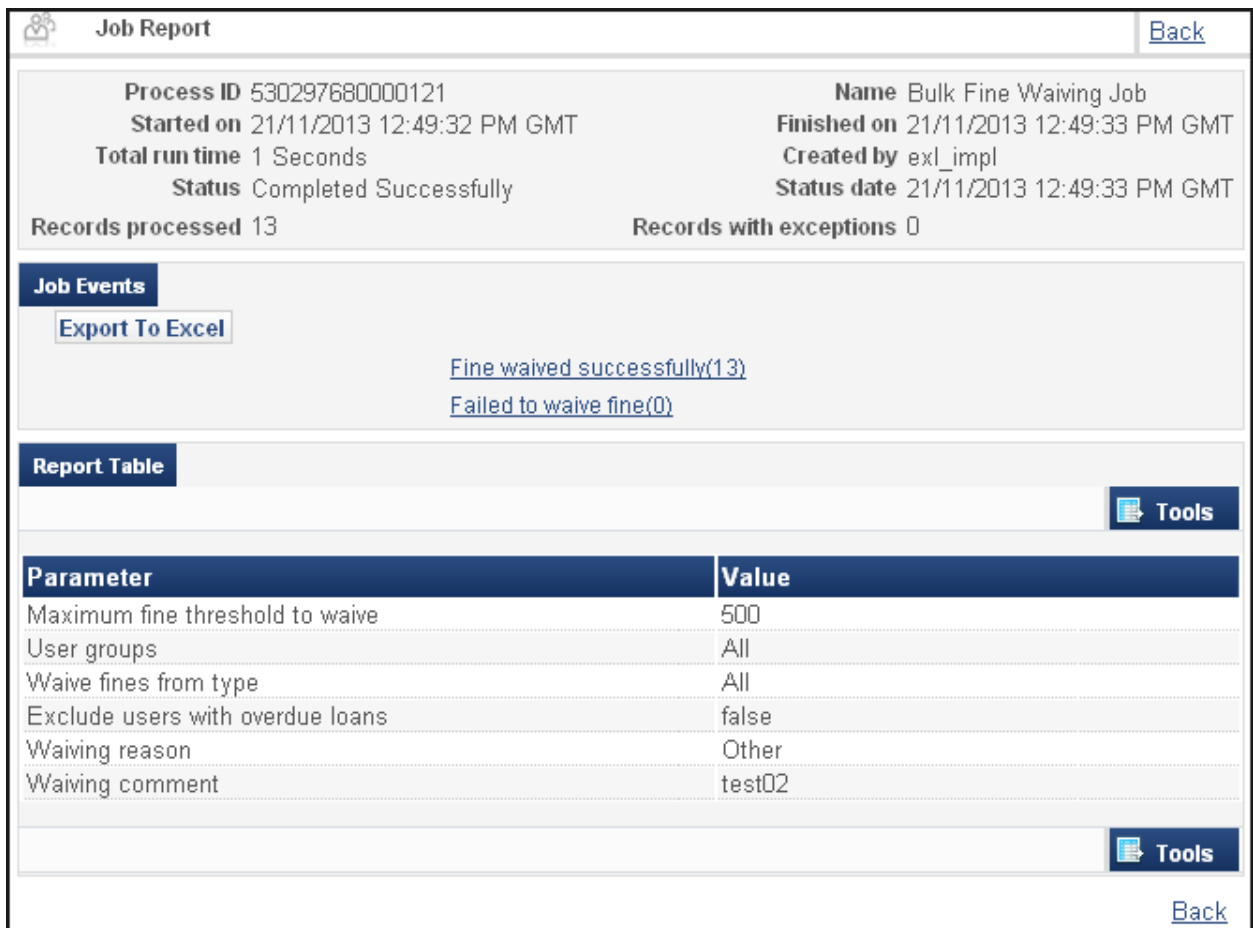


Figure 45 – Job Report Page

From the Job Events section, you can perform the following actions:

- View details on each successful event – Click the **Fine waived successfully** link to display the successful events on the Job Events page.

 Events Report		
— Fine waived successfully Description Fine waived successfully		
Fine waived successfully 1 2 ▶ ▶▶ 1 - 10 of 13 Records Tools		
User identifier	Fine type	Fine ammount
032952	Other	0.00
15014	Lost item replacement fee	0.00
15009	Other	0.00
15004	Other	0.00
123	Registration fee	99.00
123	Other	0.10
310305	Lost item replacement fee	0.00
310305	Lost item process fee	0.00
310305	Lost item replacement fee	0.00
777	Registration fee	99.00
1 2 ▶ ▶▶ 1 - 10 of 13 Records Tools		
Cancel		

Figure 46 – Job Events Page (Successful Events)

- View details on failed event – Click the **Failed to waive** link to display the failed events on the Job Events page.

 Events Report		Cancel
— Failed to waive fine Description -		
Failed to waive fine No records were found.		
Cancel		

Figure 47 – Job Events Page (Failed Events)

- Export the report to an Excel file – Click the **Export to Excel** button to export the job event details.

Bursar Export Fee Types

Description

The purpose of this enhancement is to enable customers to export specific fine/fee types to the bursar system. When this option is selected, only fines/fees of the specified type are exported.

Technical Instructions

The General System Administrator role can configure integration profiles.

To export specific types of fine/fee to the bursar system:

- 1 On the General Configuration page (**Administration > General Configuration > Configuration Menu**), click **Integration Profiles** under **External Systems**. The Integration Profile List opens.
- 2 Select **Actions > Edit** next to the profile with the integration type bursar. The External Systems page opens.
- 3 Click the **Actions** tab to configure the parameters in the **Export** section.

External System
Cancel Save

External System

Code Bursar

Name BursarExport

Integration Type Bursar

General Information

Actions

Contact Info

Actions

Export

Active * ☒ Active ☐ Non Active

Plugin

Time before export (Days) * 0

Minimal amount for user

User identifier type * Primary Identifier

User groups

Fine/Fee types to export

Institutional fine/fee * ☐ No ☒ Yes

Library fine/fee

Output file path * bursar

Schedule Every Sunday at 21:00

Run

Cancel Save

Figure 48 – Actions Tab

- Click the **Browse** icon to open the Fine/Fee Types List page.

Fine/Fee types list		Back	Add Types
			Tools
Fine/Fee type			
☐	All		
☐	Card renewal		
☐	Carrel Fee		
☐	Case Rent		
☐	Claim return fee		
☐	Credit		
☐	Damaged item fine		
☐	Digitization fee		
			Tools
		Back	Add Types

Figure 49 – Fine/Fee Types List Page

- 5 Select the fines/fees to export and then click **Add Types**. The External System Page page reopens and displays the selected items in the **Fine/Fee types** to export field.

External System [Cancel] [Save]

External System

Code Bursar Name BursarExport Integration Type Bursar

General Information Actions Contact Info

Actions

Export

Active * ☒ Active ☐ Non Active

Plugin [Dropdown]

Time before export (Days) * 0

Minimal amount for user [Text]

User identifier type * Primary Identifier [Dropdown]

User groups [Text]

Fine/Fee types to export Card renewal, Carrel Fee [Text] [Icons]

Institutional fine/fee * ☐ No ☒ Yes

Library fine/fee [Text]

Output file path * bursar

Schedule Every Sunday at 21:00 [Dropdown]

[Run]

[Cancel] [Save]

Figure 50 – External System Page – Types Added

6 Click Save.

Self-Check Machine Extensions Support

Description

The purpose of this enhancement is to enable customers to include the following elements for each open charge in the self-check Patron Information Response message and allow self-check users to view this information (if available) when requested:

- EB – Barcode of the item that is linked to the charge (such as for an overdue/lost item)
- ET – Title of the item that is linked to the charge
- EC – Cash transaction type code
- ED – Cash transaction type description

- EF – Sum
- EK – Fee ID

Note: If you already included the **Extended Fines and Fees** extension type in your Self Check integration profile, no new configuration is necessary to include the new extensions listed above.

Technical Instructions

The General System Administrator role can configure integration profiles.

To export specific types of fines/fees to the bursar system:

- 1 On the General Configuration page (**Administration > General Configuration > Configuration Menu**), click **Integration Profiles** under **External Systems**. The Integration Profile List opens.
- 2 Select **Actions > Edit** for the self-check system's profile. The External Systems page opens.
- 3 Click the **Actions** tab to configure the parameters in the **General Information** section.

The screenshot shows a web-based configuration interface for an 'External System'. At the top, there are 'Cancel' and 'Save' buttons. Below is a header section with 'External System' and a table with columns: Code, Self, Name, SelfCheck, Integration Type, and Self Check. The main area has three tabs: 'General Information', 'Actions' (which is selected), and 'Contact Info'. Under the 'Actions' tab, there is a 'General Information' section containing various settings:

- SC Identifier*: SC
- Error Correction: ☒ No ☐ Yes
- Alert: ☒ No ☐ Yes
- Item Transfer: ☒ No ☐ Yes
- SC Language: Unknown (dropdown)
- Retries Allowed: (text field)
- Timeout Period: (text field)
- Checkin: ☒ No ☐ Yes
- Checkout: ☒ No ☐ Yes
- Renew Policy: ☒ No ☐ Yes
- Fee Payments: ☒ No ☐ Yes
- Return Message: ☒ No ☐ Yes
- Extension Type: Extended Fines and Fees (dropdown, highlighted with a red box)**
- Item Identifier: Barcode (dropdown)
- Authentication Required: ☒ No ☐ Yes

At the bottom of the 'General Information' section is a 'Download Certificate' button. At the bottom of the entire window are 'Cancel' and 'Save' buttons.

Figure 51 – Actions Tab

- 4 Select **Extended Fines and Fees** from the **Extension type** drop-down list.
- 5 Click **Save**.

Disregard Overdue Fines for Lost or Claimed Returned Items

Description

The purpose of this enhancement is to enable customers to disregard overdue fines for lost or claimed returned items. At the time the item is lost or claimed returned, the user will be charged for any lost fees only if they apply.

If a lost or claimed returned item is found later, the user will be charged for the overdue fines that were initially disregarded, and refunded any lost fees that were charged to the user's account.

Previously, the system would automatically charge overdue fines in addition to any lost fines at the time items were lost or claimed returned.

Technical Instructions

The following roles can configure this enhancement:

- Fulfillment Administrator
- General System Administrator

To access this functionality:

- 1 On the Fulfillment Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu**), click **Other Settings** under **General**. The CustomerParameters mapping table opens for the Fulfillment component.

Mapping Table

You are configuring: Main Campus

[Organization Unit List](#)

Table Information

Sub System

INFRA

Updated By

-

Table Description

Customer Parameters

Table Name

CustomerParameters

Last Updated

-

Mapping Table Rows

Enabled	parameter key	parameter	parameter value	free text description
	auto_renew_loan_days	fulfillment	2	The days period to auto renew item
	course_restricted_bib data will be del	fulfillment	false	
	overdue_at_claim_return_loan	fulfillment	false	Create overdue charges when item
	overdue_at_lost_loan	fulfillment	true	Create overdue charges when item
	prefer_doc_delivery_from_e-resources	fulfillment	false	when both P to D and E to D digit
	remember_last_loan_display	fulfillment	false	Determine if the loan workbench s

Figure 52 – CustomerParameters Mapping Table in Fulfillment Component

2 Set the following parameters:

- **Overdue_at_claim_return_loan** – Set to **false** if you want to disregard overdue fines for items that were claimed to be returned. Otherwise, set to **true** to create charges for overdue fines.
- **Overdue_at_lost_loan** – Set to **false** if you want to disregard overdue fines for items that were declared lost by the user. Otherwise, set to **true** to create charges for overdue fines.

3 Click **Save**.

Override Booking Policies

Description

The purpose of this enhancement is to enable staff users to override the following booking policies and create the booking request: future limit, maximum allowed booking length, and back to back bookings by the same user.

Technical Instructions

The following roles can configure this enhancement:

- Fulfillment Services Operator
- Fulfillment Services Manager

To override booking policies:

- 1 On the Repository Search page (**Resource Management > Search and Sets > Repository Search**), locate the item that you want to book.
- 2 Click **Request** for the item that you want to book. The Create Request page opens.

Create Request

Create Request

Title Hey Jude.

Institution Library Science College

Request Type * Booking request

Requester * Brown, Allison

Override Booking Policies ☒

Note

Override the following booking policies: future limit, maximum allowed booking length and back to back booking.

Start time * End time

Pickup At *

Figure 53 – Create Request Page

- 3 Select **Booking request** from the **Request type** drop-down list.
- 4 Select the **Override Booking Policies** field.
- 5 Specify the remaining fields on the request page and then click **Submit** to create the request.

Community Zone Priority for Online Resources

Description

The purpose of this enhancement is to allow you to list Community Zone (CZ) resources before local resources in the View It tab. This priority applies to each level of online resources (top, unspecified, and last). Within each level and zone (CZ or local), the services are also alphabetized. In addition, general electronic services are now alphabetized.

Technical Instructions

The following roles can configure this enhancement:

- Fulfillment Administrator
- General System Administrator

To list CZ resources first:

- 1 On the Fulfillment Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu**), click **Online Services Order** under **Discovery Interface Display Logic**. The Online Services Order page opens.



Figure 54 – Online Services Order Page

- 2 For the **Display CZ packages first** field, select **Yes**.

If this field is set to **No**, the online resources will be sorted alphabetically per level (top, unspecified, and last) only. Priority will not be given to CZ resources.

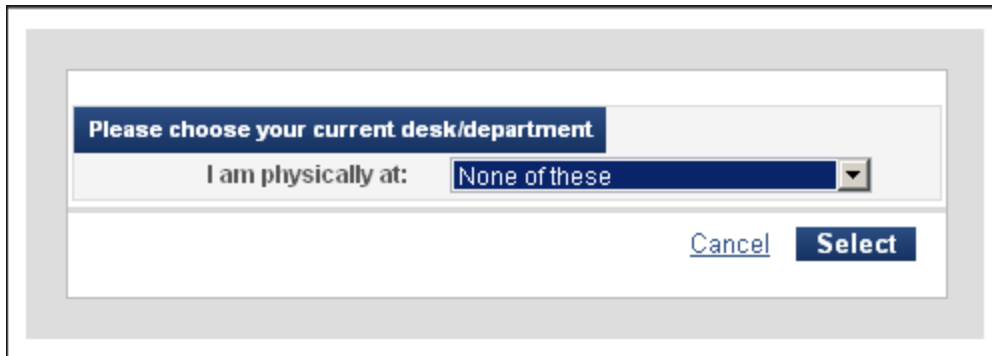
Note: You can also set this priority via the `uresolver_display_cz_records_first` parameter in the CustomerParameters mapping table (Fulfillment > Fulfillment Configuration > Configuration Menu > Other Settings).

Force Currently at Location Selection During Logon

Description

The purpose of this enhancement is to enable institutions to force users to select their current location each time they log on to Alma.

If this option is configured and there is more than one location available, Alma will display the following dialog box every time users log on:



Please choose your current desk/department

I am physically at: None of these

[Cancel](#) [Select](#)

Figure 55 – Select Current Location Dialog Box

Technical Instructions

The General System Administrator role can configure this enhancement.

To force staff users to select a location during logon:

- 1 On the General Configuration page (**Administration > General Configuration > Configuration Menu**), click **Other Settings** under **General**. The CustomerParameters mapping table opens.

Mapping Table

You are configuring: Main Campus

Table Information

Sub System

INFRA

Table Name

CustomerParameters

Updated By

-

Last Updated

-

Table Description

Customer Parameters

Mapping Table Rows

Enabled	parameter key	parameter	parameter value	free text description
	authentication_method	general	LOCAL	user is updatable
	default_language	general	en	
	EnvelopeFrom	general	alma@exlibrisgrou	
	force_location_selection_on_login	general	false	Should the choose your current des
	multi_campus_inventory_managei	general	false	

Figure 56 – CustomerParameters Mapping Table

- 2 Set the **force_location_selection_on_login** parameter to **true**. If the parameter is set to **false**, the system will automatically set the **Currently at** field to the last location at which the staff user signed in.
- 3 Click **Save**.

Other Fulfillment Enhancements

- When you export an Excel file from the Resource Request Monitoring page, the MMS ID column is now included.
- Non-patron requests can now be viewed on the Items in Department page. Instead of Yes/No, the **Request filter** now includes the following options: **Library requests**, **No requests**, **Patron and library requests**, and **Patron requests**. These options can also be viewed in the **Requests** column of the displayed table.
- The following options are now available for a fulfillment unit's **On shelf request policy** option (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Fulfillment Units**):
 - No requesting from available holdings – If an item from the holdings is available, all items from this holdings may not be requested for pickup at any pickup location. All items from other holdings are not impacted.
 - No requesting – If an item attached to this rule is available, it may not be requested for pickup at any pickup location.
- There is a new parameter in the Fulfillment CustomerParameters mapping table: **remember_last_loan_display**. When set to **false** (default), the Patron Services page opens in This Session mode. When set to **true**, the Patron Services page opens in the last mode selected by the operator. In either case, the operator can change the display mode via the **Loan display** drop-down list on the Patron Services page

Administration – General

The following sections describe the functions provided for the General component in the December 2013 release of Alma.

XSL for Label Printing API

Description

This enhancement provides customers with control of barcode validation when printing labels from a third-party client application such as BIAFLabel. Alma allows customers to create customized XSL for checksum validation of barcodes when running the API for label printing.

Alma does this by allowing a checksum character code as the final digits of the barcode for incoming items. Alma processes the barcode, runs the checksum on the barcode (the checksum as dictated by the end digits, which point Alma to the label printer settings that contain the checksum XSL supplied by the customer), and removes the checksum code before printing the validated barcode.

Technical Instructions

The General System Administrator can access this enhancement.

To view or edit this enhancement:

- 1 From the Administrative configuration page (**Administration > General Configuration > Configuration Menu**), click **Customize Letters** under **General Configuration**. A list of xsl templates and sample letters opens.
- 2 Find the `../xsl/checksum_calc.xsl` letter, most likely at the bottom of the page, and click the **Customize** button in its row.
- 3 The checksum/barcode xsl letter opens (see [Figure 57](#)).

Configuration File [Cancel] [Save]

Filename:

File Key:

Description:

Updated by:

Update Date:

Enabled:

Content:


```

<xsl:stylesheet version="1.0"
  xmlns:xsl="http://www.w3.org/1999/XSL/Transform">
  <xsl:output indent="yes"/>
  <xsl:template match="node()|@*>
    <xsl:copy>
      <xsl:apply-templates select="node()|@*"/>
    </xsl:copy>
  </xsl:template>
  <xsl:template match="printout/section-01/physical_item_display_for_printing/barcode">
    <barcode><xsl:value-of select="." /><xsl:call-template name="checksum">
      <xsl:with-param name="string" select="." /></xsl:call-template></barcode>
  </xsl:template>
  <xsl:template name="checksum">
    <xsl:param name="string"/>
    <xsl:variable name="sum" select="0"/>

```

[Cancel] [Save]

Figure 57 – Checksum/Barcode Customizable XSL

The following fields are editable:

- Description – the text that describes the file and its purpose in plain language.
- Enabled – the field that determines whether or not the XSL is actively in use by the system.
- Content – the XSL template that specifies the way the barcode extension and the checksum routines function when loaded by the label printer.

Other Administration – General Enhancements

- The following fine/fee types were added to the FineFeeTypeDefinition mapping table (**Administration > User Management Configuration > Configuration Menu > Patron Charges > Fines/Fees Behavior**): University Press, University Shop, Carrel Fee, Locker Key, Thesis Folder, Postage, Case Rent, Library Card Replacement.

Administration – Manage Jobs

The following sections describe the functions provided for managing and running jobs in the December 2013 release of Alma.

New Functionality When Running a Job

Description

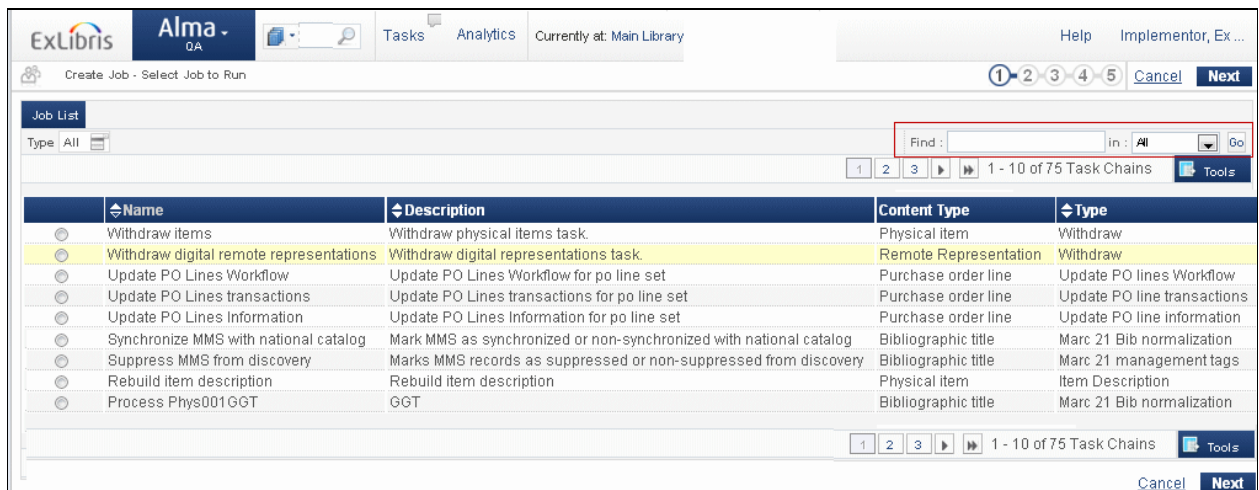
Several new features have been added to the Create Job wizard (**Administration > Manage Jobs > Run a Job**).

Technical Instructions

The jobs on this page are displayed according to your role (see the documentation for this page in the *Alma Administration Guide* or Alma online help). Note that the General System Administrator can view/select all the available jobs on this page.

Step 1 – Select Job to Run: Search Box Now Displayed

A search box is now displayed on the Select Job to Run page, allowing you to search the list of jobs.



The screenshot shows the Alma 'Create Job - Select Job to Run' page. At the top, there's a navigation bar with 'ExLibris', 'Alma', and 'QA' logos, along with 'Tasks', 'Analytics', and 'Currently at: Main Library'. A search bar is visible in the top right. Below the navigation bar, there's a 'Job List' section with a 'Find:' search box and a 'Go' button. The search box is highlighted with a red rectangle. Below the search box, there's a table of jobs. The table has four columns: 'Name', 'Description', 'Content Type', and 'Type'. The first row is 'Withdraw items' with a description 'Withdraw physical items task.' and content type 'Physical item'. The second row is 'Withdraw digital remote representations' with a description 'Withdraw digital representations task.' and content type 'Remote Representation'. The third row is 'Update PO Lines Workflow' with a description 'Update PO Lines Workflow for po line set' and content type 'Purchase order line'. The fourth row is 'Update PO Lines transactions' with a description 'Update PO Lines transactions for po line set' and content type 'Purchase order line'. The fifth row is 'Update PO Lines Information' with a description 'Update PO Lines Information for po line set' and content type 'Purchase order line'. The sixth row is 'Synchronize MMS with national catalog' with a description 'Mark MMS as synchronized or non-synchronized with national catalog' and content type 'Bibliographic title'. The seventh row is 'Suppress MMS from discovery' with a description 'Marks MMS records as suppressed or non-suppressed from discovery' and content type 'Bibliographic title'. The eighth row is 'Rebuild item description' with a description 'Rebuild item description' and content type 'Physical item'. The ninth row is 'Process Phys001 GGT' with a description 'GGT' and content type 'Bibliographic title'. At the bottom of the table, there's a pagination bar showing '1 - 10 of 75 Task Chains' and a 'Tools' button.

Name	Description	Content Type	Type
Withdraw items	Withdraw physical items task.	Physical item	Withdraw
Withdraw digital remote representations	Withdraw digital representations task.	Remote Representation	Withdraw
Update PO Lines Workflow	Update PO Lines Workflow for po line set	Purchase order line	Update PO lines Workflow
Update PO Lines transactions	Update PO Lines transactions for po line set	Purchase order line	Update PO line transactions
Update PO Lines Information	Update PO Lines Information for po line set	Purchase order line	Update PO line information
Synchronize MMS with national catalog	Mark MMS as synchronized or non-synchronized with national catalog	Bibliographic title	Marc 21 Bib normalization
Suppress MMS from discovery	Marks MMS records as suppressed or non-suppressed from discovery	Bibliographic title	Marc 21 management tags
Rebuild item description	Rebuild item description	Physical item	Item Description
Process Phys001 GGT	GGT	Bibliographic title	Marc 21 Bib normalization

Figure 58 – Select Job to Run – Search Box

Step 2 – Select Set: Search Box and Content Type Filter Now Displayed

The following new functionality has been added to the Select Set page:

- A search box is now displayed that allows you to search the list of sets. This is the same search box that is displayed on the Manage Sets page (Resource Management > Manage Sets).
- The **Content type** filter drop-down list has been added. Note that only options relevant for the job you selected in step 1 are displayed.

ExLibris Alma QA

Create Job - Select Set

Content Type: PO line

Find: In: All Go

1 2 1 - 10 of 16 Sets Tools

	Name	Type	Content Type	Create Date
	CC In Review Set	Logical	PO line	29/05/2013 11:07:21 PM BST
	closed pol	Logical	PO line	29/05/2013 01:23:12 PM BST
	closed set	Logical	PO line	05/06/2013 06:43:23 AM BST

1 2 1 - 10 of 16 Sets Tools

Back Cancel Next

Figure 59 – Select Set – Search Box and Content Type Filter

Step 4 – Job Details and Schedule: Job Name Automatically Filled In with Name and Date and As Soon as Possible Automatically Selected

The following new functionality has been added to the Job Details and Schedule page:

- The **Job name** field is now automatically filled with the name and date of the job.
- The **As soon as possible** option is automatically selected, since it is the only option available.

ExLibris Alma QA

Tasks Analytics Currently at: Main Library Help

Create Job - Job Details and Schedule 1 2 3 4 5 Back Cancel Next

General Information

Job Name * Update PO Lines Information - closed set - 2013-12-08 16:36:34

Schedule Job

Tools

As soon as possible

Back Cancel Next

Figure 60 – Job Details and Schedule – Job Name Automatically Filled In and As Soon As Possible Automatically Selected

Step 5 – Review and Confirm: Task Parameters Section Moved and Save Button Changed to Submit

The following changes have been implemented to the Review and Confirm page:

- The Task Parameters section has been moved to the bottom of the page.
- The Save button has been changed to **Submit**.

ExLibris Alma QA

Tasks Analytics Currently at: Main Library Help

Create Job - Review and Confirm 1 2 3 4 5 Back Cancel Submit

General Information

Job Name Withdraw items - AutoChangeToClaimedReturnedSet_02/10/2012 06:10 - 2013-12-09 08:24:46

Set Information

Set ID 67261020000121

Name AutoChangeToClaimedReturnedSet_02/10/2012 06:10

Scheduling

Schedule As soon as possible

Task Parameters: Withdraw items

How to handle holdings without items and bibliographic records? Do nothing

Back Cancel Submit

Figure 61 – Review and Confirm – Task Parameters Section Moved and Save Button Changed to Submit

New Functionality Added to the Update PO Line Information Job

Description

The following new functionality has been added to the Step 3 – Enter Task Parameters page of the Update PO Line Information job (**Administration > Manage Jobs > Run a Job**).

- When moving the cursor over a job, the row is highlighted.
- When clicking in a field, the check box of the field is selected.
- When selecting a value for the **License** field, a meaningful description is now displayed.

Task Parameters: Update PO Lines Information			
☐	Material Supplier		Unconditionally
☐	Access Provider		Unconditionally
☐	Invoice status	No invoice	Unconditionally
☒	Receiving note		Unconditionally
☐	Claiming grace period (days)		Unconditionally
☐	Acquisition method	Purchase	Unconditionally
☐	Material type (Physical)	Art Original	Unconditionally
☐	Material type (Electronic)	Book	Unconditionally
☒	License	Academic licence agreement	Unconditionally
☐	Rush	Yes	Unconditionally
☐	Manual renewal	Yes	Unconditionally
☐	Manual Packaging	Yes	Unconditionally

Figure 62 – Update PO Lines – Row Highlighted, Automatic Check Box Selection, and Meaningful License Value

Other Administration – Manage Jobs Enhancements

- The **Export physical item labels** job now properly exports a file containing the barcode and checksum.
- If you run a **Change physical item** job to mark a set of missing items as available, the status of the items is now successfully changed.

Resource Sharing

The following sections describe the functions provided for Resource Sharing in the December 2013 release of Alma.

Rota Assignment Rules

Description

The purpose of this enhancement is to enable configuring the conditions under which rota templates are invoked.

Technical Instructions

The following roles can configure rota assignment rules:

- Fulfillment Administrator
- General System Administrator

To configure rota assignment rules:

- 1 On the Rota Assignment Rules List page (**Fulfillment > Configuration Menu > Resource Sharing > Rota Assignment Rules**), click **Add Rule**. The Rota Assignment Rules page opens.

The screenshot shows the 'Rota Assignment Rules' configuration page. It features a header with a gear icon and the title 'Rota Assignment Rules'. Below the header is a form with three main sections: 'Rota Assignment Rules', 'Input Parameters', and 'Output Parameters'. The 'Rota Assignment Rules' section contains fields for Name, Description, Created By, Updated By, Created On, and Updated On. The 'Input Parameters' section displays a message 'No records were found.' and includes fields for Name, Operator, and Value, along with a 'Possible Values' link and an 'Add Parameter' button. The 'Output Parameters' section includes fields for Name, Result, and Rota Templates.

Figure 63 –Rota Assignment Rules Page

- 2 In the **Rota Assignment Rules** section, enter a rule for the name in the **Name** field.

- 3 In the **Input Parameters** section, do the following:
 - a Specify the components of the input parameter in the **Name** field (**Requested Format** = Physical/Digital, **User Group** = User group of the patron who has requested the resource).
 - b Select the required operator in the **Operator** field. The relevant values display in the **Value** field, if applicable.
 - c Click **Add Parameter**. The set of input parameters is added to the list of parameters for the rota assignment rule. Repeat this procedure to add all required parameters for the rule.

A set of input parameters may look like this: *Requested Format = Digital; User Group = Faculty*. In this case, the rota assignment rule would apply only for Digital items on loan to faculty members.
- 4 In the **Output Parameters** section, select a rota template to which the rule parameters are to apply.
- 5 Click **Save**. The configured rule displays on the Rota Assignment Rules List page.

Enabled	Move Up	Move Down	Rule Name	Description	Updated By
			Institution rule	-	Support, Ex Libris
			Faculty Rule	-	Support, Ex Libris

Figure 64 –Rota Assignment Rules List Page

When the configured rule parameters are met for a resource sharing request, the specified rota template is invoked.

To recalculate a rota assignment:

- 1 On the Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**), select **Add > Manually**, select a citation type and click **Choose**. The Resource Sharing Borrowing Request page opens.

Resource Sharing Borrowing Request Cancel

General Information Parameters

Resource Information

Title *

Author

Author Initials

Edition

ISBN

Publisher

Publication Date

Place of Publication

Additional Person Name

Source

Series Title Number

Call Number

Note

Volume

Part

Chapter

Pages

Request Attribute

Requester *

Request Status

Format

Allow Other Format ☐

Preferred Send Method

Needed By

Pickup At *

Shipping Cost

Willing to Pay ☐

Agree to Copyright terms * ☐

Needs patron information ☐

Request Note

Add Partners Add Rotas

Figure 65 –Resource Sharing Borrowing Request Page

- Enter the relevant information in the required fields, and click **Add Rotas** to add a rota. The Rota Templates page opens.

Rota Templates

Filter: All

☐	Name	Code	Status	Type	Scope
☐	eyal1	eyal12	Active	Ordered	Institution
☐	eyal3	eyal	Active	Non Ordered	Institution
☐	J Rota Test	12345	Active	Ordered	Institution
☐	Test 4	4444	Active	Non Ordered	Institution
☐	Test 5	5555	Active	Ordered	Institution

Figure 66 –Resource Sharing Borrowing Request Page

- Select the check box of the relevant rota and click **Select**. The Resource Sharing Borrowing Request page opens.

- 4 Click **Save**. The Resource Sharing Borrowing Requests page opens.
- 5 Search for the newly configured request. Click the **Recalculate Rota Assignment** link to attach the rota to the request according to the configured rules.

Managing Rota Templates per Library and Institution

Description

The purpose of this enhancement is to enable managing rota templates and rota assignment rules on both the library and institution levels.

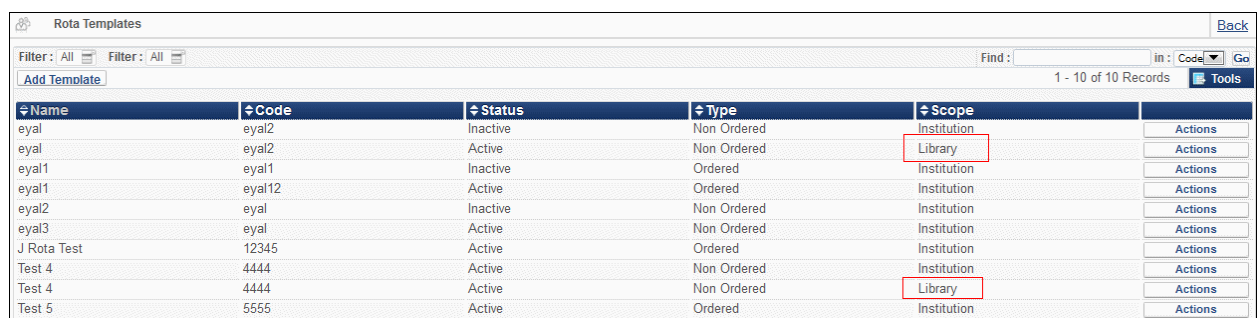
Technical Instructions

The following roles can access this enhancement:

- Fulfillment Administrator
- General System Administrator

To assign a rota template to a library:

- 1 On the Fulfillment Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu**), ensure that a library is selected in the **You are configuring** filter at the top of the page.
- 2 Open the Rota Templates page (**Resource Sharing > Rota Templates**) and select **Actions > Duplicate** for a template. A duplicate of the template displays on the page, and the new template's **Scope** value is listed as **Library**.



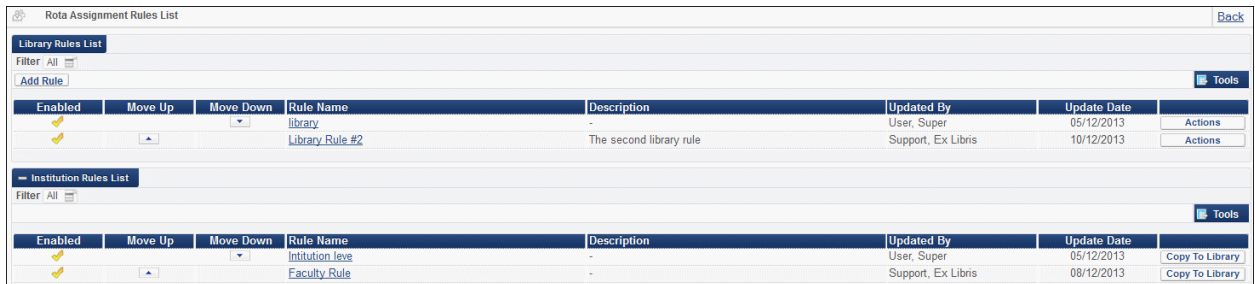
Name	Code	Status	Type	Scope	Actions
eyal	eyal2	Inactive	Non Ordered	Institution	Actions
eyal	eyal2	Active	Non Ordered	Library	Actions
eyal1	eyal1	Inactive	Ordered	Institution	Actions
eyal1	eyal12	Active	Ordered	Institution	Actions
eyal2	eyal	Inactive	Non Ordered	Institution	Actions
eyal3	eyal	Active	Non Ordered	Institution	Actions
J Rota Test	12345	Active	Ordered	Institution	Actions
Test 4	4444	Active	Non Ordered	Institution	Actions
Test 4	4444	Active	Non Ordered	Library	Actions
Test 5	5555	Active	Ordered	Institution	Actions

Figure 67 – Rota Templates Page — Scope

To manage rota assignment rules for a library:

- 1 On the Fulfillment Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu**), ensure that a library is selected in the **You are configuring** filter at the top of the page.

- Open the Rota Assignment Rules List page (**Resource Sharing > Rota Assignment Rules**). Rules configured on the library level display in the **Library Rules List** section, and rules configured on the institution level display in the **Institution Rules List** section.



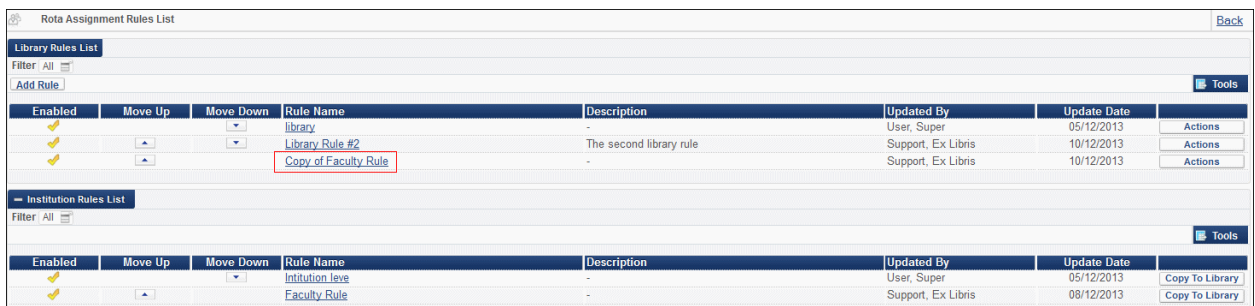
The screenshot shows the 'Rota Assignment Rules List' page. It has two main sections: 'Library Rules List' and 'Institution Rules List'. Each section has a table of rules with columns for 'Enabled', 'Move Up', 'Move Down', 'Rule Name', 'Description', 'Updated By', 'Update Date', and 'Actions'.

Enabled	Move Up	Move Down	Rule Name	Description	Updated By	Update Date	Actions
☒			library	-	User, Super	05/12/2013	Actions
☒			Library Rule #2	The second library rule	Support, Ex Libris	10/12/2013	Actions

Enabled	Move Up	Move Down	Rule Name	Description	Updated By	Update Date	Actions
☒			institution level	-	User, Super	05/12/2013	Copy To Library
☒			Faculty Rule	-	Support, Ex Libris	08/12/2013	Copy To Library

Figure 68 –Rota Assignment Rules List Page

- To copy an institution rule to the library level, click **Copy to Library** in the Institution Rules List section. The Rota Assignment Rules page opens.
- Modify the rule parameters, as necessary, and click **Save**. The specified rule displays in the Library Rules List section.



This screenshot is similar to Figure 68 but shows an additional rule in the 'Library Rules List' section. The 'Copy of Faculty Rule' is highlighted with a red box. The 'Institution Rules List' section remains the same.

Enabled	Move Up	Move Down	Rule Name	Description	Updated By	Update Date	Actions
☒			library	-	User, Super	05/12/2013	Actions
☒			Library Rule #2	The second library rule	Support, Ex Libris	10/12/2013	Actions
☒			Copy of Faculty Rule	-	Support, Ex Libris	10/12/2013	Actions

Enabled	Move Up	Move Down	Rule Name	Description	Updated By	Update Date	Actions
☒			institution level	-	User, Super	05/12/2013	Copy To Library
☒			Faculty Rule	-	Support, Ex Libris	08/12/2013	Copy To Library

Figure 69 – Rota Assignment Rules List Page with Rule Copied to Library

Automatic Location of Incoming Lending Requests

Description

The purpose of this enhancement is to enable matching a lending request with an existing resource. The request is shipped only when a single resource is found for the request. When a physical resource is found, a digitization or move request is placed. When an electronic resource is found, a document delivery request is placed.

Technical Instructions

The following roles can access this enhancement:

- Fulfillment Administrator
- General System Administrator

To configure automatic location of incoming lending requests:

- 1 On the Fulfillment Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu**), click **Other Settings** under **General**. The CustomerParameters mapping table opens for the Fulfillment component.

Enabled	parameter key	parameter module	parameter value	free text description	Updated By	Last Updated	
	auto_renew_loan_day	fulfillment	2	The days period to auto r	-	-	Customize
	demerit_enable	fulfillment	false	Whether the customer us	-	-	Customize
	demerit_history_days	fulfillment	0	How many days back loa	-	-	Customize
	demerit_maximum_th	fulfillment	0	Number of demerits after	-	-	Customize
	demerit_suspension_e	fulfillment	0	Period of days for susper	-	-	Customize
	email_partner_configu	fulfillment			-	-	Customize
	email_partner_configu	fulfillment			-	-	Customize
	generate_resource_sh	fulfillment	false		-	-	Customize
	ill_item_creation_lib_c	fulfillment	RES_SHARE		-	-	Customize
	ill_item_creation_loc_	fulfillment	OUT_RS_REQ		-	-	Customize
	overdue_at_claim_ret	fulfillment	false	Create overdue charges	-	-	Customize
	overdue_at_lost_loan	fulfillment	true	Create overdue charges	-	-	Customize
	prefer_doc_delivery_f	fulfillment	false	when both P to D and E t	-	-	Customize
	remember_last_loan	fulfillment	false	Determine if the loan wor	-	-	Customize
	results_best_location	fulfillment	false		-	-	Customize
	rs_auto_request_lend	fulfillment	false		-	-	Customize
	rs_default_digitization	fulfillment			-	-	Customize
	rs_default_pickup_loc	fulfillment			-	-	Customize
	should_anonymize_it	fulfillment	false	Should returned loans be	-	-	Customize
	uresolver_display_cz	fulfillment	true	Should the packages in \	-	-	Customize

Figure 70 – Customer Parameters Mapping Table Page - Fulfillment

- 2 Click **Customize** for the following settings and configure them as indicated:
 - rs_auto_request_lending = *true*
 - rs_default_digitization_department = <name of digitization department to which resource is to be moved>
 - rs_default_pickup_location = <library code.location code of the pickup location for the resource>

Note: If **rs_auto_request_lending** = *false*, automatic location cannot be performed.

To configure resource sharing library information when automatic location is configured:

- 1 On the Organization Unit Details page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Library > Opening Hours**, select the **Summary** tab), select **Is Resource Sharing Library**. The Resource Sharing Information section fields display.

Organization Unit Details

Organization Unit Name: Main Campus Organization Unit Type: Institution Path: EXLDEV1.EXLDEV1_INST

Summary Contact Information Calendar Management

General Details

Organization Unit Name: Main Campus Path: EXLDEV1.EXLDEV1_INST

Code: EXLDEV1_INST

Description: Main Campus

Default Location for Acquisition: [Dropdown] Campus: [Dropdown]

Is Resource Sharing Library: ☒

Resource Sharing Information

Cancel request on locate failure: ☐

Automatically Locate Resource: ☐

ISO Symbol: [Text Field]

Figure 71 – Organization Unit Details Page

- 2 Select **Cancel request on locate failure** to cancel the resource sharing request if the resource is not located (or if more than one resource is located). In such a case, the request's status is **Cancelled**. If this option is not selected, **Request Status=Lending Request** and **Locate Status=Resource Not Located**.

The **Automatically locate resource** field is currently not in use.

- 3 Enter an ISO Symbol in the **ISO symbol** field to indicate that the library works with ISO.
- 4 Click **Save**.

When the lending request is received, if there is a single request that fulfills the request, the following occurs:

- **Physical item** – Alma checks the requested format:
 - Physical – **Shipped Physically** request is created
 - Digital – **Shipped Digitally** request is created
- **Electronic item** – Alma checks the requested format:
 - Physical - If **Allow Other Format** is selected on the Resource Sharing Lending Request page (**Fulfillment > Resource Sharing > Lending Requests**, click **Edit** for a request): A **Document Delivery** request is created. If **Allow Other Format** is not selected, the **Locate** process fails.
 - Digital – A **Document Delivery** request is created

When both a physical and electronic item are located, Alma checks the requested format:

- Physical – A **Move** request is placed on the physical item.
- Digital – On the CustomerParameters mapping table (**Fulfillment > Fulfillment Configuration > Configuration Menu > General > Other Settings**), if **prefer_doc_delivery_from_e-resources = true**, Alma converts the electronic item to digital format. If **prefer_doc_delivery_from_e-resources = false**, Alma converts the physical item to digital format.

Enhanced Inventory Management for Multiple Resource Sharing Libraries

Description

The purpose of this enhancement is to provide increased capabilities for managing the inventory of multiple resource sharing libraries. You can define which libraries serve the various resource sharing libraries.

Technical Instructions

The following roles can access this facility:

- Fulfillment Administrator
- General System Administrator

To link a resource sharing library with a regular library:

- 1 On the Fulfillment Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu**), ensure that a resource sharing library is selected in the **You are configuring** filter at the top of the page.
- 2 Open the Organizational Units Relations Setup page (**Library > Relationships**) and select the **Supply From** check box for the library from which you want the resource sharing library to accept items. By default, **All** is selected, indicating that the resource sharing library accepts items from all libraries.

The screenshot shows the 'Organizational Units Relations Setup' page. At the top, it says 'You are configuring: Resource Sharing Library'. Below this is a 'Library Relations' section with a 'Relation Type' dropdown set to 'All' and an 'Add Relation' button. The main part of the page is a table with columns: Name, Description, Deliver To, Circulate For, Acquire For, Supply From, and Note. There are two rows in the table. The first row has 'BURNS' in the Name column and a checked checkbox in the Supply From column. The second row has 'All' in the Name column and an unchecked checkbox in the Supply From column. A red rectangle highlights the 'Supply From' column header and the checkboxes in the two rows. At the bottom of the table is a 'Remove Relation' button.

☐	Name	Description	Deliver To	Circulate For	Acquire For	Supply From	Note
☐	BURNS	-	☐	☐	☐	☒	-
☐	All	-	☐	☐	☐	☐	-

Figure 72 – Organizational Units Relations Setup Page — Supply From Column

On the Resource Sharing Lending Requests Task List page (**Fulfillment > Resource Sharing > Lending Requests**), the Availability information displays only the libraries for which you have configured a **Supply From** relationship with the resource sharing library. Similarly, only the libraries for which you have configured a **Supply From** relationship display on the Manage Resource Options page when clicking Manage Fulfillment Options for a lending request.

Other Resource Sharing Enhancements

- Alma now interprets the time zone in NCIP messages as the institution's time zone

Analytics

The following section describes the functions provided for Analytics in the December 2013 release of Alma.

Addition of Physical Item Details Dimension to the Fulfillment Subject Area

Description

The purpose of this enhancement is to provide information regarding physical item details as part of the Fulfillment subject area.

Technical Instructions

The Design Analytics role can access this enhancement.

To access the Physical Item Details dimension in Alma Analytics:

- 1 Access Alma Analytics (**Administration > Analytics > Design Analytics**).
- 2 Select **New > Analysis**.

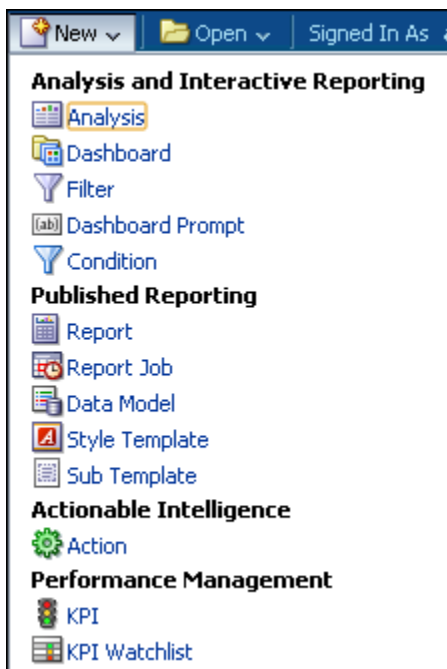


Figure 73 – New > Analysis Option

The Select Subject Area options are displayed.

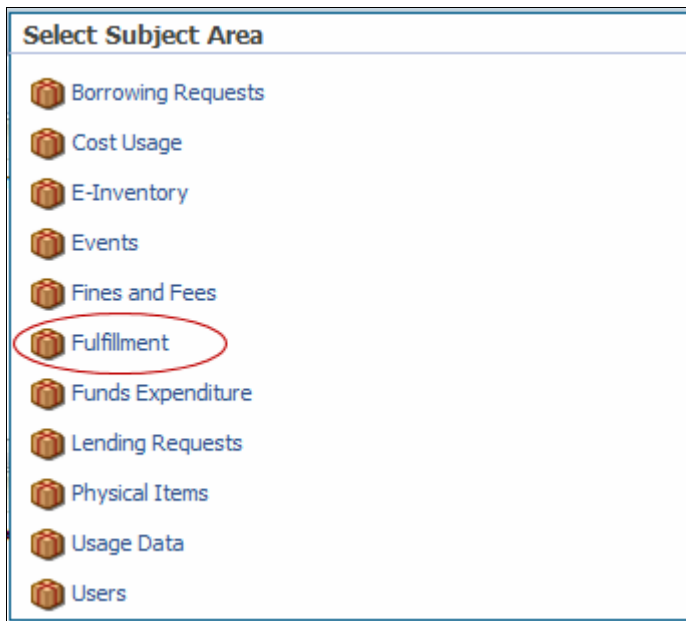


Figure 74 – Select Subject Area

3 Select **Fulfillment** > **Physical Items**.

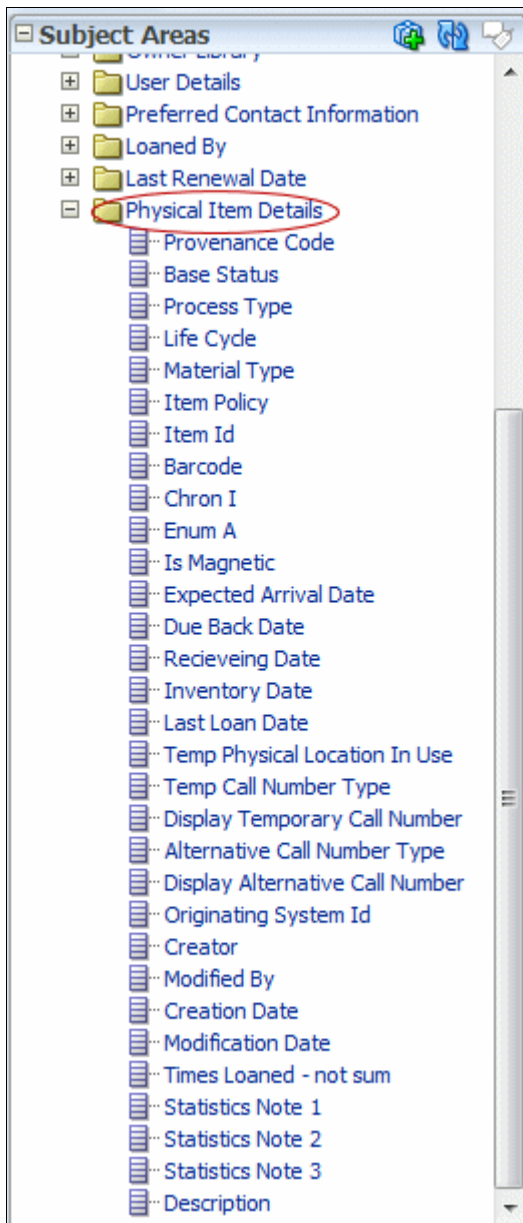
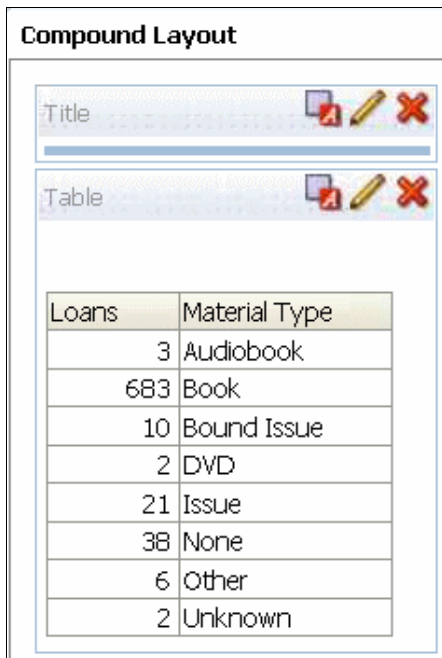


Figure 75 – Fulfillment Physical Item Details

The following is an example of a report using the Physical Item Details dimension:



The screenshot shows a 'Compound Layout' window. It has a 'Title' field at the top and a 'Table' section below it. The table has two columns: 'Loans' and 'Material Type'. The data rows are as follows:

Loans	Material Type
3	Audiobook
683	Book
10	Bound Issue
2	DVD
21	Issue
38	None
6	Other
2	Unknown

Figure 76 –Physical Item Details Report

Missing Items Report

Description

The Missing Items Report is a new, out-of-the-box, preconfigured report that can be created to display items missing from the library. The Items per Title column indicates the number of items/copies owned by the library that are missing.

Technical Instructions

The Design Analytics role can access this report.

To access the Missing Items report in Alma Analytics:

- 1 Access Alma Analytics (**Administration > Analytics > Design Analytics**).
- 2 Open the Inventory Reports (**Open > Shared Folders > Alma > Inventory > Reports**), select **Missing Items**, and click **OK**. The Missing Items Report is displayed.

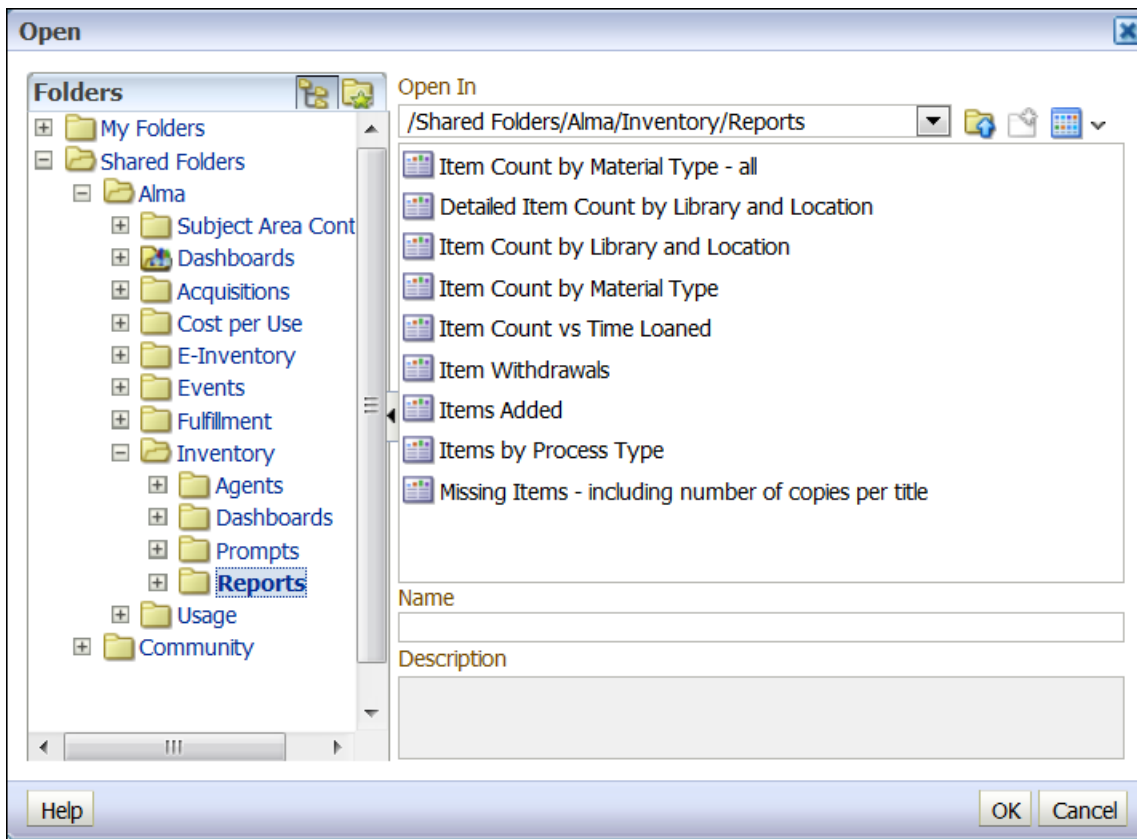


Figure 77 – Inventory Reports

Alma Analytics					
Missing Items - including number of copies per title		Search	All	Advanced	Help
Missing Items - including number of copies per title		Home	Catalog	Dashboards	New
Missing Items - including number of copies per title		Open	Signed In As	ext_support	
Title	Author	MMS Id	Barcode	Process Type	Items per Title
"Partly laws common to all mankind": foreign law in American courts /	Waldron, Jeremy.	99176752990001161	1	Missing	4
2012 supplement, Constitutional Law, seventeenth edition /	Sullivan, Kathleen M., 1955-	99199680900001161		Missing	6
A woman under the influence		99187929390001161	11719020611408	Missing	10
A concise history of the Spanish Civil War.	Jackson, Gabriel.	99186107850001161	11719013201548	Missing	2
A cultural history of Tibet	Snellgrove, David L.	99185830000001161	11719018232654	Missing	2
A cultural history of fashion in the twentieth century : from the catwalk to the sidewalk /	English, Bonnie.	99194610990001161	11719026900441	Missing	1
A feminist companion to Paul /		99190018990001161	11719023820089	Missing	1
A formal model of visualization in computer graphics systems /	Onodera, Tamiya, 1959-	99181798630001161	11719015235528	Missing	1
A fragile relationship : the United States and China since 1972 /	Harding, Harry, 1946-	99176378240001161	11719021779071	Missing	1
A grammar of Akkadian /	Huehnergard, John.	99192178140001161	11719019951898	Missing	2
A history of Christian-Latin poetry from the beginnings to the close of the Middle Ages.	Raby, Frederic James Edward, 1888-	99184107810001161	11719016612899	Missing	2
A long way gone : memoirs of a boy soldier /	Beah, Ishmael, 1980-	99177711760001161	11719027970088	Missing	1
A photometric atlas of the spectrum of Arcturus [lambda]3600-8825 Å	Griffin, R. F. (Roger Francis)	99189101570001161	11719000037665	Missing	1
A preface to Chaucer; studies in medieval perspectives.	Robertson, D. W. 1914-1992. (Durant Waite),	99190392760001161	11719014146627	Missing	5
A secure base : clinical applications of attachment theory /	Bowlby, John.	99189960400001161	11719024534606	Missing	1
A short history of astronomy, from earliest times through the nineteenth century.	Berry, Arthur, 1862-	99181452000001161	11719000025413	Missing	2
A study in John Wesley's doctrine of baptism in the light of current interpretations [microform] /	Cho, Chong Nahm, 1927-	99180059420001161	Q451441	Missing	1
A treatise on universal algebra, with applications.	Whitehead, Alfred North, 1861-1947.	99192261680001161	11719011373323	Missing	2
ADDING A PHYSICAL ITEM.	LOG, KATE.	99200299040001161		Missing	1

Figure 78 – Missing Items Report

Other Analytics Enhancements

- The Analytics Web service has been replaced with a new Web service that supports the retrieval of data in several chunks. Documentation of the new Web service is available from the Alma Developers page (under **Administration > General Configuration > Alma Developers**) in Alma.
- The total and remaining amounts for fine and fee report in Alma Analytics are now calculated correctly.

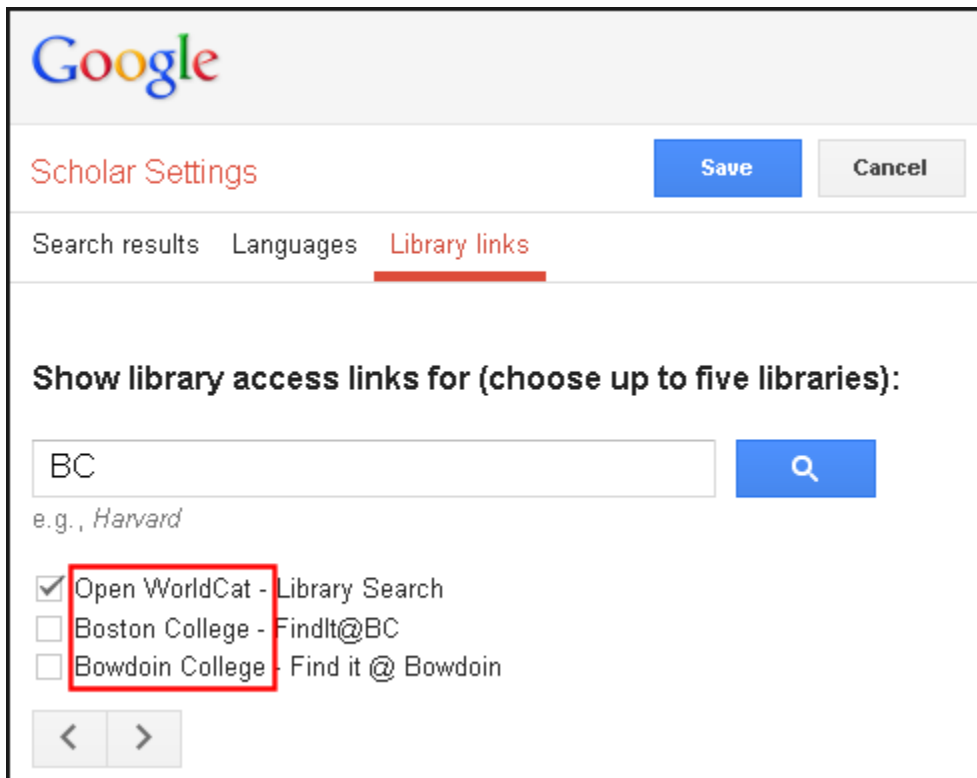
Integrations with External Systems

The following sections describe the functions provided for integrations with external systems in the December 2013 release of Alma.

Display Name for Google Scholar Registration

Description

The purpose of this enhancement is to allow customers to customize the name that displays in Google Scholar Settings for your library.



The screenshot shows the Google Scholar Settings interface. At the top is the Google logo. Below it, the title 'Scholar Settings' is displayed in red, with 'Save' and 'Cancel' buttons to its right. A navigation bar contains three tabs: 'Search results', 'Languages', and 'Library links', with the latter being the active tab. The main content area is titled 'Show library access links for (choose up to five libraries):'. Below this title is a search input field containing 'BC' and a magnifying glass icon. A hint 'e.g., Harvard' is shown below the input. A list of three library options follows, each with a checkbox: 'Open WorldCat - Library Search' (checked), 'Boston College - FindIt@BC', and 'Bowdoin College - Find it @ Bowdoin'. A red rectangular box highlights the first option. At the bottom of the list are left and right arrow buttons.

Figure 79 – Google Scholar Settings Page

Technical Instructions

The following roles can access this enhancement:

- Repository Administrator
- Catalog Administrator
- General System Administrator

To publish electronic holdings to Google Scholar, you must configure the Publish electronic records to Google Scholar publishing profile and run it weekly to make sure that holdings information is accurate.

To customize the display name:

- 1 On the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**), click **Publishing Profiles** in the **Record Export** section. The Publishing Profiles page opens.
- 2 In the row that contains the **Publish electronic records to Google Scholar** profile, select **Actions > Edit**. For standard configurations, the Publishing Profile Details page opens and displays the Registration Parameters section.

Publishing Profile Details		Cancel	Save
Profile name *	Publish electronic records to Google Scholar		
Profile description	Publish electronic records to Google Scholar		
Status	☒ Active ☐ Inactive		
Scheduling	Not scheduled		
Registration Parameters			
Display name (institution name will be used as default)			
keywords(1)			
keywords(2)			
keywords(3)			
keywords(4)			
keywords(5)			
Label of resolver links (when article exists electronically)			
Label of resolver links (when article does not exist electronically)			
OpenURL base			
Patron IP range (enter up to 256 IP ranges, semicolon separated, e.g 123.12.12.1;122.10.10.1-123.10.10.80)			
Show resolver links only to users that come from your IP range?	☐ Yes ☐ No		
Contact Information for Technical Issue			
First Name			
Last Name			
E-mail address			
		Cancel	Save

Figure 80 – Example Record Before Expansion

For multi-campus configurations, you must update the display name for each campus' profile.

- 3 Update the **Display name** field. If no display name is specified, the field defaults to the institution name.
- 4 Click **Save**.

Batch Set Management Tag for Publishing to Libraries Australia

Description

The purpose of this enhancement is to enable staff to run a batch job that marks whether a set of records should be synchronized with the Libraries Australia national catalog.

The following figure shows an example of a record that is marked for synchronization:

MARC Record Simple View			
Title	Cramming mystery phone charges.		
MMS ID	99118809860001021		
Originating system	ILS	Originating system ID	001647571-BCL01
Suppress from publishing	No	Synchronize with external system	No
Synchronize with national catalog	Yes	Brief record	No
Libraries Australia			
LDR 01237nam 22003017a 4500			
005 20010925170723.0			
006 m d f			
008 010925s1998 dcu s f000 0 eng d			
035 __ a (Aleph)001647571BCL01			
035 __ a (OCoLC)ocm48029265			

Figure 81 – Record Marked for Synchronization

Technical Instructions

The following roles can access this enhancement:

- Digital Inventory Operator
- Catalog Manager or Administrator
- Electronic Inventory Operator
- Repository Manager
- Requests Operator

To mark the records for synchronization:

- 1 On the Create Job - Select Job to Run page (**Administration > Manage Jobs > Run a Job**), select the **Marc 21 Bib normalization** filter option. The filtered jobs display in the list.

Create Job - Select Job to Run

Job List

Type: Marc 21 Bib normalization Find: in: All Go

1 2 3 1 - 10 of 45 Task Chains Tools

Name	Description	Content Type	Type
test1	test1	Bibliographic title	Marc 21 Bib normalization
Synchronize MMS with national catalog	Mark MMS as synchronized or non-synchronized with national catalog	Bibliographic title	Marc 21 Bib normalization
Process Phys001GGT	GGT	Bibliographic title	Marc 21 Bib normalization

1 2 3 1 - 10 of 45 Task Chains Tools

Cancel Next

Figure 82 – Select Job to Run Page

- 2 From the filtered jobs list, select **Synchronize MMS with national catalog** and click **Next**. The Create Job – Select Set page opens.
- 3 Select the set that you previously created for the job and click **Next**. The Create Job – Enter Task Parameters page opens.

Create Job - Enter Task Parameters 1 2 3 4 5 Back Cancel Next

Task Parameters: MmsTagSyncNationalCatalog

Synchronize with External * ☐ Don't publish
Catalog? ☐ Publish Bibliographic records

Back Cancel Next

Figure 83 – Enter Task Parameters Page

- 4 Select one of the following options for the **Synchronize with External Catalog** field:
 - **Publish Bibliographic records** – Publish records to Libraries Australia.
 - **Don't publish** – Don't publish records to Libraries Australia.
- 5 Click **Next**.
- 6 Enter a process name, select the schedule, and click **Next**.
- 7 Review the process information provided on the Create Process – Review and Confirm page and click **Save**.

Other Integrations with External Systems Enhancements

- The following label changes have been made to the user interface:
 - The External Interfaces link on the General Configuration page (Administration > General Configuration > Configuration Menu) has been changed to **Integration Profiles**.
 - The External System List page has been changed to the **Integration Profile List** page.
 - The integration profile types have been changed to the following: **Finance** (formerly Payment), **OCLC Connexion**, **Z39.50 Server**, **Resolver Augmentation**, **Resolver Proxy**, **SMS Communication**, **SIS** (formerly User), **Online Payment** (formerly Fine Fees Payment).
- The **System (for Ex Libris' informational purposes)** field in the Bursar, LDAP, Finance, Online Payment, Self- Check, and SIS types of external system profiles is now mandatory. If you attempt to manually run an existing profile that does not have this field defined, you receive an error message indicating that you must first configure this field. Note that this issue does not affect scheduled jobs.
- A new scheduling option, **Every day at 07:00**, will be added to the Synchronize section of the SIS profile for the first December hot fix (December 29th). The scheduling option, **Every day at 18:00**, was added to the Finance profile (**Administration > General Configuration > Configuration Menu > External Systems > Integration Profiles**). Note that these times go according to the local time of your Data Center.
- For the SIS import/synchronization, there is a maximum limit of 50 XML files in one zip file and a maximum of 20 zip files for each import/synchronization.

Collaborative Networks and Multi-Campus Institutions

The following section describes Alma enhancements provided for collaborative networks and multi-campus institutions in the December 2013 release.

Central NZ Publishing to Primo

Description

The purpose of this enhancement is to enable a collaborative network to publish bibliographic and inventory information in a central manner directly from the NZ. This capability replaces the need of every member to publish centrally managed resources separately.

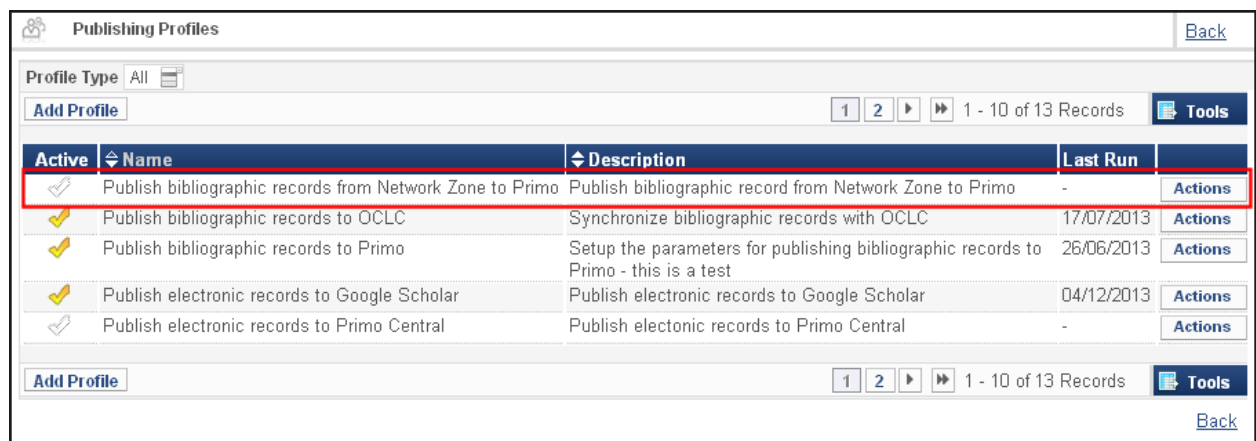
Technical Instructions

The following roles can access this enhancement:

- Repository Administrator
- General System Administrator

To add a publishing profile:

- 1 On the Resource Management Configuration page in Alma (**Resource Management > Resource Configuration > Configuration Menu**), click **Publishing Profiles** in the Record Export section. The Publishing Profiles page opens.



Active	Name	Description	Last Run	Actions
☒	Publish bibliographic records from Network Zone to Primo	Publish bibliographic record from Network Zone to Primo	-	Actions
☒	Publish bibliographic records to OCLC	Synchronize bibliographic records with OCLC	17/07/2013	Actions
☒	Publish bibliographic records to Primo	Setup the parameters for publishing bibliographic records to Primo - this is a test	26/06/2013	Actions
☒	Publish electronic records to Google Scholar	Publish electronic records to Google Scholar	04/12/2013	Actions
☒	Publish electronic records to Primo Central	Publish electronic records to Primo Central	-	Actions

Figure 84 – Publishing Profiles Page

- 2 In the row that contains the **Publish bibliographic records from Network Zone to Primo** profile, select **Actions > Edit**. The Publishing Profile Details page opens for the selected export type.

Publishing Profile Details [Cancel] [Save]

Profile Details

Profile name * Publish bibliographic records from Network Zone to Primo

Profile description Publish bibliographic record from Network Zone to Primo

Status ☒ Active ☐ Inactive

Scheduling Not scheduled

Run full publishing ☐

Submission Format

FTP configuration Sub-directory

Content Options

Related records information enrichment ☐

[Save]

Figure 85 – Publishing Profiles Details Page

- 3 Specify the following fields:
 - **Run full publishing** – If this option is selected, the system publishes all records, replacing previously published data. If this option is not selected, the system publishes records that have changed since the last time they were published. This includes bibliographic records that were added, updated, deleted, and linked to inventory records that changed.
 - **Scheduling** – From the drop-down list, select one of the predefined scheduling options.
 - **FTP configuration** – By default, the publishing process places the exported files in a directory that Primo uses to harvests the files. This field specifies a predefined profile that contains the FTP information. If the transfer fails, the system includes a link to the published files in the publishing report.

From the drop-down list, select the name of a predefined S/FTP connection.
 - **Sub-directory** – The subdirectory in which the exported files are placed.

- **Related records information enrichment** – Indicates whether related record information is included with the bibliographic records.
- **Status** – Select **Active** to schedule the job.

4 Click **Save**.

Support Ability to Assign Specific Available For as Part of an EOD/Repository Metadata Import

Description

This enhancement allows libraries to assign specific Available For groups to electronic inventory in multi-campus or collaborative network environments. Available For groups can now be designated in EOD loads.

Available For groups can be added to an import profile on the Resource Management configuration interface.

Technical Instructions

The following roles can access this feature:

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

To access this feature:

- 1 On the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**) or Acquisitions Configuration page (**Acquisitions > Acquisitions Configuration > Configuration Menu**), click the **Import Profile** link under **Record Import**. The Run Import page opens with a list of existing profiles and an Add New Profile button.
- 2 To create a new profile with Available For in its parameters, click the **Add New Profile** button, select **Repository** for type, and enter values for each step until you reach the Inventory Information step.

To add an Available For parameter to an existing profile, find the profile in the list, select **Actions > Edit**, and then select the **Inventory Information** tab.

- 3 If it is not already selected, select **Electronic** under the Inventory Operations heading. The page reloads to include E-Book Mapping fields. Any campus groups or consortium member groups that your network or institution has configured appear in the **Default Available for** drop-down field (see [Figure 86](#)).

Import Profile Details 1 2 3 4 5 6 Back Cancel Save Draft Save

Profile Type Repository

Inventory Operations

☒ Electronic ☐ Physical ☐ None ☐ Mixed

E-Book Mapping

Material type Book

Extract access URL subfield

from field

Extract provider subfield

name from field

Interface name

Available for field 959subfield j

Default Available for Hyde Park

Authentication note

Andersonville

Hyde Park

North Campus

Downstate

Enable proxy False

Activate resource

Library subfield Default library

Back Cancel Save Draft Save

Figure 86 – Available For Mapping Field and Default Drop-Down

- 4 Enter the **Available for field** used by the import file to indicate which groups have the resource available to them.
- 5 Select an entry from the **Default Available for** drop-down list to designate a group in case the file does not contain the Available For group information.

When an import job is run using this profile, the Available For specifications follow the entries directed here.

Other Collaborative Network and Multi-Campus Institution Enhancements

- Consortia can now configure an environment in which each member institution can share electronic resources at the campus/library level. For detailed information, refer to the **Multi-Campus Support for Google Scholar/Primo Central Publishing** enhancement in the Alma November release notes.

Alma Resolver

The following sections describe Alma Resolver enhancements provided in the December 2013 release.

Electronic Services Page (UResolver Screen) Enhanced to Include Metadata Information

Description

The purpose of this enhancement is to provide additional information on the Electronic Services page (previously the UResolver Screen). With the December release, metadata information is included in the display of information on the Electronic Services page when you click **View It** for a resource in the search results list.



Figure 87 - Metadata Displays on the Electronic Services Page

The following metadata, when available, is displayed for a book:

- Book title
- ISBN
- Author last name
- First name (or initials)
- Year information

The following metadata, when available, is displayed for a journal:

- Journal title
- ISSN
- Year

Enhanced Message Capability for Electronic Services (UResolver Screen)

Description

The purpose of this enhancement is to display a “No Full Text Services” message on the Electronic Services page when no full text services are available for the OpenURL request (see [Figure 88](#)). The wording of this message may be customized to match your requirements (see [Figure 89](#)).

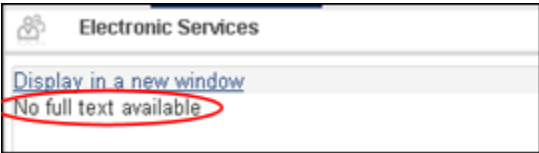


Figure 88 - No Full Text Available Message

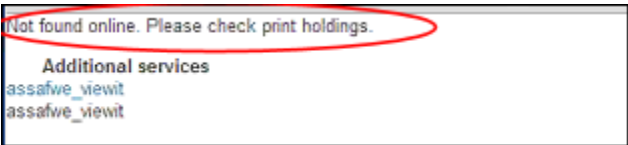


Figure 89 – Customizable Message Displays When No Full Text Is Available

Technical Instructions

The following roles can customize the wording of the no full text message:

- Fulfillment Administrator
- General System Administrator

To customize the wording for the no full text message:

- 1 On the Fulfillment Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu**), click **Labels** under **Discovery Interface Display Logic**. The Discovery Interface Labels code table page opens.
- 2 Locate the row with `c.uresolver.emptyList` in the Code column.

<code>ui.set_member.remoteDeliverySystem</code>	Remote Delivery System	Remote Delivery System	Customize
<code>c.uresolver.emptyList</code>	No fulltext available	No fulltext available	Restore

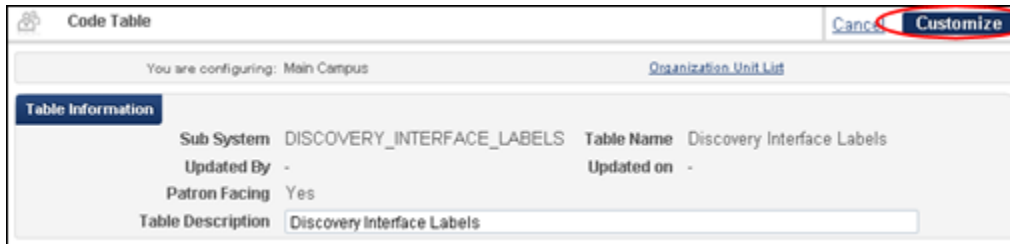
Figure 90 - c.uresolver.emptyList Code Table Option

- 3 Click the **Customize** button for this row. The Description column for the row opens for you to enter your customized message text.

- 4 Enter the text you want to display on the Electronic Services page when no full text is available.

Note: If you prefer that no message be displayed when no full text is available, leave this option blank.

- 5 Click the page **Customize** button.



The screenshot shows a web interface for configuring a 'Code Table'. At the top, there's a header bar with a gear icon, the text 'Code Table', and two buttons: 'Cancel' and 'Customize'. The 'Customize' button is circled in red. Below the header, there's a section 'You are configuring: Main Campus' with a link 'Organization Unit List'. A 'Table Information' tab is selected, showing details for the 'Discovery Interface Labels' table. The details include: Sub System (DISCOVERY_INTERFACE_LABELS), Table Name (Discovery Interface Labels), Updated By (-), Updated on (-), Patron Facing (Yes), and Table Description (Discovery Interface Labels).

Table Information	
Sub System	DISCOVERY_INTERFACE_LABELS
Table Name	Discovery Interface Labels
Updated By	-
Updated on	-
Patron Facing	Yes
Table Description	Discovery Interface Labels

Figure 91 - Page Customize Button

Known Issues

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

For details, you can read the following:

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

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

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

Fixes

The following known issues that were identified have been fixed:

- The coverage and embargo group settings (for a multi-campus environment) do not appear in Primo when clicking View It for a portfolio with these group settings.
- The demerits job that removes blocks caused by demerits does not run automatically. In order to run the job, contact Ex Libris Support and place a request to have the demerits job run.