



Alma July 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 July 2013 Release Highlights](#)
- [Alma July 2013 Documentation Highlights](#)
- [Access to July 2013 Features](#)
- Feature/enhancement descriptions for the respective Alma components and functional areas
 - [Data Services](#)
 - [Alma Show Me How](#)
 - [Acquisitions](#)
 - [Resource Management](#)
 - [Fulfillment](#)
 - [User Management](#)
 - [Resource Sharing](#)
 - [Analytics](#)
 - [Primo](#)
 - [System](#)
- [Known Issues](#)

Alma July 2013 Release Highlights

Acquisitions

- Global PO Line Changes

The purpose of this enhancement is to provide the ability to process PO line changes in a batch mode using record sets. To support this, the Acquisitions menu has a new section labeled **Processes and Sets**.

- EDI Management Enhancements

This new development enables enhanced management capabilities for EDI files. For example, when viewing EDI files, it is now possible to search for a specific file using **Find**.

Resource Management

- Tools for Managing Physical Holdings

This enhancement provides tools for managing holdings records and their content, such as deleting a holdings record that does not have any items and moving items from one holdings record to another.

- Staff Search Available For Enhancements

Staff search **Available for** enhancements are relevant for institutions working in a multi-campus environment. The **Available for** facility is relevant for electronic inventory where the multi-campus setting has been implemented.

- Local Extensions to Bibliographic Records in the Network Zone

This enhancement provides the ability to add and edit local extensions to a bibliographic record that is maintained in the Network Zone (NZ). Local extensions provide a place for entering local information while maintaining the integrity of the original and ongoing updated versions of the NZ record for other NZ members. A very nice feature of this new function is the display of the library icon on the local field line.

Fulfillment

- Booking

The July release provides support for booking functionality. Bookings can be made either by the patron in Primo, or by the staff user in Alma. Alma allows for flexible configuration

options with relation to elements such as how far in advance bookings can be made, if an item can be booked, booking preview and release times, maximum booking time, and more. For more information, refer to the Alma online help (in the *Booking* section under *Fulfillment*) or the *Alma Fulfillment* guide available with the new release scheduled for 21-July-2013.

- **Send Loan Receipt**

This enhancement allows the automatic printing of loan receipts at a circulation desk printer or automatically sends the receipts to the user's preferred email address. If patrons use a self-check machine to borrow materials, the loan receipts are sent to their preferred email addresses. In addition, it is possible to customize information that prints on the loan receipt and to send a receipt manually.

- **Patron Limit on Overdue Recalled Loans**

This enhancement provides the ability to configure the maximum number of overdue recalled loans that a patron can have before a block is triggered when a new loan or renew action is attempted. It is possible to define the type of block (loan, renewal, or both).

- **Processing Transactions for Off-Line Self-Check Machines**

Improvements have been made to the processing of transactions that are performed at a self-check machine while connectivity between Alma and the self-check machine is down. When connectivity resumes, the self-check machine automatically sends SIP2 messages to Alma for all of the transactions that have been performed while off-line. Alma processes these SIP2 messages accordingly. Previously, Alma would only receive this information if it was loaded through the off-line circulation mechanism.

User Management

- **External System Export User Options Enhancement**

The purpose of this enhancement is to provide the ability to use either a block or a fine/fee threshold for exporting users.

Resource Sharing

- **Facets for Lending and Borrowing Request Lists**

Facets are now supported for the Lending and Borrowing Requests lists. Previously, results could be filtered rather than faceted.

- Rejecting Lending Requests

This enhancement enables the lending institution to reject a request from a patron. When rejecting a request, staff can provide a rejection reason and also enter a free text explanation, if desired. This information is displayed in the request's **Notes** tab. Linked to this enhancement is a further enhancement that allows the borrowing institution to manually inform a patron that the lending request has been rejected. When a lending request is rejected using an ISO protocol, the reject message is sent automatically.

Primo

- Allow Display Logic Rules Between View It and Get It Services

Previously, it was possible to define display logic rules between Get It services and between View It services. It is now possible to define rules combining Get It and View It services. For example, you can configure Alma to hide resource sharing requests (Get It service) when full text (View It service) is available for the item.

Alma July 2013 Documentation Highlights

In addition to ensuring that the documentation remains current and includes all of the recent features that have been developed, over the course of the past couple of months, we have added documentation, or improved upon the existing documentation, in the following key areas:

Acquisitions:

- Explanation of PO line workflow and inventory created (under Purchasing > Purchasing Workflow)
- Explanation of the various PO line statuses (under Purchasing > Searching for PO Lines)
- Update of fiscal period closure documentation and inclusion of online video (under Advanced Tools > Rolling Over PO Lines)
- Overview of exporting/importing invoices to the ERP (under Integrations with External Systems > Acquisitions)

Resource Management:

- Improvement of Inventory section (under Inventory)
- Addition of Performing Withdrawals section (under Inventory > Managing Physical Resources)
- Overview and explanation of processes in Alma (under Processes)
- Explanation of authorities in Alma (under Metadata Management > Working with Authority Records)
- List of external resources in Alma (accessible directly from the Table of Contents in the online help)

Fulfillment:

- Improvement of the Resource Sharing section (under Resource Sharing)
- Improvement of the Course Reserves section (under Courses and Reading Lists)
- Addition of Lost Loan Management section (under Circulation Desk Operations > Managing Patron Services > Loaning Items)
- Improvement of the Configuration of Policies, Terms of Use, and Fulfillment Units section (under Configuring Fulfillment)

User Management:

- Updated table describing all the user roles and the accessible Alma components for each role (under General > User Management > User Roles)
- Overview of User Management in Alma (under General)

Analytics:

- Creating a report for two subject areas (Analytics – Subject Area Descriptions)

Other Enhancements:

- Addition of the Analytics and Alma-Primo guides to the online help
- Addition of Alma hotkeys/shortcuts to the online help

We have also included many How To documents and presentations under Alma > Product Documentation. These serve to augment the main Alma documentation.

In the upcoming months, we will continue to improve the documentation based on the feedback we have received to date. If you have specific comments, please feel free to send us emails via the Alma online help or directly to Documentation.Team@exlibrisgroup.com.

Access to July 2013 Features

Note: Refer to the Technical Instructions section for each feature in these release notes for information that describes the roles needed.

Feature	No Activation/ Setup Required (Note: Automatically visible to all users with the appropriate user role/permission)	Activation/ Setup Required	Visible to Administrator Only	Contact Ex Libris to Activate This Feature
Acquisitions: PO Lines Rollover per Library				
Acquisitions: Global PO Line Changes (Batch Process)				
Acquisitions: EDI Management Enhancements				
Resource Management: Tools for Managing Physical Holdings				
Resource Management: Staff Search Available For Enhancements				

Feature	No Activation/ Setup Required (Note: Automatically visible to all users with the appropriate user role/permission)	Activation/ Setup Required	Visible to Administrator Only	Contact Ex Libris to Activate This Feature
Resource Management: Local Extensions to Bibliographic Records in the Network Zone				
Fulfillment: Allowing Renewals If Patron Limits are Reached				
Fulfillment: Patron Limit on Overdue Recalled Loans				
Fulfillment: Send Loan Receipt				
Fulfillment: Processing Transactions for Off-Line Self-Check Machines				
User Management: External System Export User Options Enhancement				
Resource Sharing: Lending and Borrowing Request Lists Display Facets Instead of Filters				
Resource Sharing: Support for Unfulfilled Lending Requests				
Resource Sharing: Support for Unfulfilled Lending Requests by the Borrowing Institution				

Feature	No Activation/ Setup Required (Note: Automatically visible to all users with the appropriate user role/permission)	Activation/ Setup Required	Visible to Administrator Only	Contact Ex Libris to Activate This Feature
Analytics: Physical Item Description Exposed in Analytics				
Primo: Allow Display Logic Rules between View It and Get It Services				
System: IE9 Browser Support				
System: Attachments Processing Enhanced				
System: Persistent Login				

Data Services

The Alma July 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 12-June-2013 through 16-July-2013:

- Chadwyck PAO Periodicals Archive Online Collection 10
- CRKN Royal Society of Chemistry Journals
- de Gruyter eBooks Philosophy 2012-2013
- EBSCOhost Business Continuity & Disaster Recovery Reference Center
- EBSCOhost Engineering Source
- EBSCOhost Risk Management Reference Center
- Highwire Press British Medical Journal Quality
- Karger Journal Archive Collection Internal Medicine 2
- Karger Journal Archive ORL, Ophthalmology, Dental Medicine, Obstetrics, Gynecology and Psychology, Psychiatry
- Metapress Alliance for Children and Families
- Metapress Lyceum Books, Inc.
- Metapress Pediatric Endosurgery Group, Bangladesh
- Metapress Pennsylvania State System of Higher Education and the Frederick Douglass Institute Collaborative
- Metapress Practical Action Publishing
- Metapress Project Innovation
- Metapress Blay Publishers LLC
- ProQuest Library Science New Platform
- ProQuest PAO Periodicals Archive Online Collection 0
- ProQuest PAO Periodicals Archive Online Collection 1
- ProQuest PAO Periodicals Archive Online Collection 1 Update

- ProQuest PAO Periodicals Archive Online Collection 10
- ProQuest PAO Periodicals Archive Online Collection 2
- ProQuest PAO Periodicals Archive Online Collection 2 Update
- ProQuest PAO Periodicals Archive Online Collection 3
- ProQuest PAO Periodicals Archive Online Collection 3 Update
- ProQuest PAO Periodicals Archive Online Collection 4
- ProQuest PAO Periodicals Archive Online Collection 4 Update
- ProQuest PAO Periodicals Archive Online Collection 5
- ProQuest PAO Periodicals Archive Online Collection 5 Update
- ProQuest PAO Periodicals Archive Online Collection 6
- ProQuest PAO Periodicals Archive Online Collection 7
- ProQuest PAO Periodicals Archive Online Collection 8
- ProQuest PAO Periodicals Archive Online Collection 9
- ProQuest PAO Periodicals Archive Online English Literature Collection
- ProQuest PAO Periodicals Archive Online Historical Studies Collection
- ProQuest PAO Periodicals Archive Online History Collection
- ProQuest PAO Periodicals Archive Online JISC Collection
- ProQuest PAO Periodicals Archive Online Liberal Arts Collection
- ProQuest PAO Periodicals Archive Online New Platform
- ProQuest PAO Periodicals Archive Online Philosophy & Religion Collection
- ProQuest PAO Periodicals Archive Online Spanish Language Collection
- SAGE Reference Online 2013 Encyclopedia Collection
- SAGE Reference Online 2013 Handbook Collection
- Spandidos
- Taylor & Francis Open Access
- Toyokeizai Digital Contents Library
- University Press Scholarship Online Education

Alma Show Me How

The following sections describe Alma Show Me How for the July 2013 release of Alma.

Alma Show Me How – July

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 July release, the following Show Me How scenarios are available:
 - Create PO Line Set Using Advanced Search
 - Customize Loan Receipt Letter
 - Send or Print Loan Receipts
 - Patron Limit on Overdue Recalled Loans
 - Allowing Renewals if Patron Limits are Reached
 - Move Items between Holding Records
 - Facets in Lending and Borrowing Requests List

Acquisitions

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

PO Lines Rollover per Library

Description

The purpose of this enhancement is to provide the ability to rollover PO lines per library. Previously, rolling over of PO lines could be done only per institution.

Technical Instructions

The following roles can access this facility:

- Acquisitions Administrator
- Fiscal Period Manager

To configure PO Line rollover per library:

- 1 From the Alma main menu > Acquisitions > Advanced Tools > Rollover PO Lines, click **Add Job**. The Add Job pop-up window opens.

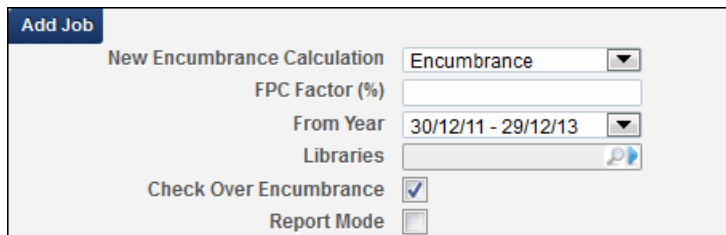


Figure 1 –Add Job Pop-up Window

- 2 Enter the job information as required. In the **Libraries** field, select a library affected by the PO line rollover.

If you do not select a value in the **Libraries** field, rollover is performed for the entire institution.

- 3 Click **Add** to add the job and continue creating other jobs, or **Add and Close** to add the job and close the pop-up window.

Global PO Line Changes (Batch Process)

Description

The purpose of this enhancement is to provide the ability to process PO line changes in a batch mode using record sets. A new section in the Alma main menu, **Acquisitions > Processes and Sets**, has been created to provide this capability. With batch processing, you can:

- Change a workflow step
- Change PO line fund distribution
- Update PO line information
- Cancel, close, and delete PO lines

When creating a PO line set, you can perform an advanced search for PO lines. The advanced PO line search enables you to perform a search using the following criteria:

- Workflow status
- Material supplier code
- Material supplier account code
- Access vendor
- Access provider code
- Acquisition Method
- Fund code
- Fund name
- License code
- Rush

Similar to the advanced repository search, you can save the search results as a set (**Save Query**) to be used later for batch processing.

You can also upload an itemized set of PO lines via an Excel file to perform global changes on all of the PO lines.

Technical Instructions

The following roles can process global PO line changes:

- Purchase Operator
- Purchase Manager

- Acquisitions Administrator
- General System Administrator

Any role that can access the **Manage Sets** option from the Alma main menu can access the PO lines advanced search and can load itemized sets of PO lines via Excel to perform global changes.

To process an advanced search and save a search results set:

- 1 From the Alma main menu > Acquisitions > Processes and Sets > Manage Sets, click **Add Set > Itemized** (or **Add Set > Logical**). The Set Details page displays.

Configure the fields in the General Information section, as described in the **Adding Itemized Sets** section of the *Alma Resource Management* guide.

- 2 Click **Advanced Search**.

The Advanced Search segment displays.

Figure 2 - Advanced Search Segment

- 3 Select the search logic (**Contains Keywords**, **Contains Phrase**, or **Is Empty**) from the drop-down list and enter your search terms or select from the drop-down lists as provided to create the advanced search.
- 4 Click **Go**.

The search results display.

Save Query

Simple Search

1 2 3 1 - 10 of 3,087 Records Tools

Advanced Search

Find in

WF status : Contains Keywords

Material vendor Contains Keywords

Material Vendor account Contains Keywords

Access vendor Contains Keywords

Access Vendor account Contains Keywords

Acquisition method Contains Keywords

Fund code Contains Keywords

Fund name Contains Keywords

License code Contains Keywords

Rush Contains Keywords

[Go](#)

Additional PO Line Reference ▼

In Review ▼

1 [01072012_064054 Barnes & Noble Library of Essential Reading , \[S.I.\] ; Barnes & Noble., 2005., 9780760765455 \(Paperback\) ISBN](#)

Order/ Line status: - / [In Review](#)

Assigned to: Shechter, Moshe (2012-08-01)

Type: Print Book - One Time Standard number: 9780760765455 (Paperback) Order/Line: - / [POL-27035](#)

Copies: General (3) Total price: 300.00 USD Funds: AutoQA Fund (33.33%)

Vendor/Account: O'niel Vendor reference ID: - Expected delivery: -

Receiving note: -

Mandatory information is missing or erroneous

[View](#) | [Go to task list](#)

2 [01072012_064321 Barnes & Noble Library of Essential Reading , \[S.I.\] ; Barnes & Noble., 2005., 9780760765455 \(Paperback\) ISBN](#)

Order/ Line status: - / [In Review](#)

Assigned to: Shechter, Moshe (2012-08-01)

Type: Print Book - One Time Standard number: 9780760765455 (Paperback) Order/Line: - / [POL-27037](#)

Copies: General (3) Total price: 300.00 USD Funds: AutoQA Fund (33.33%)

Vendor/Account: O'niel Vendor reference ID: - Expected delivery: -

Figure 3 - Advanced PO Line Search Results List

5 Click Save Query.

The Set Details page displays.

Cancel Save

Set Details

Set name -

Set type Logical

General Information

Set name *

Description

Note

Set content type *Po line

Private ☐ No ☒ Yes

Status ☒ Active ☐ Inactive

Created by Ex Libris

Status date 30/05/2013 24:28:23 AM IDT

Updated by Ex Libris

Figure 4 - Set Details Page

- 6 Complete the options for the Set Details page and click **Save**.

Your new set is saved to the list of sets on the Manage Sets page that displays.

Similar to the Manage Sets page for repository sets, there are tabs for My Sets, Public Sets, and All Sets. In addition, there is a filter option for PO lines. PO line sets can be managed with the new option **Acquisitions > Processes and Sets > Manage Sets**.

To upload an itemized set of PO lines:

- 1 From the Alma main menu > Acquisitions > Processes and Sets > Manage Sets, click **Add Set > Itemized**. The Set Details page displays.

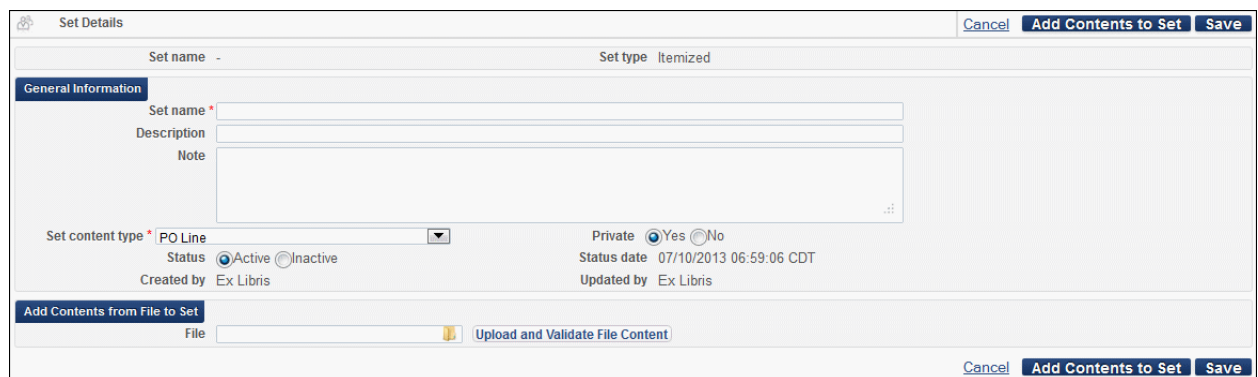


Figure 5 - Set Details Page

- 2 Configure the fields described in the General Information section of the Set Details page, as described in the **Adding Itemized Sets** section of the *Alma Resource Management Guide*.
- 3 In the **File** field, click Browse to locate an Excel file with a list of PO line reference numbers to be uploaded. The format of the Excel file must contain a column with the heading PO_LINE_REFERENCE, followed by the PO line reference numbers, as follows:

PO_LINE_REFERENCE
1902
13-0012407
13-0015495
13-0015504
14-0089662
14-0089663
14-0089664
13-0060147
13-0060148

Figure 6 – PO Line Upload Excel Format

Click **Upload and Validate Content** to upload the specified file.

To make global PO line changes:

- 1 From the Alma main menu > Acquisitions > Processes and Sets, click **Run Process**.
The Create Process – Select Process to Run page displays (the first step/page of the Create Process wizard).
- 2 Select a process from the following:
 - **Update PO Line Workflow** – Navigates to a specific stage in the workflow
 - **Update PO Line Transactions** – Modifies PO line allocation between funds
 - **Update PO Line Information** – Updates PO line information according to specified conditions
 - **Change PO Line Status** – Choose a status (**Cancel**, **Close**, or **Delete**) to which to change a set of PO lines
- 3 Click **Next**.
- 4 Select the PO line set (that was previously created and saved) and click **Next**.
- 5 Specify the task parameters.
 - For the **Update PO Line Workflow** process, select the workflow stage to which you want to proceed, or select **Save and Continue** to proceed one step ahead in the workflow.
 - For the **Update PO Line Transactions** process, select to change the PO line allocation percentage between funds, or to change the PO line allocation from one fund to another fund.
 - For the **Update PO Line Information** process, select the parameters and conditions by which to update the PO lines in the set. The check box to the left of the field must be selected for the parameter to take effect.
 - For the **Change PO Line Status** process, select a status to which to change the PO lines in the set. You can specify **Cancel PO Lines**, **Close PO Lines**, or **Delete PO Lines**.
- 6 Click **Next**.
- 7 Specify the process name and schedule and click **Next**.
- 8 Review your process settings and click **Save**.

EDI Management Enhancements

Description

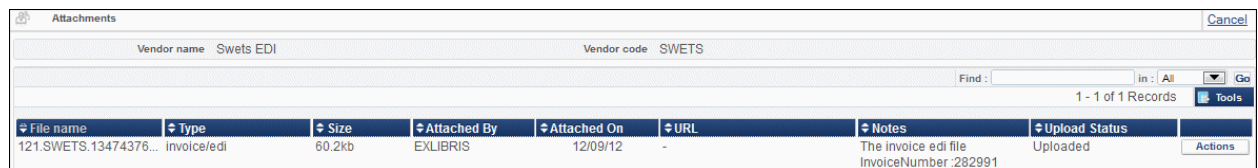
The purpose of this enhancement is to enable enhanced management capabilities of EDI files for EDI enabled vendors. When viewing EDI files, you can now search for a specific file via the **Find** box; and you can reload the EDI file to receive updated information instead of manually deleting the old EDI files (and their associated invoices) and then loading the new EDI file. Reloading the EDI file is needed in certain cases such as when the EOD is received after the EDI was already loaded.

Technical Instructions

The Vendor Manager role can access this capability.

To search for and reload EDI files:

- 1 From the Alma main menu > Acquisitions > Acquisitions Infrastructure > Vendors, locate an EDI enabled vendor.
- 2 Select **Actions > View EDI files**. The Attachments page displays, with the list of EDI files associated with the vendor.



File name	Type	Size	Attached By	Attached On	URL	Notes	Upload Status	Actions
121.SWETS.13474376...	Invoice/edi	60.2kb	EXLIBRIS	12/09/12	-	The invoice edi file InvoiceNumber :282991	Uploaded	

Figure 5 – Attachments Page

- 3 Optionally, you can search for an EDI file using the **Find** and **in** boxes. Click **Go**.
- 4 Select **Actions > Reload** to reload data into the EDI file.

Other Acquisitions Enhancements

- When adding a vendor, a warning message displays in either of the following scenarios:
 - If the **Liable for VAT** option is not selected and the invoice contains VAT.
 - If the **Liable for VAT** option is selected and the invoice does not contain VAT.
- Item policy information is now included in EDI order messages.

- The following information is now displayed on an item's print slip and spine label:
 - Accession Number
 - Copy ID
 - Permanent Location
 - Enum/chron
- The **Funds** option is now available as an alternative in the list of **Persistent Search** box options.
- Requests that have not yet begun the workflow (usually because the item is not yet available) now have the Process facet of **Requested** instead of **Undefined** (the previous facet) on the **Resource Request Monitoring** page.

Resource Management

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

Tools for Managing Physical Holdings

Description

The purpose of this enhancement is to provide tools for managing holdings records and their contents. This is accomplished with options to:

- Delete holdings records that do not have any items
- Move items from one holdings record to another holdings record

Technical Instructions

The following roles can access this facility:

- Repository Manager
- Physical Inventory Operator
- Purchasing Manager
- Purchasing Operator

To move items and delete holdings:

- 1 Complete a physical title or all titles search for something in the database with multiple holdings.

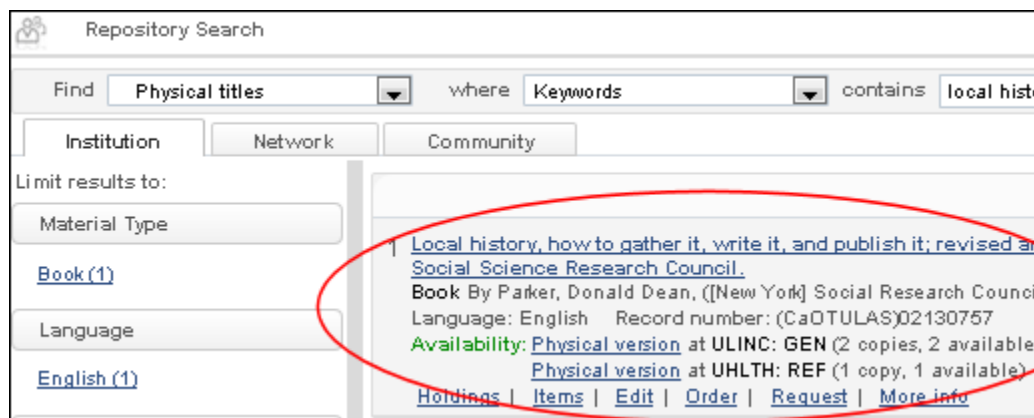


Figure 6 - Multiple Holdings

- 2 From the results list, click **Items**.

The List of Items page displays.

List of Items

Resource description [Local history, how to gather it, write it, and publish it; Parker, D. Council \[New York\] \[1944\]](#)

[View all holdings](#)

List of Items

Status All Library All Location All

[Move Items](#)

☐	Barcode	Library	Location	Call Number	Description	Temporal
☐	361-10	Main Library	General	-	-	No
☐	361-30	Medical Library	Reference	-	-	No
☐	361-20	Main Library	General	-	-	No

Figure 7 - List of Items Page

- 3 Select the item(s) to move and click **Move Items**.

List of Items

Resource description [Local history, how to gather it, write it, and publish it; Parker, Don Council \[New York\] \[1944\]](#)

[View all holdings](#)

List of Items

Status All Library All Location All

[Move Items](#)

☐	Barcode	Library	Location	Call Number	Description	Temporal
☐	361-10	Main Library	General	-	-	No
☒	361-30	Medical Library	Reference	-	-	No
☐	361-20	Main Library	General	-	-	No

Figure 8 - Select Item(s) and Click Move Items

The List of Holdings page displays.

List of Holdings							
List of Holdings							
Filter		All	Find :				
	ID	Library	Location	Call Number	Copy Id	Access Number	No. of Items
☐	224965330000121	Main Library	General	-	-	-	2
☐	224965360000121	Medical Library	Reference	-	-	-	1

Figure 9 - List of Holdings Page

4 Select the holdings location to which you want to move the items and click **Select**.

List of Holdings							
List of Holdings							
Filter		All	Find :				
	ID	Library	Location	Call Number	Copy Id	Access Number	No. of Items
☒	224965330000121	Main Library	General	-	-	-	2
☐	224965360000121	Medical Library	Reference	-	-	-	1

Figure 10 - Select a Holdings Location to Identify the Move to Location for the Item(s)

The List of Items page displays with an informational message to confirm what has been processed.

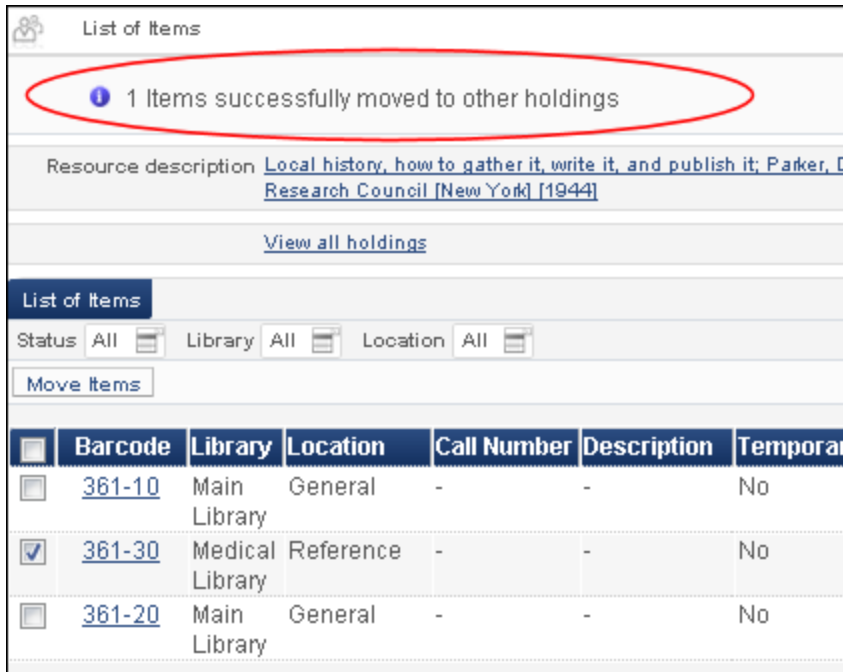


Figure 11 - Confirmation Message

- Click the **View all holdings** link.

The updated List of Holdings page displays.

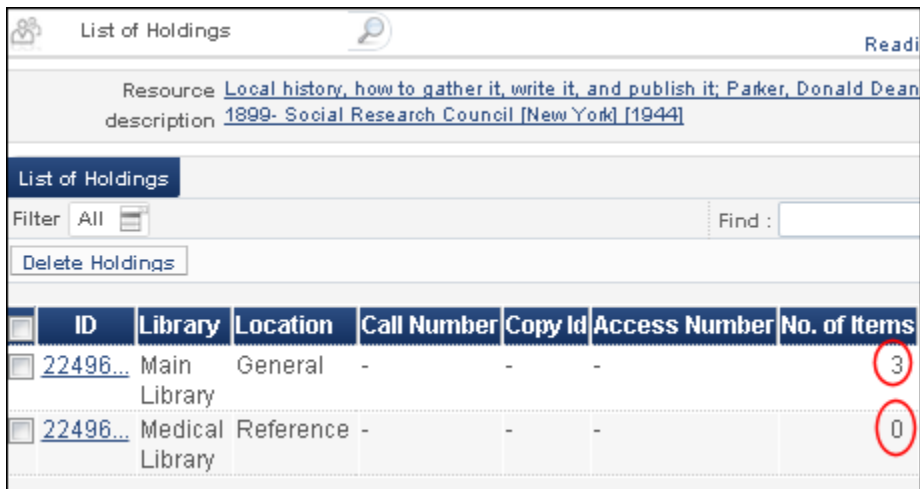


Figure 12 - View All Holdings Display

- To delete the Medical Library/Reference holdings with zero items, select that holdings (row) and click **Delete Holdings**.

Resource [Local history, how to gather it, write it, and publish it; Parker, Donald Dear](#)
description [1899- Social Research Council \[New York\] \[1944\]](#)

List of Holdings

Filter: All Find :

Delete Holdings

	ID	Library	Location	Call Number	Copy Id	Access Number	No. of Items
☐	22496...	Main Library	General	-	-	-	3
☒	22496...	Medical Library	Reference	-	-	-	0

Figure 13 - Select and Delete Holdings

- 7 When the delete confirmation pop-up window displays, click **Confirm**.

Confirmation Message

Please note the following:

i You are about to delete holdings. Only empty holdings will be deleted

Are you sure you want to perform this action?

[Cancel](#) **Confirm**

Figure 14 - Delete Holdings Confirmation Message

The List of Holdings page refreshes with an informational message regarding the change and the holdings record (Medical Library/Reference in this example) removed from the list.



Figure 15 – Informational Message and Updated List of Holdings

Staff Search Available For Enhancements

Description

The purpose of this enhancement is to provide an **Available for** facet with your search results and **Available for** advanced search options for electronic resources. The staff search **Available for** enhancements are specifically relevant to institutions that work in a multi-campus environment and for electronic inventory that has the **Available for** setting. Multi-campus inventory management is configured in Resource Management > Resource Configuration > Configuration Menu > General > Other Settings. For additional information, refer to the *Alma Resource Management* guide and the `multi_campus_inventory_management` option.

Technical Instructions

Any role can access this capability as long as the criteria are met for multi-campus support or Network Zone support.

To access the Available for facet capability:

- 1 Complete a search for electronic resources (collection, portfolio, or title).

The Repository Search page displays with the search results and your facet options to include the new **Available for** facet that lists all the libraries and campuses that are a part of the groups for which the electronic resources are available for. For additional information, refer to the *Alma Resource Management* guide.

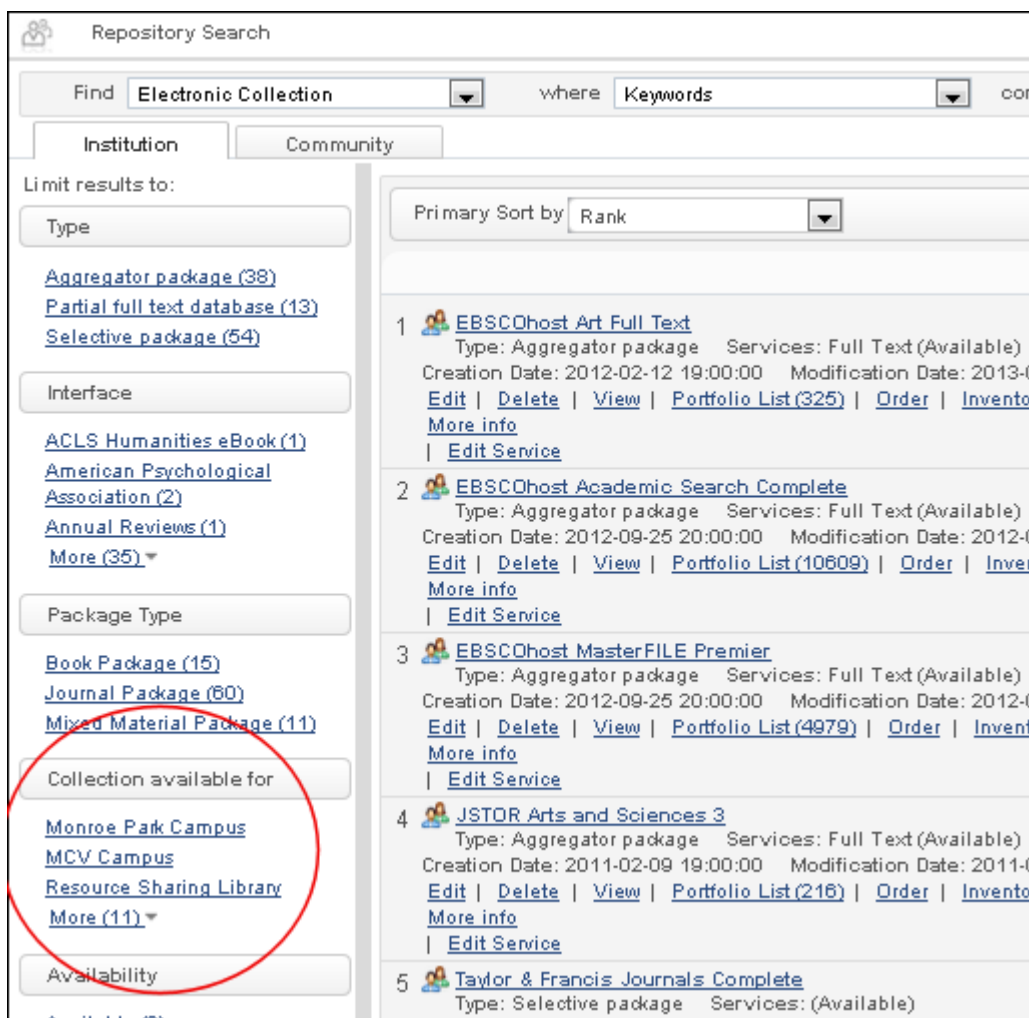


Figure 16 - Available For Facet

2 Click an **Available for** facet link.

The results list displays all of the electronic collections that are available for the library/campus that you selected in the facet, as in the example below for the MCV Campus.

Search limited to:		Collection available for: MCV Campus x	
1	 THROMBOSIS AND HAEMOSTASIS & STATE OF THE ART.		
	Type: Selective package		
	Creation Date: 2013-07-04 05:34:38	Modification Date: 2013-07-04 05:34:38	
	Edit Delete View Inventory Debug Screen Create E-Activation Task More info		
2	 COLLEGE ART ASSOCIATION OF AMERICA. Basic Institutional Membership		
	Type: Selective package		
	Creation Date: 2013-07-04 05:34:36	Modification Date: 2013-07-04 05:34:36	
	Edit Delete View Inventory Debug Screen Create E-Activation Task More info		
3	 GESTA & NEWSLETTER OF THE INTERNATIONAL CENTER OF MEDIEVAL ART [MEMBERSHIP].		
	Type: Selective package		
	Creation Date: 2013-07-04 05:34:36	Modification Date: 2013-07-04 05:34:36	
	Edit Delete View Inventory Debug Screen Create E-Activation Task More info		

Figure 17 - Selected Available For Facet Display

To access the Available for advanced search options:

- 1 From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
- 2 Click **Advanced Search**.
- 3 From the Find drop-down list, select one of the electronic options (electronic titles, electronic portfolio, or electronic collection).
- 4 Click **Add Conditions**.
- 5 Select from the following Available for column options:
 - Electronic Collection Column (see the figure below)
 - Collection Available for
 - Collection Available only for
 - Electronic Portfolio Column (see the figure below)
 - Available for
 - Available only for

Advanced Search - Add Conditions

All titles	Electronic Collection	Electronic Portfolio
☐ Language	☐ Linking Level	
☐ LC Control No.	☐ Title Service PID	
☐ ISBN	☐ Service Type	
☐ ISSN	☐ Electronic collection Type	
☐ ISSN link	☐ Creator Name	
☐ Other Standard ID	☐ Language	
☐ Government document number	☐ Category	
☐ National bibliography number	☐ Collection available for	
☐ Publisher number	☐ Collection available only for	
☐ Standard number	☐ Interface Name	
☐ Other System Number	☐ Library	
☐ Copyright Note		

[Cancel](#) [Add Conditions](#)

Figure 18 - Available For Advanced Search Electronic Collection Options

Advanced Search - Add Conditions

All titles	Electronic Collection	Electronic Portfolio
☒ Title	☐ Electronic collection Name	☐ Available for
☐ Uniform title	☐ Crossref Enabled	☐ Available only for
☐ Serial Title	☐ Collection PO Line ID	☐ Portfolio Authentication Note
☐ Creator	☐ Creation Date	☐ General Note
☐ Names	☐ Modification Date	☐ Portfolio PO Line ID
☐ Subjects	☐ Activate From	☐ Portfolio PID
☐ Subjects (LC)	☐ Activate To	☐ Portfolio License ID
☐ Medical Subjects (MeSH)	☐ Free	☐ Portfolio PDA ID
☐ Series	☐ Authentication Note	☐ Access Rights
☐ Publisher	☐ Public note	☐ Availability
☐ LC Call Number	☐ Internal Description	☐ Creation Date
☐ Dewey decimal class number	☐ Service Authentication Note	☐ Is Standalone

[Cancel](#) [Add Conditions](#)

Figure 19 - Available For Advanced Search Electronic Portfolio Options

Local Extensions to Bibliographic Records in the Network Zone

Description

The purpose of this enhancement is to provide the ability to add and edit local extensions to a bibliographic record that is maintained in the Network Zone (NZ). The purpose of the local extensions is to provide a place for you to enter local information and, at the same time, maintain the integrity to the original and ongoing updated versions of the NZ record for other NZ members.

Specifically, you can enter local information in the 9XX fields. These fields are always identified as local fields. Also, the 09X, 59X, and 69X fields may contain local information. However, these fields may also be a part of the NZ record. When you are working in the MD Editor, local fields for NZ records are identified by the library icon.

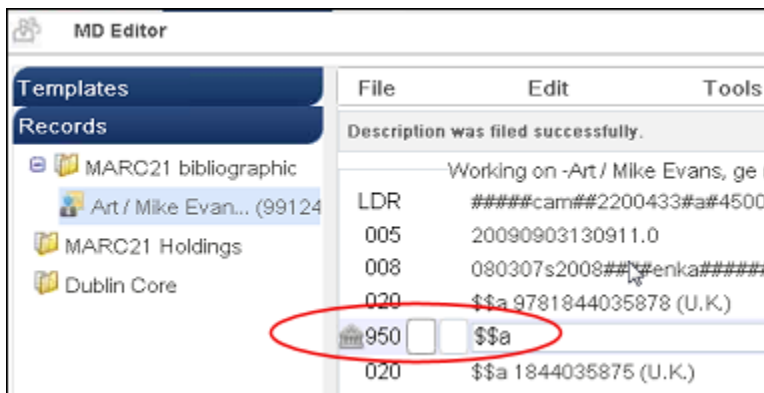


Figure 20 - Local Library Icon for a Network Zone Record

Technical Instructions

Any role that can add and edit records using the MD Editor can access this new capability

To add a local field to a Network Zone record:

- 1 Open an NZ record in the MD Editor.
- 2 Click **Edit > Add Localized Field** to enter 9XX, 09X, 59X, or 69X field numbers.

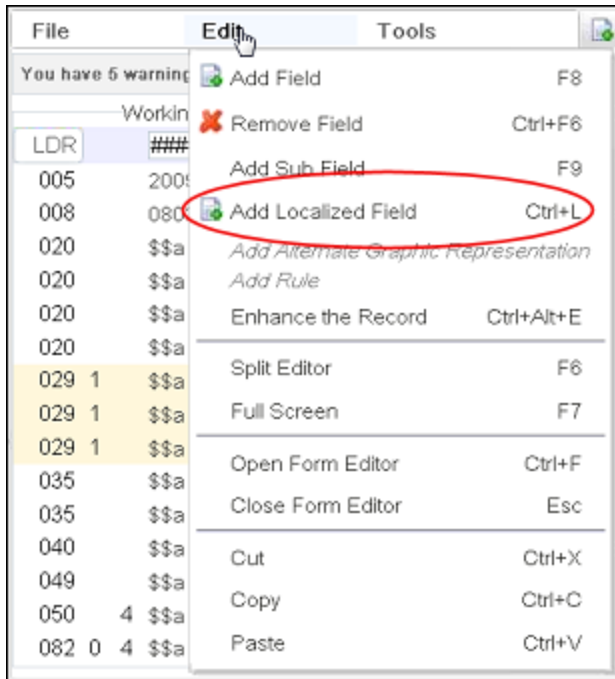


Figure 21 - Add Localized Field Menu Option

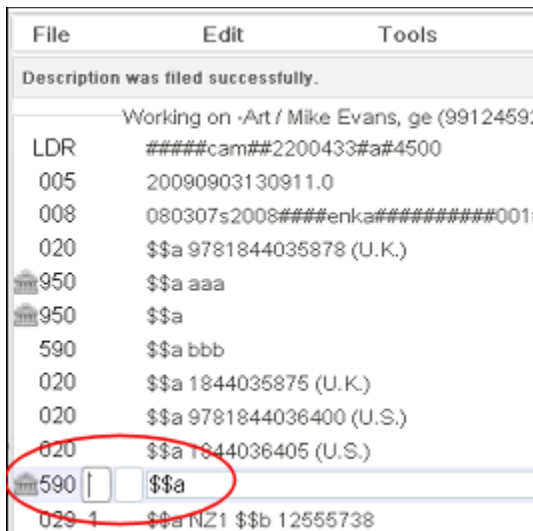


Figure 22 - 59X Field Added as a Local Field

See below for an illustration of a record that is maintained in the Network Zone that has different local field extensions for different Network Zone members.

The screenshot shows the Alma MARC Record Simple View interface. The record is titled "Network Record". The following fields are highlighted with green boxes:

- MMS ID: 992081010000121
- Originating system ID: 99240000000151
- 950 __ |a local data on institution1
- 985 __ |a Shared data on network
- 985 lo |a local data on institution1

The interface includes a top navigation bar with "ExLibris", "Alma Development", and "Currently at: Main Library - ULINC Receiv.". The record details section shows "Suppress from publishing: No", "Synchronize with external system: No", and "Brief record: No". The record content is displayed in a table format with fields like LDR, 001, 005, 008, 245, 950, 985, and 985 lo. The bottom of the interface has "Back" and "Edit" buttons.

Figure 23 - Local Field Extension Example 1

The screenshot shows the Alma MARC Record Simple View interface. The record is titled "Network Record". The following fields are highlighted with green boxes:

- MMS ID: 99120000000141
- Originating system ID: 99240000000151
- 590 __ |a local data on institution2
- 956 __ |a local data on institution2

The interface includes a top navigation bar with "ExLibris", "Alma Development", and "Currently at: None". The record details section shows "Suppress from publishing: No", "Synchronize with external system: No", and "Brief record: No". The record content is displayed in a table format with fields like LDR, 001, 005, 008, 245, 590, 956, and 985. The bottom of the interface has "Back" and "Edit" buttons.

Figure 24 - Local Field Extension Example 2

Other Resource Management Enhancements

- When copying the call number (shelf location) from the bibliographic record to the holdings record using the Alma holdings templates, the system now correctly retrieves the call number from the 084 field (instead of the 099 field) when the first indicator 8 (other scheme) is specified.
- The internal description information for an electronic resource now displays in the **Notes** field in the **Notes** tab on the **Electronic Portfolio Editor** page.

- A suppression indicator (icon) displays in the physical items search results list with one of the following tool tips:
 - Bibliographic record suppressed
 - Holdings record suppressed
 - Both bibliographic and holdings records suppressed
- The **View It** option/link now displays for databases in electronic collection search results.
- A new index has been added in Advanced Search labeled **Electronic location and note** (that is specific to 856 \$\$u, \$\$z).

Fulfillment

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

Allowing Renewals If Patron Limits are Reached

Description

This enhancement allows you to trigger a limits-related block at the circulation desk based on the type of patron service (loan or renewal) that is attempted. The following limits-related blocks may be configured to block either loan actions or renewal actions or both:

- Patron cash limit
- Patron overdue limit
- Patron recall overdue limit (new) – see [Patron Limit on Overdue Recalled Loans](#)

You can specify whether to block loans, renewals, or both loans and renewals. Previously, Alma blocked both loans and renewals.

Technical Instructions

The Fulfillment Administrator role can configure this capability.

To configure block options for loans and renewals:

- 1 From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.

The Fulfillment Configuration page opens.

- 2 From the Physical Fulfillment section, click **Block Preferences**.

The Workbench Preferences page opens.

Workbench Preferences
Back Save

Workbench Preferences List
Tools

Description	Actions	Handlers	blocks
The loan regular due date conflicts with booking request	Override By All	Shorten the due	
The renew due date conflicts with booking request	Handle Automatically	Shorten the due	
Item is not loanable	Override By Manager		
Item is not renewable	Override By Operator		
Item does not belong to this institution	Block		
Item is on Hold Shelf for this patron	Handle Automatically	Delete the requ	
Item cannot be loaned due to booking request	Block		
Item has not been received by Acquisitions Department	Block		
Item is requested by another patron	Block	Restart the requ	
Item renew period exceeded	Override By Operator		
Item cannot be loaned from this circulation desk	Block		
Item cannot be returned at this circulation desk	Block		
The loan cannot be renewed due to the loan status	Block		
Item is on hold shelf for another patron	Block	Restart the requ	
Patron cash limits has exceeded	Override By Manager		Both
Patron is expired	Override By Manager		Both
Patron is not active	Override By Manager		Loan
Patron loan limit exceeded	Block		Renew
Patron overdue limits has exceeded	Override By Operator		Both
Patron overdue recall limit exceeded	Block		Both
Not Renewable – Item has Request(s)	Handle Automatically		
Item is currently on loan by another patron	Override By Operator	Return the item	
User does not have a patron role or the role has expired	Block		

Tools
Back Save

Figure 25 - Workbench Preferences Page

- In the **Blocks** column, select one of the following treatments for the patron block:
 - Both** – blocks both renewals and loans
 - Loan** – blocks loan attempts only
 - Renew** – blocks renewal attempts only
- Click **Save**.

Patron Limit on Overdue Recalled Loans

Description

This enhancement allows you to configure the maximum number of overdue recalled loans that a patron can have before a block is triggered when a new loan or renew action is attempted. In addition, you can specify whether to trigger the block based on the service type (loan, renewal, or both).

Note: The item must be both overdue and recalled before the system increments the patron's tally.

Technical Instructions

The Fulfillment Administrator role can configure this capability.

To configure the patron limit and block option for overdue recalled loans:

- 1 From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.

The Fulfillment Configuration page opens.

- 2 From the Patron Configurations section, click **Patron Limits**.

The Patron Limits Definitions mapping table opens.

Mapping Table

You are configuring: Main Campus

Table Information

Sub System FULFILLMENT

Table Name PatronLimits

Updated By admin1

Last Updated 30/04/2012

Table Description Patron Limits Definitions

Mapping Table Rows

Enabled	User group	Max. cash	Max. overdues	Max. bookings	Max. overdue recalls
	Staff	150	5		
	Faculty	180	15		
	Visitor	0	2		
	Undergraduate St	50	5		
	Graduate Student	100	5		

Create a New Mapping Row

User group Faculty

Max. cash

Max. overdues

Max. bookings

Max. overdue recalls

Add Row

Figure 26 - Patron Limits Definitions Mapping Table

- For each user group defined, enter a value in the **Max. overdue recalls** column.
If you are adding a new user group, specify the **Max. overdue recalls** field in the Create a New Mapping Row section.
- Click **Save**.
- From the Fulfillment Configuration page, click **Block Preferences** in the Physical Fulfillment section.
The Workbench Preferences page opens.

Workbench Preferences
Back Save

Workbench Preferences List
Tools

Description	Actions	Handlers	blocks
The loan regular due date conflicts with booking request	Override By All	Shorten the due	
The renew due date conflicts with booking request	Handle Automatically	Shorten the due	
Item is not loanable	Override By Manager		
Item is not renewable	Override By Operator		
Item does not belong to this institution	Block		
Item is on Hold Shelf for this patron	Handle Automatically	Delete the requ	
Item cannot be loaned due to booking request	Block		
Item has not been received by Acquisitions Department	Block		
Item is requested by another patron	Block	Restart the requ	
Item renew period exceeded	Override By Operator		
Item cannot be loaned from this circulation desk	Block		
Item cannot be returned at this circulation desk	Block		
The loan cannot be renewed due to the loan status	Block		
Item is on hold shelf for another patron	Block	Restart the requ	
Patron cash limits has exceeded	Override By Manager		Both
Patron is expired	Override By Manager		
Patron is not active	Override By Manager		
Patron loan limit exceeded	Block		
Patron overdue limits has exceeded	Override By Operator		Both
Patron overdue recall limit exceeded	Block		Both Loan Renew
Not Renewable – Item has Request(s)	Handle Automatically		
Item is currently on loan by another patron	Override By Operator	Return the item	
User does not have a patron role or the role has expired	Block		

Tools
Back Save

Figure 27 - Workbench Preferences Page

- 6 In the **Blocks** column, select one of the following options for the **Patron overdue recall limit exceeded** block:
- **Both** – blocks both renewals and loans
 - **Loan** – blocks loan attempts only
 - **Renew** – blocks renewal attempts only

- 7 In the **Actions** column, select one of the following options for the **Patron overdue recall limit exceeded** block:
 - **Block** – no override is allowed
 - **Override By All** – any staff member is permitted to override the block
 - **Override By Manager** –only the manager can override the block
 - **Override By Operator** – the operator is permitted to override the block
- 8 Click **Save**.

Send Loan Receipt

Description

This enhancement enables Alma to automatically print loan receipts at a circulation desk printer or to automatically send loan receipts to users' preferred email addresses. If users use a self-check machine to borrow materials, the loan receipt is sent to their preferred email addresses.

In addition, you can customize information that appears in the loan receipt and send a loan receipt manually.

Technical Instructions

The Fulfillment Administrator role can enable the loan receipts' automatic generation.

The General Administrator can configure the loan receipts' text and layout.

To customize the loan receipt:

- 1 From the Alma main menu > General > General Configuration, click **Configuration Menu**.
The General Configuration page opens.
- 2 From the General Configuration section, click **Letter emails**.
The Letters subsystem page opens.

All Code Tables					Back
You are configuring: Main Campus					Organization Unit List
Code tables in subsystem(s)					
Sub System Letters					
Tools					
Table Name	Sub System	Description	Updated By	Customized	
Analytics Letter	Letters	Analytics Letter	-		Actions
Borrowed By Letter	Letters	Due Items	-		Actions
Borrowing Activity Letter	Letters	Patron Circulation Summary	-	✓	Actions
Conversation Letter	Letters	Conversation Letter	-		Actions
Courtesy Letter	Letters	Courtesy Notice	-		Actions
Fine Fee Payment Receipt Letter	Letters	Fine Fee Payment Receipt Letter	-		Actions
footer.xsl Letter	Letters	footer.xsl Letter	-		Actions
Ful Borrowing Info Letter	Letters	Ful Borrowing Info Letter	-		Actions
Ful Cancel Request Letter	Letters	Ful Cancel Request Letter	-		Actions
Ful Citation Slip Letter	Letters	Ful Citation Slip Letter	-		Actions
Ful Citations Slip Letter	Letters	Ful Citations Slip Letter	-		Actions
Ful Digitization Notification Item Letter	Letters	Ful Digitization Notification Item Letter	-		Actions
Ful Incoming Slip Letter	Letters	Ful Incoming Slip Letter	-		Actions
Ful Lost Loan Letter	Letters	Ful Lost Loan Letter	-		Actions
Ful Lost Loan Notification Letter	Letters	Ful Lost Loan Notification Letter	-		Actions
Ful Lost Refund Fee Loan Letter	Letters	Ful Lost Refund Fee Loan Letter	-		Actions
Ful Resource Request Slip Letter	Letters	Ful Resource Request Slip Letter	-		Actions
Ful Transit Slip Letter	Letters	Ful Transit Slip Letter	-		Actions
General Assign To Letter	Letters	General Assign To Letter	-		Actions
Interested In Letter	Letters	Notify Interested user the po pass to stage msg	-		Actions
Loan Receipt Letter	Letters	Loaned Items	-		Actions
Loan Status Notice	Letters	Loan Status Notice	-		Actions

Figure 28 - Letters subsystem Page

- In the row containing the **Loan Receipt Letter** table, select **Actions > Customize**.
The Loan Receipt Letter code table opens.

Code Table

[Cancel](#)
Customize

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

Table Information

Sub System

LETTER

Table Name

Loan Receipt Letter

Updated By

-

Updated on

-

Table Description

Loaned Items

Loaned Items

Tools

Enabled	Code	Description	Updated By	Last Updated	
	author	Author	-	-	Customize
	department	Circulation Department	-	-	Customize
	dear	Dear Sir/Madam	-	-	Customize
	description	Description	-	-	Customize
	due_date	Due date	-	-	Customize
	fine	Fine	-	-	Customize
	library	Library	-	-	Customize
	subject	Loan Receipt Letter	-	-	Customize
	letterName	Loan Receipt Letter	-	-	Customize
	loan_date	Loan date	-	-	Customize
	loans	Loans:	-	-	Customize
	sincerely	Sincerely	-	-	Customize
	inform_loaned_items	The following items have been loaned from	-	-	Customize
	title	Title	-	-	Customize
	addressFrom	Your.Department@organization.com	-	-	Customize

Tools

[Cancel](#)
Customize

Figure 29 - Loan Receipt Letter Code Table

- In the row containing the field that you want to update, click **Customize**.

You can change the information that displays for a field by updating the field's description. In addition, you can specify which fields display in the loan receipt by enabling/disabling a field.

To restore a customized field to its system default, click **Restore**.

- Click **Customize** at the bottom of the page to save the changes to all fields.

To enable loan receipts:

- From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.

The Fulfillment Configuration page opens.

Note: Loan receipts are enabled per library and circulation desk.

- 2 From the **You are configuring** drop-down list, select the library that you want to configure.
- 3 From the Library section, click **Circulation Desks**.

The Circulation Desks List page opens.

- 4 For the circulation desk you want to configure, click **Actions > Edit**.

The Circulation Desk – General Information page opens.

Circulation Desk - General Information

You are configuring: Main Library

General Details | Physical Locations | Operators | Automatic Printing

General Details

Code * MAIN_CIRC

Name * Main Circulation Desk

Primary ☒ Reading room desk ☐

Picks from shelf ☒

Additional Information

Description

Map

Printing Information

Printer Main Circ Desk Prt1

Creates return receipts ☐

Creates loan receipts ☒

Loan receipt destination User preferred email

Hold Shelf Information

Figure 30 - Circulation Desk – General Information Page

- 5 In the **Printing Information** section, specify the following fields:
 - **Creates loan receipts** – select this check box to automatically generate loan receipts
 - **Loan receipt destination** – select one of the following options:
 - **User preferred email** – loan receipt is sent to the user’s preferred email address.
 - **Circulation desk printer** – loan receipt is sent to the printer specified in the **Printer** drop-down list.

- 6 Click **Save**.

Loan receipts are automatically triggered when a loan session is terminated at the configured desk.

To print/send a loan receipt manually:

- 1 From the Alma main menu > Fulfillment > Checkout/Checkin, click **Manage Patron Services**.

The Patron Identification page opens.

- 2 Enter the patron's ID and click **Go**.

The Patron Services page opens.

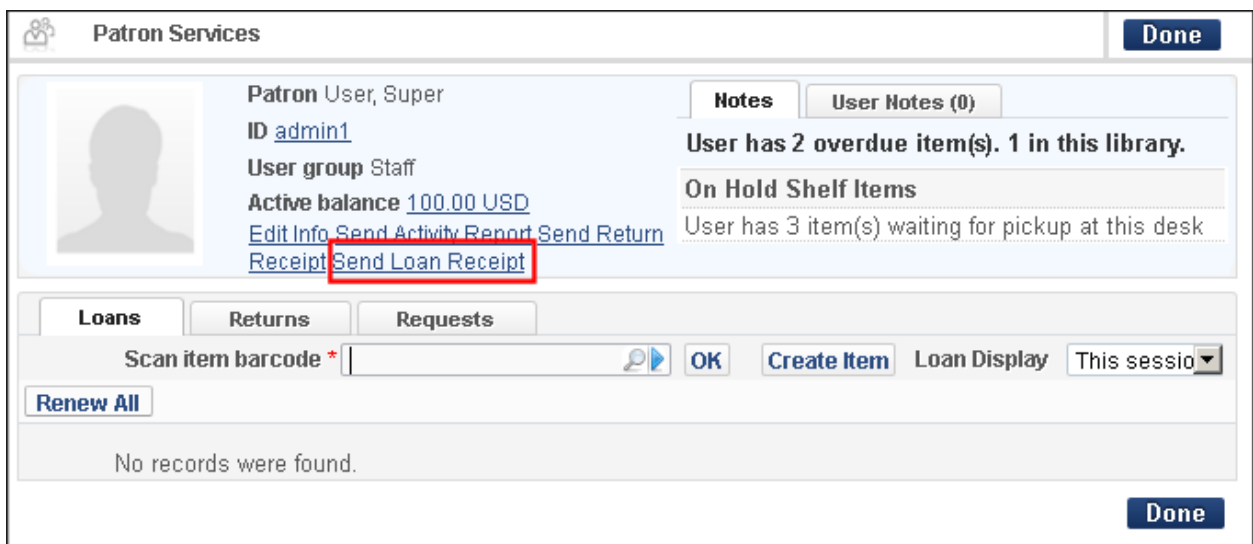


Figure 31 - Patron Services Page

Note: The above link does not appear when the circulation desk is configured to send loan receipts automatically.

- 3 Scan the barcodes for each item the patron wants to borrow.
- 4 Click **Send Loan Receipt**.

Processing Transactions for Off-Line Self-Check Machines

This enhancement improves the processing of transactions that are performed at a self-check machine while connectivity between Alma and the self-check machine is down. When connectivity resumes, the self-check machine automatically sends SIP2 messages to Alma for all

of the transactions that have been performed while off-line. Alma processes these SIP2 messages accordingly. Previously, Alma would only receive this information if it was loaded through the off-line circulation mechanism.

Note: Because the loan transactions have been done while offline and without the self-check machine being able to consult Alma for blocks and due date information, the messages that are sent after connectivity is restored are processed without block checking, and while using the due dates that have been generated by the self-check machine.

Other Fulfillment Enhancements

- A circulation desk role's capability to view all of a patron's loan/return history is determined by regional preferences as follows:
 - North America – Disabled
 - Europe/Asia Pacific – Enabled

If you are in the process of implementing your Alma system, work with your Ex Libris Professional Services contact to customize these options for your specific institution.

If you are currently in production/support and need to have your settings configured differently, contact Ex Libris Support for assistance.

- A new **Run Now** action is available on the **Lost Loan Profile List** page for each profile.

User Management

The following sections describe the functions provided for User Management in the July 2013 release of Alma.

External System Export User Options Enhancement

Description

This enhancement improves the ability to specify user export options. Previously, if both the **Block Types** and **Threshold Amount** settings of the fines/fees were not specified, neither of these settings could be utilized on its own to calculate users for export, and the single setting that was specified was ignored by the system. This enhancement enables either setting to be specified and utilized on its own to calculate users for export.

Technical Instructions

The General System Administrator role can access this capability.

To access this capability:

- 1 From the **Alma main menu** > **General** > **General Configuration** > **Configuration Menu** > **External Systems** > **External Interfaces**, select **Users** in the **Integration Type** filter to display only external systems with a **User** integration type.
- 2 Select **Actions** > **Edit** for an external system. The External System page displays.
- 3 Select the **Actions** tab. The Actions tab page displays.

External System

Code SIS Name Student Information System

General Information Actions Contact Info

Actions

Import

Active * ☒ Active ☐ Non Active

Plugin * ExternalSystemUserXmiToXmiPlugin

Input File Path * Import

Run

Create Sample File

Synchronize

Active * ☒ Active ☐ Non Active

Plugin * ExternalSystemUserXmiToXmiPlugin

Match ID Type * InstitutionStudentNumber (not listed)

Unmatched Record ☒ Add ☐ Reject

Input File Path * synchronize

Schedule Not scheduled

Run

Export

Active * ☐ Active ☒ Non Active

Plugin ExternalSystemUserXmiToXmiPlugin

User ID Type Primary Identifier

User Groups

Block Types

Fine/Fee Age(days)

Threshold Amount

Output File Path

Schedule Not scheduled

Run

Figure 32 – External System Page – Actions Tab

- 4 In the **Export** section, enter values for either the **Block types** or **Threshold amount** fields.
 - If you specify a block type, but no threshold, all fine/fee amounts of the specified block type are exported.
 - If you specify a threshold, but no block type, any block type with the specified threshold is exported.
- 5 Click **Save**.

Resource Sharing

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

Lending and Borrowing Request Lists Display Facets Instead of Filters

Description

The purpose of this enhancement is to provide a new mechanism for filtering lists of Resource Sharing Lending and Borrowing Requests. Instead of filtering results via filters on the top of the respective page, facets are now in place in the left margin of the page, to filter results according to specific categories.

Technical Instructions

The following roles can access this facility:

- Fulfillment Services Operator
- Fulfillment Services Manager

To access lending and borrowing request facets:

- 1 On the Resource Sharing Lending Requests Task List page (Alma main menu > Fulfillment > Resource Sharing > Lending Requests) or Resource Sharing Borrowing Requests (Alma main menu > Fulfillment > Resource Sharing > Borrowing Requests), facets are displayed to the left of the requests list, under the heading **Limit results to:**.

The screenshot displays the 'Resource Sharing Borrowing Requests' interface. On the left, under the heading 'Limit results to:', there are several facet categories with buttons and links:

- Status**: [Created borrowing request \(4\)](#)
- Active Partner**: [None \(4\)](#)
- Creation Date**: [Today \(4\)](#)
- Update Date**: [Today \(4\)](#)
- Requested Format**: [Digital \(1\)](#), [Physical \(3\)](#)
- Supplied Format**: [Undefined \(4\)](#)
- Due date**: [Undefined \(4\)](#)
- Last Interest Date**: [In the Future \(1\)](#), [Undefined \(3\)](#)
- Need patron information**: [No \(3\)](#), [Yes \(1\)](#)

On the right, there is a list of requests, each with a checkbox, a title, a type, a status, and action links:

- ☐ [Add](#)
- ☐ [Select All](#)
- 1 ☐ [Gone With the Wind](#)
Book By Margaret Mitchell
Status: Created borrowing request
[Edit](#) | [Cancel](#) | [Duplicate](#) | [Send query to patron](#) | [Reject](#)
- 2 ☐ [Santa Cruz County History Journal, Issue 3](#)
Article
Status: Created borrowing request
[Edit](#) | [Cancel](#) | [Duplicate](#) | [Send query to patron](#) | [Reject](#)
- 3 ☐ [The great world house : Martin Luther King, Jr., and global ethics /](#)
Book By Lee, Hak Joon, 1958- (Pilgrim Press 2011.)
ISBN: 9780829818215 (alk. paper)
Subject: Globalization Moral and ethical aspects. -- Christian ethics. -- King, Martin Luther, Jr., 1929-1968.
Status: Created borrowing request
[Edit](#) | [Cancel](#) | [Duplicate](#) | [Send query to patron](#) | [Reject](#)
- 4 ☐ [World History](#)
Article
Status: Created borrowing request
[Edit](#) | [Cancel](#) | [Duplicate](#) | [Send query to patron](#) | [Reject](#)

Figure 33 – Resource Sharing Borrowing Requests Page

- 2 Select the relevant facet on the left side of the page to filter your results.

Support for Unfulfilled Lending Requests

Description

The purpose of this enhancement is to enable the lending institution to reject a lending request from a patron. When rejecting a request, the institution provides a rejection reason and can enter a free text explanation, if desired. This information is displayed in the request's **Notes** tab.

Rejecting a request is possible only when the request has not yet been shipped.

Technical Instructions

The following roles can access this facility:

- Fulfillment Services Operator
- Fulfillment Services Manager

To access the reject request option for lending requests:

- 1 From the Alma main menu > Fulfillment > Resource Sharing > Lending Requests, click **Reject** for a request. The Reject Request pop-up window opens.

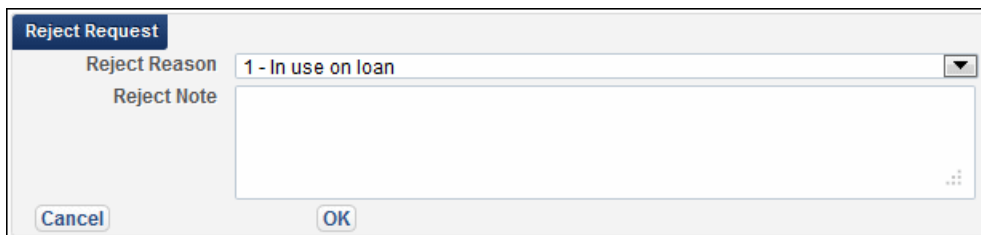
The image shows a 'Reject Request' pop-up window. It has a title bar 'Reject Request'. Inside, there is a 'Reject Reason' field with a dropdown menu showing '1 - In use on loan'. Below it is a 'Reject Note' field, which is a large text area. At the bottom left is a 'Cancel' button and at the bottom right is an 'OK' button.

Figure 34 – Reject Request Pop-up Window

- 2 Select a reason for the rejection in the **Reject reason** field.
- 3 Optionally, add a note for the rejection in the **Reject Note** field.
- 4 Click OK.

The request's citation status changes to **Rejected the borrower request**, and the **Reject reason** and **Reject note** are displayed in the **Notes** tab for the request (click the **Edit** link for the request to view the **Notes** tab).

In addition, if the request is managed using ISO ILL messages, an Unfill message is sent to the borrower, which in turn marks the partner request as rejected, refer to the [Support for Unfulfilled Lending Requests by the Borrowing Institution](#) section below.

Support for Unfulfilled Lending Requests by the Borrowing Institution

Description

The purpose of this enhancement is to enable the borrowing institution to manually inform a patron that the lending request has been rejected. When a lending request is rejected using an ISO protocol, the reject message is sent automatically.

Rejecting a request is possible only when the request has not yet been shipped.

Technical Instructions

The following roles can access this facility:

- Fulfillment Services Operator
- Fulfillment Services Manager

To reject unfulfilled lending requests at the borrowing institution:

- 1 From the Alma main menu > Fulfillment > Resource Sharing > Borrowing Requests, click **Reject** for a request. The Reject Request pop-up window opens.

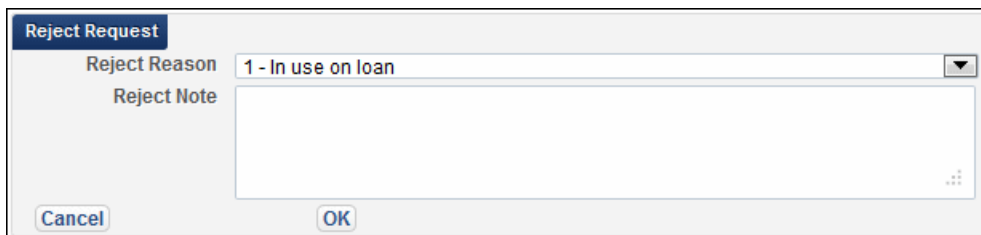
The image shows a 'Reject Request' pop-up window. It has a title bar with the text 'Reject Request'. Inside the window, there are two main fields: 'Reject Reason' and 'Reject Note'. The 'Reject Reason' field is a dropdown menu with the selected option '1 - In use on loan'. The 'Reject Note' field is a large text area. At the bottom of the window, there are two buttons: 'Cancel' and 'OK'.

Figure 35 – Reject Request Pop-up Window

- 2 Select a reason for the rejection in the **Reject reason** field.
- 3 Optionally, add a note for the rejection in the **Reject Note** field.
- 4 Click **OK**.

The request's citation status changes to **Rejected the borrower request**, and the **Reject reason** and **Reject note** are displayed in the **Notes** tab for the request (click the **Edit** link for the request to view the **Notes** tab). A notification is sent to the requester patron regarding the request rejection.

Other Resource Sharing Enhancements

- Notes can be managed when adding or editing lending requests in the **Notes** tab.

Analytics

The following section describes the function provided for Analytics in the July 2013 release of Alma.

Physical Item Description Exposed in Analytics

Description

The purpose of this enhancement is to expose the physical item description for reports and dashboards.

Technical Instructions

The Design Analytics role can access this enhancement.

To access the physical item description in Alma Analytics:

- 1 From the Alma main menu > General > Analytics, click **Design Analytics**.
- 2 Click **New > Analysis > Physical Items**.

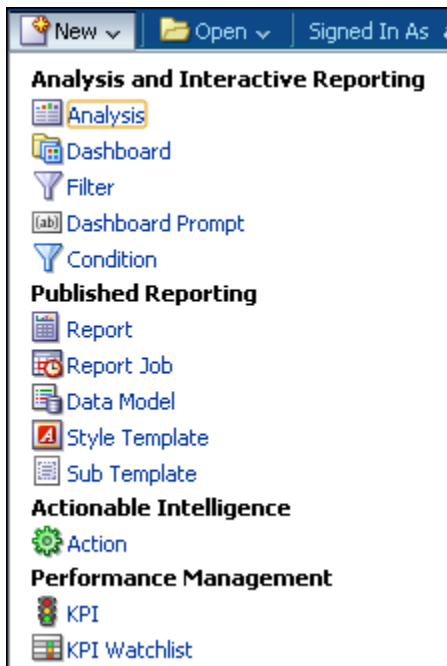


Figure 36 – New > Analysis Option

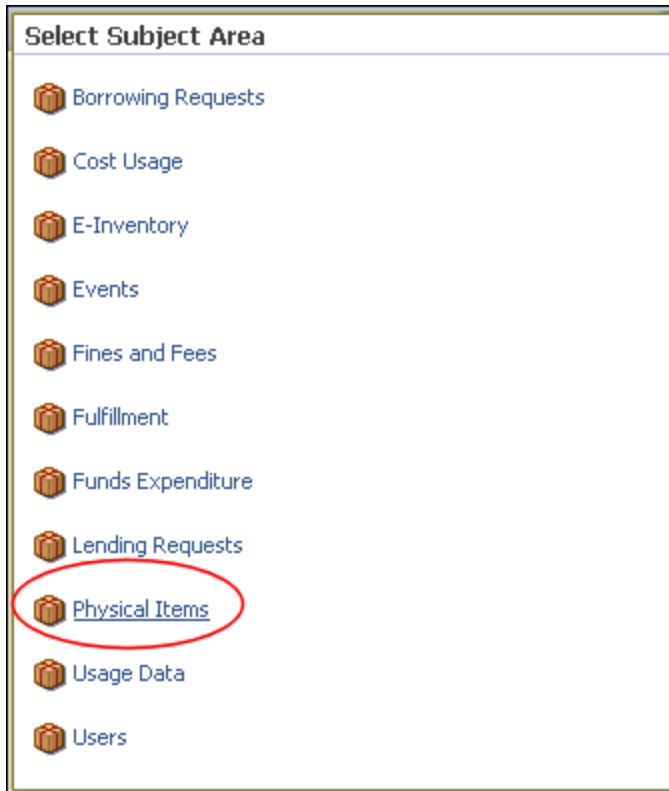


Figure 37 – Physical Items Menu Option

3 Select **Physical Items** > **Physical Item Details** > **Description**.

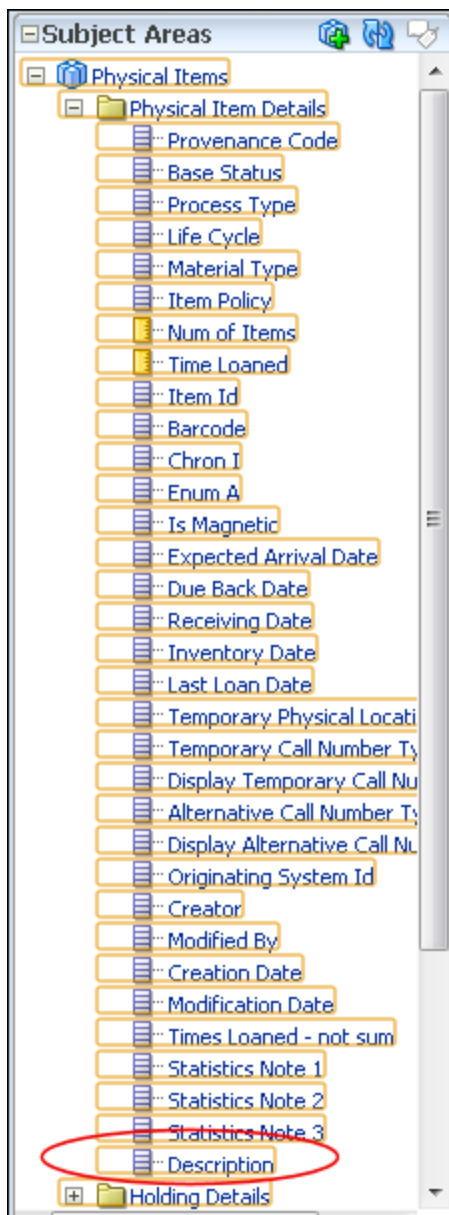


Figure 38 - Physical Item Description

Primo

The following sections describe the functions provided for Primo in the July 2013 release of Alma.

Allow Display Logic Rules between View It and Get It Services

Description

It is now possible to define rules combining Get It and View It services. For example, you can configure Alma to hide resource sharing requests (Get It service) when full text (View It service) is available for the item.

Technical Instructions

The Fulfillment Administrator role can configure this capability.

To configure display logic rules:

- 1 From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.

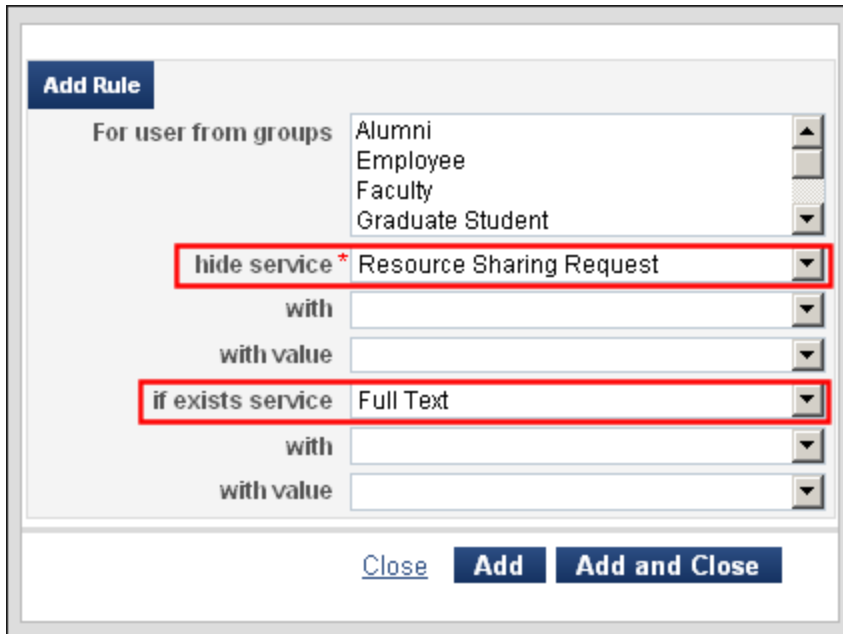
The Fulfillment Configuration page opens.

- 2 From the Discovery Interface Display Logic section, click **Display Logic Rules**.

The Discovery Interface Display Logic page opens.

- 3 Click **Add Rule**.

The Add Rule pop-up window opens.



Add Rule

For user from groups: Alumni, Employee, Faculty, Graduate Student

hide service * Resource Sharing Request

with

with value

if exists service Full Text

with

with value

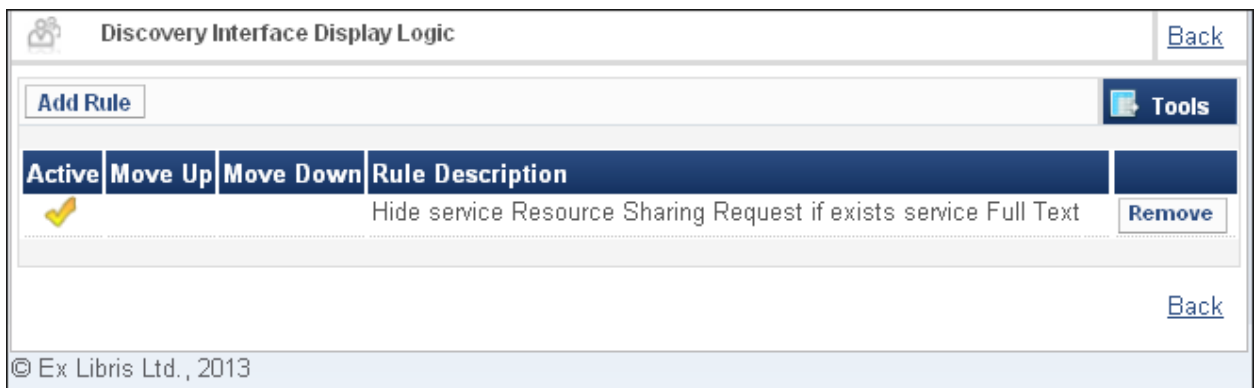
[Close](#) **Add** **Add and Close**

Figure 39 - Add Rule Pop-up Window

This allows you to hide a service (such as a Get It service) if a different type of service (such as a View It service) exists.

4 Click Add and Close.

The new rule displays in the list of rules on the Discovery Interface Display Logic page.



Discovery Interface Display Logic [Back](#)

Add Rule **Tools**

Active	Move Up	Move Down	Rule Description	
			Hide service Resource Sharing Request if exists service Full Text	Remove

[Back](#)

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Figure 40 - New Rule

System

The following sections describe Alma system enhancements provided in the July 2013 release.

IE9 Browser Support

With the July release, Alma provides support for version 9 of the Microsoft Windows Internet Explorer browser.

Attachments Processing Enhanced

The purpose of this enhancement is to improve handling of attachments throughout Alma. With the July release, performance improvements have been made and the **Attachments** tab has been updated with the following:

- The file name is mandatory when adding or editing user attachments.
- When editing an existing attachment (**Actions > Edit**), if the file name is left blank, the file name remains the same as previously saved.
- The maximum size for an attachment upload is 10MB.

See the figure below for an example of the updated **Attachments** tab from User Management.

Attachments

Cancel Save

Name User, Super Primary identifier super_user Record type Staff
Account Type Internal User group STAFF
[Manage fulfillment activities](#)

General Information Contact Information Identifiers Notes Blocks Fines/Fees Statistics **Attachments** Proxy For

Find : in : All Go

61 - 62 of 62 Records Tools

File name	Type	Size	Attached By	Attached On	URL	Notes	Upload Status	
SystemJobLi NOTIFICATION_EMA	3.0kb	System	27/11/2012	-	-	Uploaded	Actions	
SystemJobLi NOTIFICATION_EMA	3.0kb	System	27/11/2012	-	-	Uploaded	Actions	

Add Attachment

File name The maximum attachment size is 10 MB.

URL

Notes

Add Attachment

Figure 41 - Attachments Tab

Persistent Login

With the July release, persistent login has been implemented for situations where the application server may go down for system maintenance. As a result, users will not be required to log in again. Instead the Alma system will maintain their login session across application servers. When this situation occurs, the user is redirected to the home page and an informational message is provided.

ExLibris Alma - QA

Tasks Analytics Currently at O'Neill - Default Circulati... Help Implementor, Ex ...

Welcome Implementor, Ex Libris Add Widget

Your current session was interrupted and was reset automatically. Your last action may not have completed. We apologize for the inconvenience.

Tasks

- Digitization requests - approval (8)
- Electronic resources - activation - unassigned (281)
- Invoices - approval - without assignment (64)
- Invoices - review - assigned to you (3)
- Invoices - review - without assignment (12)
- Order Lines - packaging (24)

Notifications

2011-2012>Welcome to Alma!

new test2

Open in a new window

Figure 42 - Persistent Login Informational Message

Other System Enhancements

- The **System** (for Ex Libris' informational purposes) field in the Bursar, LDAP, Payment, Self-Check, and User 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.

Known Issues

- Ex Libris recently discovered a performance issue with the Loan Web Service (also known as Loan WS), specifically with the fine calculation that provides the accrued fine for an overdue loan. In order to provide acceptable performance to all our customers, Ex Libris has disabled this part of the Loan WS. All other functions in the Loan WS work as expected. A solution to the fine calculation performance issue will be provided in an upcoming release. We apologize for any inconvenience this may cause.

Fixed

The following known issue that was identified has been fixed:

- Regarding **Enhanced Delete Options for Electronic Portfolios**, the delete portfolio process does not work with itemized sets of electronic titles and all titles. It works only with electronic portfolio sets.