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Table of Contents

1	About the Alma Release Notes	5
2	Alma June 2013 Release Highlights	6
	Acquisitions	6
	Resource Management	6
	Fulfillment	6
	Course Reserves	7
	User Management	7
	Resource Sharing	7
	Primo	8
	General	8
3	Access to June 2013 Features	9
4	Data Services	11
	New Electronic Packages Added to the Alma CKB	11
	New External Resources That Are Open for Searching	12
5	Alma Show Me How	13
	Alma Show Me How – June	13
6	Acquisitions	14
	VAT Provided for the Invoice Line	14
7	Resource Management	22
	Option to Delete Bibliographic Records When Deleting a Package	22
	Enhanced Delete Options for Electronic Portfolios	23
	New Service Temporarily Unavailable Message	27
	Electronic Services Availability Definitions	29
	Other Resource Management Enhancements	32
8	Fulfillment	33
	View Patron Returns History	33
	New Closed Library Due Date Management Policy Option	34

	Control Order of Services in View It	35
	Other Fulfillment Enhancements	37
9	Course Reserves	38
	Bulk Change Option for Reading Lists	38
10	General	40
	Library and Campus IP Definitions	40
11	User Management	42
	Create External User Elements	42
	Create Proxy Patrons	43
12	Resource Sharing	46
	Automatic Generation of Temporary Item Barcodes	46
	Support for Email Communication with Resource Sharing Partners	47
13	Analytics	50
	Remaining Amount Column Added	50
14	Primo	51
	Get It Holdings Prioritization	51
15	System Enhancements	53
	Processing Icon Available for Additional Actions	53
16	Known Issue	54

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

Alma June 2013 Release Highlights

Acquisitions

- VAT on the Invoice Line

An invoice may often contain a mixture of items, some for which a VAT must be registered and some for which there is no VAT charge. In order to cater to this, it is now possible to register a VAT on the PO line level.

Resource Management

- New Is Linked Search Option

Another great new advanced search option provides a method for locating records that are linked (or not) to the Community Zone (CZ) and Network Zone (NZ).

- New Service Temporarily Unavailable Message

The purpose of this enhancement is to display the **Service temporarily unavailable** message on the UResolver services page when View It is selected for a resource whose package service level has a **Service temporarily unavailable** setting of **Yes**.

- Option to Delete Bibliographic Records When Deleting a Package

There is now an option to delete the bibliographic records of a package when deleting the package.

- Electronic Services Availability Definitions

This enhancement provides the ability to define a group of campuses and/or libraries in order to subsequently grant the members of this group access to specific electronic collections or portfolios.

Fulfillment

- View Patron Returns History

New functionality displays patron returned loan information. A new **Returns Display** option is available on the Returns tab (with the options **All** or **This Session**). The **All** option displays the returns history of the patron.

- New Closed Library Due Date Management Policy Option

This enhancement provides an additional option related to handling due dates when the normal due date falls at a time when the library is closed. A new Terms of Use parameter **Move to the end of the next open day** supports this scenario.

- Control Order of Services in View It

This enhancement provides the capability to control the order of how service results display, with options to specify the services that are to display at the top and bottom of the service list. The top service defined with this enhancement can also be used by Primo's direct linking option from the search result record.

Course Reserves

- Bulk Change Option for Reading Lists

This enhancement streamlines request options related to course reserves reading lists by providing the ability to select multiple citations in a course reserves reading list for processing.

User Management

- Proxy Patrons

This great new feature supports the option for defining proxy users. The proxy user is able to perform activities, such as loans or returns, on behalf of another user.

- Create External User Elements

This enhancement provides the manual addition of identifiers and contact information, notes, blocks, and statistics for external users as external data so that this data will be updated or overwritten during synchronization with the external student information system (SIS).

Resource Sharing

- Automatic Generation of Temporary Item Barcodes

This enhancement provides the resource sharing borrowing library with the ability to receive and circulate a borrowed item using an automatically generated temporary barcode that is generated by the system based on the resource sharing request's external identifier.

- Support for Email Communication with Resource Sharing Partners

New functionality enables the sending of borrowing resource sharing requests and messages via email.

Primo

- Get It Holdings Prioritization

This great new feature provides the initial phase to enable options for prioritizing the Primo Get It list of holdings. In the first phase, the requester IP and the holdings campus/library IP range or ranges are compared in order to associate holdings with the requester location and rank the Get It list by requester location.

General

- Library/Campus IP Definitions

This enhancement offers the option of associating IP definitions with each library/campus. With this capability, a user that is not logged in can be affiliated with a specific library/campus. Alma can then resolve electronic services according to the **Available for** settings, restricting availability to all but the defined IP addresses.

Access to June 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: VAT Provided for the Invoice Line				
Resource Management: Option to Delete Bibliographic Records When Deleting a Package				
Resource Management: Enhanced Delete Options for Electronic Portfolios				
Resource Management: New Service Temporarily Unavailable Message				
Resource Management: Electronic Services Availability Definitions				
Fulfillment: View Patron Returns History				
Fulfillment: New Closed Library Due Date Management Policy Option				
Fulfillment: Control Order of Services in View It				

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
Course Reserves: Bulk Change Option for Reading Lists				
General: Library and Campus IP Definitions				
User Management: Create External User Elements				
User Management: Create Proxy Patrons				
Resource Sharing: Automatic Generation of Temporary Item Barcodes				
Resource Sharing: Support for Email Communication with Resource Sharing Partners				
Analytics: Remaining Amount Column Added				
Primo: Get It Holdings Prioritization				
System Enhancements: Processing Icon Available for Additional Actions				

Data Services

The Alma June 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 10-May-2013 through 11-June-2013:

- Project Muse eBooks 2013
- ProQuest National Newspapers Core Collection New Platform
- OpenEdition Books
- EBSCOhost Art Source
- ProQuest SciTech Collection New Platform
- American Medical Association Backfiles
- MetaPress Association of Baccalaureate Social Work Program Directors
- Metapress Chattragram Maa-O-Shishu Hospital Medical College
- Metapress International Consortium for Social Development
- Metapress National Council for the Social Studies
- Taiwan Academic Online Journals
- Taiwan Academic Online Books
- MetaPress Acumen Publishing Limited
- IngentaConnect Access Press UK in association with GSE Research
- IngentaConnect Editorial Office of Acta Physico-Chimica Sinica
- IngentaConnect Editorial Office, Spectroscopy and Spectral Analysis
- IngentaConnect Greenleaf Publishing in association with GSE Research
- IngentaConnect Leuven University Press
- IngentaConnect Physiotherapy Pain Association
- IngentaConnect State University of New York Press
- JSTOR Arts & Sciences XII

- JSTOR Ecology & Botany II
- Sabinet SAePublications Labour Collection
- Newsbank African American Periodicals
- Nesli2 Cambridge University Press Journals
- CCH eBooks Australian Law
- CCH eBooks New Zealand Law
- Royal Society of Chemistry Journals Archive 2005-2007
- EBSCOhost CINAHL Complete

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:

- ULS (Israel Union List of Serials)
- ULI - Israel Union List (MALMAD Israel Center for Digital Information Services)
- Swinburne Library - Swinburne University of Technology
- Te Puna Search

Alma Show Me How

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

Alma Show Me How – June

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 June release, the following Show Me How scenarios are available:
 - View Patron's Loan Return History
 - Send Borrowing Requests by Email
 - Delete Electronic Portfolios with Bibliographic Records
 - Bulk Processing of Holdings Records
 - Withdraw Items and Delete Associated Records
 - Direct Linking to Electronic Resources

Acquisitions

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

VAT Provided for the Invoice Line

Description

The purpose of this enhancement is to provide the ability to enter a VAT at the invoice line level. This is in addition to the previously available capability to enter a VAT at the invoice level. With this enhancement, the following complementary functions are being added:

- Vendor VAT liability configuration (see [Vendor VAT Liability Configuration](#) on page 17)
- VAT code, an alternative to entering a VAT amount or percentage (see [VAT Code](#) on page 17)

Technical Instructions

The following roles can access this facility:

- Any role that can create an invoice can access the invoice line VAT option or code
- Acquisitions Administrator (to configure the VAT settings)

Invoice Line VAT Option

The following procedures describe:

- How to configure Alma in order to enter a VAT at the invoice line level
- How to enter a VAT (amount or percentage) at the invoice line level

To configure your system for the invoice line VAT option:

- 1 From the Alma main menu > Acquisitions > Acquisitions Configuration, click **Configuration Menu**.
- 2 From the General section, click **Other Settings**.
- 3 For the **invoice_allow_vat_in_line_level** row, click **Customize**.
- 4 For the parameter value, enter **true**.
- 5 Click **Save**.

To create an invoice line level VAT:

- 1 From the Alma main menu > Acquisitions > Receiving and Invoicing, click **Create Invoice**.

The Select Invoice Creation Process page displays.

- 2 Click **Next**.

The Invoice Details page displays.

The screenshot shows the 'Invoice Details' page in Alma. At the top, there are navigation buttons: 'Back', 'Cancel', and 'Save and Create Invoice Lines'. The page is divided into several sections. The first section contains fields for 'Invoice Number', 'Invoice Date', 'Total amount' (with a currency dropdown set to 'USD'), 'Vendor', 'Vendor Account', 'Vendor Contact Person', 'Invoice Reference #', and 'Payment method' (set to 'Accounting Department'). Below this is the 'Additional Charges' section with a 'Use Pro rata' checkbox. The 'VAT' section is highlighted with a red circle and contains the 'VAT per invoice line' checkbox, which is selected. Other fields in this section include 'VAT %' (0.0), 'Amount' (0.0), 'Inclusive' (checked), and 'Expended from fund' (checked). Below the VAT section is the 'Explicit Ratio' section with a plus icon. The 'Payment' section at the bottom has 'Prepaid' and 'Internal Copy' checkboxes.

Figure 1 – Invoice Details Page with Invoice Line VAT Option

- 3 Complete the invoice line details as usual and select the **VAT per invoice line** option.

Selecting this option disables the invoice level (versus invoice line level) VAT options. After you have configured your system to enable VAT per invoice line, you have the flexibility to enter the VAT at the invoice level or the invoice line level each time you create a new invoice by selecting or not selecting the **VAT per invoice line** option.

- 4 Click **Save and Create Invoice Lines**.
- 5 Click **Add Invoice Line**.

The Add Invoice Line page displays with the new invoice line level VAT options (VAT % or Amount).

Add Invoice Line

Type: **Regular** Line Number: **1**

PO line: Price: **0.00 USD**

Total Price: **0.00 USD**

Quantity: **0** VAT Note: **-**

Reporting Code:

Note:

Invoice amount: **100.00 USD** Total invoice lines amount: **-**

VAT %: **0.0** Amount: **0.0**

Fund*: Percent: **100.0** Amount: **0.00 USD**

[Add Fund](#)

No records were found.

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

Figure 2 – Add Invoice Line Page with Line Level VAT Option

- 6 Enter the invoice line information to include the VAT percentage or the VAT amount.
- 7 Select a fund and click **Add Fund**.
- 8 Click **Add and Close**.

The Invoice Details page displays with the invoice line that you added.

Invoice Details

Invoice Number: **100** Unique Invoice Identifier: **504746660000121** Vendor: **E0629**

Summary Alerts Invoice Lines Notes Attachments

Status: **All** Type: **All**

[Add Invoice Line](#) 1 - 5 of 5 Records [Tools](#)

Line #	Type	Price	Total Price	VAT Note	Status	Description	Funds	Note	PO Line #	Actions
1	Regular	100.00 USD	100.00 USD	Approximately 9.09 included in line Total Price.	Ready	-	Accounting and Finance E-resources (100.0%)	-	-	Actions
999991	Shipment	0.00 USD	0.00 USD	-	In-Review	-	-	-	-	Actions
999992	Discount	0.00 USD	0.00 USD	-	In-Review	-	-	-	-	Actions

Figure 3 - Invoice Details Page with Invoice Line Added

- 9 Click **Save and Continue**.
- 10 Complete the remainder of the invoice workflow.

Vendor VAT Liability Configuration

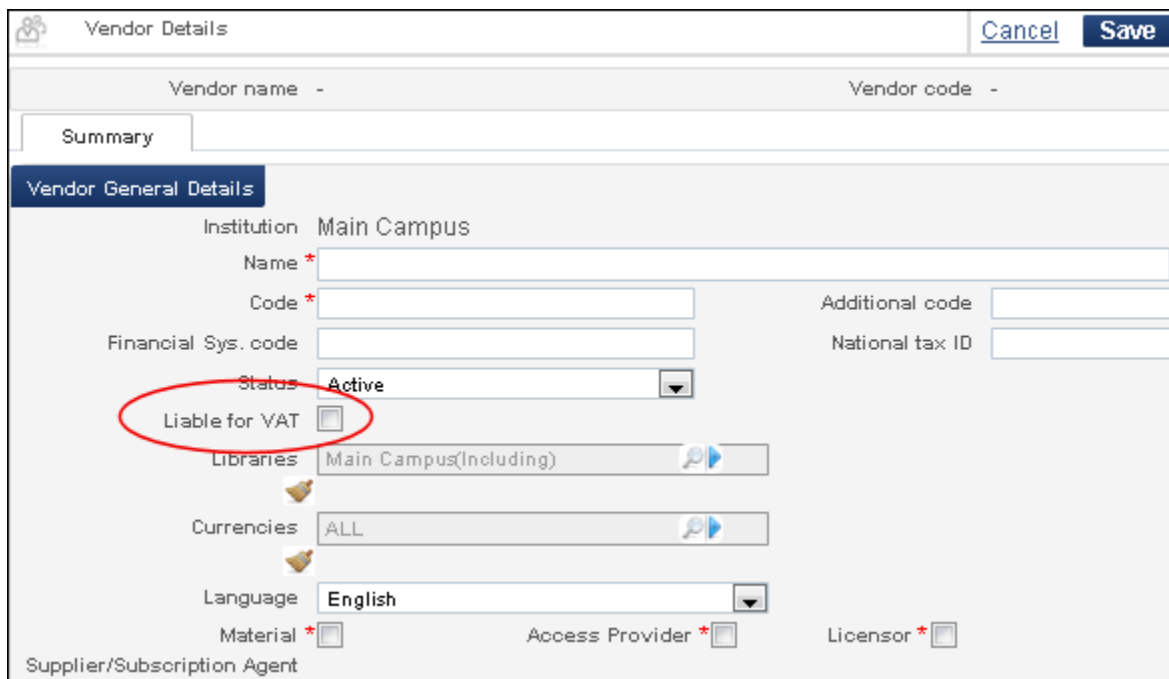
A new option to specify VAT liability is available when creating or editing a vendor record. By default, the VAT liability option is set to not liable for a VAT for all vendors.

Note: With the next release, warnings will be added for instances 1) where a vendor is not liable for a VAT and the invoice has a VAT and 2) where a vendor is liable for a VAT but the invoice does not have a VAT specified.

To configure a vendor record for VAT liability:

- 1 From the Alma main menu > Acquisitions > Acquisitions Infrastructure, click **Vendors**.
- 2 Click **Add Vendor**.

The Vendor Details page displays.



The screenshot shows the 'Vendor Details' form in Alma. The 'Vendor General Details' tab is selected. The 'Institution' is set to 'Main Campus'. The 'Status' is set to 'Active'. The 'Liable for VAT' checkbox is highlighted with a red circle. Other fields include 'Name', 'Code', 'Financial Sys. code', 'Additional code', 'National tax ID', 'Libraries', 'Currencies', 'Language', 'Material', 'Access Provider', and 'Licensor'.

Figure 4 - Vendor Details (Liable for VAT Option)

- 3 Enter the vendor details as usual and select **Liable for VAT** to indicate that the vendor is liable for the VAT.
- 4 Click **Save**.

VAT Code

As an alternative, you may choose to use a VAT code to set the VAT for an invoice or for an invoice line instead of letting a staff person enter a VAT amount or percentage. When this

feature is configured, the VAT amount and percentage options are disabled on the details pages; and the system automatically calculates the VAT as determined by the VAT code.

To configure a VAT code:

- 1 From the Alma main menu > Acquisitions > Acquisitions Configuration, click **Configuration Menu**.
- 2 From the Invoices section, click **VAT Codes**.

The Code Table page displays.

The screenshot shows the 'Code Table' configuration page. At the top, there are 'Cancel' and 'Save' buttons. Below, it states 'You are configuring: Main Campus' with a link to 'Organization Unit List'. The 'Table Information' section displays: Sub System: ACQUISITION, Table Name: VAT Codes, Updated By: exl_impl, Updated on: 11/06/2013, and Table Description: VAT percentage codes. Below this is a section titled 'VAT percentage codes' with an 'Import' button. A message states 'No records were found.' At the bottom, the 'Create a New Code Table Row' section has input fields for 'Code', 'Description', and 'Default Value' (set to 'No'), along with an 'Add Row' button.

Figure 5 - VAT Code Configuration Code Table Page

- 3 In the Create a New Code Table Row section, enter the VAT code, description, and specify if this is to be the default.

Code = the percent amount

Description = the text that displays in the VAT Code drop-down list of options

Code Table Cancel Save

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

Table Information

Sub System: ACQUISITION Table Name: VAT Codes
 Updated By: exl_impl Updated on: 11/06/2013
 Table Description: VAT percentage codes

VAT percentage codes

[Import](#) [Tools](#)

Enabled	Display	Order	Code	Description	Default Value	Updated By	Last Updated	
☒			5	Five Percent	☒	exl_impl	11/06/2013	Delete

Create a New Code Table Row

Code: Description:
 Default Value: [Add Row](#)

Figure 6 - VAT Code Configuration Example

4 Click **Add Row** and **Save**.

To enter a VAT code for an invoice line:

1 Access the invoice line pop-up window (see below) by creating or editing an invoice.

Add Invoice Line

Type: Line Number: 1
 PO line: Price: USD
 Total Price: 0.00 USD
 Quantity: VAT Note: -
 Reporting Code:
 Note:

Invoice amount: 100.00 USD Total invoice lines amount: 0.00 USD

VAT Code: [Update Amount](#)
 VAT %: Amount:

Fund*: Percent: Amount: USD [Add Fund](#)

No records were found.

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

Figure 7 - VAT Code Option

2 Select a **VAT Code** from the drop-down list.

Note: Since the VAT code option has been configured, the VAT % and Amount fields have been disabled.

The screenshot shows the 'Add Invoice Line' form. At the top, there's a 'Type' dropdown set to 'Regular' and a 'Line Number' field set to '1'. Below these are 'PO line' and 'Price' (0.00 USD) fields. The 'Total Price' is 0.00 USD. There's a 'Quantity' field set to '0' and a 'VAT Note' field. A 'Reporting Code' dropdown is also present. Below these is a large 'Note' text area. At the bottom of the form, there's a summary section showing 'Invoice amount 100.00 USD' and 'Total invoice lines amount 0.00 USD'. Below this is a 'VAT Code' dropdown menu, which is circled in red. The dropdown menu is open, showing two options: 'Five Percent' and 'Ten Percent'. To the right of the dropdown is an 'Update Amount' button. Below the dropdown is a 'VAT %' field (disabled) and an 'Amount' field (0.0). Below these is a 'Fund*' field (disabled) and a 'Percent' field (100.0). To the right of the 'Percent' field is an 'Amount' field (0.00) and a 'USD' label. Below the 'Amount' field is an 'Add Fund' button. At the bottom of the form, there's a message 'No records were found.' and three buttons: 'Close', 'Add', and 'Add and Close'.

Figure 8 - VAT Code Drop-Down List Example

- 3 Click **Update Amount**.
The pop-up window refreshes with the VAT %.

Add Invoice Line

Type **Regular** Line Number 1

PO line Price USD

Total Price 0.00 USD

Quantity VAT Note -

Reporting Code

Note

Invoice amount 100.00 USD Total invoice lines amount 0.00 USD

VAT Code [Update Amount](#)

VAT % 5.0 Amount

Fund* Percent Amount USD [Add Fund](#)

No records were found.

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

Figure 9 - VAT % Updated

Resource Management

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

Option to Delete Bibliographic Records When Deleting a Package

Description

The purpose of this enhancement is to provide the option to delete bibliographic records when deleting a package.

Note: The next release will include the ability to choose different options for dealing with childless bibliographic records, such as do nothing, delete, or suppress (similar to [Enhanced Delete Options for Electronic Portfolios](#) on page 23).

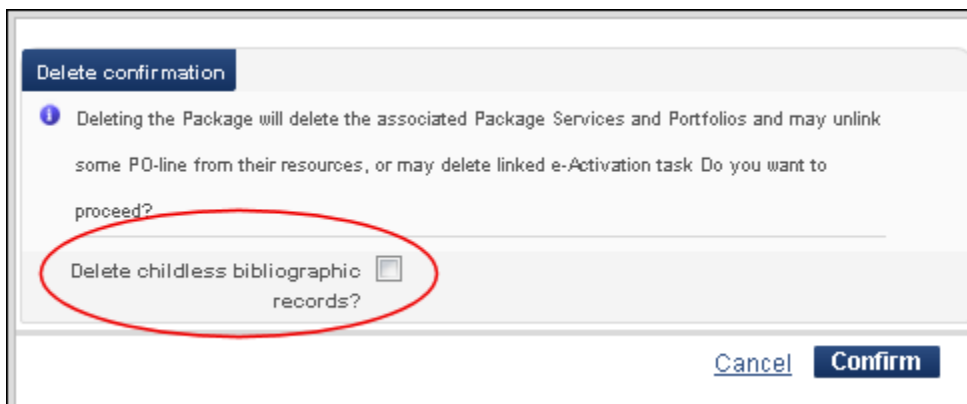
Technical Instructions

The Electronic Inventory Operator Extended role can access this delete capability.

To delete bibliographic records when deleting a package:

- 1 From the Alma main menu > Resource Management > Search and Sets, click **Repository**.
- 2 Complete a search for a package to be deleted.
- 3 Click the **Delete** row action for the package to be deleted.

The Delete Confirmation message displays with the option to **Delete childless bibliographic records**.



Delete confirmation

Deleting the Package will delete the associated Package Services and Portfolios and may unlink some PD-line from their resources, or may delete linked e-Activation task. Do you want to proceed?

Delete childless bibliographic records? ☐

[Cancel](#) **Confirm**

Figure 10 - Delete Confirmation Message

- 4 Select **Delete childless bibliographic records** to delete bibliographic records.
- 5 Click **Confirm**.

Enhanced Delete Options for Electronic Portfolios

Description

The purpose of this enhancement is to provide additional options that complement the delete portfolios capability in Alma. With the June release, you can:

- Delete (or suppress) childless bibliographic records using the **Actions > Delete** option
- Delete (or suppress) childless bibliographic records by selecting one or more portfolios and clicking the new **Delete Selected** button
- Run a process to delete a set of portfolios

Technical Instructions

The Electronic Inventory Operator Extended role can access these delete capabilities.

To delete bibliographic records when deleting a portfolio:

- 1 From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
- 2 Complete a search for an electronic collection that contains portfolios to be deleted and click **Edit Service**.

The Electronic Service Editor page displays.

Electronic Service Editor

Electronic Collection name Gale Cengage Business Insights: Essentials

Service Type Full Text [View all services](#)

Service Description | Activation Information | Linking Information | Portfolios | Notes | Available For

Service activation status ☐ Not Available ☒ Available

Activate new portfolios associated with service automatically? ☐ No ☒ Yes

Active from date

Active until date

Service temporarily unavailable ☐ No ☐ Yes

Service unavailable as of date

Service unavailability reason

[Cancel](#) [Save](#)

Figure 11 - Electronic Service Editor Page

- 3 Click the **Portfolios** tab.
- 4 Use the steps below when deleting a single portfolio or skip to step 5 when deleting selected/multiple portfolios.
 - a For the portfolio to be deleted, click **Actions > Delete**.

The Delete Confirmation message displays with the option **How to handle childless bibliographic record?**.

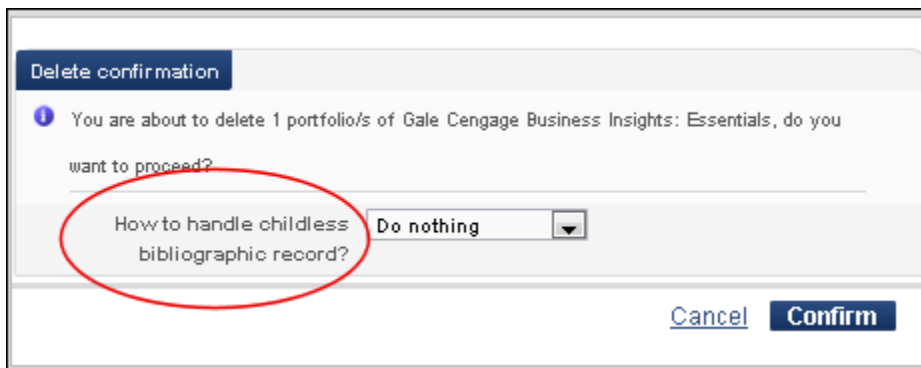


Figure 12 - Portfolio Delete Confirmation Message

When there is an active E-Activation task, an additional warning message, *Deleting the portfolio deletes the linked electronic activation task*, displays in the Delete Confirmation message.

- b From the drop-down list, select **Delete bibliographic record**.
- (Your other options are Suppress bibliographic record and Do nothing.)

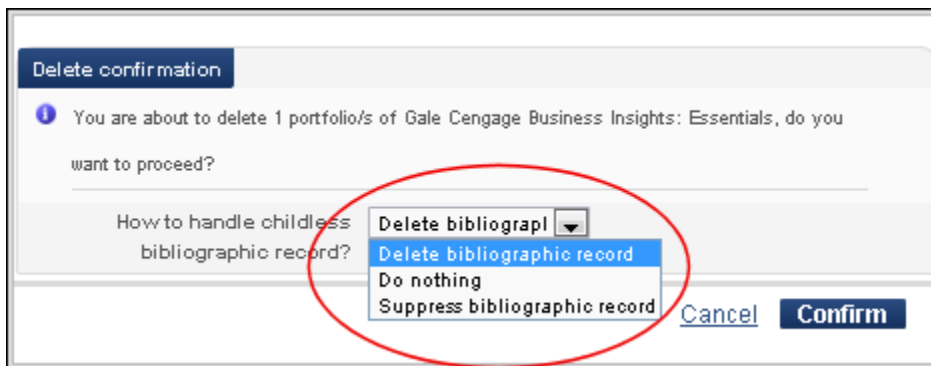


Figure 13 - Portfolio Delete Options

- c Skip to step 6.
- 5 Use the steps below when deleting selected/multiple portfolios.
 - a Select the portfolios to be deleted.

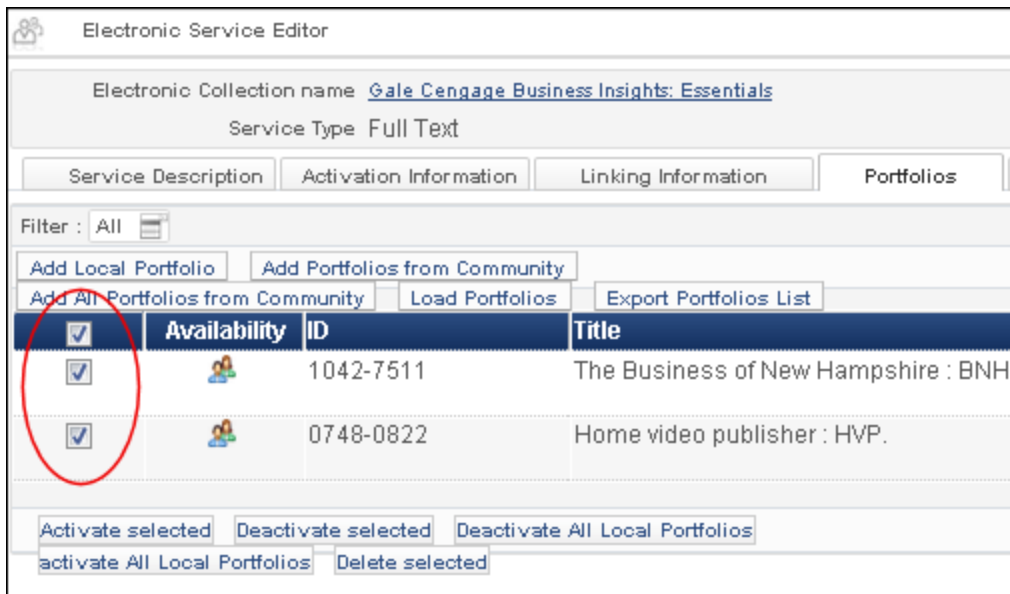


Figure 14 - Select Multiple Portfolios to Delete

b Click **Delete Selected**.

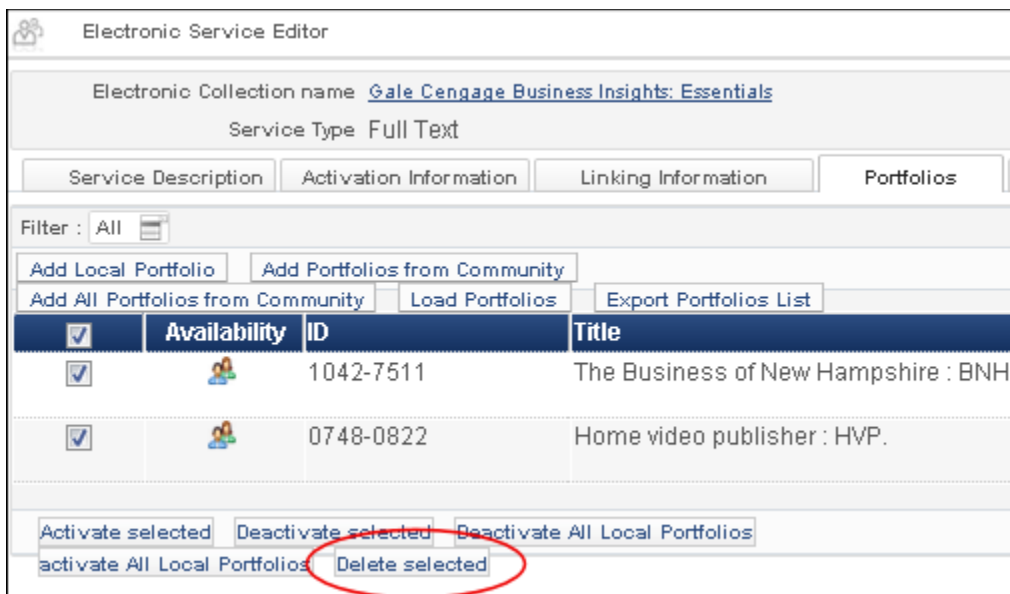


Figure 15 - Delete Selected Button

The Delete Confirmation message displays with the option **How to handle childless bibliographic record?**.

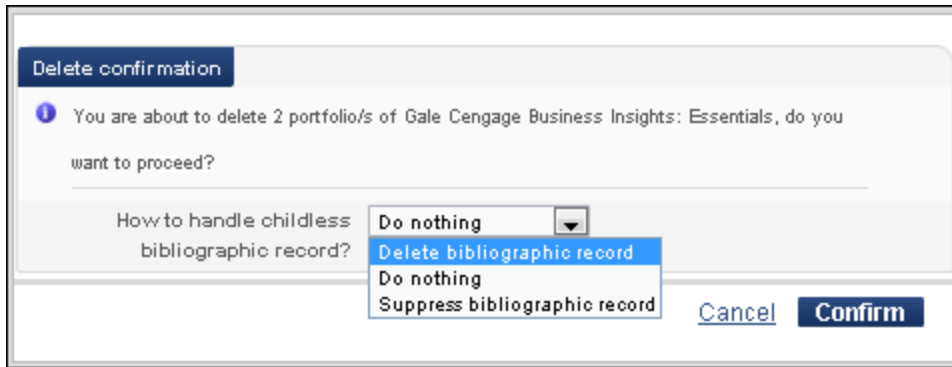


Figure 16 - Delete Confirmation Message for Multiple Selected Portfolios

- c From the drop-down list, select **Delete bibliographic record**.
(Your other options are Suppress bibliographic record and Do nothing.)

6 Click **Confirm**.

To run a process to delete portfolios:

- 1 From the Alma main menu > Resource Management > Processes, click **Run Process**.
The Create Process – Select Process to Run page displays with the list of processes.
- 2 Select **Delete portfolios** to filter the list.
- 3 Select the **Delete portfolios** process and click **Next**.

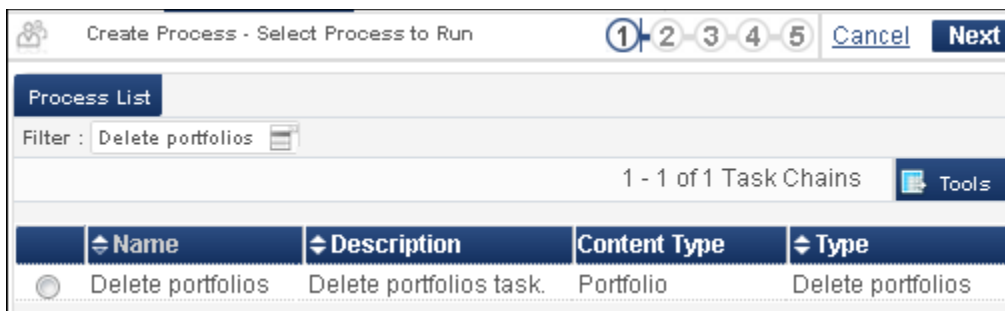


Figure 17 - Delete Portfolios Process

- 4 Select the set of portfolios to be deleted (that was previously saved using the repository search) and click **Next**.

The Create Process – Enter Task Parameters page displays with the parameters for the **Delete portfolios** process.

Create Process - Enter Task Parameters

1 2 3 4 5 Back Cancel Next

Task Parameters: Delete portfolios

Delete policy

Portfolio is linked to an active PO- * Delete portfolio

line

Portfolio is linked to an active e- * Delete portfolio

Activation task

How to handle childless * Delete bibliographic record

bibliographic record?

Figure 18 - Delete Portfolios Parameters

- 5 Select from the following parameters and click **Next**.
 - Portfolio is linked to an active PO line
 - Delete portfolio
 - Skip
 - Portfolio is linked to an active e-Activation task
 - Delete portfolio
 - Skip
 - How to handle childless bibliographic record?
 - Delete bibliographic record
 - Do nothing
 - Suppress bibliographic record
- 6 Enter a process name, select the scheduling option, and click **Next**.
The Create Process – Review and Confirm page displays.
- 7 Review the process selections that you have made; and if they are correct, click **Save**.

New Service Temporarily Unavailable Message

The purpose of this enhancement is to display the **Service temporarily unavailable** message on the UResolver services page when **View It** is selected for a resource whose package service level has a **Service temporarily unavailable** setting of **Yes**. See the figures below.

Electronic Service Editor

Electronic Collection name [MetaPress Heldref CreateLicenseTest 1705130843](#)

Service Type Full Text

Service Description Activation Information Linking Information Portfolios

Service activation status ☐ Not Available ☒ Available

Activate new portfolios associated with service automatically? ☒ No ☐ Yes

Active from date Active until date

Service temporarily unavailable ☐ No ☒ Yes Service unavailable as of date

Service unavailability reason

Figure 19 - Service Temporarily Unavailable Setting of Yes

UResolver Screen

[Display in a new window](#)

Full text available at: [MetaPress Heldref CreateLicenseTest_1705130843](#)

Service temporarily unavailable due to **System update**

Available from 1997 volume: 46 issue: 1

Figure 20 - UResolver Display of Service Temporarily Unavailable Message

The message text is pulled from the description entered in **Service unavailability reason**.

When **Service temporarily unavailable** is set to **No** for the package and service is available, the UResolver services page normally displays as in the figure below.

UResolver Screen

[Display in a new window](#)

Full text available at: [MetaPress Heldref CreateLicenseTest_1705130843](#)

Available from 1997 volume: 44 issue: 1

Figure 21 - UResolver Services Page Display for Available Service

Electronic Services Availability Definitions

Description

The purpose of this enhancement is to provide the ability to manage access to electronic resources according to groups.

Note: To enable this feature, the **multi_campus_inventory_management** parameter in Alma main menu > General > General Configuration > Configuration Menu > General Configuration > Other Settings must be set to **true** by the General System Administrator.

Technical Instructions

The following roles can configure campus/library groups:

- Repository Administrator
- General System Administrator

The following role can define availability for electronic collections or portfolios:

- Electronic Inventory Operator

To define a group of campuses/libraries:

- 1 From the Alma main menu > Resource Management > Resource Configuration, click **Configuration Menu**.
- 2 From the General section, click **Inventory Network Groups**.
- 3 Click **Add Group**.

The Add Group pop-up window opens.

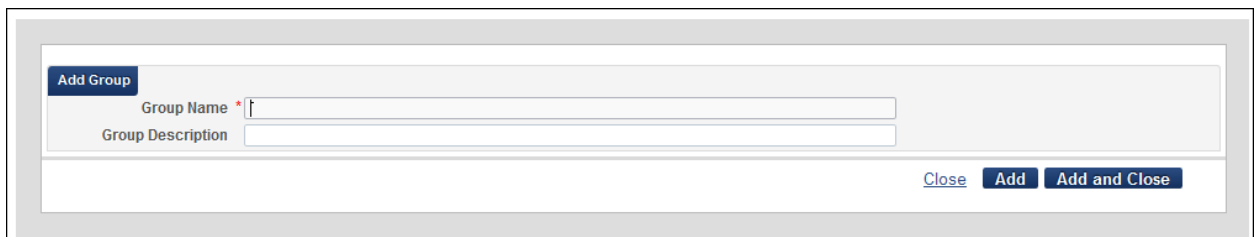


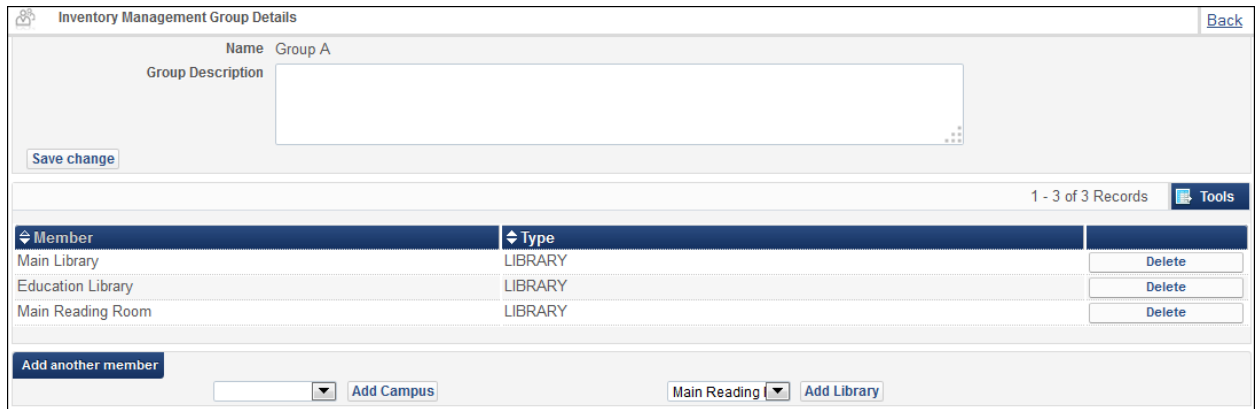
Figure 22 - Add Group

- 4 Assign a name to the group, optionally enter a description, and click **Add and Close**.
- 5 Click **Actions > Edit** for the group on the Inventory 'Available For' Management Groups page.

The Inventory Management Group Details page displays.

- 6 Select one of the previously defined campuses and/or libraries and click **Add Campus** and/or **Add Library**.

The campuses/libraries are added to the list of group members.



Member	Type	
Main Library	LIBRARY	Delete
Education Library	LIBRARY	Delete
Main Reading Room	LIBRARY	Delete

Figure 23 - Group Members

To define availability for electronic collections or portfolios:

- 1 From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
- 2 Complete a search for an electronic collection or portfolio whose availability you want to define.
- 3 Click **Edit** or **Edit Service** beneath the search results.
- 4 Click the **Available For** tab.



Service Description	Activation Information	Linking Information	Portfolios	Notes	Available For
---------------------	------------------------	---------------------	------------	-------	---------------

Figure 24 - Available For Tab

- 5 Click **Add Group Info** and select a group that you previously defined.

Figure 25 - Group for Which the Resource Will Be Available

If you are in the Electronic Portfolio Editor, you can also define group-specific e-journal coverage and/or embargo information.

Figure 26 - Group for Which the Portfolio (According to Coverage/Embargo Information Specified) Will Be Available

- 6 Click **Add and Close**.
- 7 Click **Save**.

The electronic collection, portfolio, or service will be made available via the UResolver services page (in Primo or other third-party applications) for the campuses and/or libraries defined as members of the specified groups. If group-specific e-journal coverage/embargo information was specified for a portfolio, this will also be taken into account by Alma's UResolver when calculating available services. This provides your institution with further flexibility in managing its electronic services.

Note: The groups defined for electronic collections are applicable to all the package services and portfolios that are part of the collection unless other groups are defined for specific package services/portfolios.

Other Resource Management Enhancements

- With the June release, the holdings match algorithm has been refined to prevent duplicate holdings from being created in the purchase order process, MD import, and when moving items/changing physical item information.
- The purpose of this enhancement is to provide a method for locating records that are linked (or not linked) to the Community Zone (CZ) and Network Zone (NZ). This capability has been added to the advanced search function in Repository Search. There is a new **Is linked** option.
- The Record item material type was changed to **Sound Recording**.

Fulfillment

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

View Patron Returns History

Description

The purpose of this enhancement is to display a list of all loans that were returned by the patron. Until now, patron services displayed only return actions that took place in the current session.

Technical Instructions

The following roles can configure this option:

- Circulation Desk Operator - Limited
- Circulation Desk Operator
- Circulation Desk Manager

In the June release, a new **Returns Display** option to display **All** or **This Session** (refer to the figure below) is provided on the **Returns** tab of the Patron Services page. By selecting the **All** option, you can view the returns history for a specific patron.

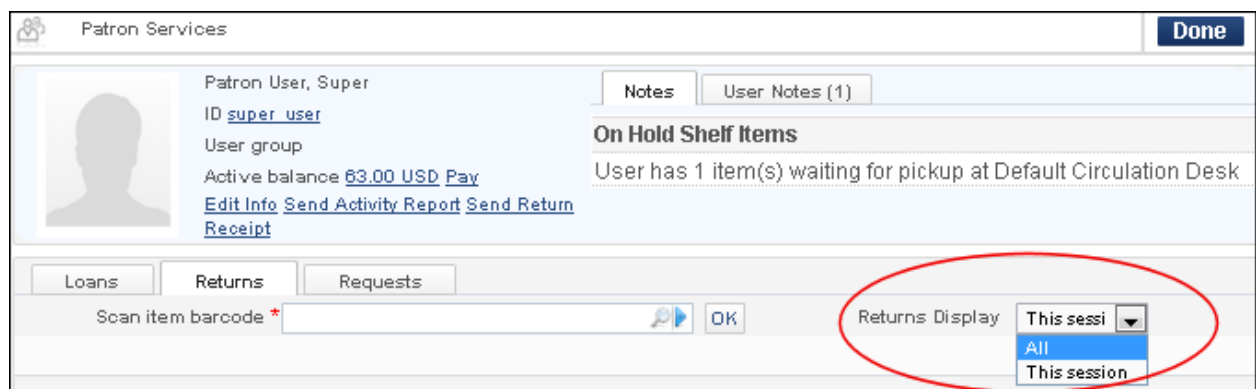
The screenshot shows the 'Patron Services' interface. At the top right is a 'Done' button. The main area displays patron information for 'Patron User, Super' with ID 'super_user'. Below this is a section for 'On Hold Shelf Items' stating 'User has 1 item(s) waiting for pickup at Default Circulation Desk'. A navigation bar at the bottom contains 'Loans', 'Returns' (selected), and 'Requests' tabs. Below the tabs is a 'Scan item barcode' field with an 'OK' button. On the right side, the 'Returns Display' dropdown menu is open, showing three options: 'This sessi' (partially visible), 'All' (highlighted in blue), and 'This session'. A red circle highlights the dropdown menu.

Figure 27 - Returns History with the All Option

New Closed Library Due Date Management Policy Option

Description

The purpose of this enhancement is to provide another option regarding how to handle due dates when the normal due date falls at a time with the library is closed. With the June release, there is a new Terms of Use configuration option for **Move to the end of the next open day**.

Technical Instructions

The Fulfillment Administrator role can configure this option.

To access this new Terms of Use configuration option:

- 1 From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.
- 2 From the Physical Fulfillment section, click **Terms of Use and Policies**.
- 3 For one of the loan terms of use profiles, click **Actions > Edit**.
- 4 For Closed Library Due Date Management, click **Actions > Edit Policy via Update**.

The Policy Details page displays.

Policy Details

You are configuring: College (Small)

Policy Type: Closed Library Due Date Management

Policy Name * No Change To Due Date

Policy Description Default value for ClosedHourManagement

Value * ☒ Keep - Keep the current due Date ☐ Move Backward - Move to end of previous open day ☐ Move forward - Move to beginning of next open day

☐ Move to the end of the next open day

Default Policy ☐ False ☒ True

Figure 28 - Move to the End of the Next Open Day Option

Control Order of Services in View It

Description

This enhancement provides the capability to control the order of how service results display, with options to specify the services that are to display at the top and bottom of the services list. The top service defined with this enhancement can also be used by Primo's direct linking option, from the search result record.

Technical Instructions

The Fulfillment Administrator role can configure this capability.

To configure the order of services:

- 1 From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.
- 2 From the Discovery Interface Display Logic section, click **Online Services Order**.

The Online Services Order page displays.

The screenshot shows the 'Online Services Order' configuration page. It has a header with a user icon and the title 'Online Services Order'. Below the header, there are two main sections. The first section is titled 'Top services' and contains an 'Add to top' button. Below this button, it says 'No records were found.' The second section is titled 'Services to be placed last' and contains an 'Add to last services' button. Below this button, it also says 'No records were found.'

Figure 29 - Online Services Page

- 3 Click **Add to Top** (or **Add to Last Services**).

The Add to Top pop-up window displays.

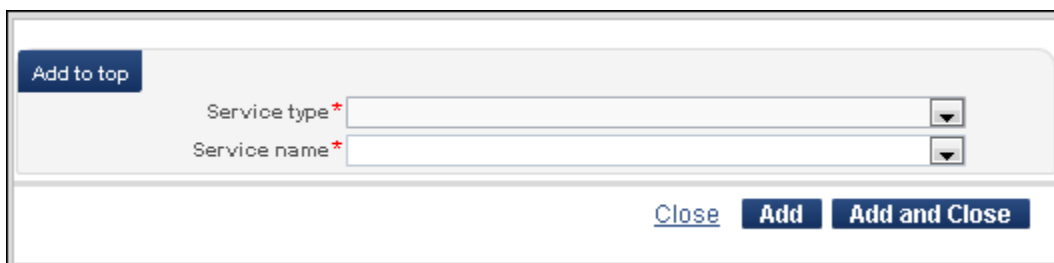
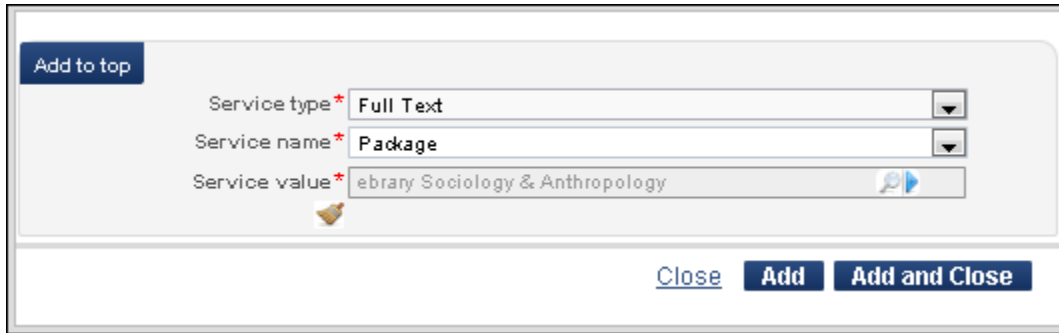
The screenshot shows the 'Add to top' pop-up window. It has a title bar with the text 'Add to top'. Inside the window, there are two input fields: 'Service type' and 'Service name', both marked with a red asterisk. Each field has a dropdown arrow on the right. At the bottom of the window, there are three buttons: 'Close', 'Add', and 'Add and Close'.

Figure 30 - Add to Top Pop-up Window

- 4 Select one of the following service types:
 - Selected Full Text
 - Full Text
 - DB Service
- 5 Specify the service name for the service type that you selected and enter the service value.



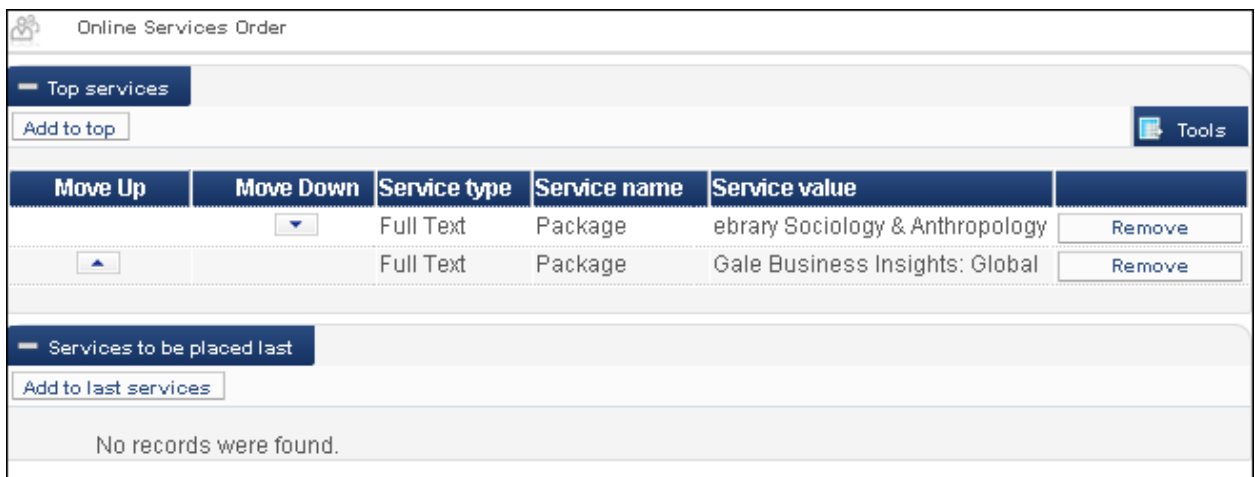
The image shows a pop-up window titled "Add to top". It contains three input fields: "Service type" with a dropdown menu showing "Full Text", "Service name" with a dropdown menu showing "Package", and "Service value" with a text input field containing "ebrary Sociology & Anthropology". There is a magnifying glass icon next to the service value field. At the bottom of the window are three buttons: "Close", "Add", and "Add and Close".

Figure 31 - Add to Top Pop-up Window with the Options Selected

- 6 Click **Add and Close**.
- 7 Repeat steps 3 through 6 for each service you want to prioritize at or near the top of the list.

The Online Services Order page displays your selections.

The display also provides **Move Up/Move Down** column options in order for you to specify the exact sequence of the services to be displayed at the top of the results.



The image shows the "Online Services Order" page. It has a header with a gear icon and the text "Online Services Order". Below the header is a section titled "Top services" with an "Add to top" button and a "Tools" button. The main table has columns: "Move Up", "Move Down", "Service type", "Service name", "Service value", and "Remove". There are two rows of services listed. The first row has "Full Text" as the service type, "Package" as the service name, and "ebrary Sociology & Anthropology" as the service value. The second row has "Full Text" as the service type, "Package" as the service name, and "Gale Business Insights: Global" as the service value. Below the table is a section titled "Services to be placed last" with an "Add to last services" button. At the bottom, it says "No records were found."

Move Up	Move Down	Service type	Service name	Service value	Remove
	▼	Full Text	Package	ebrary Sociology & Anthropology	Remove
▲		Full Text	Package	Gale Business Insights: Global	Remove

Figure 32 - Top Services Selected

- 8 Use this same approach to place services at the bottom of the results with the **Add to Last Services** button.

Note: By clicking the **General Electronic Services Order** option in the Discovery Interface Display Logic section of the **Fulfillment > Fulfillment Configuration > Configuration Menu**, you can order General Electronic Services in the same manner.

Other Fulfillment Enhancements

- Due to the introduction of a built-in option to prevent the automatic placement of an item on the hold shelf, the Scan In Items Preview mode is no longer available. By configuring the circulation desk to use the **Has hold shelf processing** option (see **Configuring a Circulation Desk** in the Fulfillment Configuration documentation), you can prevent a returned item from being placed on the hold shelf.
- Request statuses can now be customized in the Request Task Name Patron Display code table, which is accessible from the **Alma main menu > Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Request Task Name**.

Course Reserves

The following sections describe the functions provided for Course Reserves in the June 2013 release of Alma.

Bulk Change Option for Reading Lists

Description

The purpose of this enhancement is to streamline creating requests, such as move requests, related to course reserves reading lists by providing the ability to select multiple citations in a course reserves reading list for processing.

Technical Instructions

The following roles can access this facility:

- Course Reserves Operator
- Fulfillment Services Operator

To access this facility:

- 1 From the Alma main menu > Fulfillment > Course Reserves, click **Reading Lists**.
- 2 Click **Actions** > **Work** for the reading list with which you want to work.

The Edit Reading List page displays.

Edit Reading List | Cancel | Print Slip | Being Prepared | Change Status | Print Slip Report | **Place Request** | Remove

Course Code: TEST ILAN2 | Section: - | Course Name: TEST ILAN2
 Processing Department: COURSE_UNIT | Instructor: -

Reading List Information
 Code: * TEST ILAN2
 Name: * TEST ILAN2
 Owner:
 Status: Complete
 Due Back Date: 31/12/2015

Citations | Notes

Alerts: All | Citation/Locate Status: All | Citation Type: All

Add Repository Citation | Add Non-Repository Citation | Add Brief

☒ Select All

1 ☒ Mission Belge du Bengale Occidental.: Lettre du P. Depelchin sur la mort du P. Veys.
 Physical Book (Sn 1868.)
 Availability: Physical version at LAW: 0102130724; 09-000016154 GENERAL (1 copy, 1 available)
 Physical version at BURNS: R111C; 09-000016154 GENERAL
 Citation Status: Being Prepared
 Resource Locate Status: Resource Located
[Edit](#) | [Resource Locate](#) | [Set Complete](#) | [Manage Fulfillment Options](#) | [Items](#) | [Remove](#) | [Duplicate](#) | [Print Slip](#) | [Detach from Repository](#) | [More info](#)

2 ☒ La mission belge du Bengale occidental.
 Physical Book (Société belge de librairie 1890.)
 Subject: Missiologie. -- Jesuits India Bengal. -- Jesuits Missions. and others
 Availability: Physical version at BURNS: UNASSIGNED; 09-000012576 GENERAL
 Citation Status: Being Prepared
 Resource Locate Status: Resource Located
[Edit](#) | [Resource Locate](#) | [Set Complete](#) | [Manage Fulfillment Options](#) | [Remove](#) | [Duplicate](#) | [Print Slip](#) | [Detach from Repository](#) | [More info](#)

Figure 33 - Edit Reading List Page

- 3 Select the citations for which you want to create a request and click **Place Request**.

The Create Request page displays.

Create Request | Cancel | Submit

Create Request

Title: -
 Institution: College
 Request Type: *

Library physical digitization request
 Move permanently
 Move temporarily

Figure 34 - Create Request Page

- 4 Select the Request Type from the drop-down list, complete the remainder of your request, and click **Submit**.

Note: If all of the citation related items are already shelved at temporary locations, their due back date will be updated according to the current due back date of the reading list.

General

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

Library and Campus IP Definitions

Description

The purpose of this enhancement is to provide the ability to associate IP definitions on both the library and campus levels. This can be a single IP address or multiple IP addresses in a range.

With this capability, a user that is not logged in can be affiliated with a specific library and/or campus. Using the IP definition, Alma can then resolve electronic services according to the **Available for** settings (see the following release notes feature, Electronic Services Availability Definitions), restricting availability to all but the defined IP addresses. The IP definition/identification can also be used to prioritize locations for Get It and Real-Time Availability (RTA). For more information, see Get It Holdings Prioritization below.

Note: When an institution is a multi-campus institution, each library must have at least one IP definition. Alma prompts with a message if the IP address is missing.

Technical Instructions

The General System Administrator role can configure both library- and campus-level IP definitions.

To enter an IP definition for a library:

- 1 From the Alma main menu > General > General Configuration, click **Configuration Menu**.
- 2 From the Libraries section, click **Manage Your Institution's Libraries** and select the **Libraries** tab.
- 3 Click **Actions > Edit** for one of the libraries and select the new **IP Definitions** tab.
- 4 Click **Add IP Definition**.

The Add IP Definition pop-up window displays.

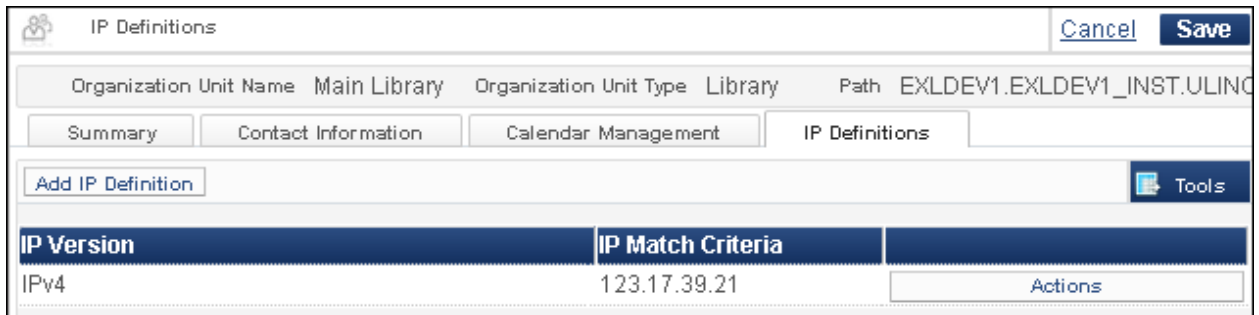


A pop-up window titled "Add IP Definition". It contains two input fields: "IP Version*" with a dropdown menu showing "IPv4", and "IP Match Criteria*" with an empty text box. At the bottom right, there are three buttons: "Close", "Add", and "Add and Close".

Figure 35 - Add IP Definition Pop-up Window

- 5 Enter the IP definition and click **Add and Close**.

The IP Definitions page displays with the IP information that you entered.



The "IP Definitions" page in the system. It has a header bar with "Cancel" and "Save" buttons. Below the header, there are tabs for "Summary", "Contact Information", "Calendar Management", and "IP Definitions" (which is selected). A table below the tabs shows the IP definitions. The table has three columns: "IP Version", "IP Match Criteria", and "Actions". The first row shows "IPv4" for IP Version and "123.17.39.21" for IP Match Criteria. There is an "Add IP Definition" button on the left and a "Tools" button on the right of the table.

IP Version	IP Match Criteria	Actions
IPv4	123.17.39.21	

Figure 36 - IP Definition

- 6 Click **Save**.

To enter an IP definition for a campus:

- 1 From the Alma main menu > General > General Configuration, click **Configuration Menu**.
- 2 From the Libraries section, click **Campuses**.
- 3 Click **Actions** > **Edit** for one of the campuses and select the new **IP Definitions** tab.
- 4 Follow steps 4 through 6 in the above procedure.

User Management

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

Create External User Elements

Description

Until now, it was possible to add data such as identifiers, blocks, contact information, statistics information, and notes to external users only as internally managed data. As such, the manually added data was not synchronized by the external student information system (SIS) synchronization process.

The purpose of this enhancement is to enable the manual addition of identifiers, blocks, contact information, statistics, and notes for external users as external data. If added as external data, it is updated or overwritten during synchronization with the SIS.

Technical Instructions

The User Manager role can create external user elements.

To add an external element to an external user:

- 1 From the Alma main menu > General > User Management, click **Find and Manage Users**.
- 2 From the **Account Filter** drop-down list, select **External users**.
- 3 For a specific patron, click **Actions > Edit**.

The patron's owner is defined as the external system.

External	Name Smith, James	Owner SIS12	Primary identifier 252571	User group 03BC Master's	Record type Public
----------	-------------------	-------------	---------------------------	--------------------------	--------------------

Figure 37 - Owner Defined as External System

- 4 Click the **Identifiers, Notes, Blocks, Contact Information, or Statistics** tabs.
- 5 Click the **Add** button in the tab. For example, click **Add Identifier**.

The appropriate pop-up window displays.

- 6 Enter the options as required and select **Add as an external**.

Figure 38 - Add as an external Option

7 Click **Add and Close**.

The identifier is added to the list of identifiers with a green check box displayed in the External Data column.

Active	ID Type	Value	Note	Created By	Creation Date	External Data	
✓	Barcode	145987	-	exl_impl	17/07/2011 09:13:12 AM IDT		Actions
✓	Barcode	15151	bar	Support, Ex Libris	25/04/2013 11:55:36 AM IDT	✓	Duplicate
✓	Barcode	151512	bar	Support, Ex Libris	25/04/2013 11:59:39 AM IDT		Actions
✓	Barcode	123990	-	User, Super	04/06/2013 12:32:41 PM IDT	✓	Duplicate
✓	Barcode	99125	-	User, Super	04/06/2013 12:33:41 PM IDT	✓	Actions

Figure 39 - External Data Column Selected

If the value for this identifier in the SIS differs, the value defined above will be replaced with the value in the SIS during the next synchronization process.

Note: Any internal identifiers that overlap with external identifiers or have the same value as the primary identifier are deleted as part of the SIS synchronization process.

Create Proxy Patrons

Description

The purpose of this enhancement is to enable the definition of a proxy user for another user in the system. The proxy user can then perform certain activities in Alma, such as loans or returns, on behalf of this user.

Technical Instructions

The following role can configure proxy patrons:

- User Manager

The following roles can work with proxy patrons:

- Circulation Desk Operator
- Circulation Desk Manager

To define a proxy patron:

- 1 From the Alma main menu > General > User Management, click **Find and Manage Users**.
- 2 Locate the user you want to define as a proxy for another user and click **Actions > Edit**.
- 3 Click the **Proxy For** tab.
- 4 Select or enter the user for whom you want the current user to be a proxy.

The screenshot shows the 'User Details' page for a user named James Smith. The page has a header with 'User Details', a 'Room...' dropdown, and 'Cancel' and 'Open For Update' buttons. The main content area displays user information: Name Smith, James; Primary identifier 814240; Account Type External; Record type Public; and User group Undergraduate Student. Below this is a row of tabs: General Information, Contact Information, Identifiers, Notes, Blocks, Statistics, Attachments, and Proxy For. The 'Proxy For' tab is selected, showing a 'Proxy for' dropdown with 'Aaron, Daren' and an 'Add User' button.

Figure 40 - Define a Proxy User

- 5 Click **Add User**.
- 6 Click **Save**.

To loan or return an item on behalf of another user:

- 1 From the Alma main menu > Fulfillment > Checkout/Check-in, click **Manage Patron Services**.
- 2 Enter the ID of the user who is acting as the proxy (in the above example, James Smith) and select **Use proxy**.

Patron Identification

Enter patron's ID

Scan patron's ID or search for patron *

Use proxy ☒

Figure 41 - Use Proxy

3 Click Go.

The **Proxy** for drop-down list displays.

Patron Identification

Enter patron's ID

Scan patron's ID or search for patron *

Use proxy ☒ Proxy for

Figure 42 - Proxy For

4 Select the user on whose behalf patron services are being managed and click **Go**.

The loan/return information for this user displays in the Loans/Returns tab. This user also receives email notifications regarding the actions taken on his behalf.

Patron Services

Patron Aaron, Daren
 ID [2525350587](#)
 User group Graduate Student
 Active balance [0.00 USD](#)
[Edit Info](#) [Send Activity Report](#) [Send Return Receipt](#)

Notes User Notes (0)

Loans Returns Requests

Scan item barcode* Loan Display 1 - 1 of 1 Records

Title	Due Date	Barcode	Fine	Loan Date	Loan Status	Item Policy	Library	
☐ Maine - a novel /	11/07/13 07:33:30 EDT	MC10004	-	11/06/13	Normal	Null	Education Library	Actions

Figure 43 - Loan Information for Other User

Note: Requests cannot be handled via proxy users. A patron must personally handle requests.

Resource Sharing

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

Automatic Generation of Temporary Item Barcodes

Description

The purpose of this enhancement is to provide the resource sharing borrowing library with the ability to receive and circulate a borrowed item using an automatically generated temporary barcode that is generated by the system based on the resource sharing request's external identifier.

Technical Instructions

The following role can configure the use of temporary item barcodes:

- Fulfillment Administrator

The following roles can work with temporary item barcodes:

- Fulfillment Services Operator
- Fulfillment Services Manager

To configure the use of temporary item barcodes:

- 1 From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.
- 2 From the General section, click **Other Settings**.
- 3 Click **Customize** for the `generate_resource_sharing_temp_barcode` parameter and change the parameter value from false to **true**.
- 4 Click **Save**.

To work with temporary item barcodes:

- 1 From the Alma main menu > Fulfillment > Resource Sharing, click **Borrowing Requests**.
The Resource Sharing Borrowing Requests page displays.
- 2 Ensure that you are currently at the correct circulation desk (by clicking the **Currently At** link at the top of the page and selecting the appropriate circulation desk) and click **Receive** to receive the item from the resource sharing partner.

9 [Poems. Second series / William Butler Yeats.](#)
Book By Yeats, W. B. (London : A H Bullen 1909.)
 Status: Shipped Physically
 Due date: 07/05/2013
[Edit](#) | [Cancel](#) | [Duplicate](#) | [Send](#) | [Send query to patron](#) | [Receive](#)

Figure 44 – Receive Item

The automatically generated temporary item barcode displays in the **Please fill in temporary barcode** field on the Received Items page, in the following format: RS-<resource sharing partner barcode>.

Received Items

Received Items

Received Format ☐ Digital ☒ Physical

Please fill in temporary barcode * RS-EXL0000208

Figure 45 – Temporary Barcode

Support for Email Communication with Resource Sharing Partners

Description

The purpose of this enhancement is to enable the sending of borrowing resource sharing requests and messages via email.

Technical Instructions

The following role can configure a partner of the type **Email**:

- Fulfillment Administrator

The following roles can communicate with resource sharing partners via email:

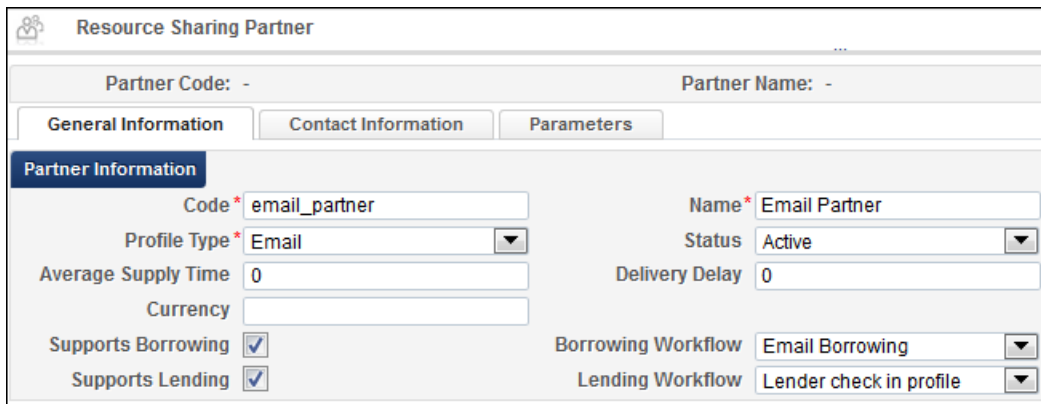
- Fulfillment Services Operator
- Fulfillment Services Manager

To configure a resource sharing partner of type Email:

- 1 From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.
- 2 From the Resource Sharing section, click **Partners**.
- 3 On the Resource Sharing Partner List page, click **Add Partner**.

The Resource Sharing Partner page displays.

- 4 Enter a code and name for the email partner and select **Email** from the Profile Type drop-down list.



Resource Sharing Partner

Partner Code: - Partner Name: -

General Information Contact Information Parameters

Partner Information

Code * email_partner Name * Email Partner

Profile Type * Email Status Active

Average Supply Time 0 Delivery Delay 0

Currency

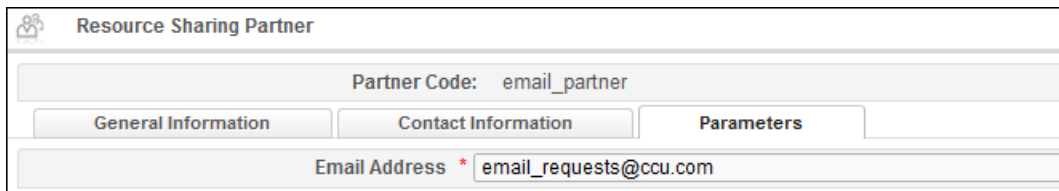
Supports Borrowing ☒ Borrowing Workflow Email Borrowing

Supports Lending ☒ Lending Workflow Lender check in profile

Figure 46 - Defining an Email Partner

Note: For an explanation of the rest of the fields on this page, refer to the Resource Sharing Requests section (under Integrations with External Systems) of the Alma documentation.

- 5 Click the **Parameters** tab and enter the email address to which resource sharing borrowing/lending requests are to be sent.



Resource Sharing Partner

Partner Code: email_partner

General Information Contact Information Parameters

Email Address * email_requests@ccu.com

Figure 47 - Email Address

- 6 Click **Save**.

Note: The email address specified in the Parameters tab must be added to the Email Include List mapping table (**General Configuration > Configuration Menu > External Systems > Allowed Emails**).

To send a borrowing request to the configured partner via email:

- 1 From the Alma main menu > Fulfillment > Resource Sharing, click **Borrowing Requests**.
The Resource Sharing Borrowing Requests page displays.
- 2 Select **Add > Manually** in the top left-hand corner of the page and choose the citation type in the window that opens.
The Resource Sharing Borrowing Request page displays.
- 3 From the **Partner** drop-down list in the Request Attributes section, select the name of the email partner you previously defined.

Request Attribute	
Title	-
Requester *	Abraham, Barton
Owner *	Resource Sharing Library
Item Creation Location	BC Law
Partner	Email Partner
Request Status	Created borrowing request
External Identifier	
Format	Physical
Needed By	
Pickup At	Resource Sharing Library
Agree to Copyright terms *	☒
Needs patron information	☐
Request Note	

Figure 48 - Selecting an Email Partner

Note: For an explanation of the rest of the fields on this page, refer to the Alma documentation.

4 Click Save.

The borrowing request is created.

5 Click Send beneath the borrowing request on the Resource Sharing Borrowing Requests page.

An email such as the following is sent to the lending resource sharing partner.

```
Book
Title: Great Expectations
Author: Charles Dickens
Publisher: Penguin Books
Year: 1990
Edition: 2
ISBN: 1234-5678
Chapter: 2
Pages: 20-30
Request Id: EXL0005601
Request Format: PHYSICAL
Sincerely,
Resource Sharing Library
Main Campus
```

Analytics

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

Remaining Amount Column Added

A new column, **Remaining Amount**, has been added to the Fines and Fees subject area. It is calculated by subtracting the transaction amount from the original amount.

Primo

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

Get It Holdings Prioritization

Description

The purpose of this enhancement is to provide the initial phase of enabling prioritizing considerations for the Primo Get It list of holdings. In the June release, the requester IP and the holdings campus/library IP range or ranges will be compared in order to associate holdings with the requester location and rank the Get It list by requester location. With this information, the ranking is prioritized in the following manner for the Get It/RTA response:

- 1 Holdings that are in the requester's library receive a high rank and display first in the results list.
- 2 Holdings that are in the requester's campus but not in the library receive a second-level ranking.
- 3 Holdings that are neither in the requester's location nor in his campus receive a third-level ranking.

Note: Availability is considered the highest priority and locations with available items are always displayed before locations without available items.

Technical Instructions

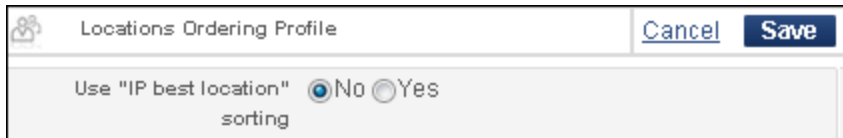
The following roles can access this facility:

- Fulfillment Administrator
- General System Administrator

To configure this option:

- 1 From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.
- 2 From the Discovery Interface Display Logic section, click **Locations Ordering Profile**.

The Locations Ordering Profile page displays.



A screenshot of a software dialog box titled "Locations Ordering Profile". The dialog has a title bar with a small icon on the left and the text "Locations Ordering Profile". On the right side of the title bar are two buttons: "Cancel" and "Save". Below the title bar, there is a single line of text: "Use 'IP best location' sorting". To the right of this text are two radio buttons. The first radio button is selected and is followed by the text "No". The second radio button is unselected and is followed by the text "Yes".

Figure 49 - Locations Ordering Profile Page

- 3** For **Use IP best location sorting**, select **Yes** and click **Save**.

System Enhancements

The following section describes Alma system enhancements provided in the June 2013 release.

Processing Icon Available for Additional Actions

After clicking an action button such as **Save**, the user is blocked from performing additional operations until the system has completed the current operation. Alma now displays a processing icon until the operation is complete and the page is refreshed.

This icon is provided throughout Alma and is viewable to all user roles.



Figure 50 – Processing Icon

Known Issue

- Regarding Enhanced Delete Options for Electronic Portfolios on page 23, the delete portfolio process does not work with itemized sets of electronic titles and all titles. It works only with electronic portfolio sets.