



Alma October 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 October 2013 Release Highlights](#)
- Feature/enhancement descriptions for the respective Alma components and functional areas
 - [Data Services](#)
 - [Alma Show Me How and Videos](#)
 - [Documentation Highlights](#)
 - [Acquisitions](#)
 - [Resource Management](#)
 - [Fulfillment](#)
 - [Resource Sharing](#)
 - [Analytics](#)
 - [Primo](#)
 - [Collaborative Networks](#)
 - [User Management Enhancements](#)
- [Known Issue](#)

Alma October 2013 Release Highlights

Acquisitions

- **List of Proposed Identifiers**

The PO line has been further enhanced to allow the staff user to select the identifier that will be associated with the order.

- **Packaging PO Lines by Fund**

This enhancement provides the option of packaging PO lines by fund, which makes the management of the PO approval task list more efficient. Fund managers will now be able to locate all POs associated with a fund.

- **Exporting POs to External Accounting Systems**

It is now possible to export POs to the institution's external accounting system.

Resource Management

- **Enhanced Authority Record Management**

This great new enhanced functionality provides catalogers with more options for viewing and navigating to authority records associated with a bibliographic record that they are editing in the MD Editor. A magnifying glass icon to the left of a field indicates that there is a related authority record. Clicking the magnifying glass icon opens the related authority record on the right side of the split screen.

- **Enhanced Support for MARC-Encoded RDA**

This release sees enhancements related to the integration of MARC21 with the Resource Description and Access (RDA) format. Relevant fields have been added to the bibliographic, authority, and holdings tables in Alma. This enhances tasks related to cataloging, searching, and indexing that rely on MARC-encoded RDA.

- **German National Library (GND) Authorities Files**

Authorities (Subjects and Names) from the German National Library have been added to the Alma Community Zone and will be updated on a weekly basis.

Fulfillment

- **Addition of Time Option to Due Date Policy**

This enhancement allows for specifying a time (HH:MM) for a Due Date policy. If no time is specified, Alma will continue to use the closing time of the specified date.

Resource Sharing

- **Associating Resource Sharing Libraries with Users**

This enhancement allows for indicating the library that is responsible for resource sharing requests initiated by a user. Where multiple resource sharing libraries are used, all of a patron's resource sharing requests will be still managed by the same resource sharing library.

- **Manually Locating Resources**

Before sending resource sharing partners a request, it is now possible to locate a requested resource at the potential resource sharing partner suppliers.

- **Managing Reportable Shipping Costs**

This enhancement enables the configuration of shipping costs for borrowing and lending requests. You can also configure a rule in Fulfillment Configuration that indicates the conditions under which a specified shipping cost is applied.

Analytics

- **Bibliographic Details Suppressed from Discovery**

It is now possible to expose bibliographic record details suppressed from discovery in reports and dashboards. This is available for all areas in which Bibliographic Details appears as a dimension.

- **Fines and Fees Waiving Reason Description**

The waiving reason description for fines and fees is now exposed in Alma Analytics.

- **User Details Customer-Defined Identifiers**

User details customer-defined identifiers are now exposed in Alma Analytics. They are available for all areas in which User Details appears as a dimension.

Collaborative Networks

- **Fulfillment Network – Request from Any Member Institution**

This enhancement allows for patrons of institutions that share a common Fulfillment Network to directly request items from any institution in the Fulfillment Network. In order for an institution to be able to supply a resource to a patron, the patron must be locally registered at the institution. This enhancement provides the automatic registration of the patron at the non-home institution.

- **Resolving Electronic Resources in the Network Zone**

This enhancement expands the Alma Link Resolver functionality to provide electronic services for electronic resources that are managed centrally in the Network Zone.

Data Services

The Alma October 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 09 September 2013 through 06 October 2013:

- de Gruyter eBooks Linguistics 2013
- Casalini EIO Premier eBooks
- Casalini EIO Premier Journals
- Cairn Open Access 2013

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:

- University of Melbourne Library
- Australian National Bibliographic Database (Test)
- Libraries Australia Modified
- LIBRIS - Swedish Union Catalogue
- Global Books in Print (Bowker)

Alma Show Me How and Videos

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

Alma Show Me How – October

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 October release, the following Show Me How scenarios are available:

- Show Authority Record in MD Editor
- Locate Resource Before Sending Borrowing Request
- Create a Locate Profile
- Add a Locate Profile to a Partner
- Manual Rota Assignment for Borrowing Requests
- Search for E-Resources in the Network Zone

Alma Videos – October

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

- Show Authority Records in the MD Editor
- Locate Resource Before Sending Borrowing Request
- Resolving Electronic Resources in the Network Zone

Documentation Highlights

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

- Working with the Community Zone Updates Task List (under Resource Management > Inventory)
- Fulfillment Configuration (under Fulfillment > Fulfillment Configuration)
- The following integration areas (under Integrations with External Systems):
 - Bursar systems
 - LDAP/SAML authentication
 - Z39.50 search
 - SMS communications

Note: The **General** component will be renamed **Administration** for the next Alma hot fix (in October). In anticipation of this change, the *Alma General Guide* has been renamed *Alma Administration Guide*. The Managing Jobs and Running Jobs sections have been moved to this guide to match the upcoming change (November) in the Alma user interface.

Acquisitions

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

PO Line Advanced Search Operators

Description

The purpose of this enhancement is to provide the **Equals** option exclusively for the following fields in the Acquisitions Manage Sets advanced search:

- Workflow
- Material Supplier
- Access Provider
- Acquisition Method
- Fund Code
- License Code
- Rush
- Cancellation Restriction

Technical Instructions

The following roles can search for PO lines using the Acquisitions Manage Sets advanced search:

- Purchase Operator
- Purchase Manager
- Acquisitions Administrator

- General System Administrator

To search for PO lines using the advanced search:

- 1 On the Manage Sets page (Acquisitions > Processes and Sets > Manage Sets), click **Add Set > Logical**. The Set Details page displays.
- 2 Configure the fields in the General Information section, as described in the **Adding Itemized Sets** section of the *Alma Resource Management Guide*.
- 3 Click **Advanced Search**.

The Advanced Search segment displays.

The screenshot shows the 'Advanced Search' segment. It features a 'Find' input field followed by the word 'in'. To the right of 'in' is a dropdown menu currently set to 'Title'. Below these are several search criteria, each with a dropdown menu set to 'Equals':

- Workflow
- Material Supplier
- Material Supplier Account
- Access Provider
- Acquisition Method
- Fund Code
- Fund Name
- License Code
- Rush
- Cancellation restriction

Each criterion has a corresponding empty text input field to its right. At the bottom left of the segment is a 'Go' button.

Figure 1 - Advanced Search Segment

The **Equals** option is the only option that appears in the drop-down lists for the above-mentioned fields.

PO Line Cancellation Note

Description

The purpose of this enhancement is to enable the appearance of a cancellation restriction note containing a warning upon the cancellation of a PO line. To continue with the cancellation of the PO line, the user must click **Confirm**.

Technical Instructions

The following roles can configure the appearance of a cancellation restriction note upon the cancellation of a PO line:

- Purchase Operator
- Purchase Manager

To configure a PO line cancellation note:

- 1 Create or edit a PO line. New **Cancellation restriction** and **Cancellation restriction note** fields are displayed in the PO Line Details section.
- 2 Select the **Cancellation restriction** check box.
- 3 Write a note in the **Cancellation restriction note** text box.

The screenshot shows the 'PO Line details' form. The 'Cancellation restriction' checkbox is checked. The 'Cancellation restriction note' text box contains the text: 'If you cancel this PO line, it will no longer be active.' Other fields include 'Acquisition method' (Purchase), 'Invoice status' (No invoice), 'Material type' (Book), 'Reporting Code', 'Identifier' (0-7868-6052-9), 'Proposed Identifier', 'Vendor reference number' (VendorRefNum_0402131026), 'Vendor reference number type', 'Note to vendor', and 'Vendor invoice number'.

Figure 2 – PO Line Details

- 4 Save the PO line.

Upon the cancellation of the PO line, the following is displayed:

The screenshot shows a 'Confirmation Message' dialog box. It contains the text: 'Please note the following:' followed by a warning icon and the message: 'There is a Cancellation Restriction on this PO Line : If you cancel this PO line, it will no longer be active.' Below this, it asks: 'Are you sure you want to perform this action?'. At the bottom right, there are 'Cancel' and 'Confirm' buttons.

Figure 3 – Cancellation Restriction Message

List of Proposed Identifiers

Description

The purpose of this enhancement is to enable the creator/editor of a PO line to select the identifier with which an order is to be associated before sending the order to the vendor. By default, the **Identifier** field is populated by the first identifier listed in the bibliographic/imported record's ISBN/ISSN (020/022) field. However, the creator/editor of a PO line can now select another identifier to be used instead.

Technical Instructions

The following roles can create and edit PO lines:

- Purchase Operator
- Purchase Manager

To select a PO line identifier:

- 1 Create or edit a PO line.
- 2 In the PO Line Details section, select an identifier from the **Proposed Identifier** drop-down list.

The identifier is displayed in the **Identifier** field.

The screenshot shows the 'PO Line details' form. It contains several fields and sections:

- Acquisition method:** Purchase (dropdown)
- Material type:** Issue (dropdown)
- Invoice status:** No invoice (dropdown)
- Reporting Code:** (dropdown)
- Rush:** ☐
- Cancellation restriction:** ☐
- Cancellation restriction note:** (text area)
- Identifier:** 2325-5307
- Proposed Identifier:** (dropdown menu is open, showing options: 0004-3249 and 2325-5307)
- Vendor reference number:** (text field)
- Vendor reference number type:** (text field)
- Note to vendor:** (text field)
- Vendor invoice number:** -

Figure 4 – Identifier and Proposed Identifier Fields

Packaging PO Lines by Fund

Description

The purpose of this enhancement is to provide the option of packaging PO lines by fund. Institutions working with functional funds will now be able to locate all the POs associated with a specific fund and manage their approval much more efficiently.

Note that if a PO line is associated with more than one fund, it cannot be packaged automatically. The following error will be generated: **PO Line contains more than one fund and cannot be packaged automatically. Please set it to Manual Packaging.** The PO line will then need to be packaged manually.

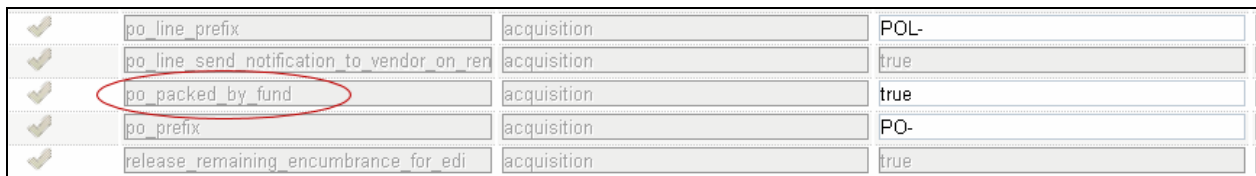
Technical Instructions

The following roles can configure the automatic packaging of PO lines by fund:

- Acquisitions Administrator
- General System Administrator

To configure the automatic packaging of PO lines by fund:

- 1 On the Acquisitions Configuration page (Acquisitions > Acquisitions Configuration > Configuration Menu), click **Other Settings** under **General**.
- 2 Set the `po_packed_by_fund` parameter to **True**.



✓	po_line_prefix	acquisition	POL-
✓	po_line_send_notification_to_vendor_on ren	acquisition	true
✓	po_packed_by_fund	acquisition	true
✓	po_prefix	acquisition	PO-
✓	release_remaining_encumbrance_for edi	acquisition	true

Figure 5 – Other Settings – Acquisitions Configuration

Note: By default the `po_packed_by_fund` parameter is set to **False**.

Exporting POs to External Accounting Systems

Description

The purpose of this enhancement is to enable exporting POs to the institution's external accounting system so that they can be recorded as required in this system.

Technical Instructions

The following role can configure the export of POs to external accounting systems:

- General System Administrator

To enable the exporting of POs to an external accounting system:

- 1 On the General Configuration page (General > General Configuration > Configuration Menu), click **External Interfaces** under **External Systems**. The External System List page is displayed.
- 2 Select **Actions > Edit** for a previously configured payment profile. The General Information page is displayed.
- 3 Click the **Actions** tab.

External System

External System

Code TestPayment

Name TestPayment

Integration Type Payment

General Information

Actions

Contact Info

Actions

Import Payment Confirmation

Active * ☐ Active ☒ Non Active

Plugin

Input File Path import

Run

Schedule Not scheduled

Export Invoice For Payment

Active * ☒ Active ☐ Non Active

Plugin

Output File Path export

Run

Schedule Every Thursday at 01:00

Use xsd format ☒

Funds Allocation Loader

Active * ☒ Active ☐ Non Active

Plugin

Input File Path * fund

File Extensions * ☐ Csv ☒ Excel

Schedule Every Monday at 01:00

Run

Export Order (PO)

Active * ☒ Active ☐ Non Active

Plugin

Output File Path * po

Rerun failed orders

Figure 6 – External System Page — Actions Tab

- 4 In the Export Order (PO) section, configure the following fields:
 - **Active:** Select **Active** to activate the export action.
 - **Plugin:** Select the method of conversion to be used to transform input files of different formats to input that can be recognized by Alma (not currently in use).
 - **Output file path:** Enter a subdirectory of the path specified when creating the S/FTP connection.
- 5 Click **Rerun Failed Orders** to export all POs to the defined output file path from which the external accounting system can be configured to import the POs. Note that this process must be run manually and cannot be scheduled.

Note: The values of the file path fields on this page (the **Input file path** and **Output file path** fields) must each be unique.

Other Acquisitions Enhancements

- Until now, the default invoice approval rule did not take effect. Even when it was set to **True**, the default rule was disregarded and invoices were not sent for approval unless other invoice rules were configured and their conditions were met. This issue has been fixed and the default invoice approval rule now works as it should. If it is set to **True**, invoices will be sent for manual approval.
- The **Locations** column on the Receive New Material page (Acquisitions > Invoicing > Receive) now displays the name of the library together with the location.
- The Vendor Details EDI Information tab now displays a new field: **EDI vendor format**. If you are working with a Harrassowitz or Harrassowitz-like vendor, select **Harrassowitz** from the drop-down list. Otherwise, select **Other**.
- Issues with PO line processing whereby PO lines got stuck in review have now been resolved.
- If you import an Excel file with two invoices that have the same number, the first invoice is imported successfully and the second fails. A warning regarding a non-unique invoice number is issued.

Resource Management

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

Enhanced Authority Record Management

Description

The purpose of this enhancement is to provide catalogers with improved navigation to the authority records that are associated with a bibliographic record that they are editing in the MD Editor.

Technical Instructions

The following roles can access this enhancement:

- Cataloger
- Catalog Manager
- Catalog Administrator

To access this enhancement:

Edit any MARC record. A magnifying glass icon to the left of the field number indicates that there is a related authority record heading for the information contained in the field. Upon clicking the magnifying glass icon, the right side of the split screen displays the full authority record, as in the following example:

Working on -Ancient History (991111000000121) , Created by CKB (29/08/2013 14:01:36 IDT)		Morle, James, 1970- (9866330820000041)	
LDR	01919nam a22003613u 4500	LDR	00353nz a2200121n 4500
001	99100000000000588	001	9866330820000041
005	20130527015523.0	005	19991004150026.0
006	m d	008	991004n acannaabn n aaa
007	cr -n-----	010	\$\$a n 99255797
008	130527s2013 s eng d	040	\$\$a DLC \$\$b eng \$\$c DLC
020	\$\$a 0-415-16509-1	100	1 \$\$a Morle, James, \$\$d 1970-
035	\$\$a (CKB)1000000000000588	670	\$\$a Morle, James. Scaling Oracle 8i, 2000: \$\$b CIP t.p. (James Morle) data sheet (b. July 6, 1970)
035	\$\$a (EBL)168619	035	# # \$\$a (DLC) n 99255797
035	\$\$a (OCoLC)50766728		
040	\$\$a AU-PeEL \$\$b eng \$\$c AU-PeEL \$\$d AU-PeEL		
050	4 \$\$a D56.M659 2		
050	4 \$\$a D56.M659 2000eb		
082	0 0 \$\$a 930		
100	1 \$\$a Morle, James, \$\$d 1970-		

Figure 7 – Display of Authority Record Heading

Previously, when working in MD Editor authority-controlled fields, catalogers automatically received a drop-down list of related authority and bibliographic records headings after entering three characters, as in the following example:

The screenshot shows the MD Editor interface with a drop-down list of suggested headings. The list is divided into two sections: 'Headings from authority records' and 'Headings from bibliographic records'. The 'Headings from authority records' section includes 'Bar', 'Bar associations', 'Bar associations Brazil', 'Bar associations Great Britain', 'Bar associations Periodicals California', 'Bar associations Periodicals United States', 'Bar associations Public relations', 'Bar-bells', and 'BAR (Biofragmentable anastomosis rings)'. The 'Headings from bibliographic records' section includes 'Bar coding' and 'Bartending'.

Field	Subfield	Text
650	0	\$\$a Bar
Headings from authority records		
700	1	Bar
856	4 1	★ Bar associations
856	4 2	★ Bar associations Brazil
856	4 2	★ Bar associations Great Britain
		★ Bar associations Periodicals California
		★ Bar associations Periodicals United States
		★ Bar associations Public relations
		Bar-bells
		BAR (Biofragmentable anastomosis rings)
Headings from bibliographic records		
		★ Bar coding
		Bartending.

Figure 8 – Current Suggested Headings Drop-Down List

With the October release, catalogers view a screen such as the following after entering at least three characters and pressing F3. They can then use the **Select** button to choose the required heading:

The screenshot shows the new suggested headings screen. The interface includes a header with the text 'Working on -Ancient History (991111000000121) , Created by CKB (29/08/2013 14:01:36 IDT)'. Below the header is a search bar with the text '100 1 \$\$a Morle\$\$'. The main area displays a list of suggested headings under the heading 'Headings from authority records'. Each entry has a 'Select' button next to it.

Heading	Action
★ Morle, James, 1970-	Select
★ Morledge, G. Alan	Select
★ Morledge, Kirk W.	Select
★ Morledge, Phillip J.	Select
★ Morledge, Roy	Select
Morleĭ, Dzhon, 1838-1923	Select
Morlei, George, 1597-1684	Select
Morleĭ, Lesi Kollinson-, 1875-	Select
★ Morleigh	Select
★ Morleigh, Sidney	Select

Figure 9 – New Suggested Headings Screen

Note that for the November release, a **View** button will be added for each suggested authority record heading and the right side of the split screen will be enhanced so that a read-only version of the full authority record is displayed.

For example:

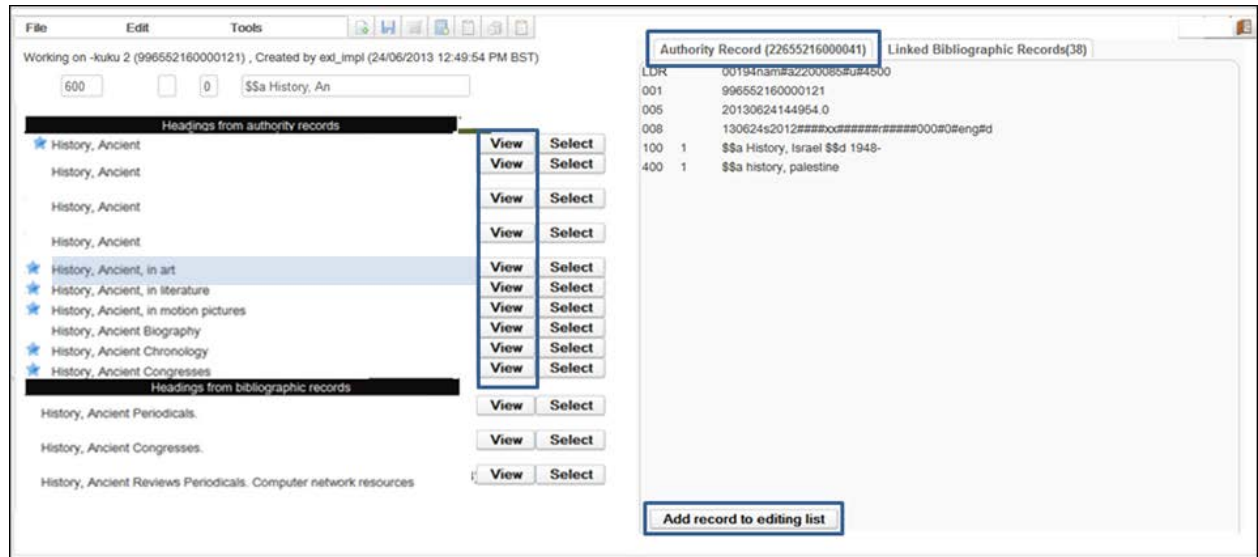


Figure 10 – View Authority Record

If the authority record is local, not locked by another user, and not already included in the authority draft list, you will be able to add it to your authority draft list by clicking the **Add Record to Editing List** button.

In addition, you will be able to click the **Linked Bibliographic Records** tab on the right side of the split screen to view a list of local bibliographic records that are linked to the selected authority record. When you click the **View** link for each result, Alma will display a full, read-only bibliographic record.

For example:

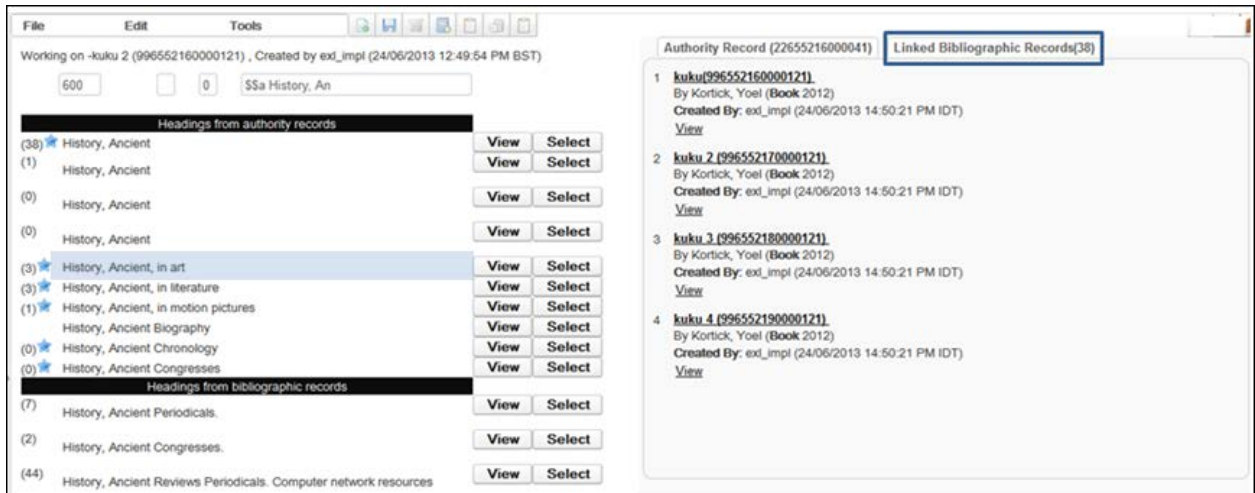


Figure 11 – View Linked Bibliographic Records

For the November release, a **View** button will also be added for each suggested bibliographic record heading and the right side of the split screen will be enhanced to display a **Bibliographic Records** tab, which will include a list of local bibliographic records containing the selected bibliographic record heading value. When you click the **View** link for each result, Alma will display a full, read-only bibliographic record.

For example:

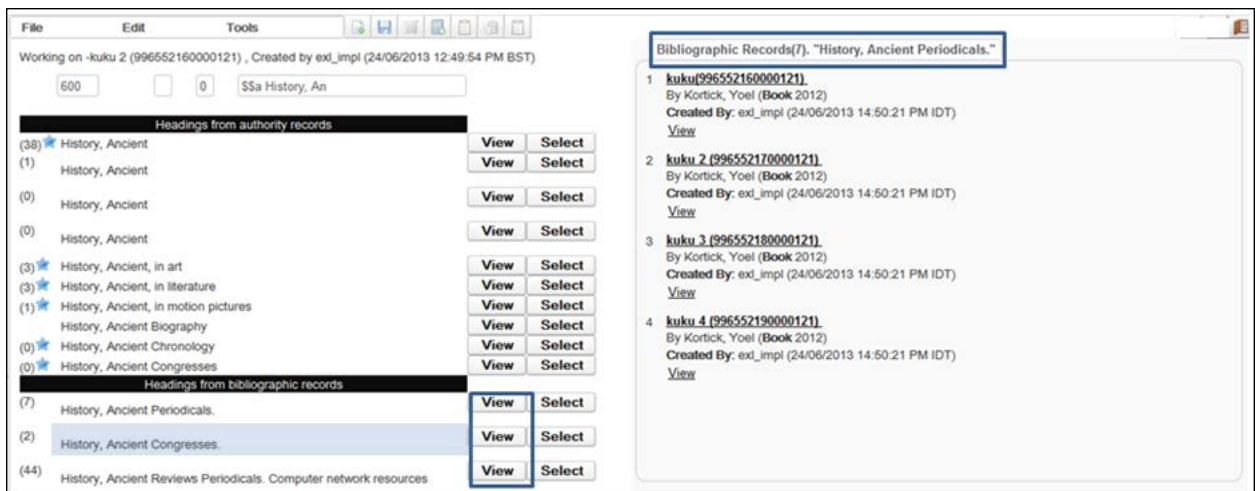


Figure 12 – View Bibliographic Records Tab

Updating URLs for Electronic Portfolios (URM-24786)

Description

Vendors that license electronic portfolios occasionally need to change the URLs that link institutions to resources.

This enhancement allows operators to update URLs using a parameter on the Change Electronic Portfolio Information form. Prior to this release, the prefix of a URL could be deleted but not changed. This release provides the option of replacing the URL string using an additional field on the same form.

Technical Instructions

The following role can access this new process:

- Electronic Inventory Operator

To batch edit a URL for an electronic portfolio:

- 1 On the Create Process – Select Process to Run page (Resource Management > Processes > Run Process), locate the correct process by clicking the **Filter** drop-down list and selecting **Information Update**.

The Change Electronic Portfolio Information process appears in the filtered list.

- 2 Select the **Change Electronic Portfolio Information** process and click **Next**.

A list of available sets opens.

- 3 Select the set to which you want to apply the process. Click **Next**.

The Task Parameters page for the process opens—parameters on the left, corresponding conditions on the right.

Figure 13 – Delete or Replace URL – Check Box and Fields

- 4 Find the **Delete or replace url's prefix** parameter and click the check box.
- 5 In the first (left-sided) text field, enter the prefix characters you want to delete or replace in the portfolio URL.
- 6 To delete the prefix, leave the second (right-sided) text field blank. To replace the prefix with a different one, enter the new characters in the second ("with") field.
- 7 Click the **Next** button.
- 8 Enter a name for the job and select a time for it to run. Click **Next**.
A summary page opens, detailing your change request.
- 9 Review the change and click **Save**.
The process runs. The system returns you to the Alma home page.

To verify that the change was successful:

- 1 On the Monitor Processes page (Resource Management > Processes > Monitor Processes), click the **Completed** tab. If the process has not completed, check the **Running** and **Scheduled** tabs to determine its status. Do not attempt to verify if the process has not completed.
- 2 Access **Resource Management > Search and Sets > Manage Sets**.
- 3 Find the set on which you performed the process and select **Actions > Members**.
- 4 Click the **Linking Information** tab.
The changed URL should appear in the **URL (override)** field.

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Electronic Portfolio Editor

Resource description [etay e-book url with amp order test102 American Business Comm](#)

Interface Name -

Service Type Full Text

Portfolio Information Linking Information Coverage Information

Url <http://www.one.co.il>

Url (override) <http://www.ezproxy.com>

Proxy enabled ☒ No ☐ Yes

Proxy selected Defa

Test access

Figure 14 – Changing the URL for Portfolio Links

- 5 Click the **Test Access** button to access the URL in the **URL (override)** field (via the Alma Resolver).

Web Service Extracts Notes to XML File

Description

The purpose of this enhancement is to enable the Label Printer Web service to extract the contents of an item's **Internal note** fields to an XML file.

For example:

Physical Item Editor

Resource description [History History \(Historical Association \(Great Britain\) : Online\) Blackwell Publishers Oxford : Print began with vol. 1, no. 1 \(Jan. 1912\). \[0018-2648\]](#)

Holding [BURNS: UNASSIGNED location: D1](#) [View all holdings](#)

Barcode bc23601 [View all items](#)

Process type Acquisition

Summary General Information ENUM/CHRON information **Notes** History

Public note

Fulfillment note

Internal Notes

Internal note 1

Internal note 2

Internal note 3

Statistics Notes

Statistics note 1

Statistics note 2

Statistics note 3

Figure 15 – Physical Item Editor Page — Notes Tab

The text that is entered in the **Internal note** fields is exported to the XML file.

```
- <display_alt_call_numbers>
  <string>jhf kuyfr kuyfffydsds uyrfhrtstrop</string>
</display_alt_call_numbers>
<edition/>
<enum_a/>
<enum_b/>
<enum_c/>
<enum_d/>
<enum_e/>
<enum_f/>
<enum_g/>
<enum_h/>
<fulfillment_note/>
<imprint>1234567890</imprint>
<internal_note1>Internal note 1</internal_note1>
<internal_note2>Internal note 2</internal_note2>
<internal_note3>Internal note 3</internal_note3>
```

Figure 16 – XML File with Internal Notes

German National Library (GND) Authorities Files

Description

This enhancement adds authorities from the German National Library - Subjects and Names to existing authorities in Alma. It allows access to the vocabulary of the GND and provides the authorities for libraries whose works are primarily in, or related to, German. The authorities are updated in the Community Zone on a weekly basis.

Technical Instructions

Using the MD Editor, catalogers can catalog a bibliographic record to use a GND authority heading (see [Enhanced Authority Record Management \(URM-2052\)](#)).

For example:

The screenshot shows the MD Editor interface. At the top, there are tabs for 'File', 'Edit', and 'Tools'. Below the tabs, a status bar indicates 'Record saved at 13:49:47. You have 21 warning(s) in your record'. The main area displays the record details: 'Working on -akameisches Barnes & (992772010000121) , Created by admin1 (02/07/2012 04:35:23 AM BST)'. The record number is 611, and the field 7 contains the heading '\$\$a akademisches t \$\$2 GND'. Below this, a list of headings from authority records is shown, each with a 'Select' button. The headings are: 'Akademisches Turnbundfest Klagenfurt 1929 9', 'Akademisches Turnbundfest Klagenfurt 1929 Ehemalige Vorzugsbenennung SWD', 'Ehemalige Vorzugsbenennung SWD', 'Akademisches Turnbundsfest', 'Akademisches Turnbundsfest Allenstein 1925 8', 'Akademisches Turnbundsfest Allenstein 1925 Ehemalige Vorzugsbenennung SWD', 'Ehemalige Vorzugsbenennung SWD', 'Akademisches Turnbundsfest Hameln 1901 3', 'Akademisches Turnbundsfest Hameln 1901 Ehemalige Vorzugsbenennung SWD', 'Ehemalige Vorzugsbenennung SWD', 'Akademisches Turnbundsfest Hameln 1909 5', 'Akademisches Turnbundsfest Hameln 1909 Ehemalige Vorzugsbenennung SWD', 'Ehemalige Vorzugsbenennung SWD', and 'Akademisches Turnbundsfest Minden 1921 7'.

Headings from authority records	
★ Akademisches Turnbundfest Klagenfurt 1929 9	Select
Akademisches Turnbundfest Klagenfurt 1929 Ehemalige Vorzugsbenennung SWD	Select
Ehemalige Vorzugsbenennung SWD	
★ Akademisches Turnbundsfest	Select
★ Akademisches Turnbundsfest Allenstein 1925 8	Select
Akademisches Turnbundsfest Allenstein 1925 Ehemalige Vorzugsbenennung SWD	Select
Ehemalige Vorzugsbenennung SWD	
★ Akademisches Turnbundsfest Hameln 1901 3	Select
Akademisches Turnbundsfest Hameln 1901 Ehemalige Vorzugsbenennung SWD	Select
Ehemalige Vorzugsbenennung SWD	
★ Akademisches Turnbundsfest Hameln 1909 5	Select
Akademisches Turnbundsfest Hameln 1909 Ehemalige Vorzugsbenennung SWD	Select
Ehemalige Vorzugsbenennung SWD	
★ Akademisches Turnbundsfest Minden 1921 7	Select

Figure 17 – Cataloging a Bibliographic Record to Use a GND Authority Heading

In addition, the GND authorities can be viewed when searching for authorities in the Repository Search, as illustrated below.

Repository Search

Find **Authorities** where **Originating System**

Institution **Community**

Limit results to:

Heading Usage

[Names \(16307\)](#)
[Series \(581\)](#)
[Subjects \(640466\)](#)

Vocabulary

GND (2644) *New authorities*
[LCK \(13671\)](#)
[MESH \(624903\)](#)

- [Hunter, D. O. 1928- \(David Ott\)](#)**
[Search bibliographic records matching this value](#) | [Edit](#)
- [Rochais, Henri](#)**
Rochais, H. (Henri)
[Search bibliographic records matching this value](#) | [Edit](#)
- [Prieto, Héctor Manuel, 1975-](#)**
[Search bibliographic records matching this value](#) | [Edit](#)
- [Zamylin, E. I. \(Evgenii Ivanovich\)](#)**
Замылин, Е. И. (Евгений Иванович), Zamylin, Evgenii Ivano
[Search bibliographic records matching this value](#) | [Edit](#)
- [Museum of Fine Arts \(Springfield, Mass.\)](#)**
Supuringuffrudo Bijutsukan, Springfield (Mass.). Museum of

Figure 18 - Search Results for System with GND Authorities

Repository Search

Find **Authorities** where **Originating System**

Institution **Community**

Limit results to:

Heading Usage

[Names \(9701\)](#)

Search limited to: Vocabulary: **GND**

- [Akademisches Turnbundsfest Hameln 1909 5](#)**
[Search bibliographic records matching this value](#)
- [Akademisches Turnbundsfest Minden 1921 7](#)**
[Search bibliographic records matching this value](#)
- [Akademisches Turnbundsfest Minden 1953 11](#)**
[Search bibliographic records matching this value](#)
- [Aktion Leseräume Leseträume](#)**
[Search bibliographic records matching this value](#)
- [Albert Cuypmarkt Amsterdam](#)**
[Search bibliographic records matching this value](#)
- [Aldeburgh Festival of Music and the Arts](#)**
[Search bibliographic records matching this value](#)

Figure 19 - Search Results Limited to GND Vocabulary

Enhanced Support for MARC-Encoded RDA

Description

This enhancement improves the integration of MARC with the Resource Description and Access (RDA) format by adding fields to the bibliographic, authority, and holdings tables used by Alma. This enhances tasks related to cataloging, searching, and indexing that rely on MARC-encoded RDA.

Technical Instructions

Any role that is part of a system that uses RDA will see new fields and subfields when employing the Alma advanced search.

To view changes to these fields in the advanced repository search:

- 1 On the Repository Search page (Resource Management > Search and Sets > Repository Search), click **Advanced Search**.

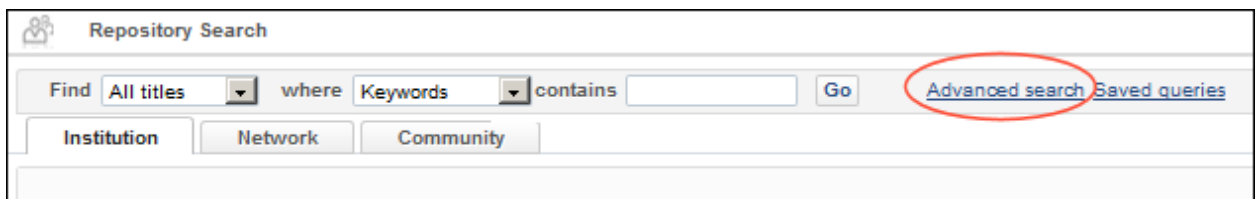


Figure 20 - Access the Advanced Search Page

- 2 On the Advanced Search page, click the **Add Conditions** button.

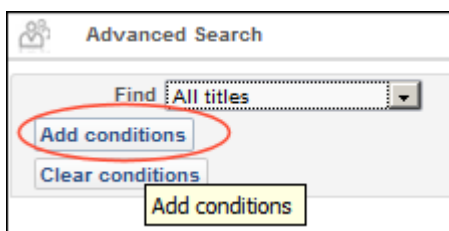


Figure 21 - Add Conditions on the Advanced Search Page

The Add Conditions form opens in a dialog box.

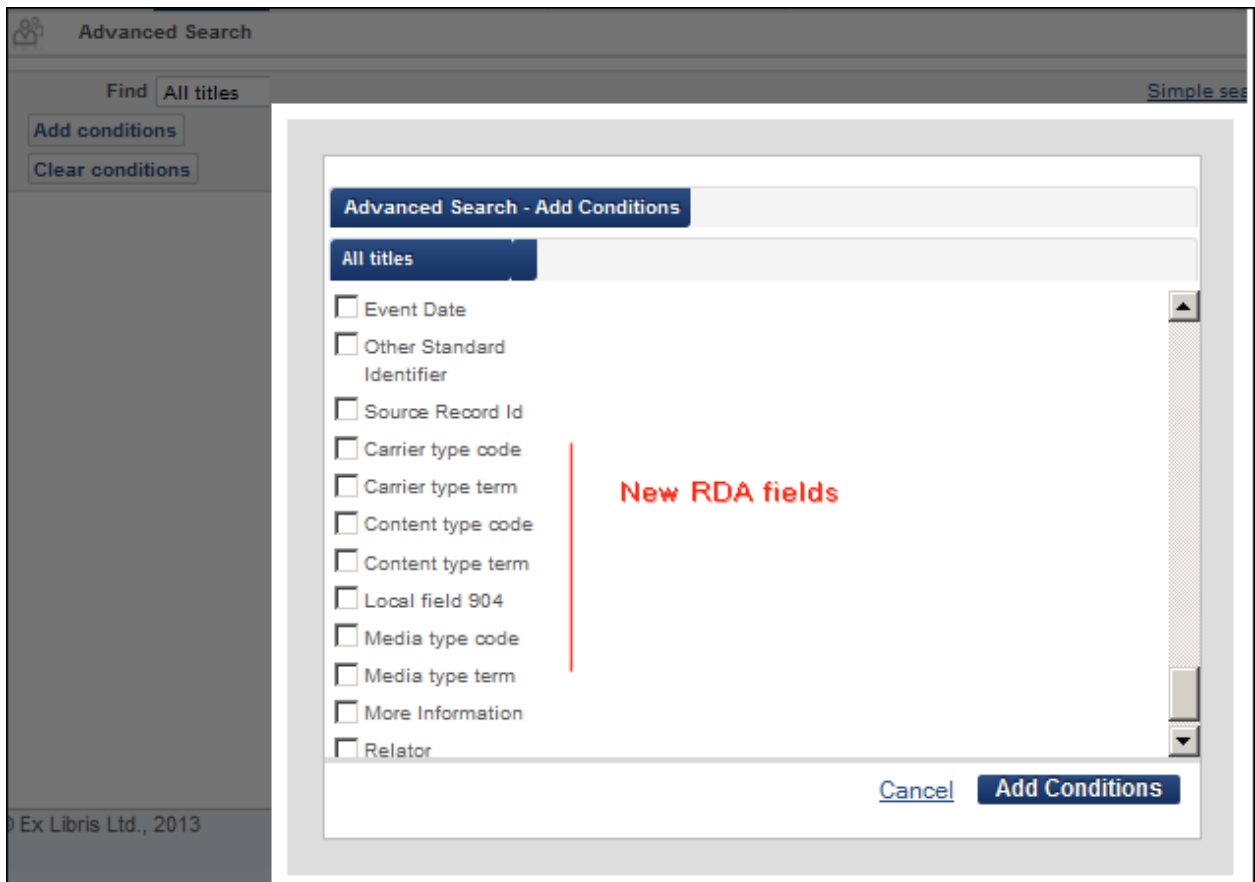


Figure 22 - Find the New Fields in the Add Conditions Form

- 3 Scroll to find the new RDA fields. To use them in a search, select them, click the **Add Conditions** button on the form, and complete your search on the Advanced Search page.

For example, if you specify the condition of **Content type form=text**, you receive results such as the following:

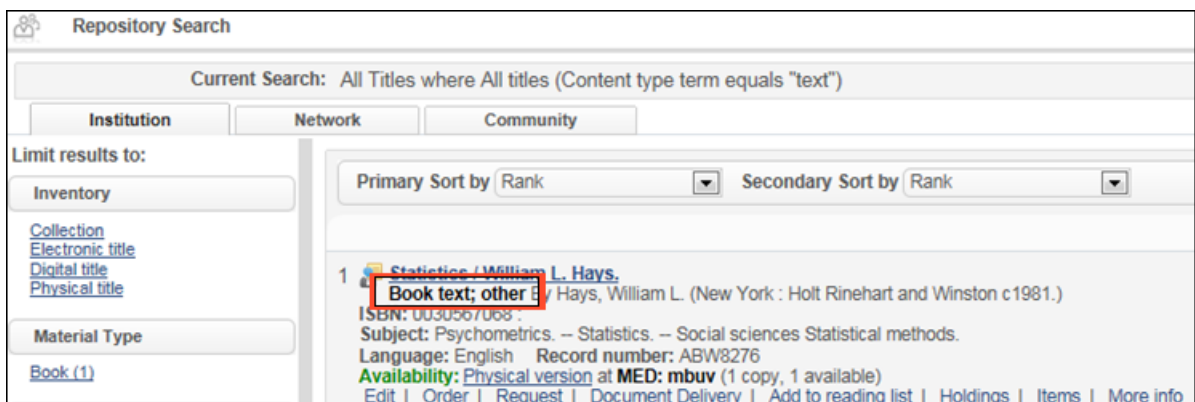


Figure 23 – RDA Conditions in Search Results

The following fields have been added for RDA:

Note: All new fields have the type "Variable." Repeatable fields are marked by "(R)" in the description. Non-repeatable fields are marked by "(NR)."

Bibliographic

Field	Description
028	Publisher Number (R)
264	Production, Publication, Distribution, Manufacture, and Copyright Notice (R)
336	Content Type (R)
337	Media Type (R)
338	Carrier Type (R)
340	Physical Medium (R)
344	Sound Characteristics (R)
345	Projection Characteristics of Moving Image (R)
346	Video Characteristics (R)
347	Digital File Characteristics (R)
377	Associated Language (R)
380	Form of Work (R)
381	Other Distinguishing Characteristics of Work or Expression (R)
382	Medium of Performance (R)
383	Numeric Designation of Musical Work (R)
384	Key (NR)

Authority

Field	Description
046	Special Coded Dates (R)
336	Content type (R)
368	Other Attributes of Person or Corporate Body (R)
370	Associated Place (R)
371	Address (R)
372	Field of Activity (R)
373	Associated Group (R)
374	Occupation (R)
375	Gender (R)
376	Family Information (R)
378	Fuller Form of Personal Name (NR)
377	Associated Language (R)
380	Form of Work (R)
381	Other Distinguishing Characteristics of Work or Expression (R)
382	Medium of Performance (R)
383	Numeric Designation of Musical Work (R)
384	Key (NR)

Holdings

Field	Description
337	Media Type (R)
338	Carrier Type (R)

Other Resource Management Enhancements

- A database collection is published if it associated with an unsuppressed bibliographic record. This is now clearly indicated by the DB collection's icon in the Repository Search, which is no longer grayed out.
- Network Zone records can now be edited properly.

Fulfillment

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

Addition of Time Option to Due Date Policy

Description

The purpose of this enhancement is to enable customers to specify a time (HH:MM) for a Due Date policy when using the following units of measurement: days, month, and week. If no time is specified, Alma will continue to use the closing time of the specified date.

Note: The Closed Library Due Date Management policy overrides the specified time and date of the Due Date policy.

Technical Instructions

The following roles can configure Due Date policies:

- Fulfillment Administrator
- General System Administrator

To specify a time for a Due Date policy:

- 1 On the Fulfillment Configuration page (Fulfillment > Fulfillment Configuration > Configuration Menu), click **Advanced Configuration Policy** under **Physical Fulfillment**.
The Policy Management page is displayed.

Policy Management
[Back](#)

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

Fulfillment Policies

Policy Type
 Find : in : Policy Name

1 2 3 ▶ 1 - 10 of 85 Records

Policy Type	Policy Name	Value	Unit Of Measurement	Is Default	Policy Owner	
Due Date	0 days due date	0	Days		Institution	Actions
Due Date	1 hour due date	1	Hours		Institution	Actions
Due Date	1 minute due date"	1	Minute		Institution	Actions
Due Date	1 month due date	1	Month		Institution	Actions
Due Date	2 Hour	2	Hours		Institution	Actions
Due Date	222 Day Loan 12:20	222	Days		Institution	Actions
Due Date	234 Day Loan	234	Days		Institution	Actions
Due Date	3 day Loan	3	Days		Institution	Actions
Due Date	3600 Minutes and no	1234	Minute	✓	Institution	Actions
Due Date	6 week Loan	6	Week		Institution	Actions

1 2 3 ▶ 1 - 10 of 85 Records

[Back](#)

Figure 24 - Policy Management Page

- 2 Select **Actions** > **Edit** for the row that contains the Due Date policy that you want to update.
The Policy Details page is displayed.

Policy Details [Cancel](#) [Save](#)

You are configuring: Main Campus

Policy Type: Due Date

Policy Name * 1 month due date

Policy Description 1 month

Value Type * ☐ Fixed ☒ Non Fixed

Value * 1 Unit Of Measurement * Month

At(HH:MM) – If empty, the library's closing time will be used

Default Policy ☒ False ☐ True

Should policy change be applied retroactively? ☒

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

Figure 25 – Policy Details Page

- 3 Select **Days**, **Month**, or **Week** from the **Unit of Measurement** drop-down list.
The **At (HH:MM)** field is displayed.
- 4 Specify the time at which the material is due on the due date in the **At (HH:MM)** field. If no time is specified, the system defaults to the closing time.
- 5 Click **Save**.

Payment Reference Number Support

Description

This enhancement allows Alma to track online payments made via the WPM Education E-Payment System and to manually enter any transactions that may have been paid directly to the WPM Education E-Payment System instead of via Primo. These payments are tracked via the online payment method and the transaction ID, which is sent in the user's transaction confirmation message from the WPM Education E-Payment System.

Technical Instructions

The following roles can record payment transactions:

- Circulation Desk Manager (logged in to a circulation desk)
- Circulation Desk Operator (logged in to a circulation desk)

To record an online payment transaction in Alma:

- 1 On the Patron Identification page (**Fulfillment > Checkout/Check-in > Manage Patron Services**), enter the user's name in the **Scan patron's ID or search for patron** and click **Go**.

The Patron Services page is displayed.

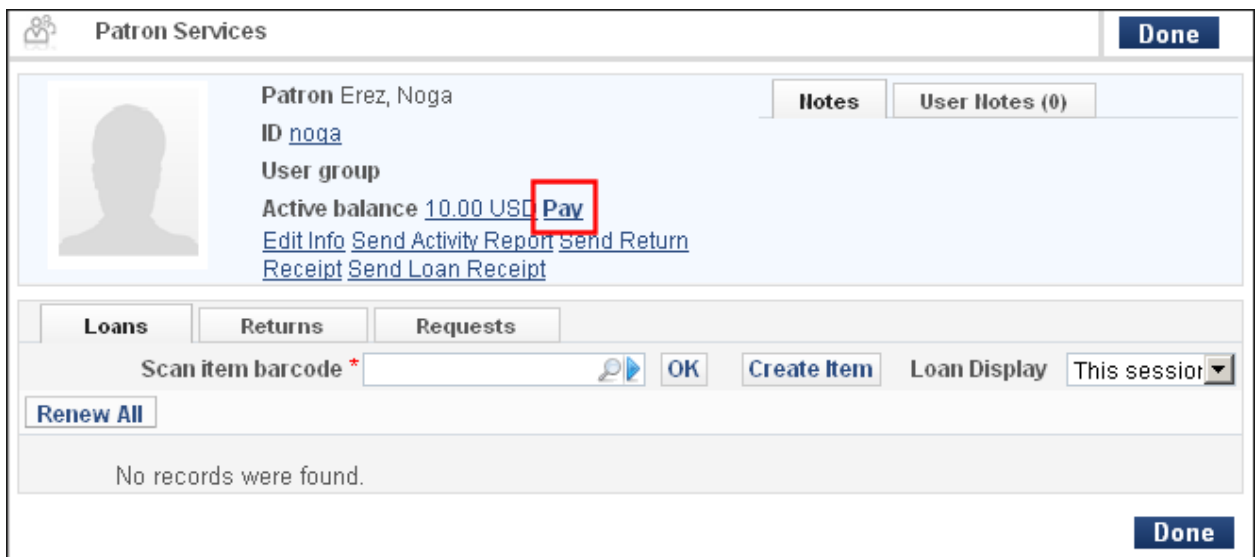
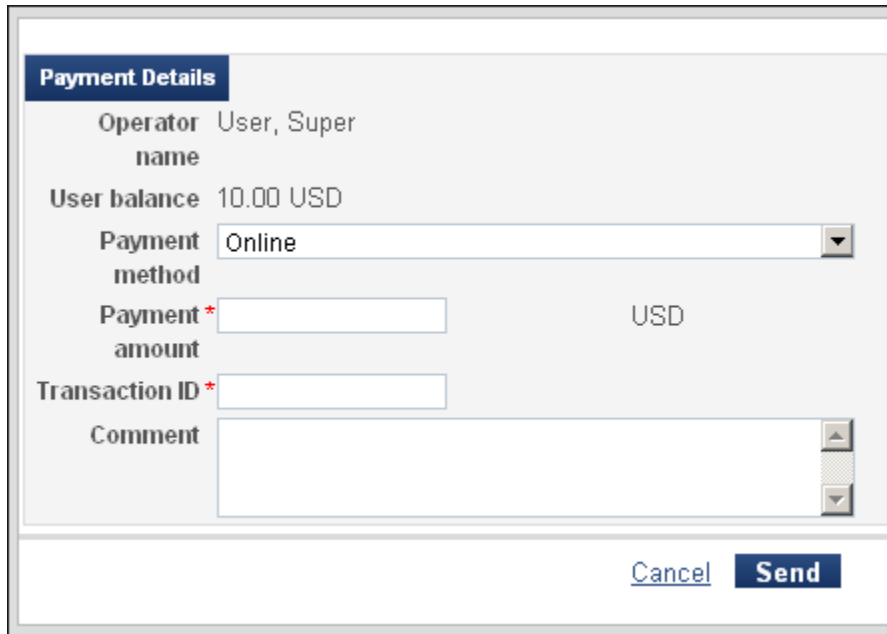


Figure 26 – Pay Link – Patron Services Page

- 2 Click the **Pay** link.

The Payment Details dialog box is displayed.



The image shows a 'Payment Details' dialog box. It has a title bar with the text 'Payment Details'. Inside, there are several fields: 'Operator name' with the value 'User, Super', 'User balance' with the value '10.00 USD', 'Payment method' with a drop-down menu showing 'Online', 'Payment amount' with a text box and 'USD' to its right, 'Transaction ID' with a text box and an asterisk, and 'Comment' with a text box. At the bottom right, there are two buttons: 'Cancel' and 'Send'.

Figure 27 – Payment Details Dialog Box

- 3 Select **Online** from the **Payment method** drop-down list.
- 4 Enter the payment amount and transaction ID, which are both listed in the user's transaction confirmation email.
- 5 Click **Send**.

Other Fulfillment Enhancements

- Overpayments to fines were lost and not credited to the balance when using self-check machines (SIP2) for fee payments. This has been fixed by rejecting overpayment of fines when using self-check machines.
- During Alma implementation, read-only access is now provided (for the Fulfillment and General System Administrators roles) to the following areas of Fulfillment Configuration (Fulfillment > Fulfillment Configuration > Configuration Menu):
 - Library
 - Physical Locations
 - Physical Fulfillment (Fulfillment Units, Terms of Use and Policies, Advanced Policy Configuration)

- The **Transaction ID** field in the Payment Details dialog box is no longer a required field. In addition, the payment receipt letter was modified to present the transaction ID at the beginning of the letter and the receipt ID was removed from the letter.
- The ACS Status self-check machine message now returns the date/time field according to the local time.
- Error messages when compiling Stunnel on Solaris have been resolved.

Resource Sharing

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

Associating Resource Sharing Libraries with Users

Description

The purpose of this enhancement is to enable indicating the resource sharing library that is responsible for resource sharing requests initiated by a specific user. Where multiple resource sharing libraries are used, all of a patron's resource sharing requests are still managed by the same resource sharing library. When a resource sharing request is configured, the specified resource sharing library is displayed as the request owner.

Technical Instructions

The following roles can access this facility:

- User Manager
- User Administrator

To indicate the resource sharing library for a user:

- 1 From the User Details page (General > User Management > Find and Manage Users), click **Actions > Edit** for a user. The General Information tab on the User Details page opens.

User Details [Cancel] [Save]

Name Black, Shawn
Account Type Internal
[Manage fulfillment activities](#)

Primary identifier 21-91376416
User group STAFF

Record type Staff

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

User Information

First name * Shawn
Last name * Black
PIN number
Job category * Please select a value
Gender
Campus
Preferred language English
Status date 07/03/2011
Expiration date
Resource sharing library
Middle name
Primary identifier * editor04
Generate
Job description
User group STAFF (not listed)
Website URL
Status Active
Birth date 19/03/2012
Purge date

Created By admin1 (07/03/2011) Updated By User, Super (09/02/2012)

User Management Information

Type * ☒ Internal - Refers to a user type whereby the user information is managed wholly within Alma.
☐ Internal with external authentication - The same as internal with the exception that the authentication is managed externally.

Password *
Verify password *

Force password change on next login ☐

User Roles

Add Role Add from Roles Template Remove Selected 1 - 2 of 2 Records Tools

	Active	Role Name	Role Group	Scope	Parameters	Status Date	
☐	☒	Invoice Manager	Acquisitions	Main Campus	-	10/01/2012	Actions
☐	☒	Patron	Fulfillment	Main Campus	-	05/01/2012	Actions

Figure 28 – User Details Page — General Information Tab

- 2 In the **Resource sharing library** field, select the library that is to be responsible for resource sharing requests initiated by this user.
- 3 Click **Save**.

To view the resource sharing library assigned to a user's request:

- 1 Open the Resource Sharing Borrowing Requests page (Fulfillment > Resource Sharing > Borrowing Requests).

Resource Sharing Borrowing Request

General Information | Parameters | Notes | Attachments

Resource Information

Title* Good meals

Author

Publisher

Year

Edition

ISBN

Place of Publication

Additional Person Name

Call Number

Note

Chapter

Pages

Request Attribute

Title Good meals

Requester* User, Super

Owner Resource Sharing Library

Request Status Created borrowing request

Format Physical

Needed By

Pickup At* Main Library

Shipping Cost USD

Agree to Copyright terms* ☒

Needs patron information ☐

Request Note

Add Partners Add Rotas

Figure 31 – Resource Sharing Borrowing Request Page with Resource Sharing Library Displayed in Owner Field

Note: If no resource sharing library was selected in the previous procedure, the **Owner** field displays the value configured in the **ill_item_creation_lib_code** field on the Customer Parameters Mapping Table page (Fulfillment > Fulfillment Configuration > Configuration Menu > General > Other Settings).

Manually Locating Resources

Description

The purpose of this enhancement is to enable locating a resource requested for borrowing at the potential resource sharing partner suppliers, in order to verify whether the partners own the requested resource, before sending these partners a request.

You assign a locate profile to a partner, which determines how the partner's catalog is to be searched. For details on configuring locate profiles, see **Configuring Locate Profiles** in the *Alma Fulfillment Guide*.

Technical Instructions

The following roles can assign a locate profile to a partner:

- Fulfillment Administrator
- General System Administrator

The following roles can add a partner to a borrowing request:

- Fulfillment Services Operator
- Fulfillment Services Manager

To assign a profile to a partner:

- 1 On the Resource Sharing Partner List page (Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Partners), select **Actions** > **Edit** for a partner. The Resource Sharing Partner General Information tab page displays.

The screenshot shows the 'Resource Sharing Partner' configuration page. At the top, it displays 'Partner Code: I-ACBELGICA-' and 'Partner Name: Academia Belgica'. Below this are four tabs: 'General Information', 'Contact Information', 'Parameters', and 'Notes'. The 'General Information' tab is active, showing a 'Partner Information' section. This section contains various fields: 'Code' (I-ACBELGICA-), 'Profile Type' (ISO), 'System Type', 'Average Supply Time' (0), 'Currency' (EUR), 'Supports Borrowing' (checked), 'Supports Lending' (checked), 'Name' (Academia Belgica), 'Status' (Active), 'Delivery Delay' (999), 'Borrowing Workflow' (DEFAULT_BOR_WF), and 'Lending Workflow' (DEFAULT_LENDING_WF). The 'Locate Profile' field is highlighted with a red box and contains a search icon.

Figure 32 – Resource Sharing Partner – Locate Profile

- 2 Ensure that all mandatory fields have values, and select a profile in the **Locate profile** field.
- 3 Click **Save**.

To add a partner to a borrowing request and manually locate a resource:

- 1 On the Resource Sharing Borrowing Requests page (Fulfillment > Resource Sharing > Borrowing Requests), locate a request that is not associated with a partner (via the facets on the left side of the page — **Active Partner** = **None**).

Resource Sharing Borrowing Requests

Limit results to:

Status

[Shipped Digitally \(10\)](#)
[Shipped Physically \(1\)](#)
[Returned item to partner \(16\)](#)
[Returned by patron \(21\)](#)
[More \(16\) ▾](#)

Active Partner

[None \(52\)](#)
[partner4 name \(3\)](#)
[partner2 iso name \(1\)](#)
[partner2 name \(2\)](#)
[More \(18\) ▾](#)

Creation Date

[Yesterday \(1\)](#)
[Up to Month Ago \(2\)](#)
[Older \(334\)](#)

Update Date

[Yesterday \(6\)](#)
[Up to Week Ago \(7\)](#)
[Up to Month Ago \(7\)](#)
[Older \(317\)](#)

Requested Format

[Physical \(325\)](#)
[Digital \(12\)](#)

Supplied Format

[Undefined \(337\)](#)

Due date

[Undefined \(336\)](#)
[Older \(1\)](#)

Add

☐ Select All

1 [Bible translator.](#)
Article
ISSN: 0006-0844
External Identifier: 23851041
Status: Rejected by partner
[Edit](#) | [Duplicate](#) | [Send](#) | [Send query to patron](#)

2 [Geoscience Canada.](#)
Book By Geoscience Canada.
External Identifier: 23863889
Status: Rejected by partner
[Edit](#) | [Duplicate](#) | [Send](#) | [Send query to patron](#)

3 [Health visitor.](#)
Article By The Association 1964-v. 71, no. 2 (Feb. 1998).
ISSN: 0017-9140
External Identifier: 23863889
Status: Shipped Physically
Due date: 14/04/2013
[Edit](#) | [Duplicate](#) | [Send](#) | [Send query to patron](#) | [Receive](#)

4 [Hot-electron transport in semiconductors](#)
Book By L. Reggiani ; with contributions by M. Asche ... [et al.].
ISBN: 0387133216
External Identifier: 5361955
Status: Rejected by partner
[Edit](#) | [Duplicate](#) | [Send](#) | [Send query to patron](#)

5 [Methodist history.](#)
Article
ISSN: 0026-1238
External Identifier: 7654321
Status: Locate in process
[View](#) | [Duplicate](#) | [Send query to patron](#) | [Receive](#)

6 [Religion](#)
Book
ISBN: 3110195984
External Identifier: 43978091
Status: Locate in process
[View](#) | [Duplicate](#) | [Send query to patron](#) | [Receive](#)

Figure 33 – Resource Sharing Borrowing Requests Page

2 Click **Edit** for a request. The Resource Sharing Borrowing Request page displays.

Resource Sharing Borrowing Request

General Information
Parameters
Notes
Attachments

Resource Information

Title * Good meals
Author
Publisher
Year
Edition
ISBN
Place of Publication
Additional Person Name
Call Number
Note
Chapter
Pages

Request Attribute

Title Good meals
Requester * User, Super
Owner Resource Sharing Library
Request Status Created borrowing request
Format Physical
Needed By
Pickup At * Main Library
Shipping Cost USD
Agree to Copyright terms *
Needs patron information
Request Note

Add Partners
Add Rotas

Figure 34 – Resource Sharing Borrowing Request Page

- Click **Add Partners**. The Resource Sharing Partner List page displays.

Resource Sharing Partner List				
Status	All	Profile Type	All	Find :
1 2 3 1 - 10 of				
	Name	Code	Status	Profile Type
☐	ABLYNX nv - Christina Verde	I-ABLYNX	Active	ISO
☐	Academia Belgica	I-ACBELGICA-	Active	ISO
☐	Académie royale des Sciences, Lettres et Beaux-Art	I-ARB	Active	ISO
☐	ACV-Documentatiedienst	I-ACV	Active	ISO
☐	ADIV-SGRS - Kolonel Jan Rotsaert	I-ADIV	Active	ISO
☐	AGC Glass Europe - R+D Centre - Bibliothèque	I-GVB-CRD	Active	ISO
☐	Agentschap voor Onderwijscommunicatie - Onderwijsb	I-MVGOND	Active	ISO
☐	AGFA-Graphics N.V. - Bibliotheek (3018)	I-AG-NV	Active	ISO
☐	Aleph	AL_SHR	Active	ISO
☐	Algemene Pharmaceutische Bond - Bibliotheek	I-APB	Active	ISO
1 2 3 1 - 10 of				

Figure 35 – Resource Sharing Partner List Page

- 4 Select the check box of the partner(s) with which you associated a locate profile (in the previous procedure), and click **Select**. The selected partner is displayed in the **Partner** field of the Resource Sharing Borrowing Request page.

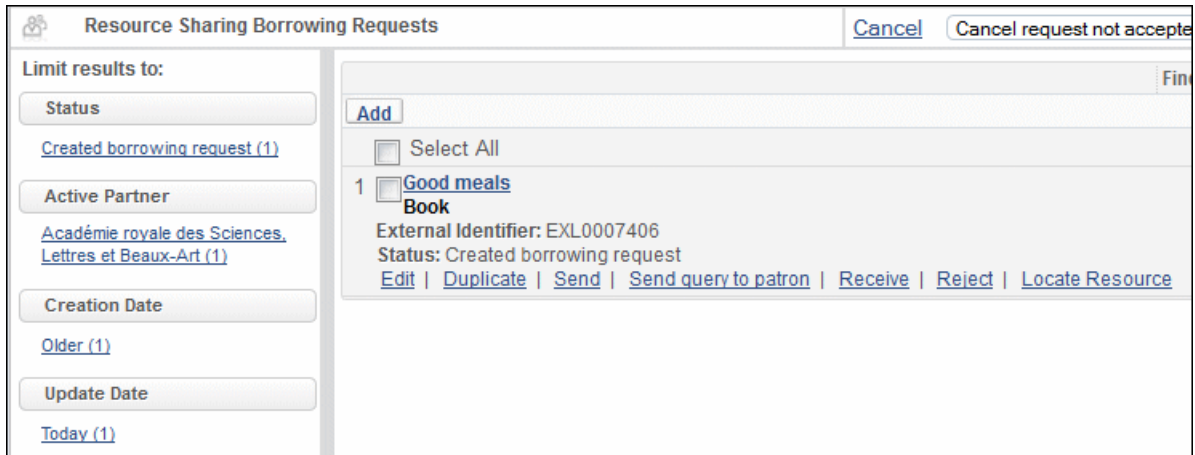


Figure 37 – Resource Sharing Borrowing Request Page — Locate Resource link

- 6 Click the **Locate Resource** link. A message displays on the Resource Sharing Borrowing Requests page indicating that the request was submitted.

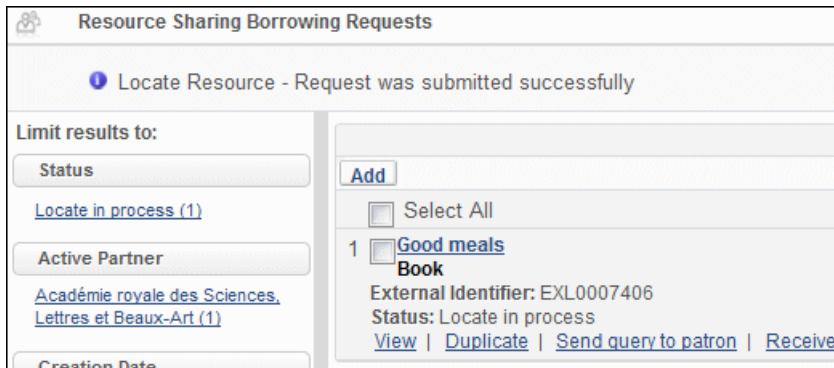


Figure 38 – Resource Sharing Borrowing Requests Page — Locate Resource Request Submitted

Alma searches the request's partners to verify that they have the resource. Partners that do not have the resource are removed from the rota.

Managing Reportable Shipping Costs

Description

The purpose of this enhancement is to enable configuring shipping costs for borrowing and lending requests. You can also configure a rule in Fulfillment Configuration that indicates the conditions under which a specified shipping cost is applied.

Technical Instructions

The following roles can define shipping costs for resource sharing requests:

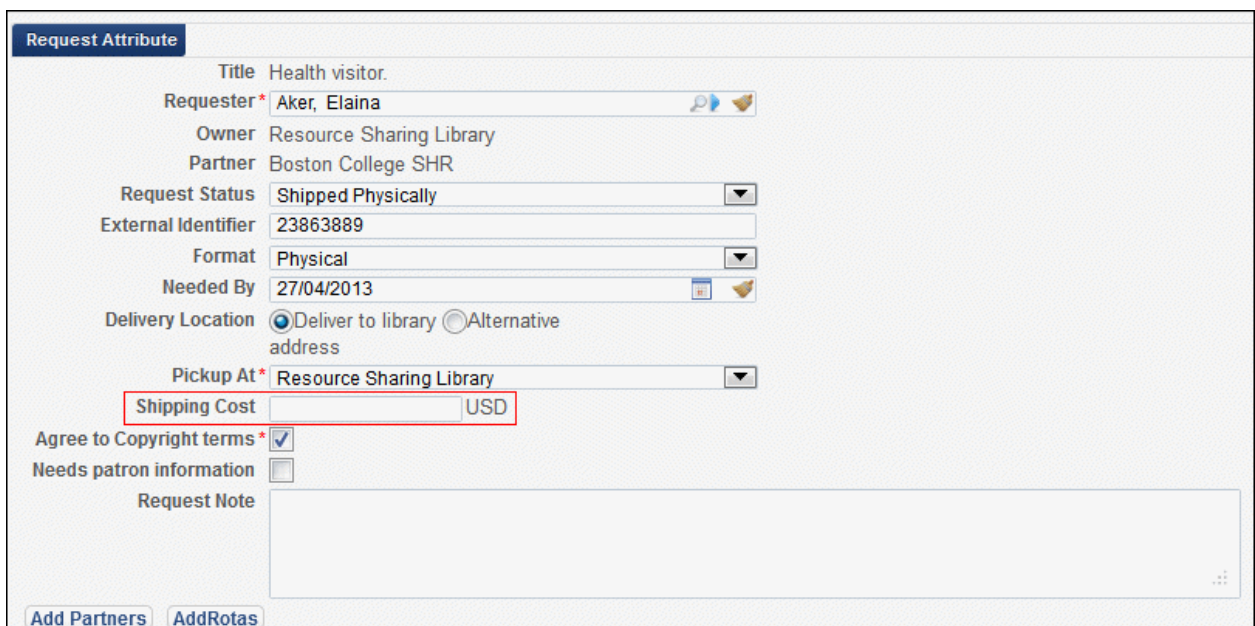
- Fulfillment Services Operator
- Fulfillment Services Manager

The following roles can configure shipping cost rules for resource sharing requests:

- Fulfillment Administrator
- General System Administrator

To define shipping costs for resource sharing requests:

- 1 On the Resource Sharing Lending Requests Task List page (Fulfillment > Resource Sharing > Lending Requests) or the Resource Sharing Borrowing Requests page (Fulfillment > Resource Sharing > Borrowing Requests), click **Edit** for a request.
- 2 Enter a shipping cost in the **Shipping cost** field. The displayed currency is the default currency of the institution.



The screenshot displays the 'Request Attribute' form. The 'Shipping Cost' field is highlighted with a red rectangular box. The form contains the following fields and values:

- Title: Health visitor.
- Requester*: Aker, Elaina
- Owner: Resource Sharing Library
- Partner: Boston College SHR
- Request Status: Shipped Physically
- External Identifier: 23863889
- Format: Physical
- Needed By: 27/04/2013
- Delivery Location: ☒ Deliver to library ☐ Alternative address
- Pickup At*: Resource Sharing Library
- Shipping Cost: [Red Box] USD
- Agree to Copyright terms*: ☒
- Needs patron information: ☐
- Request Note: [Empty text area]

At the bottom of the form are two buttons: 'Add Partners' and 'Add Rotas'.

Figure 39 – Shipping Cost Field in Request Attribute Section

To configure shipping cost rules for resource sharing lending and borrowing requests:

- 1 On the Shipping Cost — Lender Rules or Shipping Cost — Borrower Rules page (Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing), select

Shipping Cost Lender Rules or **Shipping Cost Borrower Rules**. The relevant rules list is displayed.

The screenshot shows the 'Shipping Cost - Borrower Rules List' page. It has a 'Rules List' tab, a 'Filter' dropdown set to 'All', and an 'Add Rule' button. Below these, a message states 'No records were found.'

Figure 40 – Shipping Cost Rules List Page

2 Click Add Rule.

The screenshot shows the 'Shipping Cost - Borrower Rule Editor' page. It includes fields for 'Name *', 'Description', 'Created By', and 'Updated By'. It also shows 'Created On' and 'Updated On' dates as 15/09/2013. Below these are sections for 'Input Parameters' and 'Output Parameters'. The 'Input Parameters' section shows 'No records were found.' and fields for 'Name', 'Operator', 'Value', and a 'Possible Values >' link. The 'Output Parameters' section shows a 'Name' field with 'Shipping Cost' and a 'Result' field with 'USD'.

Figure 41 – Shipping Cost Rule Configuration Page

- 3 Enter a name for the rule, and configure input and output parameters. Configuring a shipping cost rule is performed in the same manner as other rule configurations in Alma (see the **Configuring Automatic Loan Renewal Rules** section in the *Alma Fulfillment Guide*).
- 4 Click **Save**. The shipping cost rule displays on the Shipping Cost Rules list page.

The screenshot shows the 'Shipping Cost - Borrower Rules List' page after saving a rule. It displays a table with one rule. The table has columns: 'Enabled', 'Move Up', 'Move Down', 'Rule Name', 'Description', 'Updated By', 'Update Date', and 'Actions'. The rule is 'SC Rule 1' with description 'The first shipping cost rule', updated by 'Support, Ex Libris' on '15/09/2013'.

Enabled	Move Up	Move Down	Rule Name	Description	Updated By	Update Date	Actions
✓			SC Rule 1	The first shipping cost rule	Support, Ex Libris	15/09/2013	

Figure 42 – Shipping Cost Rules List Page

Manually Attaching Lending Requests to Inventory

Description

The purpose of this enhancement is to enable manually adding lending requests, and to enable associating lending requests with specific resources.

When a request does not have any inventory attached to it, you can manually attach the request to an inventory item, as long as the request has not yet been shipped. You can also detach a request from an item, as long as the request has not yet been shipped.

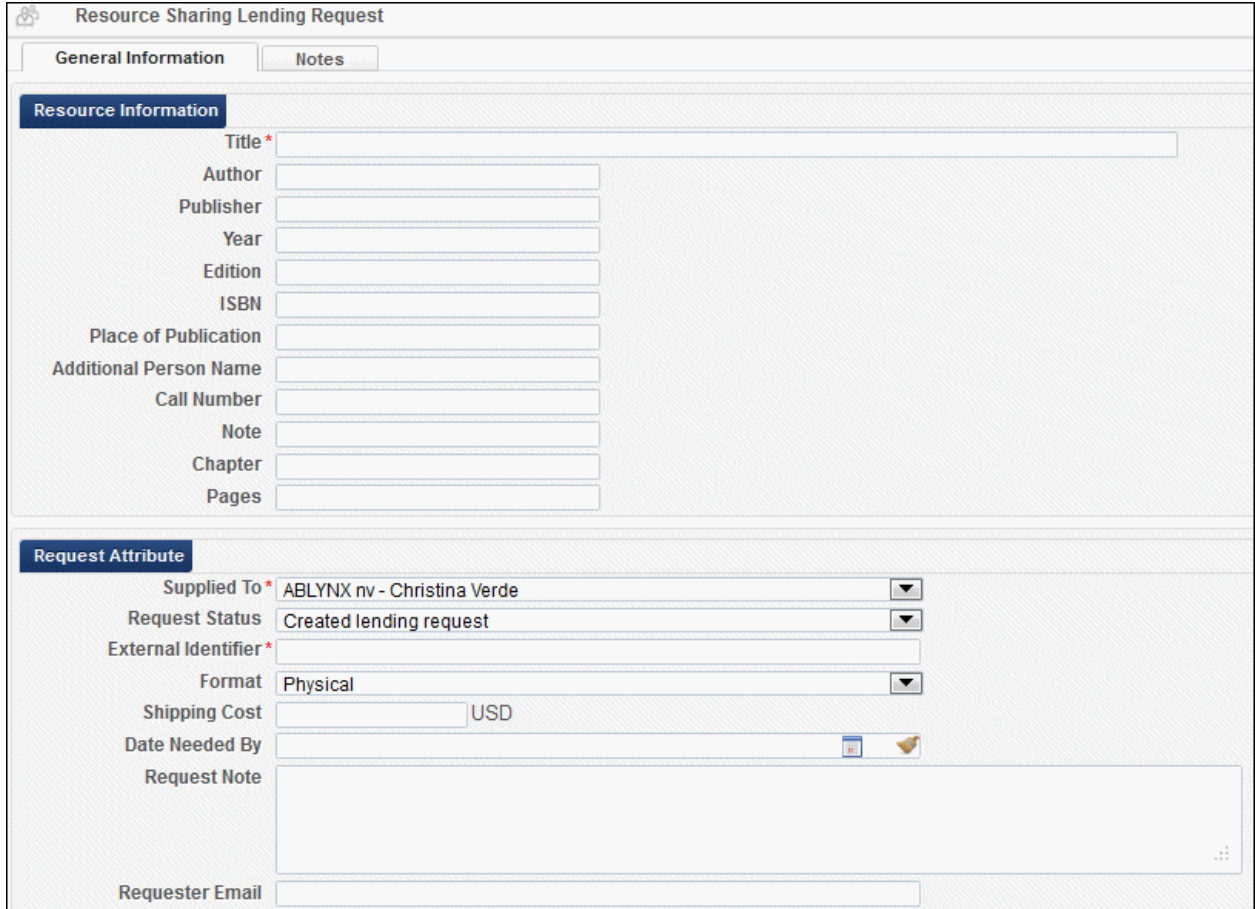
Technical Instructions

The following roles can manually create lending requests and attach/detach lending requests to/from inventory:

- Fulfillment Services Operator
- Fulfillment Services Manager

To manually create a resource sharing lending request:

- 1 On the Resource Sharing Lending Requests Task List page (Fulfillment > Resource Sharing > Lending Requests), click **Add > Manually** and select whether you want to add a **Book** or an **Article**. The relevant Resource Sharing Lending Request page is displayed.



The screenshot shows a web form titled "Resource Sharing Lending Request". It has two tabs: "General Information" (selected) and "Notes". The form is divided into two main sections: "Resource Information" and "Request Attribute".

Resource Information

- Title *
- Author
- Publisher
- Year
- Edition
- ISBN
- Place of Publication
- Additional Person Name
- Call Number
- Note
- Chapter
- Pages

Request Attribute

- Supplied To * (Dropdown menu showing "ABLYNX nv - Christina Verde")
- Request Status (Dropdown menu showing "Created lending request")
- External Identifier *
- Format (Dropdown menu showing "Physical")
- Shipping Cost (Text input) USD
- Date Needed By (Calendar icon)
- Request Note (Text area)
- Requester Email (Text input)

Figure 43 – Resource Sharing Lending Request Page

- 2 Enter a title and external identifier for the resource in the relevant fields, as well as any other information for the resource.
- 3 Click **Save**.

To manually attach resource sharing lending requests to inventory:

- 1 Create a resource sharing lending request, as described in the previous procedure.
If the resource is not located in the institution or the repository, an error message is displayed:

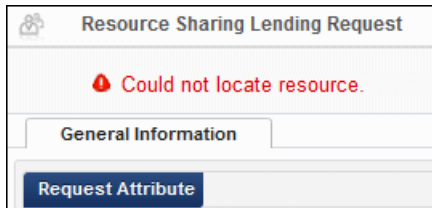


Figure 44 – Resource Sharing Lending Request — Error Message

- 2 Click **Cancel** to return to the Resource Sharing Lending Requests Task List page. The request displays in the Unassigned tab with the Resource Locate Status of **No Resources Located**.

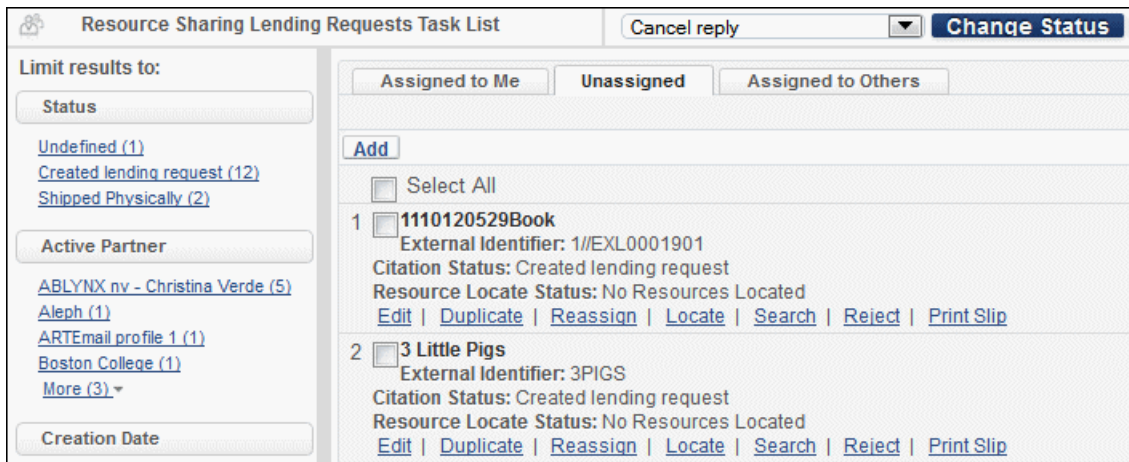


Figure 45 – Resource Sharing Lending Request — Request with No Resources Located

- 3 You can attempt to locate the resource by clicking one of the following links for a **No Resources Located** request:
 - **Locate:** Attempts to locate the resource, either due to the resource not being located or because there are multiple resources that have been found. It is recommended to click **Edit** for a resource and update relevant information before clicking **Locate**. When a resource is located, the status changes to **Resource Located**.
 - **Search:** Opens the repository search page, which enables performing a new resource search to locate the resource.

Note: If a request is processed automatically (via ISO/NCIP) and if either no resource is found or multiple resources are found that match the input criteria, the request is created with **Citation Status = Locate Failed** and **Resource Locate Status = No Resources Located**.

To detach a resource sharing lending request from inventory:

- 1 On the Resource Sharing Lending Requests Task List page, locate a request that has a resource attached to it (has the Resource Locate Status of **Resource Located**).

- 2 Click **Detach from MMS**. The Resource Sharing Lending Requests Task List page refreshes, and the request displays the Resource Locate Status of **No Resources Located**.

Other Resource Sharing Enhancements

- Borrowing requests that are sent now properly appear in the appropriate list of lending requests.
- In addition to the PI parameter that is used to create a URL to link to Relais (NCIP), an RK parameter, with the same value as the PI parameter, is now appended.

Analytics

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

Addition of Bibliographic Details Suppressed From Discovery to the Bibliographic Details Dimension

Description

The purpose of this enhancement is to expose bibliographic record details suppressed from discovery in reports and dashboards. It is available for all areas in which Bibliographic Details appears as a dimension.

Technical Instructions

The Design Analytics role can access this enhancement.

To access bibliographic details suppressed from discovery in Alma Analytics:

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

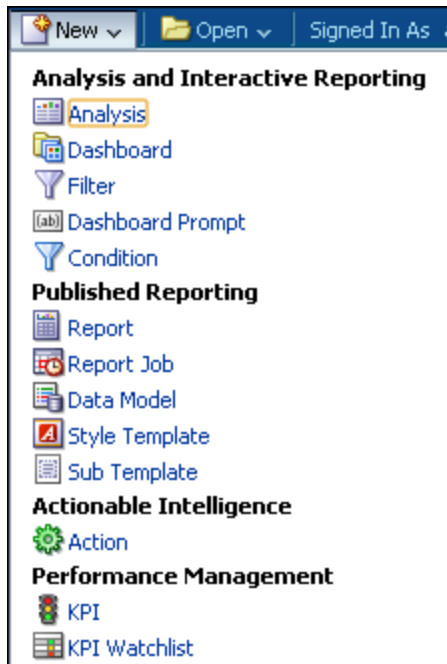


Figure 46 – New > Analysis Option

The Select Subject Area options are displayed.

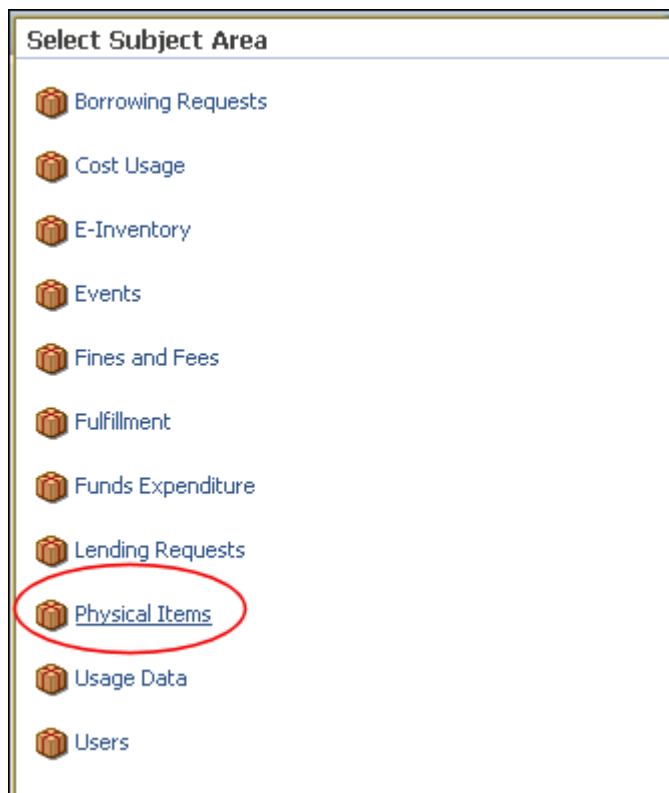


Figure 47 – Select Subject Area

- 3 Select one of the subject areas in which Bibliographic Details is a dimension. For example, select **Physical Items > Bibliographic Details > Suppressed from Discovery**.

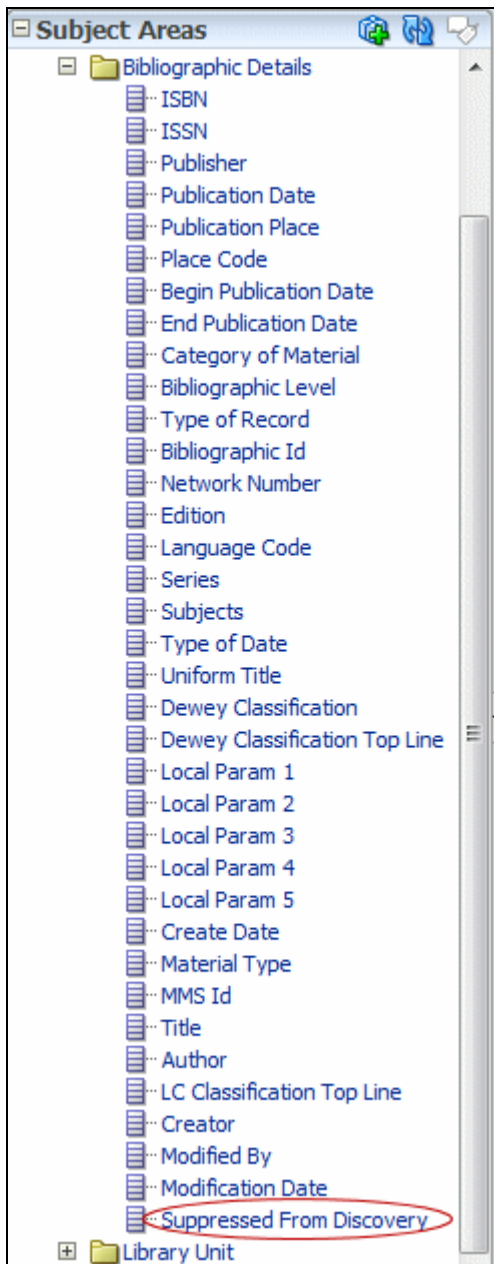


Figure 48 – Bibliographic Details Suppressed from Discovery

The following is an example of a report using Suppressed from Discovery. **Yes** indicates that the record is suppressed from external discovery systems and **No** indicates that the record is not suppressed from external discovery systems.

Compound Layout	
Title	
Table	
ISBN	Suppressed From Discovery
00795194	Yes
0079144408; 9780791444078; 0791444074	No
0079870294	

Figure 49 – Bibliographic Details Suppressed from Discovery Report

Add Waive Reason to Fines and Fees Subject Area

Description

The purpose of this enhancement is to expose the waiving reason description for fines and fees in reports and dashboards.

Technical Instructions

The Design Analytics role can access this enhancement.

To access the fines and fees waiving reason description in Alma Analytics:

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

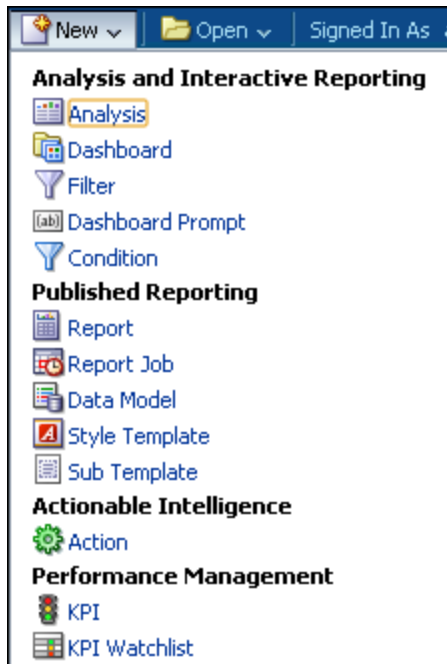


Figure 50 – New > Analysis Option

The Select Subject Area options are displayed.



Figure 51 – Select Subject Area

- 3 Select Fines and Fees > Fines and Fees Transactions > Waiving Reason Description.

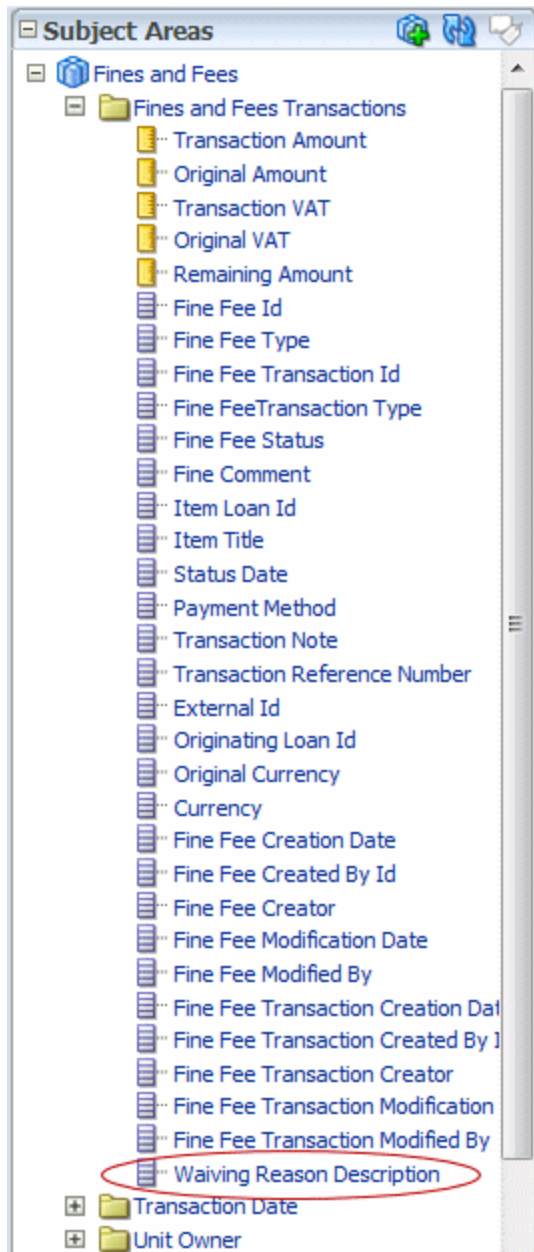


Figure 52 – Fines and Fees Waiving Reason Description

The following is an example of a report using Waiving Reason Description:

Compound Layout	
Title	
Table	
Fine Fee Id	Waiving Reason Description
678,130,530,001,021	Lost item was found
678,139,930,001,021	Other
679,912,640,001,021	Faculty
696,126,990,001,021	Other
696,127,000,001,021	Faculty
696,127,030,001,021	Faculty
696,127,040,001,021	Faculty
696,127,070,001,021	Faculty
696,127,080,001,021	Faculty
698,141,960,001,021	Unknown
1,653,493,410,001,020	Other
1,653,493,420,001,020	Lost item was found
1,679,545,070,001,020	Faculty
1,679,545,080,001,020	Faculty
1,679,545,180,001,020	Faculty
1,679,545,190,001,020	Faculty
1,679,545,330,001,020	Faculty
1,679,545,340,001,020	Faculty
1,679,545,440,001,020	Faculty
1,679,545,450,001,020	Faculty
1,679,545,550,001,020	Faculty
1,679,545,560,001,020	Faculty
1,679,545,660,001,020	Faculty
1,679,545,670,001,020	Faculty
1,750,592,760,001,020	Unknown
1,834,020,590,001,020	Unknown
1,834,020,630,001,020	Unknown
1,834,038,850,001,020	Unknown
1,834,038,860,001,020	Unknown

Figure 53 – Fines and Fees Waiving Reason Description Report

Addition of Two Customer-Defined Identifiers to the User Details Dimension

Description

The purpose of this enhancement is to two new customer-defined identifiers, in addition to the primary identifier, for reports and dashboards. They are available for all areas in which User Details appears as a dimension.

Technical Instructions

The Design Analytics role can access this enhancement.

To access these two customer-defined identifiers in Alma Analytics:

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

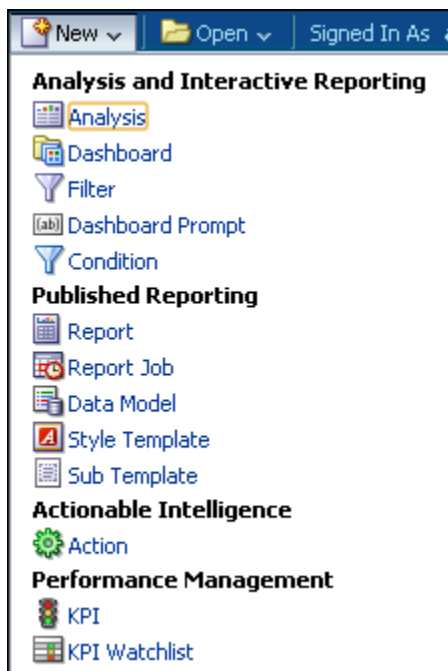


Figure 54 – New > Analysis Option

The Select Subject Area options are displayed.

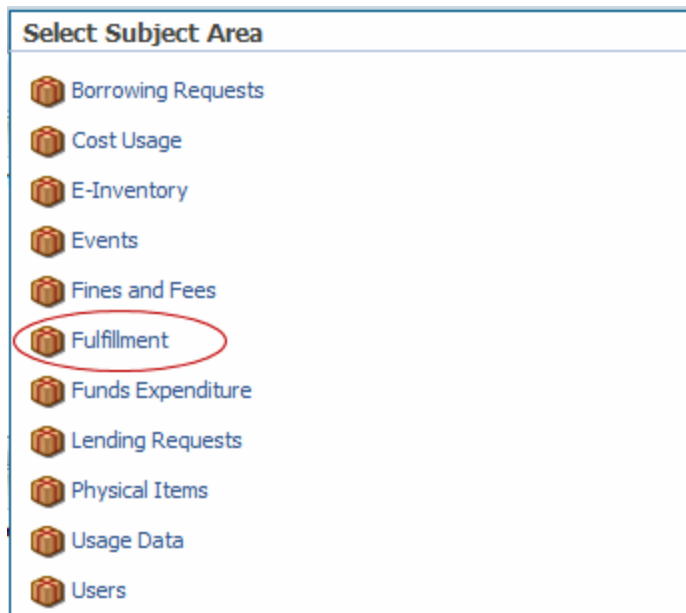


Figure 55 – Select Subject Area

- 3 Select one of the subject areas in which User Details is a dimension. For example, select **Fulfillment > User Details > Identifier 1** or **Identifier 2**.

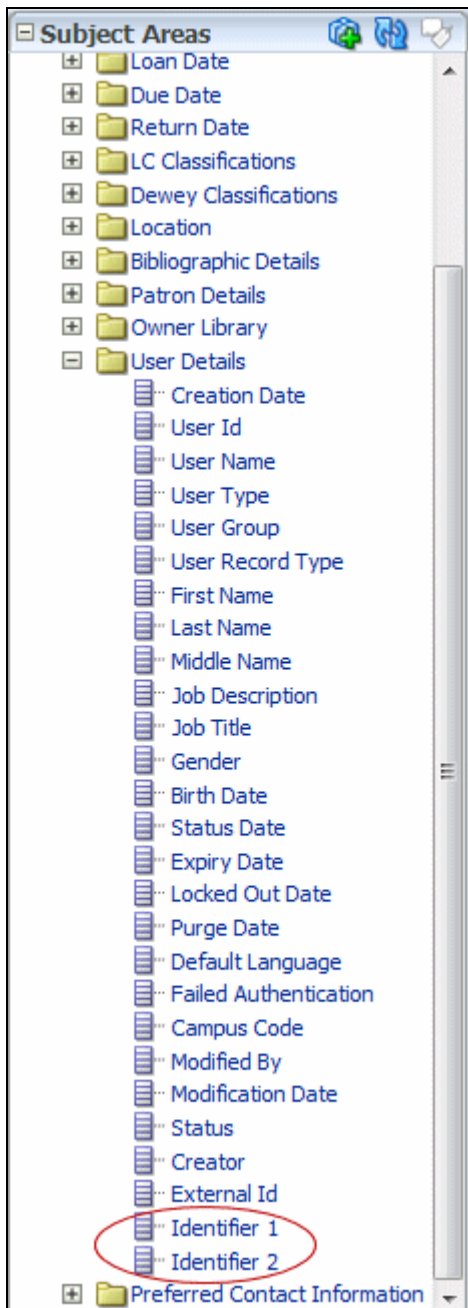


Figure 56 –User Details Identifier 1 and Identifier 2

Note: By default, these reports are empty. To configure them to display data, contact your Ex Libris representative.

Loans/Items Ratio Reports

Description

Two new reports can be created to display the ratio of loans to items per library/location and per LC classification. Each report contains three columns displaying the number of loans, the number of items, and the ratio of loans to items.

Technical Instructions

The Design Analytics role can access this enhancement.

To access the Loans/Items Ratio reports in Alma Analytics:

- 1 Access Alma Analytics (General > Analytics > Design Analytics).
- 2 Open the Fulfillment Dashboard (Open > Shared Folders > Alma > Fulfillment > Dashboards > Fulfillment Dashboard), select **Loans Items Ratio**, and click **OK**.

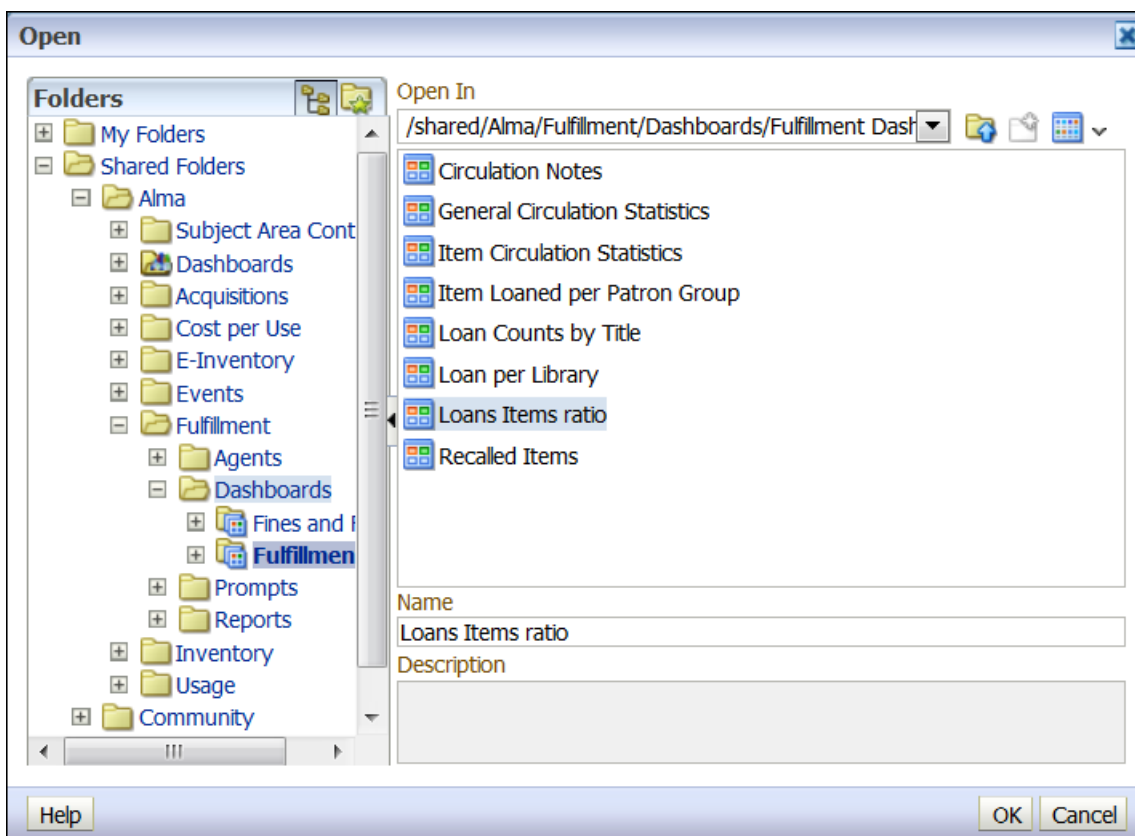


Figure 57 – Fulfillment Dashboard > Loans Items Ratio

The Loans Items Ratio tab is displayed.

- 3 Select the first level LC classification(s) as well as the library name and location(s) for which you want to view data, and click **Apply**.

The Loans - Items Ratio per Classification and Loans - Items Ratio per Location reports are displayed.

For example:

Loans - Items ratio per Classification			
Group1	Loans	Num of Items	Loans/Items
Academies and learned societies		2	
Agriculture (General)		2	
American literature		1	
Armies: Organization, distribution, military situation		9	
Astronomy		25	
Biology (General)		26	
Books (General). Writing. Paleography		6	
Chemistry		2	
Christian Denominations		1	
Christianity		4	
Commerce		12	
Communities. Classes. Races		1	
Economic history and conditions	16	124	0.129
Engineering (General). Civil engineering (General)	3	37	0.081
English literature		3	
Environmental technology. Sanitary engineering		2	
Fiction and juvenile belles lettres	11		
General legislative and executive papers		33	
Geology		1	
German literature		1	
History (General)		4	
History of Africa		1	
Home economics	7		
Indexes	1		
Industries. Land use. Labor	1	53	0.019
International law, see JZ and KZ		2	
Judaism		2	
Law in general. Comparative and uniform law. Jurisprudence		6	
Law of the United States		4	
Libraries		7	

Figure 58 – Loans/Items Ratio per Classification Report

Loans - Items ratio per location				
Library Name	Location Name	Loans	Num of Items	Loans/Items
Art Library	Ballet Music Collection	10	43	0.233
	General		33	
	Music Programmes Collection		1	
	Music Theses		1	
	Scores Collection	1	2	0.500

Figure 59 – Loans/Items Ratio per Location Report

Primo

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

WPM Education E-Payment System Support

Description

These enhancements enable users to use the WPM Education E-Payment System to pay fines and fees via My Account in Primo. Once the request is initiated in Primo and processed in the payment system and Alma, both Alma and the WPM Education E-Payment System send payment receipt emails to the user.

The WPM Education E-Payment System must first be configured in Alma to enable online payments. In addition, some configuration may be necessary in Primo. For more information, refer to the *Alma-Primo Integration Guide*.

Technical Instructions

The following role is needed to configure the WPM Education E-Payment System:

- General System Administrator

To configure the WPM Education E-Payment System in Alma:

- 1 On the General Configuration page (General > General Configuration > Configuration Menu), click **External Interfaces** under **External Systems**. The External System List page is displayed.
- 2 Click the **Add External System** button. The first page of the External System wizard is displayed.

External System
12
[Cancel](#)
[Next](#)

Code	Name	Integration Type
WPM	WPM Education	Fines Fees Payment

External System

Code *
WPM

Name *
WPM Education

Integration Type *
Fines Fees Payment

System (for Ex Libris' informational purposes)
WPM Education

Default
☐

Description

Created By
Ex Libris (30/07/2013)
Updated By
Ex Libris (30/07/2013)

[Cancel](#)
[Next](#)

Figure 60 – External System Page 1

- 3 Perform the following actions on this page:
 - a) Enter a code and name for the WPM Education E-Payment system.
 - b) From the **Integration type** drop-down list, select **Fine Fees Payment**.
 - c) Select **WPM Education** from the **System** drop-down list.
 - d) Click **Next**.

The External System – Actions Section is displayed.

External System

Code	Name	Integration Type
WPM	WPM Education	Fines Fees Payment

Actions

Fines Fees Payment Type

Fines Fees Payment Type WPM Education ▼

WPM Education Definitions

System URL *

Client Id *

Pathway Id *

Department Id *

Shared Secret *

Email From *

Email Footer

Vat Code *

Vat Description *

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

Figure 61 – External System Page 2 – Actions Section

- 4 Enter the required fields on this page. Much of this information is specific to your institution and must be provided by the online payment system provider.
- 5 Click **Save**.

To pay fines and fees via Primo:

- 1 On the **My Account > Fine & Fees** tab in Primo, click the fines and fees link at the bottom of the page.

E-shelf

Queries

My Account

My Databases

Loans (88)

Requests (15)

Fine & Fees (!)

Blocks & Messages

Personal Settings

List of Fines:

#	Title	Author	Fine Date	Type	Amount	Transferred
01	2306130906Renew		06/23/2013	Debit	10.00 USD	No
02	2306130906Renew		06/23/2013	Debit	100.00 USD	No
03	2306130906Renew		06/23/2013	Debit	50.00 USD	No
04	Assessing sport skills		06/24/2013	Debit	5.00 USD	No
05	Assessing sport skills		06/24/2013	Debit	5.00 USD	No
06	2605131044Renew		05/26/2013	Debit	10.00 USD	No
07	2605131044Renew		05/26/2013	Debit	100.00 USD	No
08	2306130906Loan		06/23/2013	Debit	10.00 USD	No
57	1606131031Loan		06/16/2013	Debit	10.00 USD	No
58	2306130932Loan		06/23/2013	Debit	10.00 USD	No
59	1905130711Loan		05/19/2013	Debit	10.00 USD	No
60	1905130711Renew		05/19/2013	Debit	100.00 USD	No
Fines Balance:					2811.0	

Figure 62 – Fines & Fees Link in My Account

- On the WPM Education E-Payment System's Payments page, select the items to pay and click **Continue**.

Please check the items you want to pay for and click 'Continue' to proceed

Description of item(s) to pay	Total Cost
Total Library Payments	£30.25
Total to Pay Now	£30.25

Please click on Continue to proceed Continue

Figure 63 – Sample WPM Education E-Payment System's Payments Page

- On the WPM Education E-Payment System's Payment Method page, enter your credit card and billing address information and then click **Continue**.

Please click on Continue to proceed
Continue

* indicates a required field

Enter Credit / Debit Card Details

Card Type*







Card Holder Name*

Card Number*

Card Security Code*



Expiry Date (MMM/YYYY)*

Start Date (MMM/YYYY)

Please check the items you want to pay for and click 'Continue' to proceed

Description of item(s) to pay	Total Cost
Total Library Payments	£30.25
Total to Pay Now	£30.25

Please click on Continue to proceed
Continue

Figure 64 – Sample WPM Education E-Payment System's Payment Method Page

- On the WPM Education E-Payment System's Transaction Confirmation page, click **Confirm your transaction**.

Confirm your transaction

Summary

Description of item(s) to pay	Total Cost
Total Library Payments	£30.25
Total to Pay Now	£30.25

Payment Information

Debit/Credit Card
Name on Card: Noga
Last 4 Digits of Card Number: 1111
Card Type:

Billing Address
1 Bills Dr.
Fourth Floor - Office
201
Orchard Park
NY
10203
UNITED STATES

Email confirmation will be sent to: **Noga@sgroup.com.**

Edit details

Figure 65 – Sample WPM Education E-Payment System’s Transaction Confirmation Page

Payment receipt emails are sent to the user shortly after processing completes in the WPM Education E-Payment System and Alma.

Thank you for your Ex Libris payment.

Your Ucard/Library Number is ADMIN1
Cardholder Name: Noga
Card Reference:

You have made the following payment:

Library Fines
Paid today: 30.25 (GBP)
Your payment reference is: UoSSPO220423

The University receipt number for this transaction is UoSSPO220423.

Please make a note of this receipt number, in case you need to make a query about this payment.

For any Library queries please contact library@shield.ac.uk.

If you have any queries about your payment, please email onlinepayments@shield.ac.uk.

Figure 66 – Sample WPM Education E-Payment System's Payment Receipt Email

Collaborative Networks

The following sections describe the functions provided for Collaborative Networks in the October 2013 release of Alma.

Fulfillment Network – Request from Any Member Institution

Description

The purpose of this enhancement is to enable patrons of institutions that share a common Fulfillment Network to directly request items from any non-home institution in the network.

In order for an institution to be able to supply a resource to a patron, the patron must be locally registered at that institution. This enhancement provides the automatic registration of the patron at the non-home institution.

When discovering a Primo record that has inventory at more than one institution, the patron can simply view the inventory of another institution by selecting the Other Institutions option in the Primo Get It tab. If the user selects a non-home institution in the network, the system automatically registers the patron at that institution, allowing them to view the available request options and place requests based on the new locally-registered linked patron record.

Note: This feature is dependent upon the configuration of a Fulfillment Network. To configure a Fulfillment Network, contact your Ex Libris representative.

Technical Instructions

There are no associated configurations for this enhancement. For information on how to register walk-in users, see the Managing Patron Services, Registering Patrons section in the *Alma Fulfillment Guide* or the “Allowing Walk-in Loans at Other Institutions in the Fulfillment Network” enhancement in the Alma August 2013 Release Notes.

Resolving Electronic Resources in the Network Zone

Description

This enhancement expands the Alma link resolving functionality to provide electronic services for electronic resources that are managed centrally in the Network Zone.

An institution working in a collaborative network environment can now configure the Alma Link Resolver to resolve context-sensitive services for resources that are managed in the Network Zone and available for the institution. When this configuration is in place, any Open URL request to the Alma Link Resolver consults the Network Zone to resolve electronic services that are available for the institution. The electronic services are presented in the View It tab of the Alma Link Resolver's services page.

The figures below illustrate an example in which an electronic resource is available only in the Network Zone and not as part of an institution's own inventory.

The screenshot shows the 'Repository Search' interface. At the top, there is a search bar with 'Find All titles' and a dropdown menu. To the right, it says 'where ISBN'. Below the search bar, there are three tabs: 'Institution', 'Network', and 'Community'. The 'Network' tab is selected. On the left, under 'Limit results to:', there is a list of options: 'Inventory', 'Collection', 'Electronic title', 'Digital title', and 'Physical title'. The 'Inventory' option is selected. On the right, the search results are displayed. The first result is '1 The Defender of Peace'. Below the title, it says 'Book By Marsilius, of Padua, d. 1342?, (Harper & Row 1967)'. The ISBN is '0-231-12355-8'. The availability is 'Availability: Electronic version at AC Humanities eBook: Full Text'. There are links for 'Edit', 'Order', and 'View It'.

Figure 67 – E-Resource Available only in Network Zone

An Open URL request to the Alma Link Resolver consults the Network Zone to resolve the electronic services that are available for the institution and displays these services in the View It tab. For example, the figures below show a search within the Citation Linker for an electronic resource entitled "The Defender of Peace." The e-services available for this resource are resolved via the Network Zone and displayed in the View It tab.

The screenshot shows the 'Citation Linker' search form. At the top, there are three tabs: 'Journal', 'Article', and 'Book'. The 'Book' tab is selected. Below the tabs, there are several input fields: 'Book Title' (with the text 'he defender of peace'), 'Date (YYYY-MM-DD)' (with a calendar icon), 'Volume', 'Part', 'ISBN' (with the text '0-231-12355-8'), 'Author Last Name', 'Author First Name', 'Author Initials', 'Publisher', and 'Publication Date'. At the bottom, there are two buttons: 'Go' and 'Clear'.

Figure 68 – Search for E-Resource in the Member Institution

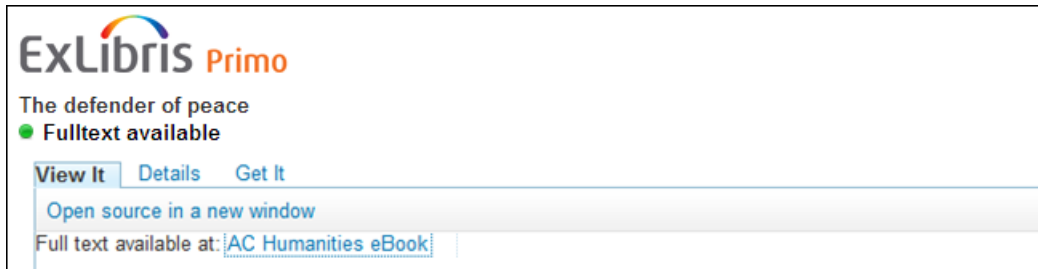


Figure 69 – Electronic Services Displayed in the View It Tab

Technical Instructions

The following role can configure this new functionality:

- General System Administrator

Note: The Ex Libris Implementation Consultant typically sets this configuration for a consortium prior to delivery.

To change the value for Alma Resolver in the Network Zone:

- 1 On the General Configuration page (General > General Configuration > Configuration Menu), click **Other Settings** under **General Configuration**.
- 2 Change the value of the `nz_collaborative_inventory` parameter to **true**.

User Management Enhancements

The following enhancements were made in the User Management area:

- Encrypted user pin codes and passwords are now properly decrypted.
- The primary identifier is now properly generated when registering a user from another institution that is part of the same Fulfillment Network.

Known Issues

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.