

Alma May 2014 release:
**Celebrating the International
Day of Families**



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Table of Contents

1	About the Alma Release Notes	4
2	Data Services	5
	New Electronic Packages Added to the Alma CKB	5
3	Alma Show Me How	6
	Alma Show Me How – May	6
4	Resource Management	7
	General Publishing Profile Options Expanded	7
	Other Enhancements:	14
5	Analytics	15
	New Requests Subject Area – Part 2	15
	Alma Analytics OBIEE Upgrade	15
6	Integrations with External Systems	17
	Exporting Patron Record Information to an External System	17
7	Developer Network	20
	Overview	20
	Getting Started	24
8	Alma Scheduled Maintenance Notifications	26
	Alma Scheduled Maintenance Notification Enhancements	26
9	Known Issues	28
	Electronic Collections	28
	Import Profiles	28
	Fulfillment	28
	Resource Sharing	29
	Analytics	29

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:

- [Data Services](#)
- [Alma Show Me How](#)
- Feature/enhancement descriptions for the respective Alma components and functional areas
 - [Resource Management](#)
 - [Analytics](#)
 - [Integrations with External Systems](#)
- [Developer Network](#)
- [Alma Scheduled Maintenance Notifications](#)
- [Known Issues](#)

Data Services

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

New Electronic Packages Added to the Alma CKB

The following packages were added to the Alma CZ during the period 06-April-2014 through 27-April-2014:

- Emerald Business, Management and Economics eBook Series Collection
- Emerald Social Science eBook Series Collection
- Emerald Management First Journals
- Emerald Management First Health and Social Care
- Emerald Management First Public Sector Zone
- SpringerLink Health & Hospitals Journals
- SpringerLink Health & Hospitals Books
- Edward Elgar Books
- JSTOR Hebrew Journals
- Magnes Press eBooks

Alma Show Me How

The following sections describe Alma Show Me How and videos for the May 2014 release of Alma.

Alma Show Me How – May

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

- Assign a Process to an Item
- Link a Local E-Collection to a CZ E-Collection
- View License Info of an Electronic Portfolio
- Add an Electronic Collection of Database Type

Resource Management

The following sections describe the functions provided for the Resource Management component in the May 2014 release of Alma.

General Publishing Profile Options Expanded

Description

Alma record publishing for the General publishing profiles has been expanded to include:

- Options for configuring publishing profiles that enable you to enrich the published record with physical item information from the related items
- An option to schedule a General publishing profile to run on a daily basis
- An option to delete a General publishing profile

Add Items Information

The Inventory Enrichment section now includes the **Add Items Information** option (see Figure 1). Publishing profiles that include the **Add Items Information** settings direct the system during publishing to add the specified **Repeatable field** to the published bibliographic record for each item that is related to the published bibliographic record. The item information that is included in the bibliographic record to be published is determined by the subfields that are identified in the Inventory Enrichment section of the publishing profile when you select Add Items Information. Only the specified subfields are added to the bibliographic record to be published.

Inventory Enrichment

☐ Add Holdings Information
 ☒ Add Items Information
 ☐ None

Repeatable field	☐	Barcode subfield	☐
item.Pid.Subfield	☐	Material type subfield	☐
Copy ID subfield	☐	Item status subfield	☐
Item Policy subField	☐	Is Magnetic subfield	☐
Provenance subfield	☐	Enumeration B subfield	☐
Enumeration A subfield	☐	Chronology J subfield	☐
Chronology I subfield	☐	Process type subfield	☐
Description subfield	☐	Permanent location subfield	☐
Permanent library subfield	☐	Current location subfield	☐
Current library subfield	☐	Call number subfield	☐
Call Number type subfield	☐	Alternative call number subfield	☐
Alternative Call number type subField	☐	Temporary call number subfield	☐
Temporary Call number type subField	☐	Storage Location ID subField	☐
Inventory number subfield	☐	Pieces subfield	☐
Pages subfield	☐		

Figure 1 - Add Items Information

Scheduling

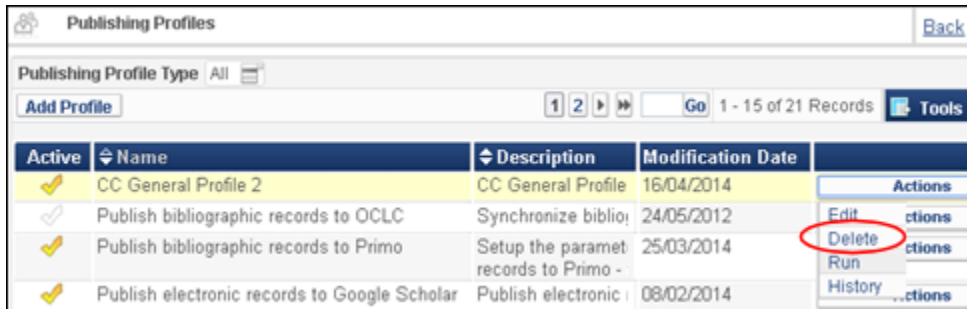
As part of the publishing profile details, you can specify your scheduling preference for each publishing profile that you configure. For General publishing profiles, you now have the option to select a scheduling setting that will run publishing every day.

Scheduling	Every day at 07:00 ▼ Not scheduled Every Sunday at 07:00 Every day at 07:00 On the 01 of every month
------------	--

Figure 2 - Every Day Publishing Option

Deleting

For General publishing profiles, you now have the option to delete a profile using the Delete row action.



The screenshot shows the 'Publishing Profiles' interface. At the top, there's a 'Publishing Profile Type' dropdown set to 'All', an 'Add Profile' button, and a 'Go' button. Below this is a table with columns: 'Active', 'Name', 'Description', 'Modification Date', and 'Actions'. The table contains four rows of profiles. The 'Delete' option in the 'Actions' column of the second row is circled in red.

Active	Name	Description	Modification Date	Actions
	CC General Profile 2	CC General Profile	16/04/2014	Edit Delete Run History
	Publish bibliographic records to OCLC	Synchronize bibliographic records to OCLC	24/05/2012	Edit Delete Run History
	Publish bibliographic records to Primo	Setup the parameters for publishing records to Primo	25/03/2014	Edit Delete Run History
	Publish electronic records to Google Scholar	Publish electronic records to Google Scholar	08/02/2014	Edit Delete Run History

Figure 3 - General Publishing Profile Delete Row Action

Technical Instructions

The following roles can configure publishing profiles:

- Catalog Administrator
- General System Administrator

To configure a new publishing profile with item information:

- 1 Access the Publishing Profiles page (**Resource Management > Resource Configuration > Configuration Menu > Record Export section > Publishing Profiles**).
- 2 Click **Add Profile** and select **General Profile**. The Publishing Profile Details page opens.

Figure 4 - General Publishing Profile Details Page

- 3 Complete the configuration settings on the Publishing Profile Details page to match your criteria using the table below that describes these parameters.

Parameter	Description
Profile Name	Enter a profile name that helps clearly identify this configuration profile from the other publishing profiles.
Profile Description	Use the Description parameter to provide additional information about the publishing profile that you are creating.
Status	Specify whether this profile has an active or inactive status. Note: If you have selected a scheduling option other than Not scheduled and you select the Inactive status, the publishing job will not run. The publishing jobs run only for publishing profiles with an Active status.

Parameter	Description
Scheduling	Choose one of the following options for scheduling the publishing of records that you identify in the Set Name parameter: ▪ Not scheduled ▪ Every Sunday ▪ Every day ▪ The first of every month
Set Name	Browse to select the set that you want to publish.
FTP Configuration	Select the FTP configuration that you require for this publishing configuration from the drop-down list of FTP configurations that you have already created (Administration > General Configuration > Configuration Menu > External Systems > S/FTP Definitions).
Subdirectory	Specify the name for the subdirectory to be used for the published files. For example, if you specified Alma in the Subdirectory field during S/FTP connection configuration, and you enter MyPubFiles in this field, the data is published to the Alma/MyPubFiles directory.
MARC Output Format	Select the format that you prefer for the output file that you are publishing. The drop-down list provides the following options: ▪ MARC 21 binary – No folders are created. One file is created for each type of record (new, update, delete). ▪ MARC 21 XML - Folders are created that include separate files for each record.
Compressed File Name Prefix	Enter a prefix that will help you identify the published files for this publishing profile. Note: The extension for these files is tar.gz.

4 Click **Next**.

5 Select **Add Items Information**. The fields for the item information mapping dynamically appear.

Publishing Profile Details 1 2 3 Back Cancel Next

Profile Id - Profile Name CC General Profile 1

Bibliographic Normalization

Correct the data using normalization rules

Inventory Enrichment

☐ Add Holdings Information ☒ Add Items Information ☐ None

Repeatable field	Barcode subfield
item.Pid.Subfield	Material type subfield
Copy ID subfield	Item status subfield
Item Policy subField	Is Magnetic subfield
Provenance subfield	Enumeration B subfield
Enumeration A subfield	Chronology J subfield
Chronology I subfield	Process type subfield
Description subfield	Permanent location subfield
Permanent library subfield	Current location subfield
Current library subfield	Call number subfield
Call Number type subfield	Alternative call number subfield
Alternative Call number type subField	Temporary call number subfield
Temporary Call number type subField	Inventory number subfield
Inventory number subfield	Storage Location ID subField
Pages subfield	Pieces subfield

Figure 5 - Add Items Information Mapping Fields

- Specify the field/subfields to which the related item record information should be mapped in the bibliographic record that will be created for publishing.

Publishing Profile Details 1 2 3 Back Cancel Next

Profile Id - Profile Name CC General Profile 1

Bibliographic Normalization

Correct the data using normalization rules

Inventory Enrichment

☐ Add Holdings Information ☒ Add Items Information ☐ None

Repeatable field	949	Barcode subfield	a
item.Pid.Subfield		Material type subfield	b
Copy ID subfield		Item status subfield	
Item Policy subField		Is Magnetic subfield	
Provenance subfield		Enumeration B subfield	
Enumeration A subfield		Chronology J subfield	
Chronology I subfield		Process type subfield	
Description subfield		Permanent location subfield	
Permanent library subfield		Current location subfield	
Current library subfield		Call number subfield	
Call Number type subfield		Alternative call number subfield	
Alternative Call number type subField		Temporary call number subfield	
Temporary Call number type subField		Storage Location ID subField	
Inventory number subfield		Pieces subfield	
Pages subfield			

Figure 6 - Add Items Information Mapping for Publishing

For every physical item that is related to the published bibliographic record, Alma will create a field/subfield combination in the bibliographic record to publish using the mapping that you identify in the Inventory Enrichment section of this page.

For item information such as library, location, and material type that may have both a code and description, only the code is published, not the description.

Specific to mapping library/location information, you can use either the permanent library/location or the current library/location options. When you use the current library/location mapping option, the system will publish either the permanent library/location or the temporary library/location information depending on the item's library/location at the time of publishing.

- 7 Click **Next** to complete the publishing configuration and click **Save**.

Other Enhancements:

- The following new search index is available and will be fully functional after the re-indexing process is completed during the month of May:
 - Creation Date of MMS Record
- The **Run** option (**Actions > Run** or **Run** button) has been removed from the publishing profiles (**Resource Management > Resource Configuration > Configuration Menu > Record Export > Publishing Profiles**). These profiles can now be run only by setting the **Scheduling** option.

Analytics

The following sections describe the functions provided for Analytics in the May 2014 release of Alma.

New Requests Subject Area – Part 2

Description

As described in the Alma April release notes, the history of fulfilled requests has been added to the May release of Alma Analytics. Fulfilled requests are now available for analysis.

Note: Since saving the request history in Alma began with the April release, the data/content available for your Analytics analysis begins with the April request activity/history and the request history that is saved going forward.

Below are the key changes since the April release:

- The Active Request Flag field will now have both Yes (Y) and No (N) values in order for you to differentiate between requests that are still in progress (flag=Y) and requests that are completed (flag = N).
- The Time-to-Patron Collection measure should now have values for requests with the Active Request Flag equal to N.

Alma Analytics OBIEE Upgrade

Description

During May, we are upgrading to the latest version of Oracle Business Intelligence Enterprise Edition (OBIEE). The upgrade will be gradual and not part of the May release itself. Information on the upgrade dates for each region will be sent separately.

The upgrade to an up-to-date version of OBIEE is essential, and it will provide the following main enhancements:

- Resolves the issue of browser support for Internet Explorer and Chrome
- Adds the ability to export to Excel 2007

The upgrade itself should be seamless to end users with no impact on existing reports and no major changes in the user interface, but it does introduce many new features from which you can benefit. We have created a presentation to help you get to know how these features can be

used in Alma. Refer to this [link](#) (in the Ex Libris Documentation Center) to access the presentation, *Get to Know Thirteen New OBIEE Features in Alma Analytics*. You can also find a myriad of internet sites that explain the new features in OBIEE.

Integrations with External Systems

The following sections describe the functions provided for integrations with external systems in the May 2014 release of Alma.

Exporting Patron Record Information to an External System

Description

With this release, Alma provides the capability to export patron records. As patron record changes occur in Alma, you can now synchronize the information with an external system. This new capability has been implemented by providing additional options in the integration profiles for external systems. With these new options, you can specify:

- Date parameters related to patron record changes in Alma to act as a trigger for export
- A group of Alma users to target for export
- Whether to automatically run a patron record export on a regularly identified schedule, or run it manually

When the export job is run, the export process creates an XML file in the format that is used by the Import and Synchronize actions (also defined on the Actions tab of the integration profile). An XSL file may be used to alter the format. The XSL file, `../xsl/letters/ExportUserLetter.xsl` (with the description **export user letter xsl**), is available and configurable in **Customize Letters** (**Administration > General Configuration > Configuration Menu > General Configuration**).

Technical Instructions

The General System Administrator role can configure an integration profile for exporting patron records.

To configure an integration profile to export patron records:

- 1 Access the User integration profile that you want to modify to include the patron record export parameters.
 - a On the General Configuration page (**Administration > General Configuration > Configuration Menu**), click **Integration Profiles** under **External Systems**. The Integration Profile List page opens.
 - b Filter the list using the **Users** integration type from the drop-down list. (The filter drop-down list has been updated with **Users** that replaces the **SIS** option.)

The screenshot shows the 'Integration Profile List' interface. On the left, there is a sidebar with a search bar containing '5555', a list of integration names including 'user export' and 'Student Informat', and a 'Name' header. The main area displays a list of integration types. A dropdown menu is open, showing a list of options: 'All', 'Resolver Augmentation', 'Bursar', 'Discovery Interface', 'Online Payment', 'LDAP', 'OAI Repository Definition', 'OCLC Connexion', 'Finance', 'Resolver Proxy', 'Remote Storage', 'SAML', 'Self Check', 'SMS Communication', 'SWETS Wise', 'Users' (which is circled in red), and 'Z39.50 Server'.

Figure 7 - Users Filter for the Integrations Profile List

- 2 In the row of the integration profile you want to edit, select **Actions > Edit**. The External System page displays.
- 3 Click the **Actions** tab.
- 4 Locate the **Export Users** section. (The previously named Export section is now called Export User Blocks.)

The screenshot shows the 'Export users' configuration form. It includes a section for 'Active' status with radio buttons for 'Active' (selected) and 'Non Active'. Below this are several input fields: 'User Groups' (set to 'Graduate Student'), 'Days Since Creation' (set to '12'), 'Days Since Update' (set to '12'), 'Days Since Deletion' (set to '12'), 'Output File Path' (set to 'export_users'), and 'Schedule' (set to 'Every Wednesday at 20:00'). A 'Run' button is located at the bottom left of the form.

Figure 8 - Export Users Section

- 5 Enter the parameters for exporting patron records to match your requirements. Refer to the table below for a description of the available parameters.

Parameter	Description
Active	Specify whether the Export Users job is active. If the job is active, it runs according to the selected scheduling option in the Export Users section. If it is inactive, it will not run.
User Groups	Browse to select one or more user groups to identify the patron records to be considered for export.
Days Since Creation	Use this option to set a condition, in number of days, that identifies when to include a patron record in the export. This parameter indicates the number of days since the patron record was created in Alma. The patron record that meets this criterion must also be a member of one of the user groups selected in the User Groups parameter in order for the patron record to be exported.
Days Since Update	Use this option to set a condition, in number of days, that identifies when to include a patron record in the export. This parameter indicates the number of days since the patron record was updated in Alma. The patron record that meets this criterion must also be a member of one of the user groups selected in the User Groups parameter in order for the patron record to be exported.
Days Since Deletion	Use this option to set a condition, in number of days, that identifies when to include a patron record in the export. This parameter indicates the number of days since the patron record was deleted in Alma. The patron record that meets this criterion must also be a member of one of the user groups selected in the User Groups parameter in order for the patron record to be exported.
Output File Path	Enter a subdirectory of the path specified when creating the secure FTP connection. For example, if you specified Alma in the Sub-directory field during secure FTP connection configuration and you enter SIS_Export in the Output File Path field, the files are exported to the Alma/SIS_Export directory (under the root FTP directory).
Schedule	Select one of the scheduling options that are predefined by an Ex Libris administrator. If you select Not scheduled , the job runs only when you manually run it.

6 Click **Save**.

Developer Network

Ex Libris is excited to announce the Developer Network—a new and completely open environment for developers to experiment and collaborate on extensions to Ex Libris solutions. The Network is a major new initiative that brings many important advantages to you.

As you may know, Ex Libris was the first library vendor to introduce an open platform strategy supported by a community-led collaborative platform, EL Commons. The Developer Network not only refreshes the technology used for developing code extensions; it provides a brand new, open environment for sharing, experimenting, and managing the lifecycle of developments that extend Ex Libris products. In addition, it offers new ways for you to access, share, and collaborate regarding APIs and developments.

Overview

The Developer Network includes:

- API Documentation
- Technical Blogging
- Code and Apps
- Forum
- Dashboard
- API Console

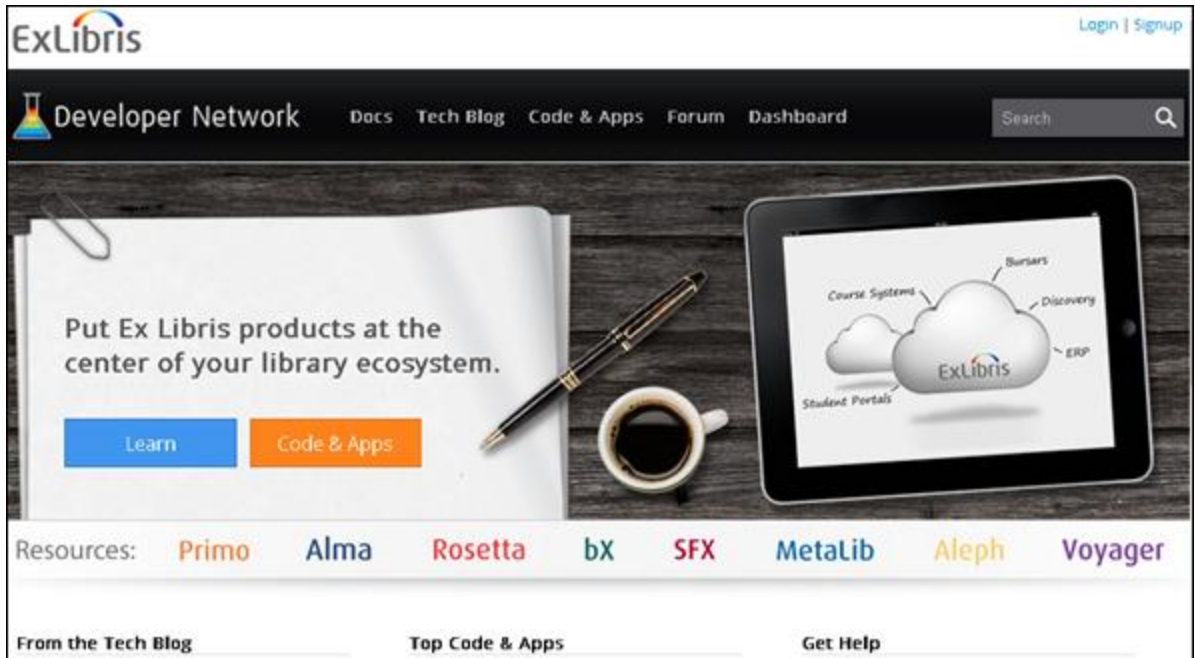


Figure 9 - Developer Network

These components of the Developer Network have already been seeded with information that you will want to access and begin using right away (see Getting Started on page 24).

The Developer Network provides the ultimate developers sandbox where you can:

- Experiment with APIs in real time
- Get sample RESTful API calls in a variety of development languages such as JAVA, PHP, Python, and Java Script

API Documentation

Noting that the anticipated primary audience of the Developer Network is IT staff and developers, a key component is to provide in-depth documentation so that customer and non-Ex Libris customer developers alike have access to the documentation they need in order to develop code that complements and extends the capability of Ex Libris software.

Documentation regarding Alma APIs can be found in the APIs column on the Alma page.

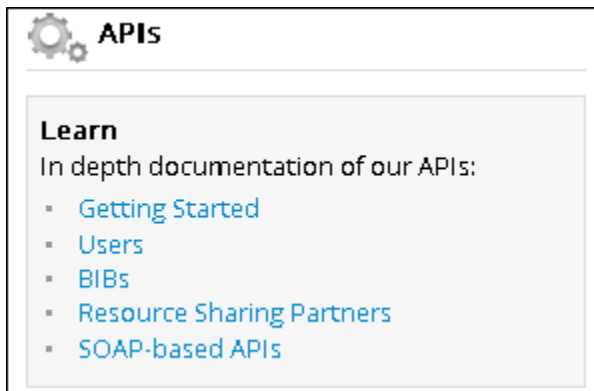


Figure 10 - Alma API Documentation

Documentation regarding integration with financial software, identity management systems, and so forth can be found in the Integrations column on the Alma page.

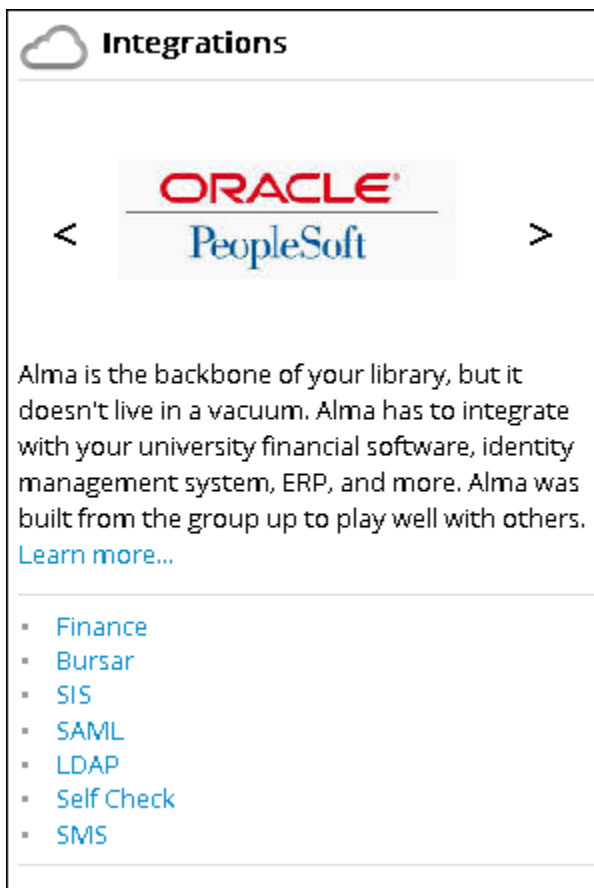


Figure 11 - Alma Integrations Documentation

Technical Blogging

The Developer Network provides a blogging space where you can share success stories, advice, and examples of your work. This space can also be used for sharing how-to instructions, tips, and white papers.

For an example from the Developer Network tech blog, see https://developers.exlibrisgroup.com/blog/alma_sentry_integration.

Code and Apps

The Code and Apps component of the Developer Network provides an advanced portal for sharing, experimenting, and managing the lifecycle of developments that is hosted on an open source code repository such as GitHub. Sites such as GitHub enable you to:

- Make the latest version of the code available to everyone
- Track changes to the code over time
- Subscribe to a repository to be informed when changes are made
- Accept changes from others as part of your collaborative coding

Ex Libris has opened an area/group on GitHub that provides a repository and handles code hosting. This is the place to showcase code samples. For an example, see <https://github.com/ExLibrisGroup/Rosetta.IWPlayer>.

Forum

The forum component is included to foster discussions and share ideas, questions, and answers about how to get the most value from Ex Libris APIs.

Dashboard

The dashboard component provides cloud customers the facilities to manage applications using the dashboard. This is where you obtain API keys, manage permissions, and view usage analytics.

API Console

The API console enables you to discover and test Ex Libris APIs in the shortest time possible. It provides a testing environment (sandbox) in which you can experiment with Ex Libris APIs before implementing them in your solutions. Click the **API console** link as highlighted in the figure below to access this capability.

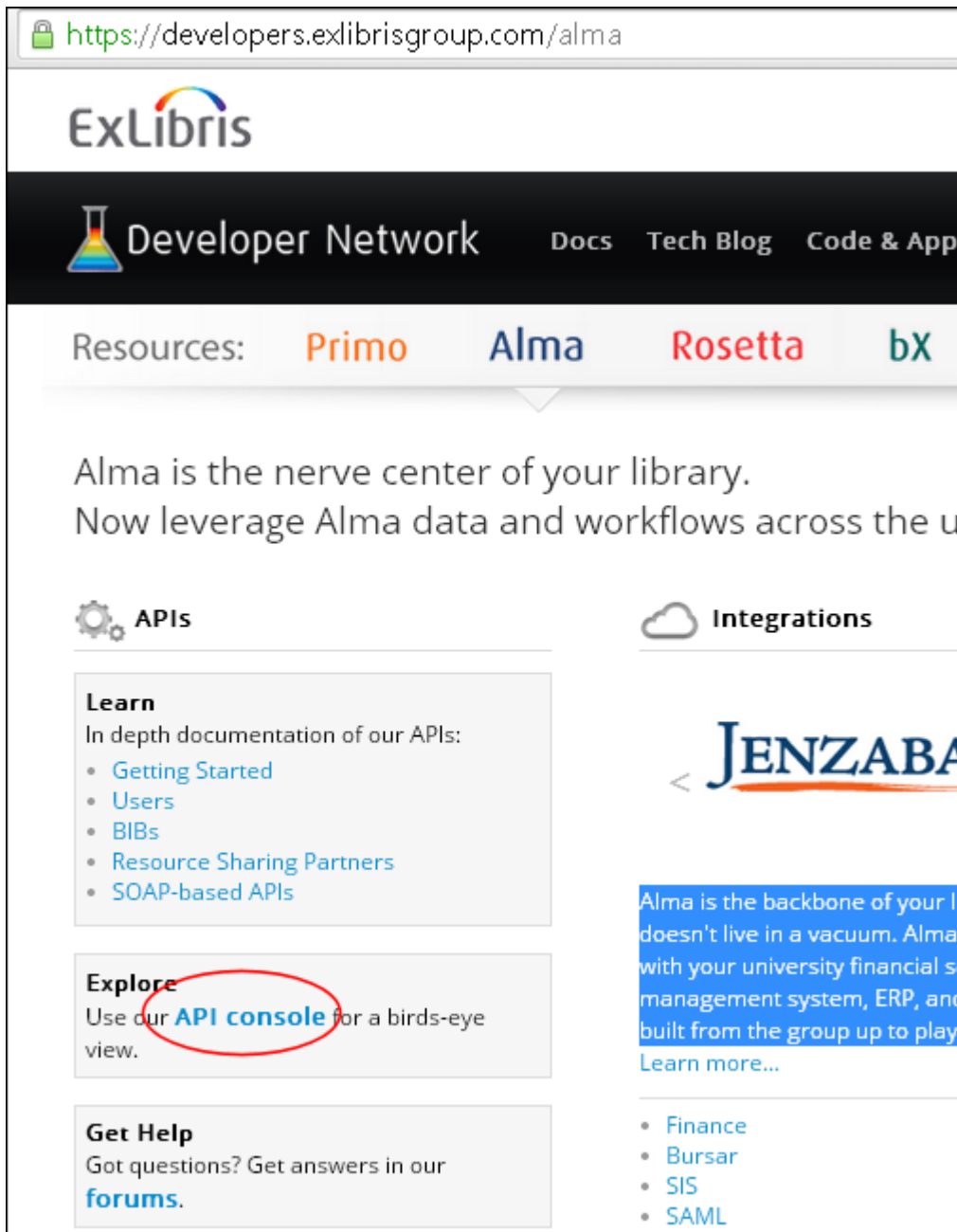


Figure 12 - API Console Link

Getting Started

The best way to get started is to try it. Everything is available and ready for you to try using our guest sandbox. In the coming months, you will also be able to connect to your institution's data using the Developer Network.

The Developer Network is open to anyone with access to the internet. You can start exploring what's available in the Developer Network at <https://developers.exlibrisgroup.com>.

For assistance with getting started, refer to the **Getting Started** section that can be accessed with the **Getting Started** link that is located on the <https://developers.exlibrisgroup.com/alma> page.

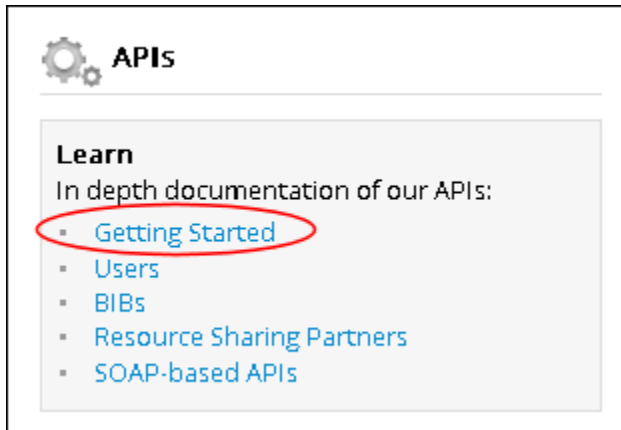


Figure 13 - Getting Started Link

For a small number of features, registration in the Developer Network is required. The steps for registration are described in the Getting Started section referenced above.

Alma Scheduled Maintenance Notifications

The following section describes the Alma maintenance-related enhancements provided with the May 2014 release of Alma.

Alma Scheduled Maintenance Notification Enhancements

As part of the May release, we improved the wording to make it easier for customers to differentiate between the different maintenance scenarios. The following is the new text for each maintenance scenario:

- Release

"Please be advised that Ex Libris will deploy a new release on your Alma production environment from {startDate} to {endDate}. Please view the release notes at the following location {releaseNotesLink} for more information about the exciting new features and enhancements in this release.

During this period, access to Alma may be unavailable, so please take this into account in your schedule. We apologize for any inconvenience this may cause."

- Release on sandbox (new)

"Please be advised that Ex Libris will deploy a new release on your Alma sandbox environment from {startDate} to {endDate}. On the release date, you will be able to view the release notes at the following location {releaseNotesLink} for more information about the exciting new features and enhancements in this release.

During this period, access to the Alma sandbox may be unavailable, so please take this into account in your schedule. "

- HF/SP

"Please be advised that Ex Libris will deploy a service pack on your Alma production environment from {startDate} to {endDate}. Please view the release notes at the following location {releaseNotesLink} for information about the issues resolved in this SP.

During this period, access to Alma may be unavailable, so please take this into account in your schedule. We apologize for any inconvenience this may cause."

- Other scheduled maintenance

"Please be advised that in order to provide you the highest standard of service, Ex Libris will carry out scheduled maintenance on your Alma production from {startDate} to {endDate}.

During this period, access to Alma may be unavailable, so please take this into account in your schedule. We apologize for any inconvenience this may cause."

- Other emergency maintenance

"Please be advised that due to unexpected service issues, Ex Libris will be carrying out unscheduled maintenance in Alma from {startDate} to {endDate}.

During this period, access to Alma may be unavailable. We apologize for any inconvenience this may cause."

The process for the above is as follows:

- The maintenance messages are always added to Alma as a notification upon login a few days before the maintenance date (for planned maintenance).
- The maintenance messages are also added to the Ex Libris system status site. Customers that register for alerts receive notifications by email.

Note: We are not announcing any of the maintenance scenarios on the Alma-L Listserv.

We encourage you to use the system status site whenever a downtime or slowness situation is encountered.

Known Issues

All of the following issues remain Known Issues in the May release.

Electronic Collections

- For the newly combined electronic collections that contain both services and bibliographic records/URLs, the Electronic Resource Activation Task List (**Resource Management > Manage Inventory > Manage Electronic Resource Activation**) may exhibit faulty behavior:
 - Selecting **Un-suppress** from the **Actions** menu may result in the disappearance of the **Activate** item from the menu list.
 - Selecting **Done** from the **Actions** menu may result in unexpected behavior.
- The **Suppress/Unsuppress** option appears if the electronic collection has both an unsuppressed/suppressed bibliographic record and a URL associated with it. Selecting this option suppresses/unsuppresses the bibliographic record from being published to Primo. For the June release, the **Suppress/Unsuppress** option will appear regardless of whether a URL is associated with the electronic collection. In the meantime, if no URL is associated with the electronic collection, you can suppress/unsuppress it through the bibliographic record.

Import Profiles

- When importing an EOD file using the New Order profile, if the location of the item does not have a call number type, the call number type of the institution should be used as the alternative call number type. Currently, however, no alternative call number is used.

Fulfillment

- If a circulation desk has an Acquisition Technical Services work order department, staff users should be able to receive items at the circulation desk. However, currently the following error is issued when attempting to receive items at such a circulation desk: "No acquisition department was selected."

Resource Sharing

- The **Rota Templates** link (**Fulfillment > Resource Sharing**) is visible to the Resource Sharing Partners Manager role in a library or an institution, as discussed in the Resource Sharing section of this document. An operator who is scoped for a specific library can view the institution-level templates in view mode, but should not be able to add templates. The **Add Template** button should therefore be disabled in view mode, but it is currently enabled.

Analytics

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

For details, you can read the following:

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

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

Ex Libris is working on updating the OBI version in order to fix this issue. However, this will take time and the fix is expected only in Q2 2014 (still to be finalized). In the meantime, use other supported browsers.

Note: This issue will be fixed during the course of May as part of the OBIEE upgrade (see the Alma Analytics OBIEE Upgrade section above).
