

Alma November 2014 release:
**Celebrating International
Day For Tolerance**



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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:

- [Data Services](#)
- [Alma Show Me How and Videos](#)
- [Particular Issues to Note](#)
- Feature/enhancement descriptions for the respective Alma functional areas
 - [Acquisitions](#)
 - [Resource Sharing](#)
 - [Alma APIs](#)
- [Known Issues](#)

Data Services

The Alma October Central KnowledgeBase and Community Zone package has been applied to the Alma environments.

New Electronic Collections Added to the Alma CKB

The following collections were added to the Alma CZ from 28-September-2014 through 26-October-2014:

- BIBSYS LM Information Delivery
- French National Licences Oxford University Press
- Practicing Law Institute (PLI) Discover Plus
- Ovid Lippincott Williams and Wilkins Total Access Collection 2014
- EricData 高等教育知識庫
- Knovel Complete Academic
- Knovel Complete Corporate
- Art and Architecture Archive
- Women's Wear Daily Archive
- Pombalina Books
- Impactum Journals

New External Resources That Are Open for Searching

The following external resource was added for this release:

- Catalogo Bibliografico Trentino [CBT]

Alma Show Me How and Videos

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

Alma Show Me How – November

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 What's New in Alma? pop-up window displays.
- 2 Select one of the processes in order to start the prompted step-by-step instructions.

For the November release, the following Show Me How scenario is available:

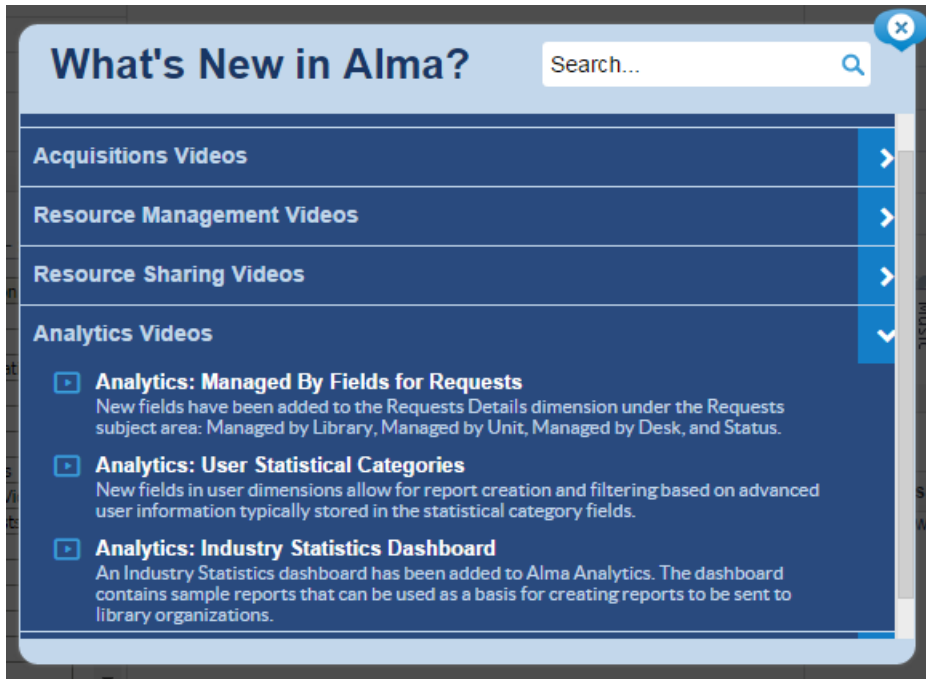
- Import ONIX-PL Licenses

Alma Videos – November

The following video (from the October release) is available when you select **Help > What's New Videos** in Alma:

- Load ONIX-PL Formatted Licenses

In addition, there are 54 videos – a collection of all the What's New Videos since March 2014 – available in the Show Me How menu. For example:



Particular Issues to Note

The following issue should be noted:

- With the December release, there will be a change in the attributes that are supported by Alma for the Z39.50 protocol. Currently, the 1211 attribute searches for all other system numbers (including CKB, for example) and not only the OCLC number. The 12 attribute searches for Alma identifiers, such as MMS_ID. As of the December release, the 1211 attribute will search for the OCLC number only, and the 12 attribute will search for both Alma identifiers and other system numbers.

For example, a search for the CKB number using the 1211 attribute, which currently works, will not work as of the December release. The 12 attribute should be used instead. A search for the OCLC number will work using both the 12 and the 1211 attributes.

For detailed information on the Z39.50 protocol, see <https://developers.exlibrisgroup.com/alma/integrations/Z39.50>.

Acquisitions

The following section describes the features provided for the Acquisitions functional area in the November 2014 release of Alma.

Legal Deposit

Description

Legal deposits apply to government or national libraries that receive copies of publications at no charge from the vendor.

Prior to the November release, Alma did not have an acquisition method to accommodate both a zero value and a notification to the vendor. In this release, Alma has added a purchase type, Legal Deposit (LD), that does not require funds or a price and that sends out different versions of the PO line order letter.

How It Works

Libraries receive one or more copies of every item published within their jurisdiction. (This includes monographs and serials, print and electronic.) Libraries can claim a zero purchase price while, in the same transaction, send an acknowledgement of receipt to vendors or publishers. Acknowledgements are system-generated with the following rules:

- Per item for monographs
- Annually for serials
- According to event (claim, order, receipt) and any edits or customizations a library makes to the email templates (see [Customizing Notification Letters](#) below).

Note: Currently, claims letters are not sent for continuous order items (serials).

LD is delivered with Alma and enabled for institutions that require it. When a new PO line is created, Alma checks if **Legal Deposit** is set to **TRUE** in the customer parameter. If it is, Alma displays the new acquisition method as an option in the user interface.

Workflow

- 1 The user creates a PO line with an acquisition method of Legal Deposit.
- 2 The system sends a request notification to the vendor.

- 3 When the operator creates an order using the LD acquisition method, the following occurs:
 - Price and fund are not mandatory
 - PO line is packed and sent to the vendor
 - PO line is not invoiced
 - PO line is redirected to the claims task list when appropriate
- 4 The vendor sends the LD monograph or serial requested by the library.
- 5 The library sends an acknowledgement to the vendor on the following schedule:
 - For LD monographs, at the time of receiving.
 - For LD serials, annually, with a record of all issues for that year.

Technical Instructions

To perform Acquisitions tasks related to LD, you must have one of the following roles:

- Acquisitions Manager
- Acquisitions Administrator

Enabling Legal Deposit as an Acquisition Method

LDs must be enabled in your institution's Acquisitions configurations before you can begin using them.

To enable Legal Deposit as an acquisition method:

- 1 On the Acquisitions Configuration page (**Acquisitions > Acquisitions Configuration > Configuration Menu**), select **Acquisition Method** from the **Purchase Order** section.
The Code Table page for Acquisition Method opens.

Code Table Cancel Translate Save

You are configuring: Main Campus [Organization Unit List](#) Ex Libris, Imple...

Table Information

Sub System ACQUISITION Table Name Acquisition Method

Updated By exl_impl Updated on 09/08/2014

Patron Facing No

Table Description Acquisition Method

Acquisition Method

Filter : English Import Tools

	Enabled	Display	Order	Code	Description	Translation	Default Value	Up
1	☒	☐	☐	PURCHASE	Purchase	Purchase	☐	exl
2	☒	☐	☐	APPROVAL	Approval Plan	Approval Plan	☐	exl
3	☐	☐	☐	GIFT	Gift	Gift	☐	exl
4	☐	☐	☐	LEGAL_DEPOSIT	Legal Deposit	Legal Deposit	☐	Sy
5	☒	☐	☐	DEPOSITORY	Depository	Depository	☐	exl
6	☒	☐	☐	EXCHANGE	Exchange	Exchange	☐	exl

Figure 1 - Check Box to Enable Legal Deposit Method

- In the row containing LEGAL_DEPOSIT as the code, click the clear check mark in the **Enabled** column to enable the method.

A yellow check appears in the Enabled column of the Legal Deposit row.

Acquisition Method

Filter : English Import

	Enabled	Display	Order	Code	Description	Translation	Default Value
1	☒	☐	☐	PURCHASE	Purchase	Purchase	☐
2	☒	☐	☐	APPROVAL	Approval Plan	Approval Plan	☐
3	☐	☐	☐	GIFT	Gift	Gift	☐
4	☒	☐	☐	LEGAL_DEPOSIT	Legal Deposit	Legal Deposit	☐
5	☒	☐	☐	DEPOSITORY	Depository	Depository	☐
6	☒	☐	☐	EXCHANGE	Exchange	Exchange	☐

Figure 2 - Legal Deposit Enabled

- Click the **Save** button.

The system enables LD as a method. The method will appear as an option for purchase orders.

Customizing Notification Letters

Alma delivers three LD notification letters that can be customized: claim, order, and receipt notices.

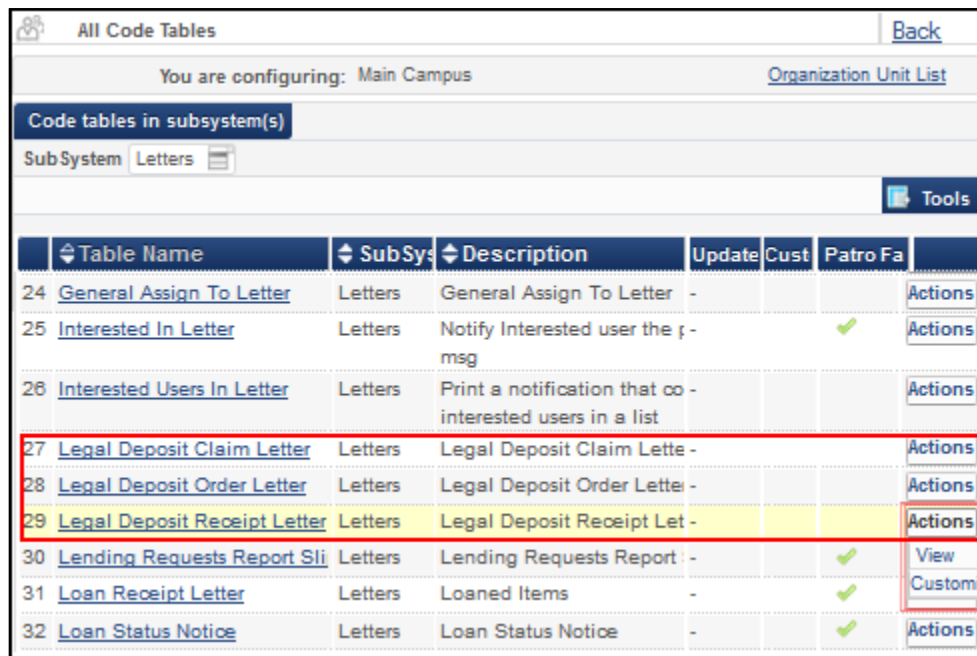


	Table Name	SubSys	Description	Update	Cust	Patro Fa	
24	General Assign To Letter	Letters	General Assign To Letter	-			Actions
25	Interested In Letter	Letters	Notify Interested user the p - msg			✓	Actions
26	Interested Users In Letter	Letters	Print a notification that co - interested users in a list				Actions
27	Legal Deposit Claim Letter	Letters	Legal Deposit Claim Lette -				Actions
28	Legal Deposit Order Letter	Letters	Legal Deposit Order Lette -				Actions
29	Legal Deposit Receipt Letter	Letters	Legal Deposit Receipt Let -				Actions
30	Lending Requests Report Sli	Letters	Lending Requests Report -			✓	View Custom
31	Loan Receipt Letter	Letters	Loaned Items	-		✓	Custom
32	Loan Status Notice	Letters	Loan Status Notice	-		✓	Actions

Figure 3 - Code Tables Letters

To customize letters, and to account for variations such as monograph versus serial, for example, or electronic versus physical, edit the XSL files that correspond to the letters you want to edit. These can be accessed from the **Administration** menu > **General Configuration** > **Configuration Menu**.

For detailed information about editing form letters in Alma, see **Configuring Alma Letters** in the *Alma Administration Guide* or in the online help.

Using Legal Deposits in Purchase Orders

Once the LD method has been enabled and the letters reviewed and edited where needed, a PO line with the method LD can be created.

To create a PO line for a Legal Deposit:

- 1 Begin a new PO line using one of the PO creation workflows. See **Creating Purchase Order Lines** in the *Alma Acquisitions Guide* or in the online help.
- 2 Enter all the required information in the PO Line page, Summary tab, and any additional information in non-required fields.

Note: For LDs, the **Price** and **Fund** fields are not required.

- 3 For the PO Line Details heading, Acquisition method, select **Legal Deposit**.

The screenshot shows a web interface for 'PO Line details'. On the left, there is a list of fields: 'Invoice status', 'Rush', 'Cancellation restriction', 'Identifier', 'Vendor reference number', and 'Note to vendor'. To the right of these fields is a dropdown menu for 'Acquisition method'. The dropdown is open, showing a list of options: 'Technical', 'Approval Plan', 'Depository', 'Exchange', 'Legal Deposit', 'Purchase', 'Technical', and 'Purchase at Vendor System'. The 'Legal Deposit' option is highlighted with a red box. The 'Acquisition method' label and the dropdown menu itself are also outlined in red.

Figure 4 - Legal Deposit on PO Line Summary Tab

- 4 Complete the LD process as you would complete a PO line. See Creating Purchase Order Lines in the *Alma Acquisitions Guide* or in the online help.

Resource Sharing

The following section describes the functions provided for Resource Sharing in the November 2014 release of Alma.

Improvements to the Primo Get It Resource Sharing Requests Link

The Primo Get It link that enables placing resource sharing requests is based on system checks that determine the patron's eligibility for placing a resource sharing request. These checks are based on:

- The patron having a valid patron role that allows placing resource sharing requests
- Fulfillment unit terms of use rules (of the type **Borrowing Resource Sharing**) that allow the placing of resource sharing requests

As of the November release, Alma makes use of the proper resource sharing *library* as the scope for checking the library resource sharing policies, instead of the *institution*. To enable Alma to make use of the proper resource sharing library as the checked scope instead of the institution ensure that the resource sharing terms of use rules of type **Borrowing Resource Sharing** are configured with the desired terms of use (as reported in the October release notes). The Borrowing Resource Sharing rules are configured at the fulfillment unit that is owned by the resource sharing library.

In addition, patron authorization to resource sharing services, previously controlled by the institution level Patron role, may now optionally be managed at the library level. Alma will use the library-level role when one has been configured, but will continue to use the institution-level one if no library-level one is defined.

Alma APIs

The following section describes the Alma API enhancements provided in the November 2014 release.

Alma RESTful APIs

For the November release, the following enhancements were added:

- Full access to all vendor information is now available via RESTful APIs. This includes read, write, and delete access to vendor core information, vendor contact information, vendor accounts, and linked interfaces. For detailed information, see the Vendors section on the following page: <https://developers.exlibrisgroup.com/alma/apis/acq>.

- RESTful APIs to update and cancel a title or an item request:

```
PUT /bibs/{MMS_ID}/requests/{request_id}
PUT /bibs/{MMS_ID}/holdings/{holding_id}/items/{item_id}/requests/{request_id}
DELETE /bibs/{MMS_ID}/requests/{request_id}
DELETE /bibs/{MMS_ID}/holdings/{holding_id}/items/{item_id}/requests/{request_id}
```

For detailed information, see <https://developers.exlibrisgroup.com/alma/apis/bibs>.

Known Issues

- 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.
- Although the borrower side renewal of loaned items that have been received through a resource sharing request is controlled by the partner's workflow profile, changing the due date using the various Change Due Date options is possible even if the workflow profile does not allow this option.
- Currently, Legal Deposit claim notifications are sent for one-time-order items only. Claim notifications for continuous-order items will be available in a future Alma release.

Fixed Issues

- The Update User Information job now allows you to update library-level roles in bulk.