

Alma November 2016 Release Notes

**Great Inventions
Around the Alma World**
Sweden - Gustaf Eric Pasch
The safety match



The Alma November release provides numerous new features and enhancements. Some of these enhancements are a result of NERS or Idea Exchange initiatives.



Download a PDF of the Release Notes - Note that the PDF includes the online help pages that describe the core functionality of the new features.

Make the Most of This Release

Action Items

- ☐ [Digital Fulfillment - Alma Document Delivery](#) – Are you supplying digitization services to your patrons, or would you like to implement this service? With this new enhancement, you can start sending digitized material to your patrons without worrying about email limitations and copyrights.
- ☐ [Control Patron Information Sharing](#) – Do you want to participate in a fulfillment network but have concerns about patron data privacy? You can now control the patron information that may be shared with other institutions in order to facilitate the fulfillment network process.
- ☐ [Sharing Digital Inventory Between Member Institutions](#) – This great new feature will provide end users with easy access to digital resources—regardless of where they are managed—and allow institutions working with a Network Zone to easily share their digital collections for the benefit of all end users.

Action Items

☐ [VAT Support for Fines and Fees](#) – If you manage VAT for library-created fines and fees, you can now manage your VAT inside Alma in a configurable, visible, and reportable manner.

☐ [Integration with Cloud IdP \(Microsoft Azure\)](#) – If you are interested in secure management of user information without having to locally maintain identity management applications, you can benefit from the streamlined and integrated user management workflows that this new feature makes available.

What's New?

The following sections present the new and changed features in this release of Alma.

Acquisitions

- [Sending Annual Receipts for Serial Legal Deposits in Bulk](#) – You can now manually run a job to send annual receipts for serial legal deposits to a list of vendors.
- [Additional Acquisitions Enhancements](#)

Resource Management



- **Idea Exchange:** [Add New Holdings from the Holdings List](#) – You can now add new holdings records from the Holdings List page without opening and actively editing bibliographic records.
- [Calendar Coverage](#) – Calendar coverage for electronic resources was expanded to include month and day.
- [Overlap Analysis Expanded to Include Community Zone Analysis](#) – The previously available Overlap Analysis (now Overlap and Collection Analysis) reporting capability was expanded to include analysis of a titles list that is compared with resources available in the Community Zone.
 Watch the [Overlap Analysis Expanded to Include Community Zone Analysis](#) video
- [Reminders for Bibliographic Records](#) – Catalogers can now add reminders to bibliographic records.
 Watch the [Reminders for Bibliographic Records](#) video

- [Cross Walk UNIMARC to MARC 21 Authority Records](#) – Alma import options were enhanced to provide a cross walk between UNIMARC authority records and MARC 21 authority records.
- [Publishing Using Filters](#) – Publishing was enhanced to use filters on the set of records that you select for publishing.
- [Browse Bibliographic Headings Sorting Improvement](#) – Subfields in Browse Bibliographic Headings are now sorted in the order in which they are cataloged instead of alphabetical order.
- [Chinese Bibliographic Headings Sort](#) – Sorting of the Chinese bibliographic headings was improved as part of the Browse Bibliographic Headings enhancement.
- [MARC 21 Leader Position 17 Enhanced for OCLC](#) – MARC 21 leader position 17 for bibliographic records was enhanced to include OCLC options in the MD Editor form and Metadata Configuration.
- [Priorities for Multiple Authority Vocabularies](#) – A priority order of names and subject headings (up to three) can now be configured when you have multiple vocabularies defined for your system.
- [Additional Resource Management Enhancements](#)

Fulfillment

- [Enhanced Automatic Copyright Approval Rules](#) – Additional clauses for digitization profile rules were added to enhance Alma's ability to automatically approve copyright clearance requests.
- [Digital Fulfillment - Alma Document Delivery](#) – You can now upload files to a document storage folder and send a link to the patron.



Watch the [Digital Fulfillment - Alma Document Delivery](#) video



- **Idea Exchange:** [Patron Notification of Requests](#) – A new job, Requests - Send Report, now generates one letter per patron, detailing all requests by status.
- [Additional Fulfillment Enhancements](#)

Resource Sharing

- [Determine Primo Resource Sharing Form Type Based on Genre](#) – The Primo resource sharing form will now load for book or article based on the genre parameter received in OpenURL.

- [Shipping Lending Requests with Multiple Items](#) – Lending requests may now indicate multiple items attached to a single request.



Watch the [Shipping Lending Requests with Multiple Items](#) video

- [Additional Resource Sharing Enhancements](#)
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Collaborative Networks

- [Sharing Digital Inventory Between Member Institutions](#) – Institutions working with a Network Zone can now expose their digital inventory to other member institutions.
 - [Control Patron Information Sharing](#) – When a linked user is created in a fulfillment network, institutions may now select attributes of a linked user that will be shared.
 - [Additional Collaborative Network Enhancements](#)
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Analytics

- [New Reports and Dashboards Added to Alma Analytics](#) – Several new default dashboards and reports were added to Alma Analytics.
 - [Active Course Code and Active Course Name Added to Bibliographic Details](#) – The **Active Course Code** and **Active Course Name** fields were added to the shared Bibliographic Details dimension.
 - [Citation Copyright Dimension Added to Course Reserves](#) – The Citation Copyright dimension was added to the Course Reserves subject area.
 - [Citation Metadata Details Added to Course Reserves](#) – The Metadata Details dimension was added to the Course Reserves subject area and contains the **Non-Repository Citations**.
 - [Additional Analytics Enhancements](#)
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Administration and Infrastructure

- [VAT Support for Fines and Fees](#) – Fines and fees now have the option to include VAT.
- [SAML Enhancements](#) – The SAML integration profile was enhanced.
- [Integration with Cloud IdP \(Microsoft Azure\)](#) – An option has been added to the Update/Notify Users job to export all users for Cloud IdP.

- [Social Authentication](#) - Alma and Primo (when working with Alma) now support external authentication for both staff and patrons, using social authentication via Google or Facebook (Twitter to be supported soon).
- [Send a Webhook Request](#) – A webhook request may now be triggered when a job ends.
- [Additional Administration and Infrastructure Enhancements](#)

APIs

- The Representation API now includes a new field, **deposit_id**.
- The **/conf/general** API retrieves general institution information such as institution code, environment type, and digital storage location. For detailed information, see <https://developers.exlibrisgroup.com/alma/apis/conf>.
- The Retrieve PO Line API can now retrieve and sort by the following fields: **Item description, Chronology I, J, K, Enumeration A, B, C**.
- The Retrieve Jobs API now includes the related profile ID for MD import jobs.
- The number of elements sent in POST or PUT API calls is no longer limited.

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.
- Related to merging bibliographic records in the MD Editor, if there are no requests, the Merge Records and Combine Inventory pop-up window does not display a count of 0 (zero) requests. The count appears for requests only when it is greater than 0 (zero). The count should also appear as 0 (zero) requests when there are no requests.
- Regarding the autocomplete/pop-up assistance being provided for several UNIMARC fields in the MD Editor, there is a known issue related to UNIMARC 327 \$a and 327 \$b. These subfields are based on the same functionality and as a result, the pop-up suggestions in the MD Editor suggests both subfields' values when entering content in either the 327 \$a or the 327 \$b.
- Fixed position fields (control fields) cannot be modified using the extension loader (extension packs) at this time.
- When creating an OCLC Connexion import profile in a Network Zone member institution with the **Use NZ** option selected, the **Use NZ record** option is used upon finding a match. Currently, there is no possibility to select the **Merge, Overlay**, or **Do not import** options instead.
- When a record is deleted in Alma, the headings associated with the record are still available when browsing bibliographic headings.

- The **Total electronic portfolios imported** count in the MD import report does not take into account the portfolios imported in the first file that is imported when the import is split into several files.
 - The **URL** condition that was added as an advanced search option under Electronic Collection when searching for electronic titles is not functioning properly.
 - A user with the Physical Inventory Operator role can edit a holdings record using the **View Inventory** option in the MD Editor, although the user should not have this capability and cannot perform this action from the List of Holdings.
 - Receiving of multiple items using Scan In Items is currently not possible when shared barcodes are used.
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Data Services

- [Library of Congress Authorities Community Zone Updates](#)
 - [New Electronic Collections Added to the Alma CKB](#)
 - No new external resources were added to Alma for the November release.
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Next Release Sneak Preview

[View a list of the features](#) that are planned for the December 2016 Alma release.

Acquisitions - November 2016 Enhancements

Sending Annual Receipts for Serial Legal Deposits in Bulk

For Legal Deposit serials, Alma does not create or send a receipt. Until now, you could manually create an Analytics report, run it once a year, and send it to vendors. For more information about legal deposits, see [Working With Legal Deposits](#).

You can now manually run a job to send annual receipts for serial legal deposits to a list of vendors. This feature includes the following new elements:

- The ability to create vendor sets (a new type of Acquisitions set, in addition to the currently existing PO lines sets) – You can create either itemized or logical vendors sets. See [Creating Vendor Sets](#).
- A new Analytics report that includes the annual serial inventory for a vendor – see the **Legal Deposit Annual Receipt** entry in [Out-of-the-Box Reports](#). You can also create other reports. If you do, add their path(s) to the Legal Deposit Reports code table. See [Configuring Legal Deposit Report Paths](#).

In addition, an Analytics object (Legal Deposit) for the report was added. See [Scheduling](#).

- A new letter **Legal Deposit Annual Receipts Letter** to send to vendors – For more information, see [Configuring Alma Letters](#).
- A new job that you can manually run that sends the above letter, with the chosen Analytics report, to each vendor in a vendor set – See **Legal Deposit Annual Receipt Task** in [Running Manual Jobs on Defined Sets](#). A new privilege, **TASK_CHANGE_LEGAL_DEPOSIT_ANNUAL_RECEIPT**, was added to the roles that can run this job.

Additional Acquisitions Enhancements

- **Job Description** was added as a field for a vendor's contact people. The field appears as a column in the table in the **Contact People** tab. For more information, see [Managing Vendors](#).
- The vendor account ERP code (<vendor_account_FinancialSys_Code>) now appears (in addition to the vendor ERP code) when exporting invoices to an ERP. For more information about exported fields, see https://developers.exlibrisgroup.com/alma/apis/xsd/invoice_payment.xsd. Also see [Financial Systems](#).

Resource Management - November 2016 Enhancements

Add New Holdings from the Holdings List

In order to provide a more efficient workflow for adding holdings records, you can now add new holdings records from the Holdings List page without opening and actively editing bibliographic records. See [The List of Holdings](#) for more information.

Calendar Coverage

Coverage for electronic resources can now be expressed by a calendar format of year/month/day. The addition of coverage in a calendar format simplifies management of electronic resources for information providers who work with calendar date format to express the date range of electronic titles. The following areas were updated to reflect calendar date coverage:

- Electronic Portfolio Editor page

When coverage date information is added to an electronic resource (as in the Electronic Portfolio Editor, for example), and only the year and month content has been entered, the system defaults the **From Day** to the first of the month and the **Until Day** to the thirty-first of the month.

See [Modifying an Electronic Portfolio's Information](#) for more information.

- New Portfolio page (see [Adding a Standalone Portfolio](#))
- Available For Information Group Settings (See the [Group Settings Tab](#) for portfolios in the [Modifying an Electronic Portfolio's Information](#) section)
- Dynamic URLs (see [Configuring Dynamic URLs for Electronic Collections and Portfolios](#))
- Alma's Link Resolver (used when portfolio coverage information is checked to determine which services to include)
- Exporting portfolios:
 - Publishing to Google Scholar (see [Publishing Electronic Holdings to Google Scholar](#))
 - Publishing to PubMed (see [Publishing to PubMed](#))

- Publishing to Primo Central (see [Publishing Electronic Holdings to Primo Central](#))
- Publishing Profiles - General Profiles type (see [Publishing and Inventory Enrichment \(General Publishing\)](#))
- Exporting in KBART format

This affects the content of the **date_first_issue_online** and **date_last_issue_online** columns. The content for these columns is YYYY, YYYY-MM, or YYYY-MM-DD according to the portfolio date information provided on the Coverage Information tab (ONLY local, global AND local, global OR local, ONLY global).

- Upload Electronic Holdings - ELSEVIER integration profile/job (see [Importing Elsevier Holdings](#))
- Portfolio Loader (Electronic Services Editor > Portfolios tab)

The following new columns are provided:

- From_MONTH
- TO_MONTH
- FROM_DAY
- TO_DAY
- GLOBAL_FROM_MONTH
- GLOBAL_TO_MONTH
- GLOBAL_FROM_DAY
- GLOBAL_TO_DAY

See [The Bulk Portfolio Information File](#) for more information.

- Community Zone Contribution and Harvesting

NOTE:

The new coverage data for CKB updates will be handled in a later phase.

- Overlap and Collection Analysis

NOTE:

The analysis handles both the Year, Volume, Issue coverage format and the Year, Month, Day coverage format.

- Alma Analytics

The E-Inventory subject area now includes the following under Portfolio Coverage Information (Date Information):

- Date Info From Month
- Date Info From Day
- Date Info To Month
- Date Info To Day

NOTE:

Staff search results already include month/day information.

The format of the dates that are displayed is determined by the **system_date_format** in Other Settings ([Resource Management > Resource Configuration > Configuration Menu > General section](#)).

Overlap Analysis Expanded to Include Community Zone Analysis

The previously available Overlap Analysis (now Overlap and Collection Analysis) reporting capability has been expanded to include analysis of a titles list that is compared with resources available in the Community Zone. Similar to the previous functionality, the comparison uses an Excel spreadsheet that contains a list of identifiers such as ISSNs for titles that you want to analyze. See [Working with Overlap and Collection Analysis](#) and [Viewing Overlap and Collection Analysis Job Reports](#) for more information.

Reminders for Bibliographic Records

Catalogers can now add reminders to bibliographic records. Note that a new privilege, **MANAGER_REMINDERS**, was added to the Cataloger and Cataloger Extended roles for this purpose. With this capability, you can customize reminder types and statuses to match the workflow you prefer to implement for using reminders. For more information, see [Working with Reminders](#).

Cross Walk UNIMARC to MARC 21 Authority Records

Alma import options were enhanced to provide a cross walk between UNIMARC authority records and MARC 21 authority records. See [Creating a UNIMARC Profile](#) for detailed information.

Publishing Using Filters

Publishing was enhanced to use filters on the set of records that you select for publishing in a publishing profile. See the procedure [to create a general publishing profile](#) and the description for [Filter Records](#) for more information.

Browse Bibliographic Headings Sorting Improvement

Sorting was improved in Browse Bibliographic Headings to display the subfields sorted in the order in which they are cataloged instead of alphabetical order. See [Browsing Bibliographic Headings](#) for the updated documentation on working with Browse Bibliographic Headings.

NOTE:

Re-indexing required for this feature will be done starting in November.

Chinese Bibliographic Headings Sort

Sorting of the Chinese bibliographic headings was improved as part of the Browse Bibliographic Headings change for November. See [Browsing Bibliographic Headings](#) for detailed information.

NOTE:

Re-indexing required for this feature will be done starting in November.

MARC 21 Leader Position 17 Enhanced for OCLC

MARC 21 leader position 17 for bibliographic records was enhanced to include the following OCLC options:

- I - Full-level input by OCLC participants
- J - Deleted record
- K - Less-than-full input by OCLC participants
- L - Full-level input added from a batch process
- M - Less-than-full added from a batch process

You will see these new options available when cataloging using the leader form in the MD Editor and when working with the Metadata Configuration options.

See [Open Form Editor](#) and [To edit fields](#) for detailed information.

Priorities for Multiple Authority Vocabularies

A priority order of names and subject headings (up to three) can now be configured when you have multiple vocabularies defined for your system. The purpose of this feature is to define priority between authority vocabularies for authority control. When you perform an F3 check of authorities in the MD Editor, for example, and a heading is not found in the vocabulary of your first, default priority, the system checks your second priority for matches. If a heading is not found in the vocabulary of your second priority, the system checks your third priority for matches. In addition to the F3 functionality, this capability applies to authority control in general. To configure this option, contact Ex Libris Support.

Additional Resource Management Enhancements

- The **Browse Call Numbers** label in the MD Editor's Tools menu was changed to **Browse Shelf Listing**. See [MD Editor Menu and Toolbar Options](#) for more information.
- A mechanism was designed to proactively identify and automatically eliminate a "ghost record" (a record that does not actually exist) that occurs in repository search results. See the [Handling Ghost Records Automatically in the Repository Search Results](#) section for more information.
- When publishing a record from Alma to Primo, the headings information (Y/N/R) is published in \$\$9 (as it was previously), but the language information is now published in \$\$L. See [Publishing Headings Enrichment to Primo](#) for more information.
- The **Starts with** search when searching external resources in the MD Editor was removed. See [Searching External Resources](#) for more information.
- The following values were added to the Physical Material Type code table (**Resource Management > Resource Configuration > Configuration Menu > General > Physical Material Type Descriptions**):
 - Floppy Disk
 - Item with Floppy Disk
 - Item with CD
 - Item with Audio Cassette

If you have already customized this table, the above values are disabled. You can enable them by modifying this code table. See [Configuring Physical Item Material Type Descriptions](#) for more information.

- The **Physical Material Type** column was added to the Exclude Process Types from Publishing mapping table (**Resource Management > Resource Configuration > Configuration Menu > Record Export > Exclude Process Types from Publishing**). The values in this column are taken from the Physical Material Type code table (**Resource Management > Resource Configuration > Configuration Menu > General > Physical Material Type Descriptions**). If this column is empty for a specified process type, all items of this process type are excluded. If this column contains a value, only items of the specified process type and physical material type are excluded. See [Excluding Resources with Specific Process Types from Publishing](#) and [Configuring Physical Item Material Type Descriptions](#) for more information.
- In the General publishing profile's Data Enrichment tab (second page of the wizard), when **Add Item Information** is selected in the **Physical Inventory Enrichment** section, the **Repeatable field** is now mandatory. For more information, see [Publishing and Inventory Enrichment \(General Publishing\)](#).

Fulfillment - November 2016 Enhancements

Enhanced Automatic Copyright Approval Rules

Additional clauses for digitization profile rules were added to enhance Alma's ability to automatically approve copyright clearance requests. This reduces the need for librarian involvement in the copyright clearance process. For more information on digitization profile rules, see [Configuring Digitization Profile Rules](#).

The following additional digitization profile clauses were added.

New Digitization Profiles Clauses

Name	Type	Description	Operators	Values
Article Title Exists	Comparison	Check whether there already exists an approved copyright record for the material.	=	☐ true ☐ false
Articles in Issue	Evaluation	Check the total number of articles in the journal issue.	☐ > ☐ >= ☐ = ☐ <= ☐ <	Number
Available in Electronic	Evaluation	Check if an electronic copy exists for the material.	=	☐ true ☐ false
Chapter Already Requested	Comparison	Check whether the requested chapter is already requested by another copyright clearance request.	=	☐ true ☐ false

Name	Type	Description	Operators	Values
Copyright Record Related to Course	Filter	Restricts comparison checks to existing copyright clearance requests that are associated with a course.	=	- true - false
Copyright Agency Approval Permission	Evaluation	Currently relevant for CLA applicable requests, only. CLA must be enabled. Check CLA approval for the material. If there are multiple responses, the last one is used.	= - InList - Is empty - Is not empty - Not Equals - NotInList - contains	- Digital Approved - Scanning Approved - Digital Declined - Scanning Declined
In the Same Course	Filter	Restricts comparison checks to existing requests associated with the same course as the request At least one of the following additional rules must be defined: Article Title Exists, Articles in Issue, Chapter Already Requested, Total Copyright Number of Chapters, Total Copyright Work Percentage.	=	- true - false
Material Required Dates	Filter	Restricts comparison checks to existing requests that overlap the request's date range. If the request's date range is missing, use the course's date range. If there is no associated course, use today's date as the start date with no end date. At least one of the following additional rules must be defined: Article Title Exists, Articles in Issue, Chapter Already Requested, Total Copyright Number of Chapters, Total Copyright Work Percentage.	=	- true - false
Publisher	Evaluation	Check the publisher against a predefined list of publishers.	= - InList	Publisher

Name	Type	Description	Operators	Values
		Enter the list of publishers in the Copyright Publishers code table; see Configuring Copyright Publishers .	■ Is empty ■ Is not empty ■ Not Equals ■ NotInList ■ contains	
Required Pages	Evaluation	Check the number of pages requested by the current request.	■ > ■ >= ■ = ■ <= ■ <	Number
Resource Total Pages	Evaluation	Check the total number of pages of the entire work (how many total pages are in the item being requested).	■ > ■ >= ■ = ■ <= ■ <	Number
Total Copyright Number of Chapters	Comparison	Check the total number of chapters requested, including previous requests.	■ > ■ >= ■ = ■ <= ■ <	Number
Total Copyright Work Percentage	Comparison	Check the percentage of the work requested, including previous requests. This rule evaluates to false if the number of pages is not specified.	■ > ■ >= ■ =	Number between 0 and 100

Name	Type	Description	Operators	Values
			■ <= ■ <	

Example:

■ **Clauses:**

- Total Copyright Work Percentage < 10 (percent of the total material)
- Material Required Dates = True
- Request Type = Course related digitization
- Copyright Record Related to Course = True

Existing, Previous Request:

- ISBN 1-86189-411-2
- Dates 1/1/2016 - 30/1/2016
- Pages 15-20
- Status Approved

■ **New Request 1:**

- ISBN 1-86189-411-2
- Dates 10/1/2016 - 2/2/2016
- Pages 35-40
- Total Resource Pages 220

Expected Result: Rule is applied because total percentage is still less than 10% (10 pages / 220 in resource)

■ **New Request 2:**

- ISBN 1-86189-411-2
- Dates 15/1/2016 - 3/2/2016
- Pages 40-60
- Total Resource Pages 220

Expected Result: Rule is not applied because total percentage for same item is now over 10% (30 pages / 220 pages in resource)

The list of reasons for approving a copyright request now includes **Automatic**. You can see the entire list of reasons when you click **Approve** while working on a request on the Approval Requests List page ([Fulfillment > Resource Requests > Approve Digitization Requests](#)).

Digital Fulfillment - Alma Document Delivery

Patron document delivery now enables the operator to upload files to a document storage folder and send the file link to the patron. Within the **Digitization Workflow Setup**, a new digitization target exists, **Document delivery - link**. For more information, see [Adding a Digitization Profile Rule](#).

Digitization Workflow Setup [Cancel] [Save]

Digitization Workflow Rule Editor

Name * Partial Digitization
Description Partial Digitization
Created By User, Admin Created On 2012/01/31
Updated By User, Admin Updated On 2016/09/20

Input Parameters [Columns] [Tools]

Name	Operator	Value	
1 Partial Digitization	=	True	[Delete]
2 User Group	In List	Academic Staff, Consortium Member, Faculty, Graduate Student, Part-time, Staff, Undergraduate Student	[Delete]

Name Operator Possible Value> Add Parameter

Workflow Setup

Digitized Content Management

Select digitization target: Document delivery - link (selected)
Maximum views: Digital inventory (representation)
Approval/Copyright Clearance Pre: Document delivery - attachment
Document delivery - link

☒ Approval
☒ Copyright clearance

Approval/Copyright Clearance Management

☒ In parallel to digitization workflow
☐ Blocks digitization workflow
☐ Automatically approved

[Cancel] [Save]

Digitization Workflow Profile

Once this new digitization target has been selected, the **Attach Documents** option from **In Process Items** uploads all attachments selected to an Alma managed digital content folder and notifies the requesting user that the documents have been uploaded. If multiple attachments are uploaded, they are stored in a .zip file format. An email is sent to the patron with a link to download the attachment. When clicking the link in the email, the user signs in with his/her normal Alma login and password and the file automatically downloads. For more information, see [Attaching Digitized Items To Be Sent To a Patron](#).

A new parameter has been added, **document_delivery_cleanup_days**, which controls the number of days the attachments are retained in the folder. For more information, see [Configuring Other Settings](#).

Patron Notification of Requests

A new job, **Requests - Send Report**, was added. The job generates one letter per patron, detailing all requests by status: **Not Active**, **In Process**, and **On Hold Shelf**. The report is configured in the Fulfillment Jobs Configuration. For more information, see [Configuring Fulfillment Jobs](#).

— Send Overdue Message to Resource Sharing Borrowing Partner
Status ☒ Active ☐ Inactive Schedule Every day at 02:00

— Expired Lending Request
Status ☒ Active ☐ Inactive Schedule Every day at 01:00

— Users - Remove Blocks
Status ☒ Active ☐ Inactive Schedule Every day at 03:00

— Activate/Deactivate Courses
Status ☒ Active ☐ Inactive Schedule Every day at 03:00

— Requests - Send report
Status ☐ Active ☒ Inactive
Non active requests ☒
Requests in process ☒
Requests on hold shelf ☒
Schedule Not scheduled

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

Fulfillment Jobs Configuration

The report can also be run for a specific patron from Patron Services. Clicking the link will run the report immediately. For more information, see [Managing Patron Services](#).

Patron Services [Refresh Blocks/Notes](#) [Done](#)

Patron Batson, Billy
ID [8888](#)
User group Undergraduate Student
Active balance [60.00 USD Pay](#)
[Edit Info](#) [Send Activity Report](#) [Send Requests Report](#)
[Submit Request](#)

Notes User Notes (0)

Loans Returns Requests

Scan item barcode * [OK](#) [Create Item](#) Loan Display This session

No records were found.

[Refresh Blocks/Notes](#) [Done](#)

Patron Services

A sample of the patron report follows:

Requests Report

2016/09/27

User, Admin
2 Ex Libris Avenue
Fourth Floor - Office 123

Clean Training
Malcha Technological Park

Jerusalem

Book Nook 12345
NY USA

Dear Sir/Madam
Please find below a report of all your current requests:

In process

Following is a list of your requests in process:

Type	Title	Author	Status	Pickup location
Patron physical item request	Earth Science		Out Of Library	Main Library
Patron digitization request	Interpreting psychological test data / Joseph Gilbert.		Pickup From Shelf	Clean Training - Digitization Department For Institution
Patron digitization request	The language instinct / Steven Pinker.		Pickup From Shelf	Clean Training - Digitization Department For Institution

On hold shelf

Following is a list of your requests waiting for your on hold shelf:

Type	Title	Author	Status	Pickup location
Patron physical item request	Oxygen : a four billion year history / Donald Eugene Canfield.		On Hold Shelf	Main Library - Main Library Circulation
Patron physical item request	Philosopher's holiday [by] Irwin Edman.		On Hold Shelf	Main Library - Main Library Circulation

Clean Training

Patron Requests Report

Additional Fulfillment Enhancements

- The **Tags Level** link in the configuration menu was changed to **Tag Mapping**.
- When a reading list that is associated with an active course has citations with approved copyright records, the reading list's course association cannot be changed or removed.
- **Anthology** was added as a citation type when adding a citation.
- If a user is a proxy for a single sponsor (not multiple sponsors), checkout at a self-check machine may be automatically performed for the sponsor. Enabling the new behavior is handled by setting a new customer parameter, **self_check_proxy_checkout**. For more information, see [Configuring Other Settings](#).
- The Fines/Fees Notification profile now accepts a range of days. The **Fines/Fees Created After** field was added for this. For example, setting the **Created Before** field to 30 and the **Created After** field to 50, means that the profile will include only fees that were created more than 30 days ago but less than 50 days ago.
- A customer parameter, **resend_courtesy_notices**, was added (**Fulfillment > Fulfillment Configuration > Configuration Menu > General > Other Settings**), with the default value of **false**. This parameter controls the

behavior of the Automatic Renewal job (Notifications - Send Courtesy Notices and Handle Loan Renewals). If the parameter is set to **true**, the job runs on loans with a due date from the last run date until the current date, plus the value of **auto_renew_loan_days**. This means that multiple courtesy notices are sent if the loan is not renewed. For example, if this parameter is set to 7 and the loan cannot be renewed (that is, the item is requested) then a reminder to the patron will be sent every day until the day the item is due. For more information, see [Configuring Other Settings](#).

- The **temp_add_renewable_to_get_loans_rest** customer parameter (**Fulfillment > Fulfillment Configuration > Configuration Menu > General > Other Settings**) was removed. This functionality is now available using the **expand=renewable** parameter of the Retrieve User Loans API. For details, see <https://developers.exlibrisgroup.com/alma/apis/users>.
- The **Loans - Overdue and Lost Item** job contains a new section, **Loans which notification was sent for**. The section includes a count, by profile, of item loans for which notifications were sent, and indicates the success or failure status. Note that the total number of successful loans does not necessarily match the total number of notifications sent, since the new job aggregates several item loans into a single notification.
- On the **Loans** tab of **Patron Services**, a new button was added, **Refresh Blocks/Notes**. Clicking the button updates the notes and checks the relevancy of any blocks—whether loans were returned and the block should be lifted or new loans were added and a block is newly applicable.
- Booking requests whose booking times have expired will now:
 - not appear in the booking calendar when attempting to place booking requests (that is, an existing request may be seen in the requests list, but it will not be reflected in the calendar that displays availability).
 - not block placing other booking requests.
 - not be retrieved using the booking availability API.

Regarding loans, if the booking times have expired, the loan is placed and the request is canceled. If the booking time has not expired, the loan is, of course, not placed.

- The Ful Resource Request Slip Letter and Ful Cancel Request Letter now include:
 - Request ID - under `notification_data/request_id`
 - Pickup location - under `notification_data/request/calculated_destination_name`

Resource Sharing - November 2016 Enhancements

Determine Primo Resource Sharing Form Type Based on Genre

The Primo resource sharing form will now load for book or article based on the genre parameter received in the OpenURL. If the genre of the OpenURL has not been mapped to a type, the form will continue to open by default for a book. For detailed information, see [Configuring Primo Request Form Type by Genre](#).

Shipping Lending Requests with Multiple Items

Lending requests may now ship multiple items attached to a single request. If multiple move requests have already been created for the lending request or if the request has already been shipped and more items are being shipped, Alma automatically marks the lending request as a multiple item request. Otherwise, adding multiple items is handled during the process of shipping items to the borrower.

When shipping to an ISO partner, one **Shipped** ISO message is transmitted. When the borrowing institution receives the message, it is recorded in the **Audit** tab of the borrowing request. The borrowing request's status is changed to **Shipped Physically**.

Likewise, multiple items may be shipped and checked back in for a single request by a broker system using the **CheckOutItem** and **CheckInItem** NCIP messages. Alma uses the requestID and ItemID information in the message to process the specific requests' items.

For more information, see [Receiving or Shipping Multiple Items for a Single Request](#).

Additional Resource Sharing Enhancements

- When **Automatically locate resource** is enabled for the the resource sharing library and a request is automatically rejected, the request status becomes **Pending Auto Reject** until the library processes the response. While in this status, the request is non-editable.

Collaborative Networks - November 2016 Enhancements

Sharing Digital Inventory Between Member Institutions

Institutions working with a Network Zone can now expose their digital inventory to other member institutions. This allows their inventory to be discoverable by member institutions. For detailed information, see [Sharing Digital Inventory with Member Institutions](#).

Control Patron Information Sharing

When a linked user is created in a fulfillment network, institutions may now select attributes of a linked user are to be shared. Only attributes configured with **Shared** set to **True** are copied to the new linked user. Fields that have **Shared** set to **False** receive a blank field at the target institution. Existing users that were created with more details retain their data. For detailed information, see [Configuring Linked Account Shared Fields](#).

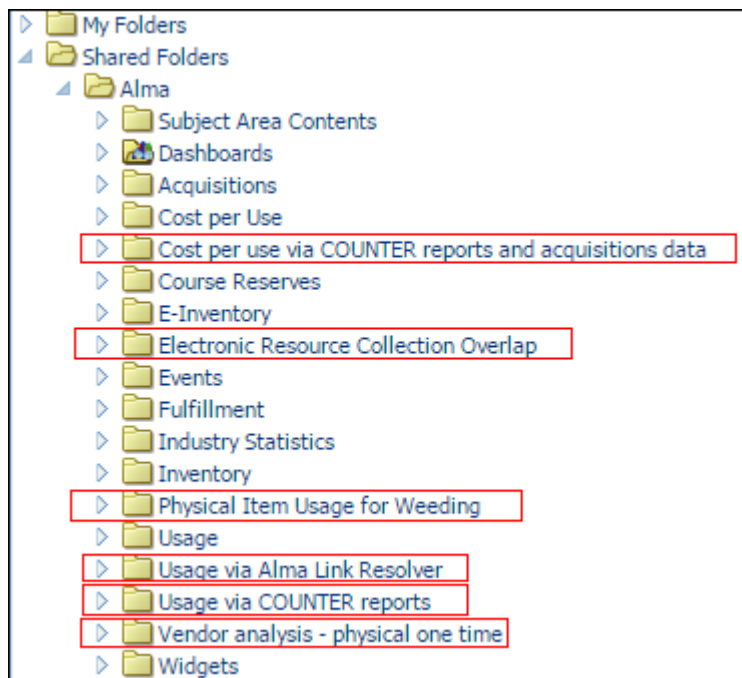
Additional Collaborative Network Enhancements

- If you want to instruct Alma to use local external resource search profiles as opposed to the Network Zone external resource search profiles, contact Ex Libris Support. See [Searching External Resources](#) for more information. Note that if you are using local external resource search profiles, the **Copy & Overlay**, **Copy & Merge**, and **Merge Preview** functions aren't currently available. This will be fixed in a future Alma release.

Analytics - November 2016 Enhancements

New Reports and Dashboards Added to Alma Analytics

Several new default dashboards and reports were added to Alma Analytics. These new dashboards allow the library to greatly increase efficiency:



New Dashboards

- The following dashboards allow the library to use funds more efficiently by purchasing the most useful resources:
 - Cost per use via COUNTER reports and Acquisitions data
 - Electronic resource collection overlap
 - Usage via COUNTER reports
 - Usage via Alma Link Resolver

- The **Physical Item Usage for Weeding** dashboard allows the library to use space more efficiently.
- The **Vendor Analysis – Physical One Time** dashboard makes the process of ordering physical items more efficient.

The following are example reports using the new dashboards:

- Cost Per Use Via COUNTER Reports and Acquisitions Data

5. Cost per use alphabetically by title for previous calendar year

Title	Cost per Use	Usage	Estimated usage	Cost	PO Line Reference	Vendor Code
Academic OneFile	0.05	770,306	840,334	45,280	595499	THOMGALE
Adult learning.	0.44	334	334	148	MONL-25718	EBSCO AUS
Africa yearbook.	57.79	4	7	396	MONL-67617	BRILL-SER
American journal of physics	3.11	735	735	2,287	MONL-84895	AIP-S
American journal of science	1.55	228	228	353	MONL-100054	EBSCO AUS
Artificial life	15.77	38	38	599	MONL-100033	EBSCO AUS
Aspasia : international yearbook of Central, Eastern, and Southeastern European women's and gender history.	11.25	44	44	495	MONL-101229	EBSCO AUS
Australian journal of political science.	0.26	3,193	3,193	817	MONL-80514	TFS-AUS
Bridgeman education	0.33	21,554	23,513	7,660	MONL-69117	EBSCO AUS
CINAHL plus	0.07	1,212,782	1,323,035	89,613	496242	EBSCO AUS
Catalan review	13.63	3	9	123	MONL-89887	LUP
CINii	0.78	477	716	555	441488	KINBOOKS-M
Citizenship studies	1.35	919	919	1,244	MONL-80867	TFS-AUS
Clinical pharmacokinetics.	3.56	1,237	1,237	4,399	MONL-99874	EBSCO AUS
Comparative politics	0.33	754	823	270	MONL-100057	EBSCO AUS
Contemporary French civilization	4.35	16	48	209	MONL-100070	EBSCO AUS
Counseling and psychotherapy transcripts, client narratives, and reference works	1.61	36	216	348	605522	ALEXSP
Eighteenth century collections online	0.06	24,592	29,510	1,760	655238	THOMGALE

Cost Per Use Via COUNTER Reports and Acquisitions Data

- Electronic Resource Collection Overlap

«os in multiple collections E-I Active portfolios in multiple collections J-N Active portfolios in multiple collections O-S **Active portfolios in multiple collections T-Z** »

All active portfolios in multiple collections T-Z

Portfolio Title	Electronic Collection Public Name	Number of Electronic Collections
T follicular helper cells : methods and protocols /	Springer ebooks	2
	Springer protocols	2
T'uf Shur Bien Preservation Trust Area Act : joint hearing before the Committee on Energy and Natural Resources and the Committee on Indian Affairs, U	HeinOnline American Indian Law Collection	2
	HeinOnline Congressional Documents Library	2
T+D : better performance through workplace learning /	EBSCOhost Business Source Complete	4
	Gale Cengage Academic OneFile	4
	Gale Cengage Expanded Academic ASAP	4
	ProQuest Education Journals	4
T-cell development : methods and protocols /	Springer ebooks	2
	Springer protocols	2
TALENTED	Informit A+ Education	2
	Informit Humanities & Social Sciences Collection	2
TALENS : methods and protocols /	Springer ebooks	2
	Springer protocols	2
TB & outbreaks weekly	Gale Cengage Academic OneFile	5
	Gale Cengage Expanded Academic ASAP	5
	ProQuest Central	5
	ProQuest Health and Medical Complete	5
	ProQuest Research Library	5

Electronic Resource Collection Overlap

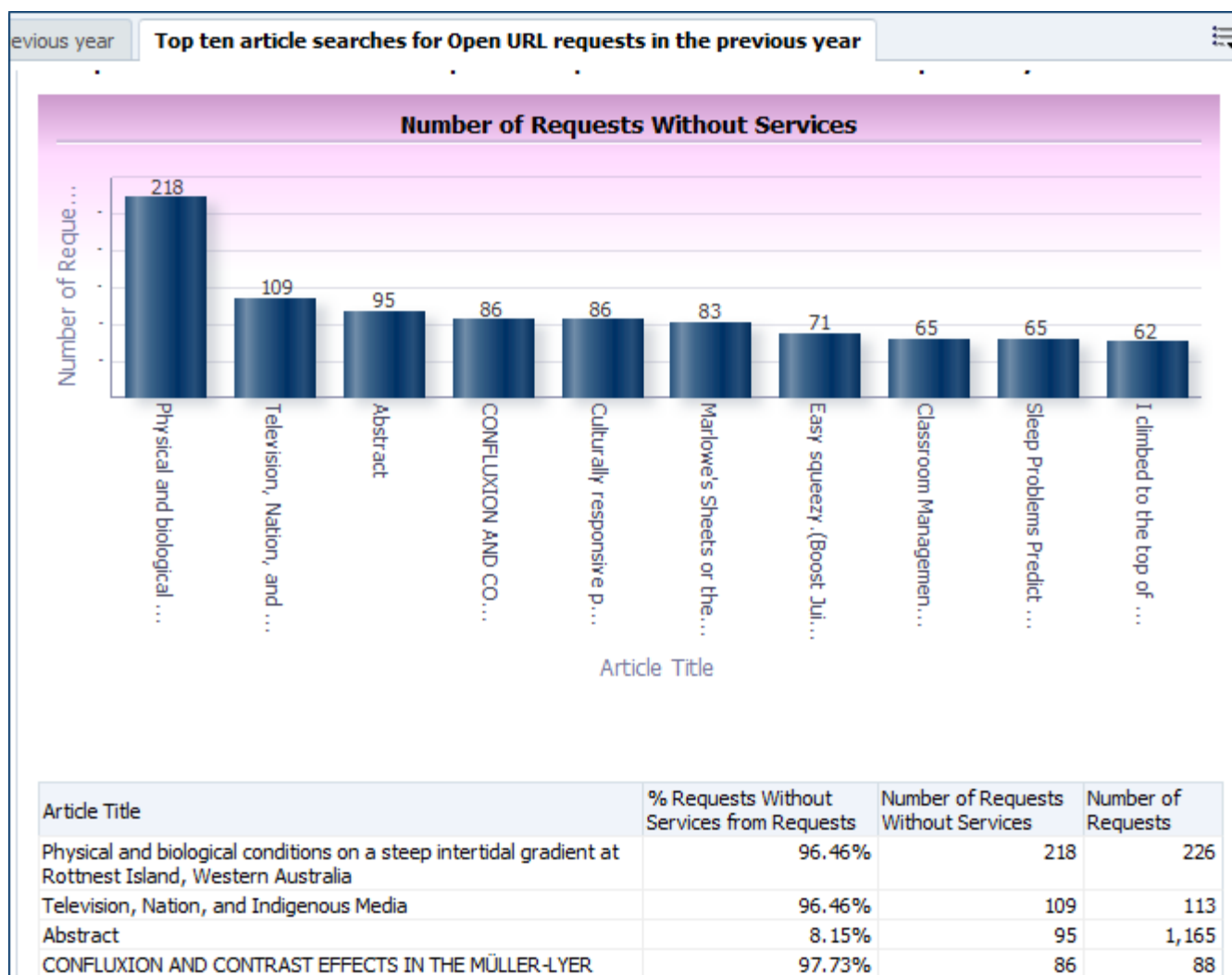
■ Physical Item Usage for Weeding

1. Items in library at least three years and never loaned in last three years with prompt for library name

Library Name	Location Name	Title (first 60 characters)	Barcode	Permanent Call Number
Main Library	CDs	Australian orchid genera an information and identification s	33168028492011	584.40994 J76A 2006
		Australian tropical rain forest plants trees, shrubs and vin	33168028492219	581.7340994 H996A 2003
		Beetles of the world	33168028522742	595.76 L421B 2002
		Conference on the International Patent System Conférence su	33168027592654	346.0486 C748 2002
		English language growth resources	33168030521112	428.24 E58.1 2010
		Families of flowering plants of Australia an interactive ide	33168028490056	582.13012 T431F 2001
		Freshwater and estuarine molluscs an interactive, illustrate	33168028728810	594.30994 P796F 2000
		Highway 61 revisited	33168028524797	782.42166 D996H 2000
			33168028524805	782.42166 D996H 2004
		Integrated governance linking up government, business and ci	33168027436761	351 C748 2004
		Lake Mungo window to Australia's past /	33168029657323	994.4801 B787L 2002
		Media control the spectacular achievements of propaganda /	33168027270012	303.375 C548M 2005
		Mites in soil an interactive key to mites and other soil mic	33168028523013	595.42 W231M 2001
		Modern times	33168028524771	782.42166 D996M 2006
			33168028524789	782.42166 D996M 2006
		Musical illusions and paradoxes	33168028525802	781.11 D486P 1995
		Nashville skyline	33168029462658	782.42166 D996N 2003
		Nature & animals	33168028524698	792.024 S724N 2005
		People & sounds	33168028524763	792.024 S724P 2005
		Phantom words and other curiosities	33168028525794	781.11 D486P 2003
		Pipe up overcoming anxiety about speaking up in groups /	33168027436928	808.51 R655P 2004
		Sing! 2012 volume 2	33168031256080	782.42083 S617 2010

Physical Item Usage for Weeding

■ Usage via Alma Link Resolver



Usage via Alma Link Resolver

- Usage via COUNTER reports

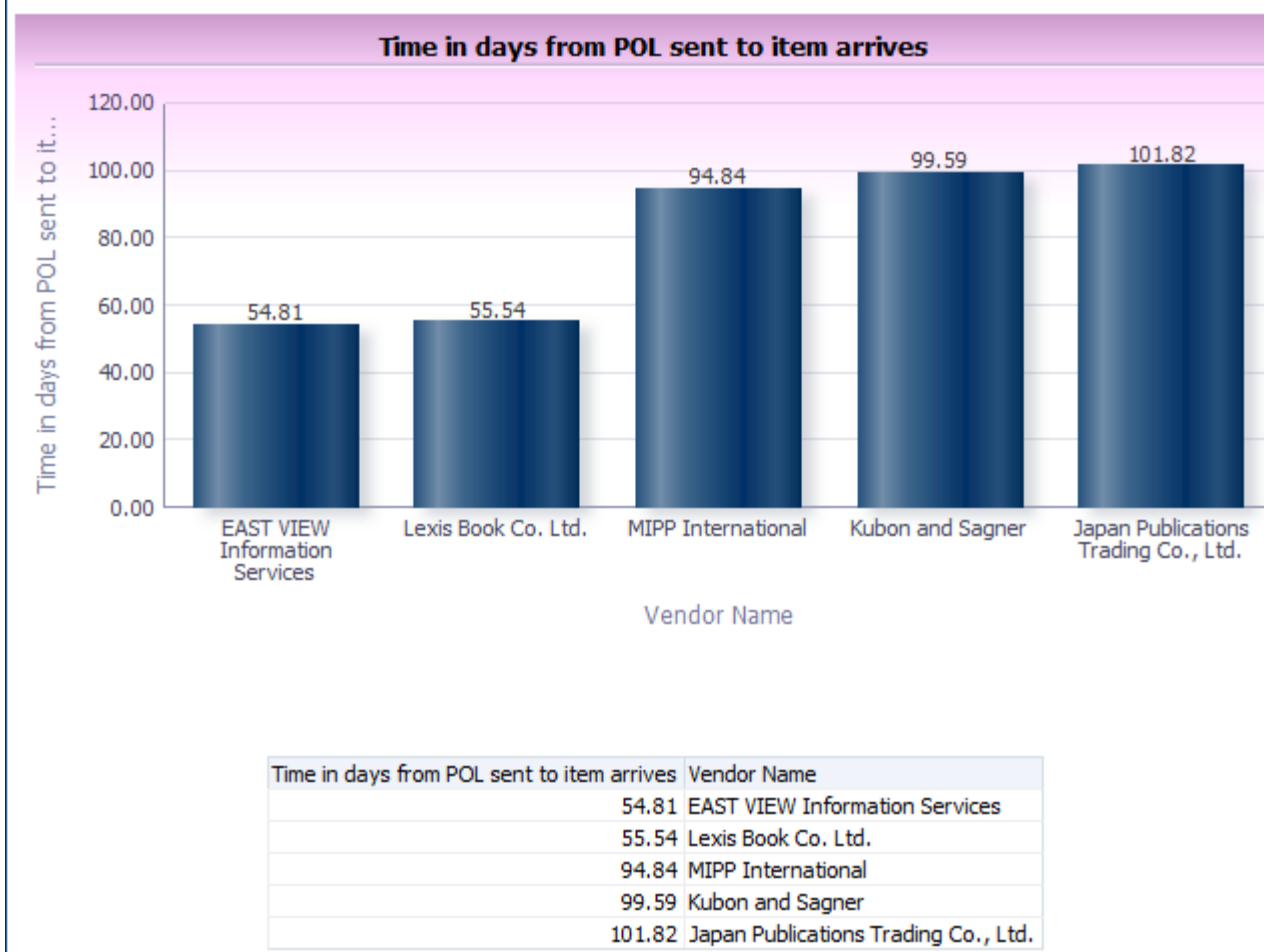
15. Usage Data - Changes in previous two calendar years - Increase in Usage

Title	Journal Usage Counter Two years ago	Journal Usage Counter One year ago	Journal Usage Counter Change (One year ago - Two years ago)
"Before I Forget...": Journal of the Poyntzpass and Distric...	4	6	2
'Atiqot / עתיקות	17	85	68
12th International Conference on Finance & Banking: Struc...	1	8	7
19th Century Music	247	3,784	3,537
20 Century British History	158	351	193
20-20 Magazine	13	21	8
2D Materials	23	132	109
3 Biotech	38	61	23
3D Research	15	25	10
4D International Journal of Management and Science	8	17	9
A Contrario	1	2	1
A Fine FACTA	4	7	3
A to B	1	2	1
A.I.E.E., Journal of the (1924 - 1930)	16	48	32
AA Files	203	262	59
AAA: Arbeiten aus Anglistik und Amerikanistik	3	43	40
AADE in Practice	2	9	7
AAHE&ERIC/Higher Education Research Report	3	8	5
AANA Journal	115	135	20
AAP Bulletin Wire	27	29	2
AAPS PharmSciTech	208	313	105
ABA Bank Marketing and Sales	4	5	1
ABA Bankers News	1	2	1

Usage via COUNTER reports

- Vendor Analysis - Physical One Time

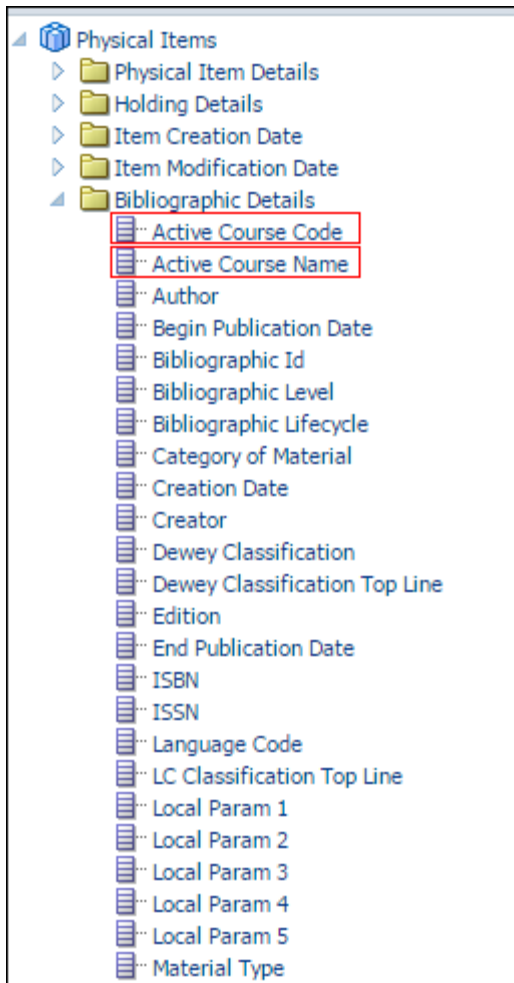
2. The five slowest - Average time in days from POL sent to item arrived in previous year for non-continuous orders by vendor for vendors who made 20 or more orders in the last year



Vendor Analysis - Physical One Time

Active Course Code and Active Course Name Added to Bibliographic Details Dimension

The **Active Course Code** and **Active Course Name** fields were added to the shared Bibliographic Details dimension. These fields can be used to create reports for courses that are active.



Active Course Code and Active Course Name Fields

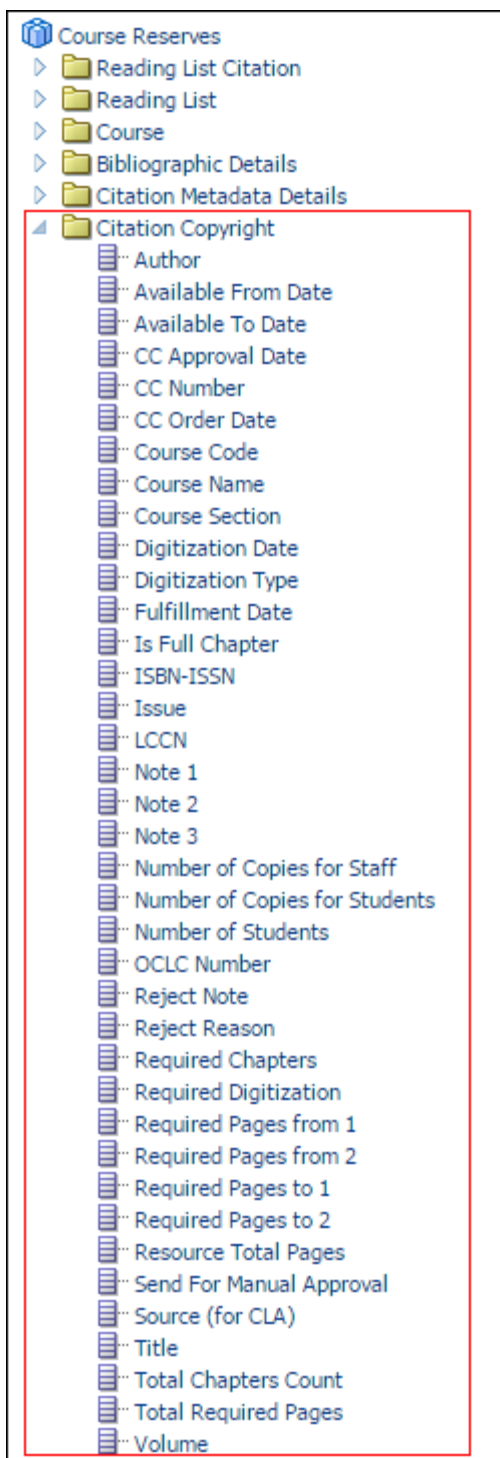
The following is an example report using the **Active Course Code** and **Active Course Name** fields:

Active Course Code▲▼	Active Course Name	Title
ArthHist101	Art History 101	A Family guide to Real math /
		A documentary history of art.
		A short history of Chinese art.
		Going to Iran /
		Personal history /
		The Best short plays, 1981 /
		The immortal life of Henrietta Lacks /
		The land of the Great Sophy /
		The poster : its history and its art.
ArthHist101;ArthHist32a-section winter;HIST215;MDA101	Art History 101;Art History 101-section winter;History of Modern Europe;Modern Arts	Electronic design
		Water and environment news
ArthHist101;ArthHist32a-section winter;MDA101	Art History 101;Art History 101-section winter;Modern Arts	History curatorship /
ArthHist101;HIST215	Art History 101;History of Modern Europe	What is art history or? /
ArthHist101;HIST215;MDA101	Art History 101;History of Modern Europe;Modern Arts	Water current
ArthHist101;MDA101	Art History 101;Modern Arts	Present history /
ArthHist32a-section winter	Art History 101-section winter	Harry Benson on photojournalism /
		Human nature /
		Nature

Active Course Code and Active Course Name Report

Citation Copyright Dimension Added to Course Reserves Subject Area

The Citation Copyright dimension was added to the Course Reserves subject area. You can use the fields of this dimension to create reports concerning citation copyright information.



Citation Copyright

Many of the fields of the Citation Copyright dimension are taken from the **Copyright Attributes** section of the Edit Reading List Citation page in Alma:

Copyright Attributes

Copyright Auditing Required

☒

Number of Students

150

Number of Copies for Students

Number of Copies for Staff

Resource Total Pages

Required Chapters

Total Chapters Count

Required Pages

From

To

From

To

Total Required Pages

Date Available From





Date Available To





Note 1

Note 2

Note 3

Requires Digitization

☒

Send for manual approval

☒



Copyright Attributes

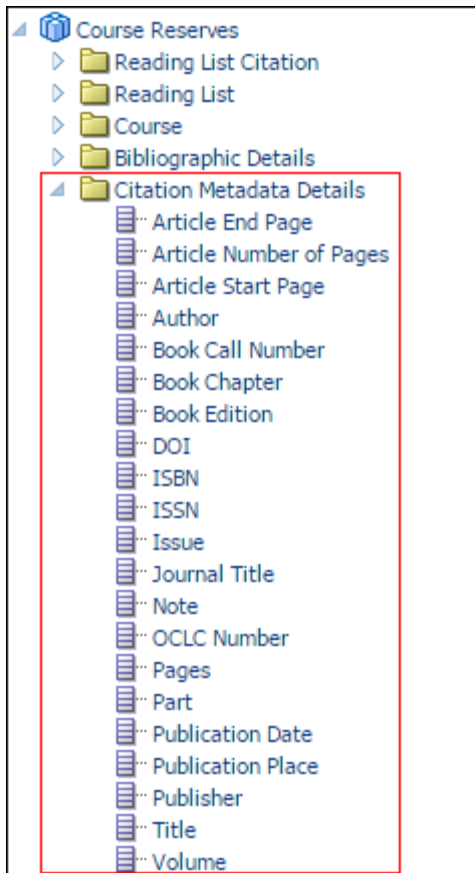
The following is an example report using fields from the **Citation Copyright** dimension:

Title	Number of Students	Number of Copies for Students	Number of Copies for Staff	Available From Date	Available To Date	Required Chapters	Required Pages from 1	Required Pages to 1	Required Pages from 2	Required Pages to 2	Total Required Pages	Resource Total Pages	Source (for CLA)
Book B	70	3	1	9/20/2016	5/31/2017	1	1	40			40	40	D
Journal B	20	1	1	9/20/2016	9/30/2017	1	15	32	45	80	54	80	D
Book A	95	4	2	9/20/2016	12/31/2016	2	105	130	161	180	46	210	B
Journal A	170	3	1	9/20/2016	1/31/2017	1	1	54			54	250	C
Book C	440	10	3	9/20/2016	3/31/2017	4	101	170			70	315	A

Citation Copyright Report

Citation Metadata Details Added to Course Reserves Subject Area

The Metadata Details dimension was added to the Course Reserves subject area. You can use the fields of this dimension to create reports concerning non-repository citations.



Citation Metadata Details

The following is an example report using fields from the **Citation Metadata Details** dimension:

Citation Origin	Title	Is Repository Citation	Author	Journal Title	Publisher	Pages	Note	Number Of Citations
Brief	Article A	No	AB	Journal A		1-99	test3	1
	Article B	No	BC	Journal B		1-99	test5	1
	Book A	No	AA			1-99	test2	1
	Book B	No	BB			1-99	test4	1
	Book C	No	CJ			1-99	test6	1
	Creative a	No			Macmi	1-99	test15	1
	Fair value	No			John	1-99	test14	1
	ICSA profe	No			ICSA	1-99	test12	1
ExternalLink	Alzheimer'	No	Rober	Nature	Natur	1-99	test9	2
	IAS 38 Int	No				1-99	test17	1
	Plagiarism	No				1-99	test19	1
	Punch Tave	No				1-99	test20	1
	life	No				1-99	test23	1
	nature	No				1-99	test24	1
PC	Art and Sc	No	Holme			1-99	test1	1
UploadedFile	hallo kitt	No				1-99	test22	2
	Fair value	No			John	1-99	test13	1
	IAS 38 Int	No				1-99	test16	1

Citation Metadata Details Report

Additional Analytics Enhancements

- A new out-of-the-box report was added to Alma analytics - **Legal Deposit Annual Receipt**. This report displays all the serial issues that were received in the institution for a given vendor in the last 12 months. The new **Legal Deposit Annual Receipt Task** can be used to send this report to vendors. For detailed information, see [Sending Annual Receipts for Serial Legal Deposits in Bulk](#).



Administration and Infrastructure - November 2016 Enhancements

VAT Support for Fines and Fees

Fines and fees now have the option to include VAT. The VAT percentage is defined in the Fines/Fees Type Definition table. For detailed information, see [Configuring Fines/Fees Behavior](#).

Mapping Table
Cancel Save

You are configuring: Clean Training

Table Information

Sub System USER_MANAGEMENT
 Table Name Fine Fee Type Definition

Updated By -
 Last Updated -

Table Description

Customization mode: Specific rows can be customized

Mapping Table Rows
Tools

	Fine/Fee type	Waiveable?	Manual creation?	Refundable?	Fine/Fee owner	VAT Percentage	
1	Card renewal	True	True	True	Institution	17	Restore
2	Carrel Fee	True	True	True	Library	0	Customize
3	Case Rent	True	True	True	Library	0	Customize
4	Claim return fee	True	False	True	Library	17	Restore
5	Credit	False	False	True	Library	17	Restore
6	Damaged item fine	False	True	True	Library	17	Restore
7	Digitization fee	True	True	True	Library	0	Customize
8	Document delivery serv	True	False	True	Library	17	Restore
9	Issue library card	True	True	True	Library	0	Customize
10	Library Card Replaceme	True	True	True	Library	0	Customize
11	Locker Key	True	True	True	Library	0	Customize
12	Lost item process fee	True	True	True	Library	0	Customize
13	Lost item replacement	True	True	True	Library	0	Customize
14	New user fee	True	True	True	Institution	0	Customize
15	Notification fee	True	False	True	Library	0	Customize
16	Other	True	True	True	Library	0	Customize
17	Overdue fine	True	False	True	Library	0	Customize
18	Overdue notification fin	True	False	True	Library	0	Customize
19	Patron registration fee	True	True	True	Library	0	Customize
20	Personal delivery fee	True	False	True	library	0	Customize
21	Photo copy service	True	True	True	Library	17	Restore
22	Postage	True	True	True	Library	0	Customize
23	Recalled Overdue fine	True	False	True	Library	0	Customize
24	Registration fee	True	True	True	Library	0	Customize
25	Renew fee	True	False	True	Library	17	Restore
26	Resource sharing recipie	True	True	False	Library	0	Customize
27	Resource sharing reques	True	True	False	Library	0	Customize
28	Service fee	True	True	True	Library	0	Customize
29	Thesis Folder	True	True	True	Library	0	Customize
30	University Press	True	True	True	Library	0	Customize
31	University Shop	True	True	True	Library	0	Customize

Tools
Cancel Save

Fines/Fees Type Definition

The Fines and Fees Details tab of the User Details page now has two columns for **Original VAT** and **Remaining VAT**. They are hidden by default but can be enabled from the **Columns** drop-down list on the page. See [Assigning Fines and Fees to Users](#).

User Details

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

Internal

Name Batson, Billy
Primary identifier 8888
Record type Public
Account Type

User group Undergraduate Student

[Manage fulfillment activities](#)

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

Fines and Fees summary

Active balance 10.00 USD
Disputed balance -
Transferred balance -

Fines and Fees Details

Fine/Fee type All
Status Active

Add Fine or Fee

Find:
in: Title
Go

1 - 1 of 1 Records
Columns
Tools

		Creation Date	Fine/Fee type	Status	Status Date	Comment	Fee Owner	Title
1		2016/09/26	Card renewal	Active	2016/09/26	-	Clean Training	-

Waive
Execute

Currently filtered balance 10.00 USD
Currently filtered disputed balance 0.00 USD

☒ Creation Date
☒ Fine/Fee type
☒ Status
☒ Status Date
☒ Comment
☒ Fee Owner
☒ Title
☒ Item Barcode
☒ Original Amount
☒ Remaining Balance
☐ Original VAT
☐ Remaining VAT

Actions
Save
Done

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Fines and Fees Details Tab - Columns Drop-Down List

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

Name Batson, Billy Primary identifier 8888 Record type Public Account Type

Internal User group Undergraduate Student

[Manage fulfillment activities](#)

[General Information](#)
[Contact Information](#)
[Identifiers](#)
[Notes](#)
[Blocks](#)
[Fines/Fees](#)
[Statistics](#)
[Attachments](#)
[Proxy For](#)

Fines and Fees summary

Active balance	60.00 USD	Disputed balance	-	Transferred balance	-
----------------	------------------	------------------	---	---------------------	---

Fines and Fees Details

Fine/Fee type [All](#) | Status [Active](#) | [Add Fine or Fee](#)

Find : _____ in : Title [Go](#)

1 - 3 of 3 Records Columns ▼ [Tools](#)

	Creation Date	Fine/Fee type	Status	Status Date	Comment	Fee Owner	Title	Item Barcode	Original Amount	Remaining Balance	Original VAT	Remaining VAT	
1	2016/09/26	Lost item process fee	Active	2016/09/26	-	Main Library	Migration in world history / Patrick Manning.	13620359	20.00 USD	20.00 USD	0.00 USD	0.00 USD	Actions
2	2016/09/26	Lost item replacement fee	Active	2016/09/26	-	Main Library	Migration in world history / Patrick Manning.	13620359	35.00 USD	35.00 USD	0.00 USD	0.00 USD	Actions
3	2016/09/26	Card renewal	Active	2016/09/26	-	Clean Training	-	-	10.00 USD	5.00 USD	1.45 USD	0.73 USD	Actions

Waive ▼
Execute

Currently filtered balance
60.00 USD

Currently filtered disputed balance
0.00 USD

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

User Details Page - Fines and Fees Tab

The Fines and Fees Transaction List includes a VAT column that is hidden by default. It can be enabled from the **Columns** drop-down list on the page.

Fee/Fine Transaction List

Fines/Fees Transaction List

SAML Enhancements

The SAML integration profile was enhanced with the following features:

- A new signed certificate is now available. New integration profiles use the new signed certificate option. Existing integration profiles may select from the signed certificate or the previously existing certificates.
- There are two new certificate upload options. In addition to the JKS file upload, Alma now accepts certificate file uploads and free-text certificate entry.
- A metadata file may now be uploaded, or its URL provided, to populate the profile with the:
 - IdP issuer
 - IdP login URL
 - IdP single logout service
 - Certificate

For more information, see [SAML Authentication on the Developer Network](#).

Integration with Cloud IdP (Microsoft Azure)

Cloud identity providers, currently Microsoft Azure, may now be used for user authentication. If a cloud IdP profile is active, adding an Alma user also results in the user being exported to the cloud identity provider. This authentication is based on standard SAML protocol and, when implemented, is set up the same way as standard SAML profiles in both Alma and Primo.

For more information about cloud identity providers, see [Authentication Using a Cloud Identity Provider](#). For information on cloud IdP configuration in Azure, see [Using Microsoft Azure as a Cloud IdP with Alma](#).

Exporting users in batch is done with a new option that has been added to the **Update/Notify Users job**. Selecting **Export to Cloud IdP** creates the export and sends an email notification to each user with their username and temporary password.

Run a Job - Enter Task Parameters
12345
Back Cancel Next

i The selected set contains 18 members.

Task Parameters: Update/Notify Users

☐

Added/changed field
☒ By user account type
☐ Internal

☐

Set account to
☐ External
☐ Internal

☐

Send notification to user
Social Login invitation

☐

Expiry date

Unconditionally

☐

Purge date

Unconditionally

☐

Status
Active

Unconditionally

☐

User group
Faculty

Unconditionally

☐

Campus

Unconditionally

☐

Title

Unconditionally

☐

Add block type
User is suspended

☐

Disable block type
User is suspended

☐

Add statistics (category)
from greater metropolitan area

☐

Remove statistics
from greater metropolitan area

☐

Add role
API Analytics Read

☐

Remove role
API Analytics Read

☐

Add note

☐

Job description

Unconditionally

☐

Add resource sharing library

☐

Remove resource sharing library

☐

Disable SMS

☐

Opt in to letter

☐

Opt out of letter

☐

Export to Cloud IdP

Back Cancel Next

Update/Notify Users Job Parameters

The email notification to the user may also be sent manually from the **User Details** page by selecting **Update/Reset on IdP** and clicking **Send**.

User Details
Cancel Toggle Account Type Save

Name Batson, Billy
Account Type Internal
[Manage fulfillment activities](#)

Primary identifier 8888
User group Undergraduate Student

Record type Public

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

User Information

First name * Billy
Middle name
Last name * Batson
Primary identifier * 8888
Title
PIN number Generate
Job category Please select a value
Job description
Gender
User group * Undergraduate Student
Campus
Website URL
Preferred language English
Status Active
Status date 2011/12/17
Birth date
Expiration date 2017/12/31
Purge date
Resource sharing library Resource Sharing Library
Selected Patron Letters
Send message Update/Reset on IdP Send
Created By General mail
Social login mail
Update/Reset on IdP

Updated By Update user information job (2016/04/01)

User Management Information

Password
Verify password
Force password change on next login
Disable all login restrictions

User Roles

Add Role
Add from Profiles
Remove Selected
1 - 1 of 1 Records
Columns
Tools

	Active	Role Name	Role Area	Scope	Parameters	Status Date	Actions
1		Patron	Fulfillment	Main Library	-	2011/12/17	Actions

Cancel Toggle Account Type Save

User Details Page

For more information, see [Cloud Identity Provider](#).

Social Authentication

Alma and Primo (when working with Alma) now support external authentication for both staff and patrons, using social authentication via Google or Facebook (Twitter to be supported soon). To work with social authentication for

either staff or patrons, you must set up a [social login profile in Alma](#). For information about social authentication configuration in Primo, see [Using Social Networks for User Authentication](#).

NOTE:

Social authentication and Cloud IdP (Microsoft Azure) are two alternatives to Alma internal authentication developed by Ex Libris. With the cooperation of the Alma authentication focus group, additional external authentication alternatives will be offered in the future.

Send a Webhook Request

A webhook request may now be triggered when a job ends. For more information, see the [Developer Network](#).

In order for the webhook to be activated, Alma must have a webhook integration profile configured. For detailed information on configuring the profile, see [Webhooks](#).

Additional Administration and Infrastructure Enhancements

- A user must now have the **create_remove_blocks_privilege** privilege in order to enable/disable a block. The user roles that include this privilege are User Administrator, User Manager, Circulation Desk Operator, Circulation Desk Manager and General System Administrator.
- The PIN may now be added as a mandatory field through the Mandatory Fields tables in User Configuration (**Administration > User Management Configuration > Configuration Menu > Mandatory Details > Public** or **Administration > User Management Configuration > Configuration Menu > Mandatory Details > Staff**). It is relevant for Public and Staff configurations.
- The user information pop-up for staff and public users now includes the option to display the user's gender.

Name	Account Type	Record Type
1 User, Admin	Internal	Staff
2 U		

Name User, Admin

Primary identifier admin

Home Address 1 Ex Libris Boulevard
Book Worm EX 12345
USA

Office Address 2 Ex Libris Avenue
Fourth Floor - Office 123
Book Nook NY 12345
USA

Email nosuchmail@no.such.mail.com

Telephone 719-555-1234

Gender Female

User Pop-up

The option is disabled by default. It may be enabled in the Contact Information Pop-Up mapping table (**Administration > User Management Configuration > Configuration Menu > General > Contact Information Pop-Up**).

Mapping Table
Cancel
Save

You are configuring: Clean Training

Table Information

Sub System USER_MANAGEMENT

Table Name ContactInformationPopup
 Updated By -
 Last Updated -

 Table Description
 Customization mode: Specific rows can be customized

Mapping Table Rows
Tools

	Enabled	User element name	User type (Staff or Public)	
1	☒	Email	Organization	Customize
2	☒	Email	Public	Customize
3	☒	Email	Staff	Customize
4	☐	Gender	Public	Customize
5	☐	Gender	Staff	Customize
6	☒	Home Address	Public	Customize
7	☒	Home Address	Staff	Customize
8	☒	Name	Public	Customize
9	☒	Name	Staff	Customize
10	☒	Office Address	Public	Customize
11	☒	Office Address	Staff	Customize
12	☐	Preferred Identifier	Public	Customize
13	☐	Preferred Identifier	Staff	Customize
14	☒	Primary Identifier	Public	Customize
15	☒	Primary Identifier	Staff	Customize
16	☒	Home Address	Organization	Customize
17	☒	Telephone	Organization	Customize
18	☒	Telephone	Public	Customize
19	☒	Telephone	Staff	Customize
20	☐	Title	Public	Customize
21	☐	Title	Staff	Customize
22	☐	User Group	Public	Customize
23	☐	User Group	Staff	Customize

Tools
Cancel
Save

Contact Information Pop-Up Configuration



- **Idea Exchange:** A new column, **Expiry Date**, was added to the user roles list on the User Details page.

The screenshot shows the 'User Management Information' and 'User Roles' sections of a web application. The 'User Roles' section is active, displaying a table with one record. A 'Columns' dropdown menu is open, showing a list of columns with checkboxes. The 'Expiry Date' column is highlighted with a red box, indicating it has been added to the table.

	Active	Role Name	Role Area	Scope
1	☒	Patron	Fulfillment	Main Library

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Columns: ☒ Active, ☒ Role Name, ☒ Role Area, ☒ Scope, ☒ Parameters, ☒ Status Date, ☒ Expiry Date

User Details - Roles List

- The **All** option was removed from the **Find in** drop-down list on the Integration Profile List page (**Administration > General Configuration > Configuration Menu > External Systems > Integration Profiles**), and the **All** and **Type** options were removed from the **Find in** drop-down list in the Run a Job wizard (**Administration > Manage Jobs > Run a Job**).

Data Services - November 2016 Enhancements

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

Library of Congress Authorities Community Zone Updates

The following are the Library of Congress Subject authority updates for the period of September 29th through October 27th:

- Number of records updated: 70
- Number of records added: 214
- Number of records deleted: 27

The following are the Library of Congress Name authority updates for the period of September 29th through October 27th:

- Number of records updated: 14439
- Number of records added: 22894
- Number of records deleted: 395

The following are the Canadian name authority updates for the period of September 29th through October 27th:

- Number of records updated: 6
- Number of records added: 552
- Number of records deleted: 11

New Electronic Collections Added to the Alma CKB

The following collections were added to the Alma Community Zone from October 3rd through October 30th:

- Ebook Central Academic Complete
- Ebook Central Academic Complete International Edition
- Ebook Central Academic Complete UKI Edition
- Ebook Central Academic Complete, Middle East Edition

- Ebook Central Aerospace
- Ebook Central Business
- Ebook Central Business Complete
- Ebook Central Business Project Management
- Ebook Central Byron Hoyt Online Sheet Music
- Ebook Central Chemical Engineering
- Ebook Central Civil Engineering
- Ebook Central College Complete
- Ebook Central Computing
- Ebook Central Corporate Engineering
- Ebook Central Custom Penwell
- Ebook Central Custom SME (Society of Manufacturing Engineers) Source™
- Ebook Central D&B International Business Reports™
- Ebook Central Deutsche Sammlung
- Ebook Central Education
- Ebook Central Electronics Engineering
- Ebook Central Employee Development
- Ebook Central Engineering & Industrial Management
- Ebook Central Engineering Core
- Ebook Central Engineering Select
- Ebook Central Engineering Systems
- Ebook Central Environmental Engineering
- Ebook Central Finance
- Ebook Central Food Science Engineering
- Ebook Central Health & Medicine
- Ebook Central History
- Ebook Central Human Resources
- Ebook Central IGI Global InfoSci Books
- Ebook Central IGI Global InfoSci Journals
- Ebook Central Law
- Ebook Central Leadership
- Ebook Central Literature & Language

- Ebook Central Materials Engineering
- Ebook Central Mechanical Engineering
- Ebook Central Medical Technology
- Ebook Central Nordic
- Ebook Central Octavio
- Ebook Central Petroleum Engineering
- Ebook Central Pharmaceuticals
- Ebook Central Power Engineering
- Ebook Central Pre 2015: Business & Economics
- Ebook Central Pre 2015: Computers
- Ebook Central Pre 2015: Education
- Ebook Central Pre 2015: Engineering
- Ebook Central Pre 2015: History & Political Sciences
- Ebook Central Pre 2015: Humanities
- Ebook Central Pre 2015: Interdisciplinary & Area Studies
- Ebook Central Pre 2015: Language & Literature
- Ebook Central Pre 2015: Law
- Ebook Central Pre 2015: Life Sciences
- Ebook Central Pre 2015: Medical
- Ebook Central Pre 2015: Nursing & Allied Health
- Ebook Central Pre 2015: Physical Sciences
- Ebook Central Pre 2015: Psychology & Social Work
- Ebook Central Pre 2015: Religion & Philosophy
- Ebook Central Pre 2015: Sociology & Anthropology
- Ebook Central Public Library Complete
- Ebook Central Reference
- Ebook Central Reference Research
- Ebook Central Religion
- Ebook Central Religion & Philosophy
- Ebook Central Sales & Marketing
- Ebook Central Schools & Educators Complete
- Ebook Central Science & Technology

- Ebook Central Social Sciences
- Ebook Central Spanish Language
- Ebook Central Suncor Custom
- Ebook Central The Arts
- Ebook Central University Press
- JSTOR Books EBA Pilot
- JSTOR Books Open Access
- OpenEdition Books Complete
- Oxford Reference Library Premium With Literature
- Oxford Reference Library Premium With Literature Western Civilization
- Oxford Reference Library Premium With Western Civilization
- Pennsylvania State University Press Journals
- Quosa
- Springer Hospital Edition for Japan
- Springer在线回溯数据库
- University Press Scholarship Online Architecture
- University Press Scholarship Online Art
- University Press Scholarship Online Computer Science
- University Press Scholarship Online Earth Sciences and Geography
- University Press Scholarship Online Environmental Science
- University Press Scholarship Online Information Science
- Wiley Online Library AGU 2016
- Wiley Online Library AGU Backfiles

New External Search Resources

No new external resources were added to Alma for the November release.

Next Release Sneak Preview

Acquisitions

- **Enhanced Generation of Barcode Numbers** – This development will extend the ability to generate alternate or temporary call numbers on the item record. This includes enhancements to the configuration of barcode sequences (the ability to manage multiple sequences) and a Generate button in the Physical Item Editor or List of New Items.
- **Automated Email Claiming for Continuous PO Lines** – Until now, automated claiming was possible only via EDI. This functionality will extend automated claiming to include email as well.

Resource Management



- **Idea Exchange:** Move Item(s) from One Bibliographic Record to Another – It will be possible to move a single item from one bibliographic record to another.
- **Upload Electronic Holdings from Ovid** – Similar to integration with Elsevier, there will be an automatic update of Ovid electronic holdings, eliminating the need to manually maintain the electronic holdings for these collections.
- **Restore Framework** – In certain cases, you will be able to restore deleted or updated records.
- **Enable the Visualization of Direction UNICODE characters used in Hebrew Cataloging** – You will be able to show, add, and edit UNICODE characters related to language direction.

Digital Resource Management

- **Managing Shared Digital Resources in the Network Zone** – Further enhancements initially delivered in the November release will be introduced.
- **Various enhancements to publishing in Dublin Core** will be available.
- **Collection Facets to All Titles Results** – Collection facets will be added to the All Titles search results.
- **Enhanced [Digital] Display Logic** – It will be possible to define a new type of logic rule to show/not show a digital service based on words in the public note.

Fulfillment

- **Block When Overdue Policy** – The Block When Overdue policy unit of measurement options will also have an 'accumulative' option. If used, the expiration date of the newly created block will be the currently existing latest block expiration date + the number of days that the policy dictates.



- **Idea Exchange:** Call Number on Fulfillment Pages and Notifications – The call number will display in all circulation pages in Alma, and in all relevant user notifications.
- **Payment for Digitization Request Fee** – The library will be able to attach to the requests TOU two new policies for digitization costs: cost per digitization or cost per page.

Resource Sharing

- **BLDSS** – After successful testing with the British Library and a number of UK customers, the functionality of BLDSS will be available.
- **Enhanced Overdue Messages** – It will be possible to configure an email address for SLNP partners.
- **Message via Mail** – Requests will be able to be sent to email-enabled suppliers (borrower and lender) for all status changes.

Collaborative Networks

- **Display Logic Rules** – Display logic rules will be able to be configured at the Network Zone level.

APIs

- Various APIs related to itemized sets and the MD import job will be enhanced.

Analytics

- **Course Reserves Subject Area** – The Course Reserves subject area will be enhanced.
- **Comparative Analytics** – The December release marks the first, preparatory phase for comparative Analytics. From your Alma instance, you will be able to access and fill in an institutional profile form as a first step for the planned development of comparative Analytics.

Working with Reminders

PERMISSIONS: To manage reminders, you must have the following roles:

- Cataloger
- Cataloger Extended

The privilege, `MANAGER_REMINDERS`, is available for the Cataloger and Cataloger Extended roles for working with Reminders.

New for November!

Reminders may be set for individual bibliographic records. The following pieces of information may be entered for a reminder:

- Date for the reminder to occur
- Type of reminder
- Status of the reminder
- Text describing the reminder

A list of reminder types can be customized for your workflow. See [Configuring Reminder Types](#) for more information.

A list of statuses can be customized for your workflow. See [Configuring Reminder Statuses](#) for more information.

From Alma's Repository Search results for bibliographic records, you can enter and edit reminders for individual bibliographic records using the Reminders link action. See [Creating Reminders](#) for more information.

Reminders can be added to a batch of records by running the **Add reminders** job and using a set. See [Adding Reminders Using a Set](#) for more information.

After reminders have been created:

- They can be viewed and edited using the Alma Cataloging Reminders option (**Resource Management > Cataloging > Reminders**). See [Managing Reminders](#) for more information.
- Reminder actions can be performed in repository search results. See [Actions You Can Perform on the Repository Search Results Page](#) for more information.



For more information, see the [Reminders for Bibliographic Records](#) video (3:02 min.).

Creating Reminders

Use the following procedure to create reminders for bibliographic records.

To create reminders:

1. Use Alma's Repository Search to locate the bibliographic record for which you want to set a reminder.
2. Click **Reminders** for the bibliographic record for which you want to set up a reminder.



Reminders Link

The List of Reminders page appears.

3. Click **Add Reminder**. The Reminder Details page appears.

Reminder Details

Reminder ID -

General Information

Resource description [Re-reading Harry Potter / Gupta, Suman, 1988- Palgrave Macmillan Houndmills, Basingstoke, Hampshire : 2003. \[1403912853 \(pbk.\)\]](#)

Date * 2016/10/07

Type * General

Status * New

Text

Created By Ex Libris Creation Date 2016/10/07
Modified By Ex Libris Modification Date 2016/10/07

Reminder Details Page

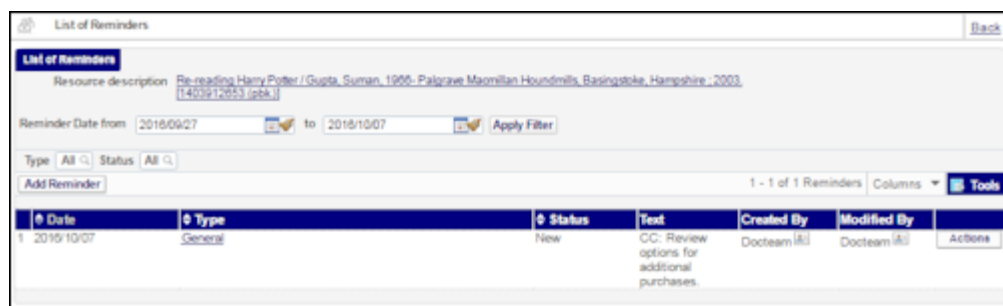
4. Using the calendar icon, select the date by which you want to manage this reminder.
5. From the Type drop-down list, select the type of reminder that you're creating. **General** is provided as the default.

This drop-down list can be customized to match your workflow. See [Configuring Reminder Types](#) for more information.

6. From the Status drop-down list, select the status that represents the state of the reminder. **New** is provided as the default.

This drop-down list can be customized to match your workflow. See [Configuring Reminder Statuses](#) for more information.

7. Enter a description of the reminder in **Text** to more fully explain the purpose of the reminder.
8. Click **Save**. The new reminder appears on the List of Reminders page.



List of Reminders Page

When multiple reminders appear on the List of Reminders page, use the following filters to manage working with the list:

- Reminder date from/to
- Type
- Status

Use the **Actions** options available for each reminder to edit or delete the reminder.

To manage all the reminders that have been created, see [Managing Reminders](#).

9. Click **Back** to return to the Repository Search list of results.

Adding Reminders Using a Set

Use the following procedure to add reminders to bibliographic records using a set and the **Add reminders** job. For additional information, see [Running Manual Jobs on Defined Sets](#).

To add reminders using a set:

1. Open the Run a Job - Select Job to Run page (**Administration > Manage Jobs > Run a Job**).

2. Select **Metadata Management** for the Type to filter the list.
3. Select **Add reminders** and click **Next**.
4. Select the set of bibliographic records that you created for this job and click **Next**.
5. Enter the reminder information and click **Next**.

Run a Job - Enter Task Parameters

1 2 3 4 5 Back Cancel Next

The selected set contains 65191 members.

Task Parameters: Add reminders

Date *

Type General

Status New

Text

Reminder Information to be Added

The Run a Job - Job Details and Schedule page appear.

6. Click **Next**.
7. Review the job summary and click **Submit**.

Run a Job - Review and Confirm

1 2 3 4 5 Back Cancel Submit

General Information

Job Name Add reminders - Itemized set for physical book titles without items - 2015/10/07 18:55:22 CDT

Set Information

Set ID 924308970000521

Name Itemized set for physical book titles without items

Set Size 695

Scheduling

Schedule As soon as possible

API Information

Task Parameters: Add reminders

Date 2015/10/14

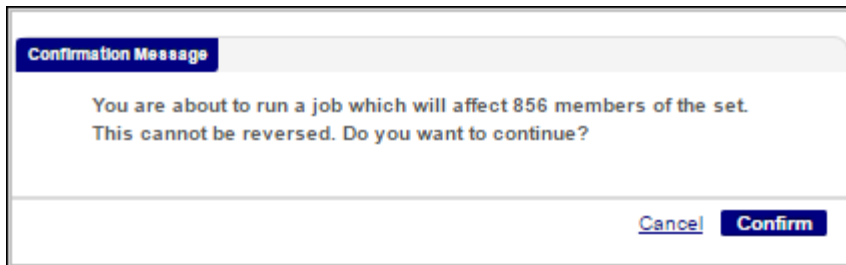
Type General

Status New

Text CC: Review resources for the Political Science department.

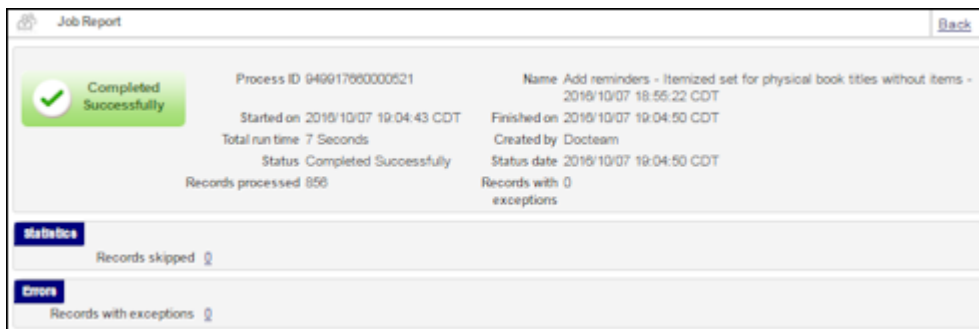
Run a Job - Review and Confirm Page

A confirmation message will prompt you as follows:



Reminder Job Confirmation Message

8. Click **Confirm**.
9. Check the **History** tab on the Monitor Jobs page for your results.
10. Click **Actions > Report** to view the results.



Reminders Job Report

Managing Reminders

From the Cataloging Reminders option (**Resource Management > Cataloging > Reminders**), you can view all the reminders.

To work with a list of all the bibliographic reminders:

1. Open the List of Reminders page for Cataloging (**Resource Management > Cataloging > Reminders**).

Date	Type	Status	Title	Entity ID	Text	Created By	Modified By	Actions
1 2016/10/07	General	New	Re-reading...	9914022900	CC: Review options for additional purchases.	Docteam (A)	Docteam (A)	Actions
2 2016/10/07	General	New	Beatrix Pott...	9910090110...	CC: Check the link issue.	Docteam (A)	Docteam (A)	Actions
3 2016/10/07	General	New	Beatrix Pott...	9912489500...	CC: Check regarding location move.	Docteam (A)	Docteam (A)	Actions

Cataloging List of Reminders Page for All Reminders

2. Use the **Reminder Date from/to**, **Type**, and **Status** filters to manage the list in order to focus on the reminders that require your action.
3. Add, edit, or delete reminders using:
 - Add Reminder
 - Actions > Edit (to access the bibliographic reminder entry)
 - Actions > Delete
4. Click the link in the Type column to access the bibliographic reminder entry.
5. Click the link in the Title column to access the MARC record simple view of the bibliographic record.
6. Click **Back** to return to the Alma home page.

Configuring Reminder Types

Use the procedure below for configuring Reminder types.

To configure Reminder types:

1. Open the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**) and click **Reminder Types** in the General section. The Code Table page for Reminder Types appears.

Code Table Cancel Customize

You are configuring: Clean Training Organization Unit List

Table Information

Sub System: INVENTORY Table Name: Reminder Types
Updated By: - Updated on: -
Patron Facing: No Table Description: Reminder Types
Table code: ReminderTypes
Customization mode: Entire table needs to be customized

Reminder Types

Filter: English Tools

Restore Default Translations

Enabled	Display	Order	Code	Description	Translation	Default Value	Updated By	Last Updated	
1	☒		GENERAL	General	General	☐	-	-	Delete

Create a New Code Table Row

Quick Add

Code: Description: Default Value: ☐ Yes Add Row

Code Table Page for Reminder Types

2. In the Create a new Code Table Row section, enter the Code and Description for a Reminder Type, specify if it is to be the default type, and click **Add Row**. The new type is added to the list in the Reminder Types section.

Code Table Cancel Customize

You are configuring: Clean Training Organization Unit List

Table Information

Sub System: INVENTORY Table Name: Reminder Types
Updated By: - Updated on: -
Patron Facing: No Table Description: Reminder Types
Table code: ReminderTypes
Customization mode: Entire table needs to be customized

Reminder Types

Filter: English Tools

Restore Default Translations

Enabled	Display	Order	Code	Description	Translation	Default Value	Updated By	Last Updated	
1	☒		GENERAL	General	General	☐	-	-	Delete
2	☒		Usage	Review usage of linked item	Review usage of linked items	☒	Docteam	2016/10/07	Delete

Create a New Code Table Row

Quick Add

Code: Description: Default Value: ☐ Yes Add Row

Reminder Type Added

3. When you have completed adding Reminder Types, click **Customize**.

Configuring Reminder Statuses

Use the procedure below for configuring Reminder statuses.

To configure Reminder statuses:

1. Open the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**) and click **Reminder Statuses** in the General section. The Code Table page for Reminder Statuses appears.

Code Table

You are configuring: Clean Training

Organization Unit List

Table Information

Sub System: INVENTORY
Updated By: -
Patron Facing: No
Table Name: Reminder Statuses
Updated on: -
Table Description: Reminder Statuses
Table code: ReminderStatuses
Customization mode: Entire table needs to be customized

Reminder Statuses

Filter: English

Restore Default Translations

Tools

Enabled	Display	Order	Code	Description	Translation	Default Value	Updated By	Last Updated	
1	✓		NEW	New	New	⊙	-	-	Delete

Create a New Code Table Row

Quick Add

Code: Description: Default Value: Yes

Code Table Page for Reminder Statuses

2. In the Create a new Code Table Row section, enter the Code and Description for a Reminder Status, specify if it is to be the default type, and click **Add Row**. The new status is added to the list in the Reminder Statuses section.

Code Table

You are configuring: Clean Training

Organization Unit List

Table Information

Sub System: INVENTORY
Updated By: -
Patron Facing: No
Table Name: Reminder Statuses
Updated on: -
Table Description: Reminder Statuses
Table code: ReminderStatuses
Customization mode: Entire table needs to be customized

Reminder Statuses

Filter: English

Restore Default Translations

Tools

Enabled	Display	Order	Code	Description	Translation	Default Value	Updated By	Last Updated	
1	✓		NEW	New	New	⊙	-	-	Delete
2	✓		Pending Approval	Pending Approval	Pending Approval	⊙	DocTeam	2016/10/07	Delete

Create a New Code Table Row

Quick Add

Code: Description: Default Value: Yes

Reminder Status Added

3. When you have completed adding Reminder Statuses, click **Customize**.

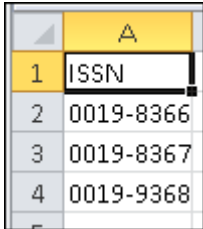
Performing Overlap and Collection Analysis for Selected Titles

Use the procedure below to perform overlap and collection analysis using an Excel input file of specific title identifiers. With the Selected Titles type of analysis, you are able to evaluate the resources in both your Institution Zone and the Community Zone.

To complete an overlap and collection analysis for selected titles:

1. Click **Submit New Report** on the Overlap and Collection Analysis page ([Resource Management > Advanced Tools > Overlap and Collection Analysis](#)).
2. From the Choose Report Type section, select the **Selected Titles** option and click **Next**.
3. Complete the parameters for step 2 of the wizard using the explanations in the table below.

Overlap and Collection Analysis - Wizard Step 2

Parameter	Description
Select File	Browse to locate the Excel file containing the unique identifiers for the selected titles you want to compare against the Institution Zone or the Community Zone. The column heading in the Excel file identifies the contents in the column as one of the following to use for matching records that you want to compare: ■ ISBN ■ ISSN ■ LCCN ■ TITLE The Excel file is a single-column file.  Example Single-Column Excel File The Excel file cannot be larger than 10 MB.

Parameter	Description
Detect overlap based on the following population New for November!	Select one of the following options from the drop-down list: ■ Do not include titles from the Community When you select this option, the analysis is completed by comparing the Excel file list with the electronic resources in the Institution Zone. This option generates the following reports: ■ Selected Titles – Title Overlap Report ■ Selected Titles – Unique Titles Report ■ Selected Titles – Not in DB Report See Viewing Overlap and Collection Analysis Job Reports for more information. ■ Include titles from the Community that are not in the Institution When you select this option, the analysis is completed by comparing the results in the Selected Titles – Not in DB Report (from analyzing resources in the Institution Zone as described above) with the Community Zone. NOTE: The results for the Selected Titles – Not in DB Report is an Excel spreadsheet that contains a list of identifiers such as ISSNs that were not found. This generated list is compared with the resources in the Community Zone. This option generates the following reports: ■ Selected Titles – Title Overlap Report ■ Selected Titles – Unique Titles Report ■ Selected Titles – Not in DB Report and ■ Selected Titles – Not in CZ report ■ Selected Titles – In CZ report See Viewing Overlap and Collection Analysis Job Reports for more information. ■ Include all titles from the Community

Parameter	Description
	When you select this option, the analysis is completed by comparing all the titles in the Excel file list with the electronic resources in the Community Zone. This option generates the following reports: ■ Selected Titles – Title Overlap Report ■ Selected Titles – Unique Titles Report ■ Selected Titles – Not in DB Report and ■ Selected Titles – Titles in CZ report ■ Selected Titles – Titles not in CZ report See Viewing Overlap and Collection Analysis Job Reports for more information.

4. Click **Next**.

5. Complete the following information on the Compare Electronic Collections page:

- **Report name** – A unique name or use the default that is supplied
- **Report description** – Further identify the report generated by Alma

Compare Electronic Collections Page

6. Click **Submit**. Alma displays a message confirming that your job was successfully submitted and displays your report job in the Report History section of the Overlap and Collection Analysis page.

7. On the Overlap and Collection Analysis page, click **View** to see the job results or use Monitor Jobs (**Administration > Manage Jobs > Monitor Jobs**) to view the job results. For more information, see [Viewing Overlap and Collection Analysis Job Reports](#).

Mapping Table
 Cancel Customize

You are configuring: QA - Provisioning
 [Organization Unit List](#)

Table Information

Sub System

FULFILLMENT

Table Name

Item Policy Exceptions for Resource Sharing

Updated By

-

Last Updated

-

Table Description

Item Policy Exceptions for Resource Sharing

Customization mode:

Entire table needs to be customized

Mapping Table Rows
Tools

	Item Policy	Exception	Updated By	Last Updated	
1	4 day Loan	True	Ex Libris	12/07/2016	Delete

Create a New Mapping Row

Quick Add

Item Policy

1 hour loan

Exception

False

Add Row

Cancel Customize

Item Policy Exceptions

Configuring Primo Request Form Type by Genre

PERMISSIONS: To configure the Primo request form type by genre, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

New for November! You can configure a Primo request form type by genre based on the genre parameter received in OpenURL. If the genre of the OpenURL has not been mapped to a type, the form will continue to open by default for a book. Access the **Request Form Type by Genre** page ([Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Request Form Type by Genre](#)).

Mapping Table

[Cancel](#)
[Customize](#)

You are configuring: Training - Member 1 - Clean
[Organization Unit List](#)

Table Information

Sub SystemFULFILLMENT
Table NameRequest Form Type by Genre

Updated By-
Last Updated-

Managed in NetworkNo

Table DescriptionResource Sharing Request Form Type by Genre

Customization mode:Entire table needs to be customized

Mapping Table Rows

Tools

	Enabled	Value	Book or Article	Updated By	Last Updated	
1		journal	Article	-	-	Delete
2		article	Article	-	-	Delete

Create a New Mapping Row

Quick Add

Value

Book or Article

Article

Add Row

[Cancel](#)
[Customize](#)

Resource Sharing Request Form Type by Genre

An item policy may be added with the exception set to either **True** or **False**. Setting the policy to **True** will create the item policy exception, which means it will be unavailable for resource sharing. Setting the item policy exception to **False** means that no exception will be created and the item will continue to be available for resource sharing as previously.

```
.EXLTabHeader div.EXLTabHeaderContent em.EXLTabHeaderContentAdditionalDataLine a  
{display:none;}
```

Requests from Any Member Institution

Patrons of institutions in a fulfillment network can request items from any institution in the network.

The patron must be locally registered at that institution. Alma provides 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 view the inventory of another institution by selecting the **More** link 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 the user to view the available request options and place requests based on the new locally-registered linked patron record. For more information on selecting institutions, see [The More Link and Institutions Lightbox](#).

NOTE: This feature is dependent upon the configuration of a fulfillment network. To configure a fulfillment network, contact your Ex Libris representative.

In addition, users may be permitted to place resource sharing requests using their own institutions, which interact with other institutions to obtain the requested resources for the users.

Sharing Digital Inventory with Member Institutions

New For November

Member institutions can share their digital inventory with other members. This allows their inventory to be discoverable by member institutions and appear in the member's ViewIt page. To allow sharing of an institutions digital inventory, set the **shareDigitalResources** parameter to **True**. For more information, see [Configuring Other Settings](#).

Code Table Cancel Customize

You are configuring: Orbis Cascade Network Zone [Organization Unit List](#)

Table Information

Sub System	USER_MANAGEMENT	Table Name	Unexposed User Groups
Updated By	-	Updated on	-
Managed in Network	No	Table Description	These user groups are unexposed to the fulfillment ne
Table code	UnExposedUserGroup		

— These user groups are unexposed to the fulfillment network

No records were found.

Create a New Code Table Row

Quick Add

Code	Description	Default Value	
Graduate Student		No	Add Row

Cancel Customize

- In the Quick Add section, select the desired user group from the dropdown, add a description, and click **Add Row**. Repeat the procedure for any additional user groups.
- Click **Customize**.

Configuring Linked Account Shared Fields

PERMISSIONS: To configure linked account shared fields, you must have one of the following roles:

- Circulation Desk Manager (logged into a circulation desk)
- Circulation Desk Operator (logged into a circulation desk)
- User or General Administrator (to configure restricted user groups).

When a new linked user is created, the originating institution defines which user attributes may be shared with the target institution. Only attributes configured with **Shared** set to **True** will be copied to the new linked user. Fields that have **Shared** set to **False** will receive a blank field at the target institution. Existing users that were created with more details will retain their data.

To configure linked account shared fields:

- Go to the Linked Account Shared Field page of the source institution (**Administration > User Management Configuration > Configuration Menu > Collaborative Networks > Linked Account Shared Fields**).

Mapping Table
Cancel
Customize

You are configuring: Training - Member 1 - Clean
[Organization Unit List](#)

Table Information

Sub System: USERS
Table Name: Linked Account Shared Fields

Updated By: -
Last Updated: -

Managed in Network: No

Table Description:

Customization mode: Entire table needs to be customized

Mapping Table Rows
Tools

	Field Name	Shared	Updated By	Last Updated
1	First Name	True	-	-
2	Middle Name	True	-	-
3	Last Name	True	-	-
4	Pin Number	True	-	-
5	Job Title	True	-	-
6	Job Description	True	-	-
7	Gender	True	-	-
8	Preferred Language	True	-	-
9	Birth Date	True	-	-
10	Expiry Date	True	-	-
11	Purge Date	True	-	-
12	Email List	True	-	-
13	Address List	True	-	-
14	Phone List	True	-	-

Tools
Cancel
Customize

Linked Account Shared Fields

- Next to each field name, select the desired sharing status from the dropdown.
- Click **Customize**.

Cloud Identity Provider

PERMISSIONS: To configure a cloud identity provider definition profile, you must have the following role:

- General System Administrator
-

User authentication may utilize a cloud identity provider (IdP), such as Azure Active Directory. If a cloud IdP profile is active, adding an Alma user also results in the user being exported to the cloud identity provider. This authentication is based on standard SAML protocol and, when implemented, is set up the same way as standard SAML profiles in both Alma and Primo.

For more information about cloud identity providers, see [Authentication Using a Cloud Identity Provider](#). For information on cloud IdP configuration in Azure, see [Using Microsoft Azure as a Cloud IdP with Alma](#).

To configure a Cloud IdP type of integration profile:

1. On the General Configuration page (**Administration > General Configuration > Configuration Menu**), click **Integration Profiles** under **External Systems**. The Integration Profile List page opens.
2. Click **Add Integration Profile**. The first page of the integration profile wizard opens.
3. Enter the profile code and name.
4. From the **Integration type** drop-down list, select **Cloud IdP**.
5. From the **System** drop-down list, select **Azure**.
6. Click **Next**. The second page of the wizard opens.

External System

Cancel
Save

External System

Code

Cloud_idp

Name

Cloud IdP

Integration Type

Cloud IdP

General Information

Actions

Contact Info

Actions

Cloud IdP

Active *

☒ Active
☐ Non Active

Domain *

Client ID *

Client Secret *

User ID Type *

Institution ID

User Groups *

Enable reset password

☒

Enable delete user

☒

Cancel
Save

Cloud IdP Integration Profile - Page 2

- Enter the Cloud IdP domain for the **Domain**—for example, `mylibrary.onmicrosoft.com`.
- For **Client ID** and **Client Secret**, see steps 7 and 8 in [Using Microsoft Azure as a cloud IdP with Alma](#).
- From the **User ID** type drop-down list, select the user ID type in which the cloud IDP identifier is to be stored.
- Select **Enable reset password** and **Enable delete user** based on their settings in Microsoft Azure. See [Using Microsoft Azure as a cloud IdP with Alma](#).
- Click **Save**. The profile you configured appears in the Integration Profile List.

Webhooks

PERMISSIONS: To configure a webhooks definition profile, you must have the following role:

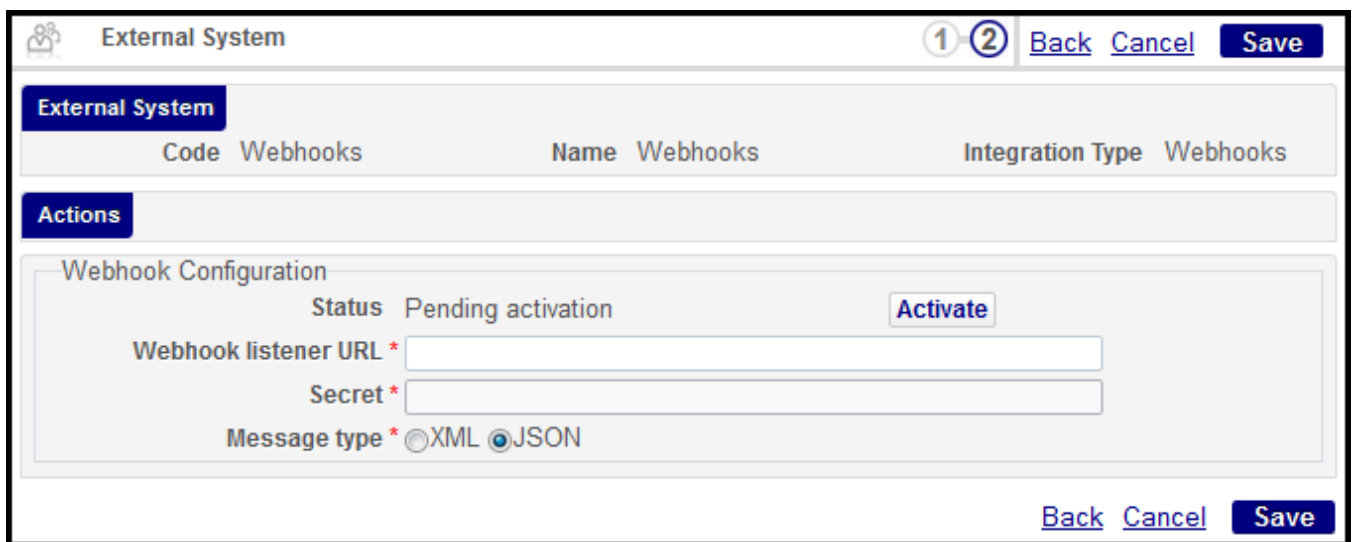
- General System Administrator

A webhook request may be triggered when a job ends. For more information, see the [Developer Network](#).

In order for the webhook to be activated, Alma must have a webhook integration profile configured.

To configure a Webhooks type of integration profile:

1. On the General Configuration page (**Administration > General Configuration > Configuration Menu**), click **Integration Profiles** under **External Systems**. The Integration Profile List page opens.
2. Click **Add Integration Profile**. The first page of the integration profile wizard opens.
3. From the **Integration type** drop-down list, select **Webhooks**.
4. Click **Next**. The second page of the wizard opens.



The screenshot shows the 'External System' configuration wizard. At the top, there's a header with a user icon, the title 'External System', and navigation buttons: '1' (selected), '2', 'Back', 'Cancel', and 'Save'. Below the header, there's a table with columns: 'Code', 'Name', and 'Integration Type'. The table contains one row with values: 'Webhooks', 'Webhooks', and 'Webhooks'. Below the table, there's an 'Actions' section with a 'Webhook Configuration' form. The form includes a 'Status' field with the value 'Pending activation' and an 'Activate' button. There are two text input fields: 'Webhook listener URL *' and 'Secret *'. At the bottom, there's a 'Message type *' field with radio buttons for 'XML' and 'JSON' (selected). At the very bottom of the form, there are 'Back', 'Cancel', and 'Save' buttons.

Webhooks Integration Profile - Page 2

5. Enter the listener URL for the **Webhook Listener URL** and secret code in **Secret**. See the Technical Information table in [Webhooks](#).
6. Select whether this is using an **XML** or a **JSON** message.
7. Click **Save**. The profile you configured appears in the Integration Profile List.