

Alma July 2015 Release:  
**Celebrating Emily  
Brontë's birthday**  
30th July



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# Alma July 2015 Release Highlights

## Acquisitions

- **Support for EDI Claims** – It is now possible to send claims by EDI for vendors that support this option. EDI claims can be used for both one-time and continuous orders.
- **Library-Level Invoices**– Institutions might like to limit access to sensitive data to users at specific libraries. It is now possible to associate invoices with a specific library. An invoice now includes an Owner field, indicating the institution or library with which it is associated. A user can select the value for this field when creating the invoice. The field appears as a column and as a facet on any page that displays a list of invoices.
- **User-Defined License Terms** – Alma now enables you to add user-defined license terms. This allows the institution to modify the license to fit differing regulations and institutional policies.

## Resource Management

- **Contributing Electronic Collections of Database Type to the Community Zone** – With the July release, local electronic collections that represent databases can be contributed to the Community Zone for the wider use of the community. As we update you about this new feature in Alma we are happy to inform you that we already have three contributions to the CZ from California State University San Marcos and KU Leuven:
  - Open Textbook Library collection
  - Kluwer Navigator collection
  - Revues Armand Colin collection

You can now find these collections as part of the Community Zone for your own use. If you have local electronic collections that will benefit the wider community be sure to post them to the Community Zone.
- **Cataloging Privileges** – Prior to the July release, every cataloger with the appropriate roles could edit bibliographic and authority records. This new functionality gives you the option to define a cataloging privileges hierarchy for better control of the privilege to edit bibliographic and authority records. This is handled through cataloging level code assignments in Resource Management.
- **New Resource Type Field** – A new field called Resource Type has been added to Alma. The Resource Type is based on existing bibliographic fields such as the LDR and 008. This new field supplements (but does not replace) the existing Material Type field. It is searchable,

available as a facet, and is extracted to Analytics. This new field is much more detailed than the existing Material Type field. As a result, it will be a useful means of constructing detailed reports.

- **Digital Inventory and Collection Enrichment for Publishing Profiles** – It is now possible to enrich publishing profiles for digital inventory for the purpose of integrating with third-party systems.
- **Publishing OAI-DC in OAI-PMH** – Alma publishing platform now supports OAI-DC, which can be useful when integrating Alma with third-party systems.
- **Mapping Digital Resources to Collections During Import** – You can now add an imported bibliographic record of a digital item to an existing collection based on metadata content. This enhancement will allow for an improved, dynamic mapping of a resource to a collection as part of the ongoing metadata import processes. This eliminates the need to perform any retroactive, post load collection assignment of materials loaded.

## Resource Sharing

- **Converting Hold Requests to Resource Sharing Borrowing Requests** – A hold request can now be converted to a resource sharing borrowing request when your library is not able to, or willing to, fulfill the request.
- **Restricting Resource Requests to a Reading Room** – Alma now supports restricting a patron's access for a received item from a resource sharing request to a reading room. When this feature is used, the patron's requested pickup location is replaced with the selected reading room location.
- **Support for a Resource Sharing Renewal Fee** – Alma now supports charging a fee when a patron renews a resource sharing item. The renew fee is added to the Borrowing Resource Sharing Terms of Use and automatically applied for any resource sharing renewal.

## Administration

- **Send Notification to Users** – Alma can send notifications to a library-defined sets of users. The new User Notification Types table includes a default notification indicating that the receiver's password was changed. You can add additional notification types.

## Collaborative Networks and Multicampus Institutions

- **Monitoring Collaborative Network Jobs Across Institutions** – The Network Zone can now monitor the jobs run by member institutions of a collaborative network.
- **Facilitate Switching Between Institutions** – Members of a collaborative network can now easily switch between member institutions for which they have a user account. In collaborative networks that use SAML single sign-on, users can switch between member institutions without having to log in separately to each institution.
- **Central Cataloging Enhancements** – With the July release, Alma provides additional support for collaborative networks that, as a central cataloging policy, only permit cataloging in the Network Zone, not the Institution Zone. With this new capability, Alma provides a new parameter setting for central record management that prevents institutions from creating local Institution Zone records.

# Data Services

## New Electronic Collections Added to the Alma CKB

The following packages were added to the Alma Community Zone during the period 31 May 2015 through 28 June 2015:

- BIBSAM American Chemical Society All 2014-2016
- BIBSAM American Physical Society Journals 2015-2016
- BIBSAM BrillOnline Journals 2014-2016
- BIBSAM British Medical Journals 2014-2016
- BIBSAM Cambridge University Press Journals Online 2015-2017
- BIBSAM De Gruyter Journals 2015
- BIBSAM Elsevier Cell Press 2014-2016
- BIBSAM Elsevier Journals Outside Freedom Collection 2014-2016
- BIBSAM Elsevier SD Freedom Collection 2014-2016
- BIBSAM Karger Medical And Scientific eJournals Complete 2014-2016
- BIBSAM Kluwer Law Journals 2013-2015
- BIBSAM Oxford University Press Journals 2015
- BIBSAM Oxford University Press Journals New Titles 2015
- BIBSAM Royal Society Publishing Journals 2014-2016
- BIBSAM Sage Premier 2014-2016
- BIBSAM Wiley Online Library Custom Collection 2014-2015
- CCC Get It Now Endocrine Society
- CCC Get It Now HealthCom Media
- CCC Get It Now Innovision Health
- CCC Get It Now Nova Science Publishers Inc
- CCC Get It Now Oncology Nursing Society
- CCC Get It Now University of South Carolina
- CCC Get It Now Wageningen Academic Publishers
- Colby, Bates and Bowdoin (CBB) SpringerLink Journals



- EdITLib Education & Information Technology Library Monographs
- Elsevier ScienceDirect Corporate Edition Book Collection
- IEEE Xplore ASPP Legacy
- ISU Digital Commons Journals
- JISC Collections Elsevier SD Agricultural And Biological Sciences 2012-2016
- JISC Collections Elsevier SD Biochem Genetics And Molecular Biology 2012-2016
- JISC Collections Elsevier SD Business Management And Accounting 2012-2016
- JISC Collections Elsevier SD Chemical Engineering 2012-2016
- JISC Collections Elsevier SD Chemistry 2012-2016
- JISC Collections Elsevier SD Computer Science 2012-2016
- JISC Collections Elsevier SD Decision Sciences 2014-2016
- JISC Collections Elsevier SD Earth And Planetary Sciences 2012-2016
- JISC Collections Elsevier SD Economics Econometrics And Finance 2012-2016
- JISC Collections Elsevier SD Energy 2012-2016
- JISC Collections Elsevier SD Engineering 2012-2016
- JISC Collections Elsevier SD Environmental Science 2012-2016
- JISC Collections Elsevier SD Freedom Collection 2012-2016
- JISC Collections Elsevier SD Health Sciences 2012-2016
- JISC Collections Elsevier SD Immunology And Microbiology 2012-2016
- JISC Collections Elsevier SD Materials Science 2012-2016
- JISC Collections Elsevier SD Mathematics 2012-2016
- JISC Collections Elsevier SD Mathematics Core 2012-2016
- JISC Collections Elsevier SD Neuroscience 2012-2016
- JISC Collections Elsevier SD Nursing And Health Professions 2012-2016
- JISC Collections Elsevier SD Pharmacology Toxicology And Pharmaceutics 2012-2016
- JISC Collections Elsevier SD Physics And Astronomy 2012-2016
- JISC Collections Elsevier SD Psychology 2012-2016
- JISC Collections Elsevier SD Social Science 2012-2016
- JISC Collections Elsevier SD Veterinary Science And Veterinary Medicine 2012-2016

- JISC Collections Institute of Physics Journal Archive 1874-1998
- JISC Collections Institute of Physics Option 1 2015
- JISC Collections Institute of Physics Option 2 2015
- JISC Collections Maney Archaeology Conservation And Heritage 2015-2017
- JISC Collections Maney Full Digital Archive 2015-2017
- JISC Collections Maney Health Sciences 2015-2017
- JISC Collections Maney Health Sciences Digital Archive 2015-2017
- JISC Collections Maney History Literature And Culture 2015-2017
- JISC Collections Maney Humanities And Social Sciences 2015-2017
- JISC Collections Maney Humanities And Social Sciences Digital Archive 2015-2017
- JISC Collections Maney Journals 2015-2017
- JISC Collections Maney Materials Science Engineering 2015-2017
- JISC Collections Maney Materials Science And Engineering Digital Archive 2015-2017
- JISC Collections Maney Philosophy Religion And Theology 2015-2017
- JISC Collections Wiley Online Library Full Collection:2015-2017
- JISC Collections Wiley Online Library Medicine and Nursing 2015-2017
- JISC Collections Wiley Online Library Smaller Collection:2015-2017
- JISC Collections Wiley Online Library SSH Collection 2015-2017
- JISC Collections Wiley Online Library STM Collection 2015-2017
- Medical Online E-Books Library
- Virginia Group SpringerLink Journals

## **New External Resources that Are Open for Searching**

The following external resources were added for this release:

- GVK (Gemeinsamer Verbundkatalog)
- KERIS (KORMARC) – subscription required
- LIBIS network

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**Note:** The Community Zone is now enriched with bibliographic records received from ProQuest for the e-brary e-collection holdings, adding approximately 170,000 full bibliographic records to the Community Zone.

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# Alma Videos

The following new videos are available from the Show Me How menu, and when you select **Help > What's New Videos** in Alma:

- [Alma HealthCheck Tool](#)
- [Library-Level Invoices](#)
- [Restricting Resource Requests to a Reading Room](#)
- [Converting Hold Requests to Resource Sharing Borrowing Requests](#)

# Particular Issues to Note

Please note the following issues in the July release:

- As of this release, you can run the OCLC publishing profiles (**Publish bibliographic record (Batchload) to OCLC** and **Publish your local holdings records (LHRs) to OCLC**) only once a day. If you attempt to run one of these profiles more than once a day, you will receive an error message.
- The new Analytics Link Resolver subject area will be added to Alma in the August 2015 release.
- Spanish is now available for both the staff Alma user interface and the patron-facing user interface (notifications, self-check machine messages, Primo Get It, View It, and My Account). To enable working with Alma in Spanish, you must activate the Spanish language by selecting the appropriate check mark in the InstitutionLanguages mapping table's **Enabled** column (**Administration > General Configuration > Configuration Menu > General Configuration > Institution Languages**) and clicking **Save**. Note that once Spanish is enabled, all patrons whose preferred language is defined as Spanish will be exposed to Alma patron-facing interface elements in Spanish.

# Acquisitions

The following sections describe the features provided for the Acquisitions functional area in the July 2015 release of Alma.

## Support for EDI Claims

### Description

Alma now supports another EDI type: claims sent to the vendor regarding missing items. For vendors that support this feature, claims are sent using EDI instead of by email. EDI claims can be used for both one-time and continuous orders.

A **Claims** check box was added to the vendor EDI information page to indicate that the vendor supports EDI claims. When set, Alma automatically sends claims to the vendor and ignores the existing configuration parameter `auto_claim` in Other Settings (**Acquisitions > Acquisitions Configuration > Configuration Menu > General**), which indicates to Alma to send emails for claims.

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**Note:** When sending a claim from the [Communications tab of the PO Line Summary page](#), the claim is sent by email regardless of whether the vendor is set to receive claims by EDI. Claims sent using EDI do not appear in this tab.

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EDI claims are placed in the same directory as EDI orders. Both outgoing EDI message types currently use the same file naming scheme. Changes were made to the EDI's XML in order to distinguish between the different types of messages. Unlike orders, each EDI claim message contains a claim for a single PO line.

### Step-by-Step Instructions

The following role can configure a vendor to support EDI claims:

- Vendor Manager

#### To configure a vendor to support EDI claims:

- 1 Follow the steps in the **To configure EDI communication with a vendor** procedure in the **Electronic Data Interchange (EDI)** section of the *Alma Integration with External Systems Guide* or the Alma online help.
- 2 While configuring the vendor in the **EDI Information** tab of the Vendor Details page, select **Claims** in the **Outgoing** section.

Figure 1 - EDI Information – Claims Field

- 3 Continue with configuring EDI communication.

## Support for Invoice Line Discounts

### Description

Alma now enables you to link non-regular invoice lines (such as **Discount**, **Shipment**, **Overhead**, and so forth) to a PO line. This enables you to link, for example, discount lines in the invoice to PO lines, and to see the discount line in the PO line's **Invoice Lines** tab.

Linking an invoice line to a PO line results in an encumbrance or a dis-encumbrance of the relevant amount from the relevant fund.

### Step-by-Step Instructions

The following roles can link non-regular invoice lines to PO lines:

- Invoicing Manager
- Invoicing Operator

#### To link non-regular invoice lines to PO lines:

- 1 The procedure to link a non-regular invoice line to a PO line is exactly like the procedure that already exists to link a regular invoice line to a PO line; the feature was simply extended to non-regular invoice lines.

While adding an invoice line in the Add Invoice Line dialog box, or while editing an invoice line on the Invoice Line Details page (see **Creating an Invoice from a PO or Manually** or **Reviewing Invoices** in the *Alma Acquisitions Guide* or Alma online help), enter or search for the PO line number in the **PO line** field.

- 2 Continue as you would for a regular invoice line. Note that some fields that are not relevant for non-regular lines do not appear.

## Library-Level Invoices

### Description

Your institution may want to limit access to invoices to the users at specific libraries due to the sensitive nature of these invoices.

Alma now enables the following:

- New invoices to be associated with a specific library. Existing invoices (created before this change) are associated by default with the institution.
- User roles **Invoicing Operator**, **Invoicing Operator Extended**, and **Invoicing Manager** to be configured for a specific library. Users assigned to a specific library can manage only invoices associated with that library; users assigned to the institution can manage invoices associated with any library or with the institution.

As with any other library-level role, a user can be assigned to multiple libraries by adding a role for each library. Existing users (before this change) are associated by default with the institution.

An invoice now includes an **Owner** field, indicating the institution or library with which it is associated. A user can select the value for this field when creating the invoice. The field appears as a column and as a facet on any page that displays a list of invoices (Find Invoices, In Review Invoices, and so forth).

### Step-by-Step Instructions

The following roles can add a library-level invoicing role to a user:

- User Manager
- User Administrator

The following roles can manage an invoice's owner, for invoices that are within their scope:

- Invoicing Manager
- Invoicing Operator
- Invoicing Operator Extended



## To add a library-level invoicing role to a user:

While adding or editing the role **Invoicing Manager**, **Invoicing Operator**, or **Invoicing Operator Extended** for a user (see **Managing User Roles** in the *Alma Administration Guide* or Alma online help), select the library at which the user can perform the role's functions from the **Scope** drop-down list on the User Role Details page. To add multiple libraries, add the role for each library. To add the entire institution, select the institution from the **Scope** drop-down list.

**Note:** If you reduce a user's scope to library-level from institution-level, or remove a library-level scope from a user, the user can no longer manage invoices that are assigned to him/her but are now out of scope.

## To manage the owning library or institution of an invoice:

- **While creating** – When manually adding an invoice (see **Creating an Invoice from a PO or Manually** in the *Alma Acquisitions Guide* or Alma online help), select the owning library or the institution from the **Owner** drop-down list on the Invoice Details page of the creation wizard. Only libraries for which you have scope appear in the list.

The screenshot shows the 'Invoice Details' form in Alma. The 'Owner' dropdown menu is highlighted with a red box and shows 'University of Texas at Dallas' selected. The form includes fields for Invoice Number, Total amount, Vendor, Vendor Contact Person, Invoice Reference #, Invoice Date, Total invoice lines amount, Vendor account, Payment method, Creation From, VAT %, Amount, Vendor tax, VAT Type, Expended from fund, Prepaid, and Internal Copy. Navigation buttons like Back, Cancel, and Save and Create Invoice Lines are visible at the top and bottom right.

**Figure 2 - Invoice Details with Owner Check Box**

For users with an institution-level scope, the drop-down list is set to the institution level by default. For users with a single library scope, the drop-down list contains only their library. For users with multiple library scopes, the drop-down list contains all of their libraries but is not set to any library by default. **Owner** is a mandatory field.

Selecting an owner restricts the list of vendors, and vice versa.

- **While importing** – When you import invoices using EDI or from an Excel file, they are associated with the institution.
- **While viewing** – You cannot view, edit, or have assigned to you invoices that are out of your scope. When viewing a list of invoices, either after a search or on a specific page in

Alma, **Owner** appears as a column in the invoice list. Select a library under the **Owner** facet to filter the list.

The screenshot shows the 'In Review Invoices' page. On the left, there are filters for 'Alert', 'Vendor', 'Source', and 'Owner'. The 'Owner' filter is expanded, showing 'Princeton University (606)' selected. The main table lists invoices with columns: Invoice #, Vendor, Owner, Creation From, Creation Date, Last Updated Date, # of Lines, Total Price, and Actions. The 'Owner' column is highlighted with a red box, and the 'Princeton University (606)' facet is also highlighted with a red box.

Invoice #	Vendor	Owner	Creation From	Creation Date	Last Updated Date	# of Lines	Total Price	Actions
1 57843	3 Absolute Backorder Service, Inc.	Princeton University	Manually	01/18/2013	01/28/2013	1	0.00 USD	Actions
2 296891	22 Otto Harrassowitz	Princeton University	Manually	01/14/2013	01/28/2013	20	1,830.83 USD	Actions
3 10095142	5 East View EDI orders	Princeton University	Manually	01/14/2013	02/21/2013	12	710.31 USD	Actions
4 10217974	3 Coultts Library Services, Inc. EDI	Princeton University	Manually	01/18/2013	12/02/2013	30	886.66 USD	Actions
5 392173	0 John Wiley & Sons, Inc.	Princeton University	Manually	01/14/2013	01/28/2013	0	0.00 USD	Actions
6 296790	17 Otto Harrassowitz	Princeton University	Manually	01/14/2013	01/28/2013	13	1,714.81 USD	Actions
7 0092156	9 Ebsco Subscription Services, Inc.	Princeton University	Manually	01/18/2013	01/28/2013	6	899.01 USD	Actions
8 0027007	10 Ebsco Subscription Services, Inc.	Princeton University	Manually	01/18/2013	01/28/2013	7	-370.83 USD	Actions
9 296682	10 Otto Harrassowitz EDI	Princeton University	Manually	01/14/2013	01/28/2013	31	1,725.82 USD	Actions

Figure 3 - Invoice List with Owner Column and Facet

## New User-Defined License Terms

### Description

Alma now enables you to add user-defined license terms.

Main menu access to the **LicenseTermsType** mapping table (**Acquisitions > Acquisitions Configuration > Configuration Menu > Licenses > Terms Type**) was replaced by the **Manage License Terms** page (**Acquisitions > Acquisitions Configuration > Configuration Menu > Licenses > Manage License Terms**). On this page, you can add and delete user-defined terms, and you can edit all license terms.

### Step-by-Step Instructions

The following roles can manage user-defined license terms:

- Acquisitions Administrator
- General System Administrator

You manage license terms on the Manage License Terms page (**Acquisitions > Acquisitions Configuration > Configuration Menu > Licenses > Managed License Terms**).

Manage License Terms

Back

Save

Add License Term

Tools

	Name	License Term Type	License Section	Order In Section	Display To Public	
1	Accessibility compliance indicator	LicenseTermsYesNo			Yes	
2	All rights reserved	LicenseTermsYesNo	Terms of Use	7	No	
3	Applicable Copyright Law	FREE-TEXT			Yes	
4	Archiving right	LicenseTermsYesNo			Yes	
5	Archiving format	FREE-TEXT			Yes	
6	Archiving note	FREE-TEXT			Yes	
7	Authorized User Definition	FREE-TEXT			Yes	
8	Citation requirement detail	FREE-TEXT	Terms of Use	8	No	
9	Clickwrap modification clause indicator	LicenseTermsYesNo			Yes	
10	Completeness of Content clause indicator	LicenseTermsYesNo			Yes	
11	Concurrency with print version clause indicator	LicenseTermsYesNo			Yes	
12	Concurrent User	NUMERIC			Yes	
13	Concurrent Users Note	FREE-TEXT			Yes	
14	Confidentiality of agreement	FREE-TEXT			Yes	

Figure 4 - Manage License Terms Page

User-defined license terms appear at the bottom of the list:

74 Remote Access	LicenseTermsYesNo	Restrictions	3	No			
75 Renewal Type	LicenseTermsRenewalType			Yes			
75 Scholarly sharing	LicenseTermsPermittedProhibited	Terms of Use	9	No			
76 Scholarly sharing note	FREE-TEXT	Terms of Use	10	No			
77 Termination Requirements	FREE-TEXT			Yes			
78 Termination Requirements Note	FREE-TEXT			Yes			
79 Termination Right Note	FREE-TEXT			Yes			
80 UCITA Override Clause Indicator	LicenseTermsYesNo			Yes			
81 Usage Data Set Up Status	FREE-TEXT			Yes			
82 Walk in User Note	FREE-TEXT	Restrictions	2	No			
83 Free License	FREE-TEXT	Terms of Use		Yes	Delete		

Figure 5 - User Defined License Term

Perform one or more of the following procedures. When you are done, click **Save**.

### To add a term:

- 1 Click **Add License Term**. The Add License Term dialog box appears.

Add License Term

Name\*

Code\*

License\* FREE-TEXT

License

Term Type

Section

Order In

Display To ☐ Public

Section

Close

Add

Add and Close

Figure 6 - Add License Term

- 2 Enter a term **Name** and a unique **Code**.

3 Select the **License Term Type**. The options are:

- **FREE-TEXT** – Free text
- **LicenseTermsPermittedProhibited** – Permitted or prohibited options
- **LicenseTermsRenewalType** – Renewal type options
- **LicenseTermsUOM** – Calendar selection
- **LicenseTermsYesNo** – Yes or no options
- **NUMERIC** – A numeric field

Note that you cannot add new license term types. Also, once you save the license term, you cannot change its type.

4 Select the **License Section** in which the term will appear

5 Enter a sequence number in **Order in Section** to configure where, within the section, the term will appear.

6 Select **Display To Public** to have the term appear in the View It tab.

7 When you are done, click **Add and Close**. The term appears in the list of terms on the Manage License Terms page

#### To edit a term:

Select a new option for the term in the **License Section** or **Display to Public** columns, or edit the value of the **Order in Section** column.

#### To delete a term you added:

Click **Delete** in the term row. You cannot delete the out-of-the-box terms.

## Other Acquisitions Updates

- PO line types **Electronic Book – Standing Order** and **Electronic Title – Standing Order** were removed because they were not clear and were not used.
- After sending a PO line, the expected activation date of the resource is updated to the expected activation date of the PO line.
- A negative number is now allowed for the discount on an invoice. This is useful for when you return an item that had a discount; the returned discount is “added” to the value.
- The mapping table `SeviceClientIdentifier` (**Administration > General Configuration > Configuration Menu > External Systems > Allowed Client IPs**) was removed.

# Resource Management

The following sections describe the functions provided for the Resource Management functional area in the July 2015 release of Alma.

## Cataloging Privileges

### Description

Prior to the July release, every cataloger with the appropriate roles could edit bibliographic and authority records. This new functionality gives you the option to define a cataloging privileges hierarchy for better control of the privilege to edit bibliographic and authority records. This is handled through cataloging level code assignments in Resource Management after Ex Libris staff set the cataloging level availability parameter for your system.

For collaborative network environments, the Network Zone system is able to manage the cataloging level code assignments centrally and distribute these assignments to all the members of the collaborative network.

With this feature of the system enabled, the following areas that deal with bibliographic and/or authority records are enhanced with this control of your records:

- MD Editor
- Metadata import (new records are imported with the lowest level)
- Quick cataloging
- Normalization/set management (batch job assignment of a code level to a set of records)

### Step-by-Step Instructions

The following roles can work with cataloging level code assignments:

- Catalog Administrator
- General System Administrator

## To create cataloging permission levels:

- 1 In the **Cataloging** section of Resource Management Configuration (**Resource Management > Resource Configuration > Configuration Menu**), click **Cataloger Permission Level**.

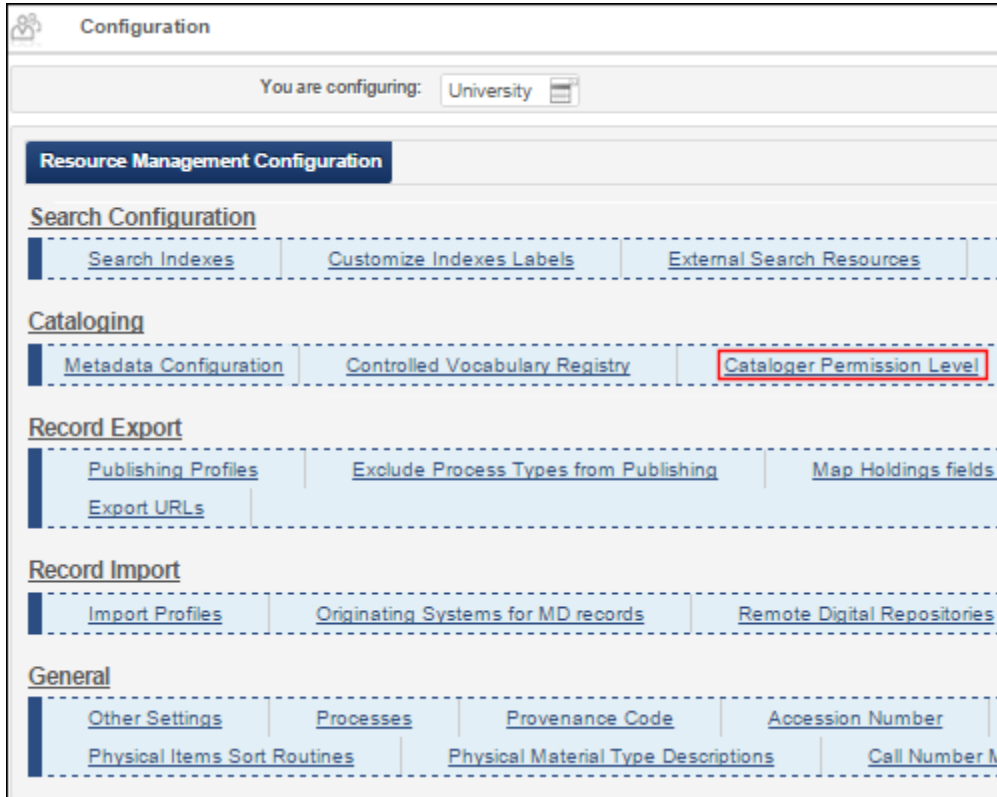


Figure 7 - Cataloging Permission Level

This configuration option is hidden until Ex Libris staff set the cataloging level availability parameter for your system.

For collaborative network environments, this configuration parameter is hidden from member institutions since this capability is managed at the Network Zone level.

- 2 Use the **Quick Add** section to create a new cataloging permission code level.

A screenshot of the 'Create a New Code Table Row' form. It features a 'Quick Add' section with a plus icon. Below this, there are three input fields: 'Code', 'Description', and 'Default Value'. The 'Default Value' field has a dropdown menu currently showing 'No'. To the right of these fields is an 'Add Row' button.

Figure 8 - Quick Add Cataloging Permission Level

- a Enter a code number from 01 through 99. 00 is the lowest permission level and is reserved by Alma. 00 cannot be edited or deleted and is the default code level unless the default is changed to a different code level.
- b Enter a description for the code level number to make it clear who is able to use this code level.
- c Use the **Default Value** option to assign a default code level other than 00.
- d Click **Add Row**.

**Code Table**

You are configuring: University

**Table Information**

Sub System REPOSITORY Table Name Cataloger Permis  
 Updated By ex\_impl Updated on 06/08/2015  
 Table Description List of all available Cataloging level Table code CatalogerLevel

List of all available Cataloging level

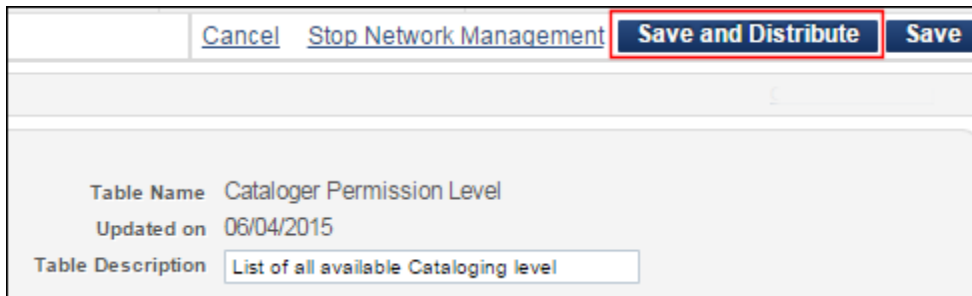
Import

	Display	Order	Code	Description	Default Value	Up
1		▼	00	Default Level	<input checked="" type="radio"/>	exl
2	▲	▼	10	Student Cataloger	<input type="radio"/>	ad
3	▲	▼	20	20	<input type="radio"/>	exl
4	▲	▼	50	50	<input type="radio"/>	exl
5	▲	▼	70	70	<input type="radio"/>	exl
6	▲		90	Senior Cataloger	<input type="radio"/>	ad

Figure 9 - Cataloging Permission Level Rows Added

- 3 When you have completed entering new cataloging permission levels, click **Save**.

For collaborative network environments, once the Network Zone administrator has completed entering the cataloging permission levels, these settings can be distributed to the member institutions by clicking **Save and Distribute**. This action submits a job to distribute these settings to the member institutions.



Cancel Stop Network Management **Save and Distribute** Save

Table Name Cataloger Permission Level

Updated on 06/04/2015

Table Description List of all available Cataloging level

Figure 10 - Network Zone Distributes Cataloging Permission Levels to the Member Institutions with Save and Distribute

#### To assign cataloging permission levels:

- 1 Access the user records that you want to update (**Administration > User Management > Find and Manage Users**).
- 2 Select **Actions > Edit** for the user record that you want to update. The User Details page appears.



**User Details**

Name Administrator, Alma  
 Account Type Internal  
[Manage fulfillment activities](#)

General Information    Contact Information    Identifiers

**User Information**

First name \* Alma  
 Last name \* Administrator  
 PIN number  
 Job category \* General Administrator  
 Gender  
 Campus  
 Preferred language English  
 Status date 03/07/2011  
 Expiration date  
 Resource sharing library  
 Cataloger level [00] Default Level  
 Created By  
**User Management Information**  
 Type \*

[00] Default Level  
 [10] Student Cataloger  
 [20] 20  
 [50] 50  
 [70] 70  
 [90] Senior Cataloger

Figure 11 - Assign Cataloging Level to a User

3 Click Save.

To work with records in the MD Editor when cataloging permission levels have been implemented:

- 1 Open a bibliographic record in the MD Editor (**Resource Management > Cataloging > Open Metadata Editor**).

The screenshot shows the MD Editor interface with a menu bar (File, Edit, Tools) and a toolbar. A warning message states: "You have 4 warning(s) in your record". The main area displays a record titled "Working on -The Medicine show [b (99320705001301451)". Below the title, there is a table of fields:

Field	Value
LDR	#####pam##2200301###4500
001	316221
005	19741104000000.0
008	740619s1974#####nyua#####001#0#eng##
010	\$\$a ^^74010418^
020	\$\$a 0394495772 \$\$a 0394730321 (pbk.)
035	\$\$9 (DLC) 74010418
040	\$\$a DLC \$\$c DLC \$\$d DLC
050 0 0	\$\$a RC81 \$\$b .M496 1974
060	\$\$a QV772 M4887
082 0 0	\$\$a 610
245 0 4	\$\$a The Medicine show \$\$c [by] the editors of Consume

At the bottom, there is a dropdown menu for "Current cataloger level" with the value "[00] Default Level" selected. A red box highlights the "change to" button and the dropdown menu, which shows "[90] Senior Cat:" with a downward arrow.

Figure 12 - Cataloging Permission Levels in the MD Editor

The MD Editor displays the current cataloging level. Any user assigned an equal or higher value cataloging level can edit the record. In addition, the MD Editor provides the option to change the cataloging level for the record. Any cataloging level equal to or below that of the cataloging level assigned to the user can be set as the cataloging level for the record.

If the user's cataloging permission level is lower than the cataloging level assigned to the record, the user can only view the record (see below).

Medicine man / Bill - View Only - your cataloger level 10 is lower than record cataloging level 90  
 Created by import (01/23/2013 16:36:18 EST)  
 LDR 00810cam#a2200277##4500  
 001 99645446160001041  
 005 20150612172424.0  
 008 810223s1980####nyu#####00011#eng##  
 010 ‡a 79007192  
 020 ‡a 0385149034 : ‡c \$7.95  
 035 ‡a (OCoLC)5563681  
 035 ‡a (CStRLIN)NJP21822140-B  
 035 ‡9 AAK4858TS  
 035 ‡a (NjP)40442-princetondb-Voyager  
 050 0 ‡a PZ4.B9387 ‡b Md ‡a PS3552.U65;  
 082 ‡a R131.5/A

Figure 13 - User's Cataloging Permission Level Is Lower than the Cataloging Level Assigned to the Record

In a collaborative environment, however, a user with a lower cataloging permission level than the cataloging level assigned to the record in the Network catalog can add and remove local fields (see below).

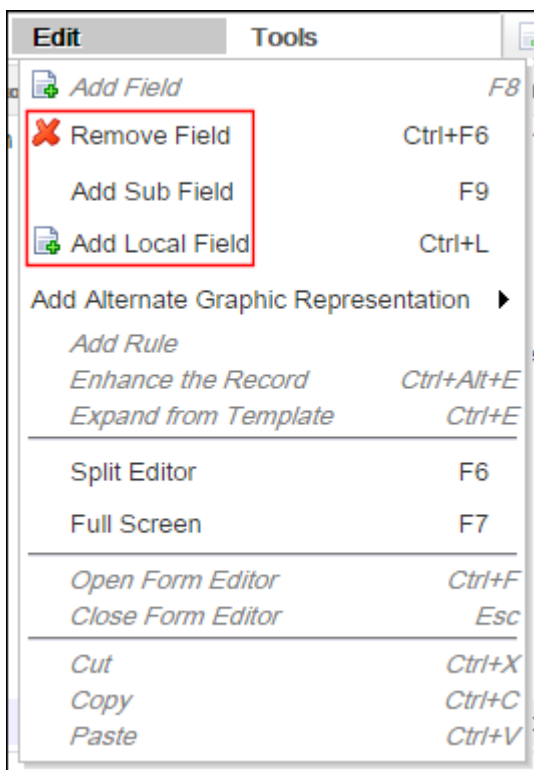


Figure 14 - Add/Remove Local Fields from a Network Zone Member Institution








File	Edit	Tools
You have 4 warning(s) in your record - Draft auto-saved at 16		
Working on -The Medicine show [b (993207		
PDT)		
250	\$\$a Rev. ed.	
260	\$\$a New York, \$\$b Pantheon B	
300	\$\$a 384 p. \$\$b illus. \$\$c 20 cm	
 650	0 \$\$a Medicine, Popular.	
 650	0 \$\$a Quacks and quackery.	
 650	0 \$\$a Cosmetics.	
 650	2 \$\$a Drugs \$\$x Popular works.	
 650	2 \$\$a Medicine \$\$x Popular work	
 650	2 \$\$a Self medication \$\$x Popula	
730	\$\$a Consumer reports.	
 900	\$\$a This is a local field	

Figure 15 - Adding/Editing a Local Field from a Network Zone Member Institution

- 2 Select a new cataloging level for the record from the drop-down list.

Current cataloger level [00] Default Level, change to	[90] Senior Cat: ▼
	[90] Senior Cataloger
	[80] 80
	[50] 50
	[30] 30
	[20] 20
	[10] Student Cataloger
	[00] Default Level

Info Alerts

020

Multiple occurrences were found for non repeatable s

035

Sub-field "9" is not listed in profile for field 035

Figure 16 - Cataloging Level Drop-Down List

- 3 Click **Save**. The current cataloging level of the record is updated to reflect your change.

Current cataloger level [90] Senior Cataloger, change to	[90] Senior Cat: ▼
--	--------------------

Figure 17 - Cataloging Level Changed

### To search for records based on a cataloging level:

- 1 Open the **Repository Search** page (Resource Management > Search and Sets > Repository Search).
- 2 Click **Advanced Search**.
- 3 Click **Add Conditions**.

- 4 Select **Cataloger Level** from the list of conditions.

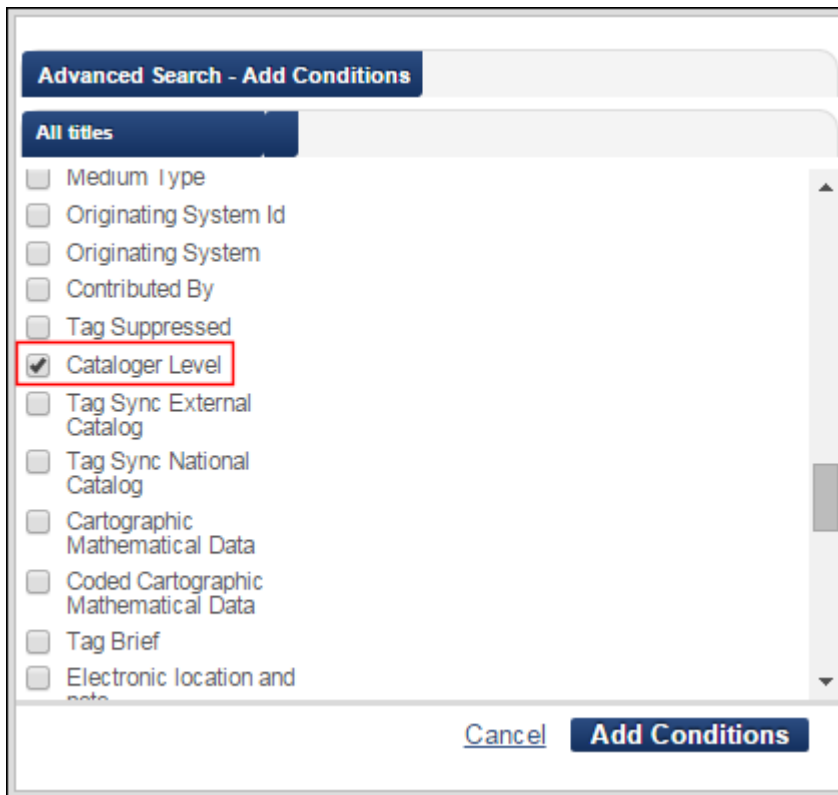


Figure 18 - Cataloging Level Advanced Search

- 5 Click **Add Conditions**.
- 6 Select your cataloging level criteria.

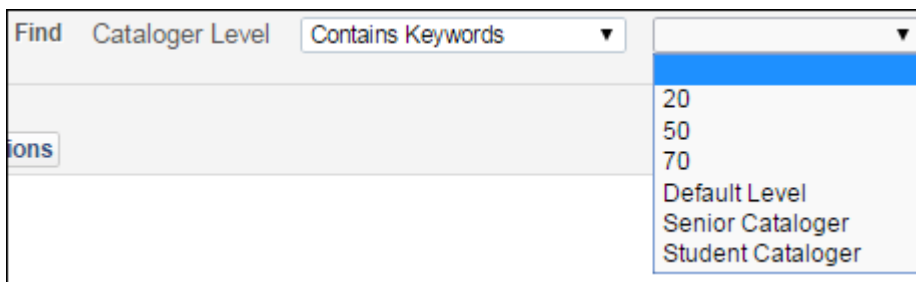
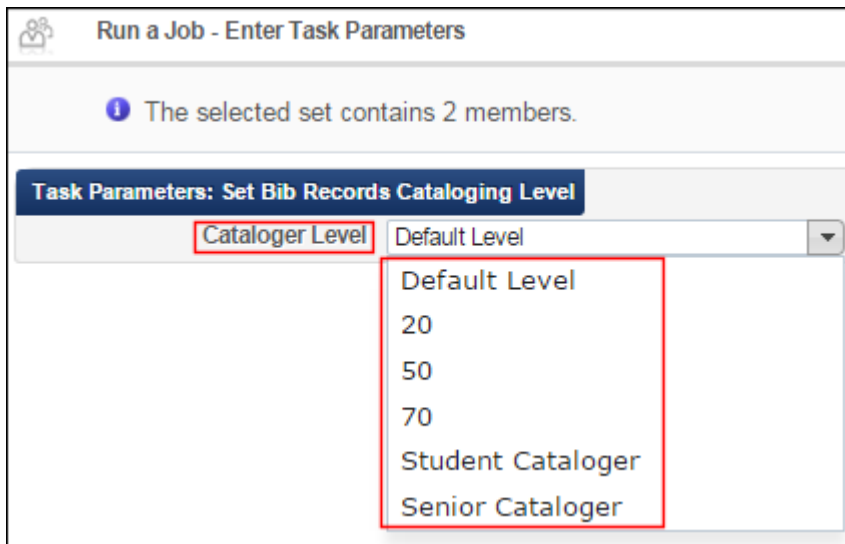


Figure 19 - Cataloging Level Search Criteria

- 7 Click **Go**. The search results display a list of records that have a cataloging level assignment matching the criteria that you selected.

### To assign a cataloging level to a set of records:

- 1 Open the **Run a Job – Select Job to Run** page (**Administration > Manage Jobs > Run a Job**).
- 2 Select one of the following:
  - Set Bib Records Cataloging Level
  - Set Authority Records Cataloging Level
- 3 Click **Next**.
- 4 Select the set that you created for assigning a cataloging level and click **Next**.
- 5 Select the cataloging level to be assigned to the selected set of records.



Run a Job - Enter Task Parameters

The selected set contains 2 members.

Task Parameters: Set Bib Records Cataloging Level

Cataloger Level Default Level

Default Level

20

50

70

Student Cataloger

Senior Cataloger

Figure 20 - Select Cataloging Level to Assign to the Set of Records

- 6 Click **Next**.
- 7 Review the general information and scheduling information and click **Next**.
- 8 Review all your job information on the **Run a Job – Review and Confirm** page and click **Submit**.

## New Resource Type Field

A new field called **Resource Type** has been added to Alma. The Resource Type is constructed based on existing bibliographic fields such as the LDR and 008. This new field supplements (but does not replace) the existing Material Type field. The new Resource Type is searchable, available as a facet, and is extracted to Analytics. The new Resource Type field is much more detailed than the existing Material Type field. As a result, it will be a useful means of constructing detailed reports. For details regarding the new Resource Type fields and the criteria for their creation, refer to the notes and table in the section below.

---

**Note:** The new field will be applied to existing records following the re-indexing process in July.

---

After a record is saved or indexed, the new Resource Type field information appears in the search results.

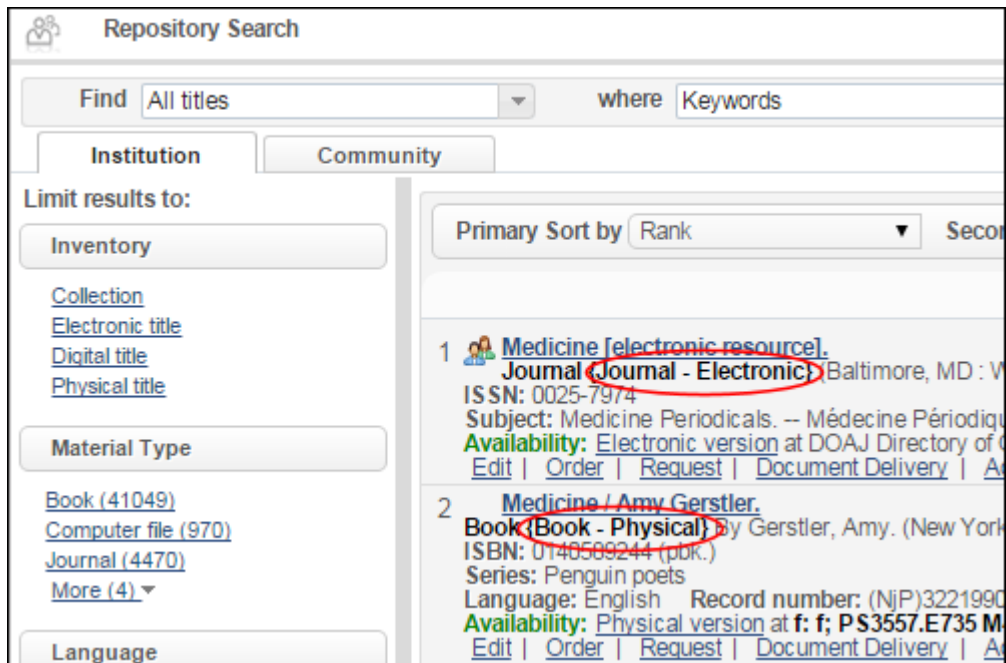


Figure 21 - Resource Type Field

It is also available as a facet.

The screenshot shows a 'Repository Search' interface. At the top, there is a search bar with the text 'Find All titles'. Below this, there are two tabs: 'Institution' and 'Comm'. The main section is titled 'Limit results to:' and contains several facets. The 'Inventory' facet lists 'Collection', 'Electronic title', 'Digital title', and 'Physical title'. The 'Material Type' facet lists 'Book (41049)', 'Computer file (970)', 'Journal (4470)', and 'More (4)' with a dropdown arrow. The 'Language' facet lists 'Afrikaans (10)', 'Akkadian (1)', 'Algonquian (Other) (1)', and 'More (141)' with a dropdown arrow. The 'Publication Year' facet lists '1000 - 1958 (11298)', '1959 - 1991 (11145)', '1992 - 2004 (10546)', and 'More (2)' with a dropdown arrow. The 'Resource Type' facet is circled in red and lists '3D artifact - Physical (1)', 'Atlas - Physical (2)', 'Audio musical - Physical (74)', and 'More (15)' with a dropdown arrow.

Repository Search

Find All titles

Institution Comm

Limit results to:

Inventory

[Collection](#)  
[Electronic title](#)  
[Digital title](#)  
[Physical title](#)

Material Type

[Book \(41049\)](#)  
[Computer file \(970\)](#)  
[Journal \(4470\)](#)  
[More \(4\)](#) ▼

Language

[Afrikaans \(10\)](#)  
[Akkadian \(1\)](#)  
[Algonquian \(Other\) \(1\)](#)  
[More \(141\)](#) ▼

Publication Year

[1000 - 1958 \(11298\)](#)  
[1959 - 1991 \(11145\)](#)  
[1992 - 2004 \(10546\)](#)  
[More \(2\)](#) ▼

**Resource Type**

[3D artifact - Physical \(1\)](#)  
[Atlas - Physical \(2\)](#)  
[Audio musical - Physical \(74\)](#)  
[More \(15\)](#) ▼

Figure 22 - Resource Type as a Facet



Resource Type is also available in Advanced Search.

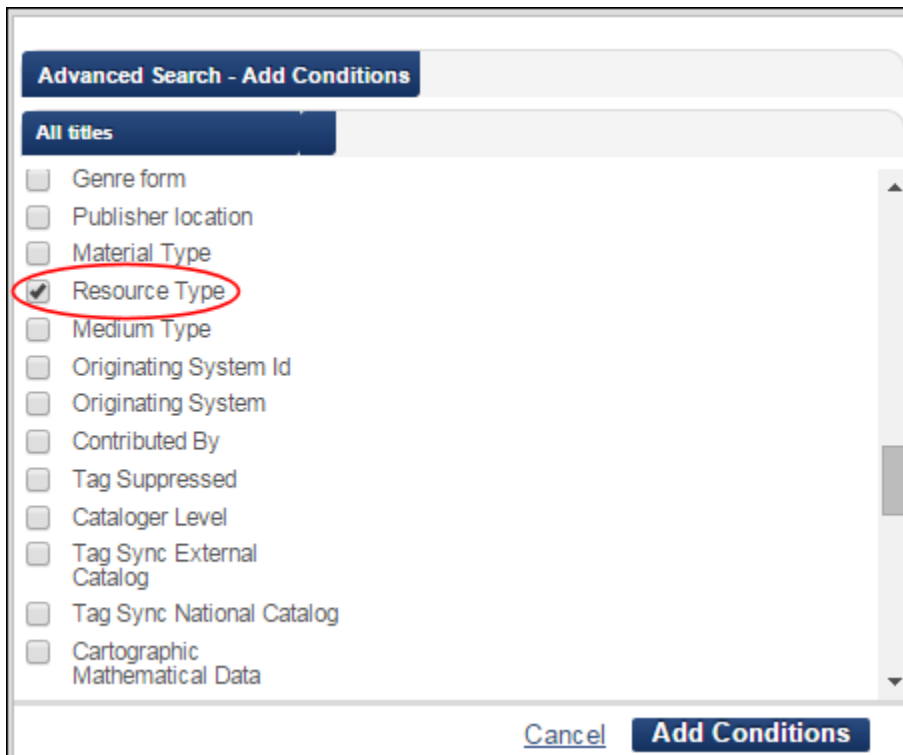


Figure 23 - Resource Type in Advanced Search

## Rules for Creation of the Field Resource Type

- != means not equal  
For example, "008 pos. 06 != d" means 008 position 6 will be anything except d
- , (comma) means or  
For example, "008 pos. 23 != a,b,c,o,f " means 008 position 23 does not equal a or b or c or o or f
- Physical = printed books, printed serials, music-CD's, CD-roms, DVD's, and so forth (except microforms)
- Electronic = online (ebooks, e-serials, and so forth)

Resource Type	Rule
Book - Physical	LDR pos. 06 = a AND LDR pos. 7 = m AND 008 pos. 23 != a,b,c,o,f
Book - Electronic	LDR pos. 06 = a AND LDR pos. 7 = m AND 008 pos. 23 = o
Braille Book – Physical	LDR pos. 06 = a AND LDR pos. 7 = m AND 008 pos. 23 = f

Resource Type	Rule
Braille Serial – Physical	LDR pos. 06 = a AND LDR pos. 7 = i,s AND 008 pos. 23 = f
Braille Map – Physical	LDR pos. 06 = e AND LDR pos. 7 = m AND 008 pos. 29 = f
Braille Music – Physical	LDR pos. 06 = c AND LDR pos. 7 = m AND 008 pos. 23 = f
Atlas - Physical	LDR pos. 06 = e AND LDR pos. 7 = m AND 008 pos. 29 != a,b,c,o AND 008 pos. 25 = e
Atlas - Electronic	LDR pos. 06 = e AND LDR pos. 7 = m AND 008 pos. 29 = o AND 008 pos. 25 = e
Map - Physical	LDR pos. 06 = e AND LDR pos. 7 = m AND 008 pos. 29 != a,b,c,o AND 008 pos. 25 != e
Map - Electronic	LDR pos. 06 = e AND LDR pos. 7 = m AND 008 pos. 29 = o AND 008 pos. 25 != e
Newspaper - Physical	LDR pos. 06 = a,e AND LDR pos. 7 = i,s AND 008 pos. 06 != d AND 008 pos. 21 = n AND 008 pos. 23 != a,b,c,o,f
Newspaper - Electronic	LDR pos. 06 = a AND LDR pos. 7 = i,s AND 008 pos. 06 != d AND 008 pos. 21 = n AND 008 pos. 23 = o
Journal - Physical	LDR pos. 06 = a AND LDR pos. 7 = i,s AND 008 pos. 06 != d AND 008 pos. 21 = p AND 008 pos. 23 != a,b,c,o,f
Journal - Electronic	LDR pos. 06 = a AND LDR pos. 7 = i,s AND 008 pos. 06 != d AND 008 pos. 21 = p AND 008 pos. 23 = o
Other Serial - Physical	LDR pos. 06 = a AND LDR pos. 7 = i,s AND 008 pos. 06 != d AND 008 pos. 21 != n,p AND 008 pos. 23 != a,b,c,o,f
Other Serial - Electronic	LDR pos. 06 = a AND LDR pos. 7 = i,s AND 008 pos. 06 != d AND 008 pos. 21 != n,p AND 008 pos. 23 = o
Manuscripts – Physical <sup>1</sup>	LDR pos. 06 = d,t AND LDR pos. 7 = m AND 008 pos. 23 != a,b,c,o,f
Manuscripts – Physical <sup>2</sup>	LDR pos. 06 = f AND LDR pos. 7 = m AND 008 pos. 29 != a,b,c,o,f

---

<sup>1</sup> music and text manuscripts

<sup>2</sup> cartographical manuscripts

Resource Type	Rule
Manuscripts – Electronic <sup>3</sup>	LDR pos. 06 = d,t AND LDR pos. 7 = m AND 008 pos. 23 = o
Manuscripts – Electronic <sup>4</sup>	LDR pos. 06 = f AND LDR pos. 7 = m AND 008 pos. 29 = o
Notated music- Physical	LDR pos. 06 = c AND LDR pos. 7 = m AND 008 pos. 23 != a,b,c,o,f
Notated music - Electronic	LDR pos. 06 = c AND LDR pos. 7 = m AND 008 pos. 23 = o
Audio musical - Physical	LDR pos. 06 = j AND LDR pos. 7 = m AND 008 pos. 23 != a,b,c,o,f
Audio musical - Electronic	LDR pos. 06 = j AND LDR pos. 7 = m AND 008 pos. 23 = o
Audio nonmusical – Physical	LDR pos. 06 = i AND LDR pos. 7 = m AND 008 pos. 23 != a,b,c,o,f
Audio nonmusical - Electronic	LDR pos. 06 = i AND LDR pos. 7 = m AND 008 pos. 23 = o
Projected medium - Physical	LDR pos. 06 = g AND LDR pos. 7 = m AND 008 pos. 33 = d,f,m,p,s,t,v AND 008 pos. 29 != a,b,c,o,f
Projected medium - Electronic	LDR pos. 06 = g AND LDR pos. 7 = m AND 008 pos. 33 = d,f,m,p,s,t,v AND 008 pos. 29 = o
2D non-projectable graphic - Physical	LDR pos. 06 = k AND LDR pos. 7 = m AND 008 pos. 33 = a,c,i,k,l,n,o AND 008 pos. 29 != a,b,c,o,f
2D non-projectable graphic - Electronic	LDR pos. 06 = k AND LDR pos. 7 = m AND 008 pos. 33 = a,c,i,k,l,n,o AND 008 pos. 29 = o
Kit - Physical	LDR pos. 06 = o AND 008 pos. 33 = b AND 008 pos. 29 != a,b,c,o,f
3D artifact - Physical	LDR pos. 06 = r AND 008 pos. 33 = r,w AND 008 pos. 29 != o
Microforms	008 pos. 23 = a,b,c
Other material - Electronic	LDR pos. 06 = m
Undefined	Everything that is not in the defined categories. This category could work as a checklist to find mistakes in the control fields as well.

---

<sup>3</sup> music and text manuscripts

<sup>4</sup> cartographical manuscripts

# Contributing Electronic Collections of the Database Type to the Community Zone

## Description

With the July release, local electronic collections that represent databases can be contributed to the Community Zone for the wider use of the community. Electronic collections representing databases have no services or portfolios. The contributed content includes a bibliographic record that describes the electronic collection and the URL that is native to the database.

This type of contribution to the Community Zone will be processed in a manner similar to other materials contributed to the Community Zone. It will be flagged with a status of **Under Review**, and Ex Libris staff will check for the contribution to meet the following minimal criteria:

- The electronic collection is not already a part of the Community Zone
- Satisfactory linking verification

Once the contribution has passed this check by Ex Libris, the contributor will be notified and the collection will be available for the wider community to use. Refer to the document *Alma Community Catalog: Cataloging Standards, Policies, Rights, and Responsibilities* available at the following link and the **Community Zone Contribution Guidelines** section in the online help or the *Alma Resource Management Guide* for additional details:

<http://www.exlibrisgroup.com/files/Products/Alma/AlmaCommunityCatalogCatalogingStandardsPolicies.pdf>

When community members activate an electronic collection of type database, the result is an electronic collection (including its bibliographic record) at the Institution Zone level which is linked to the Community Zone electronic collection.

## Step-by-Step Instructions

The following role can work with contributing database electronic collections:

- Electronic Inventory Operator

### To create and contribute database electronic collections:

- 1 Open the Electronic Collection Editor (**Resource Management > Create Inventory > Add Local Electronic Collection**).
- 2 Enter the name and description information, and select the **Database** option from the **Collection type** drop-down list.

Electronic Collection Editor

Save and continue

Public name\* ProQuest Dissertation

Public name (override)

Description ProQuest Dissertation

Internal description

Collection type Database

Service Type None

Library

Figure 24 - Creating a Database Type of Electronic Collection

- 3 Click **Save and Continue**. The **General Information** tab of the Electronic Collection Editor appears.
- 4 Select the **Additional Information** tab.
- 5 Minimally, enter the **Electronic Collection Level URL** and the **Additional description information** (bibliographic record information). These two pieces of information are required for contributing the database electronic collection to the Community Zone.

Electronic Collection Editor

Electronic Collection name ProQuest Dissertation

Electronic Collection Description General Information Additional Information

Electronic Collection Information

Source

Creator

Alternative Title

Electronic Collection Level URL

Electronic Collection is free? ☐ Not Free ☐ Free

Electronic Collection Proxy Enable ☒ No ☐ Yes

Language

Additional descriptive information

Number of portfolios 0

Available Services

Add Local Service

Figure 25 - Additional Information Tab

- 6 Click **Save**. You need to save the database electronic collection entry before you can contribute it to the Community Zone. If you attempt to contribute to the Community Zone before saving the collection entry, the system will display the following message.

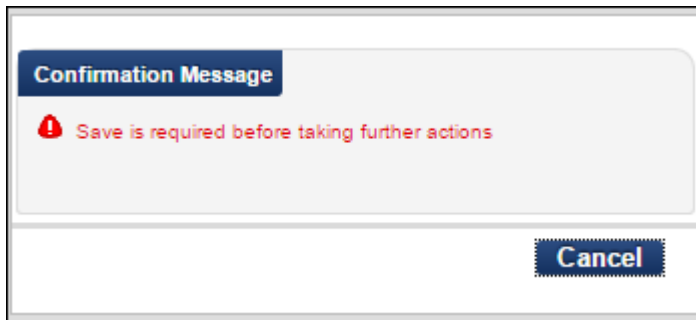


Figure 26 - Save Before Contributing

The database electronic collection that you saved appears on the Repository Search page.

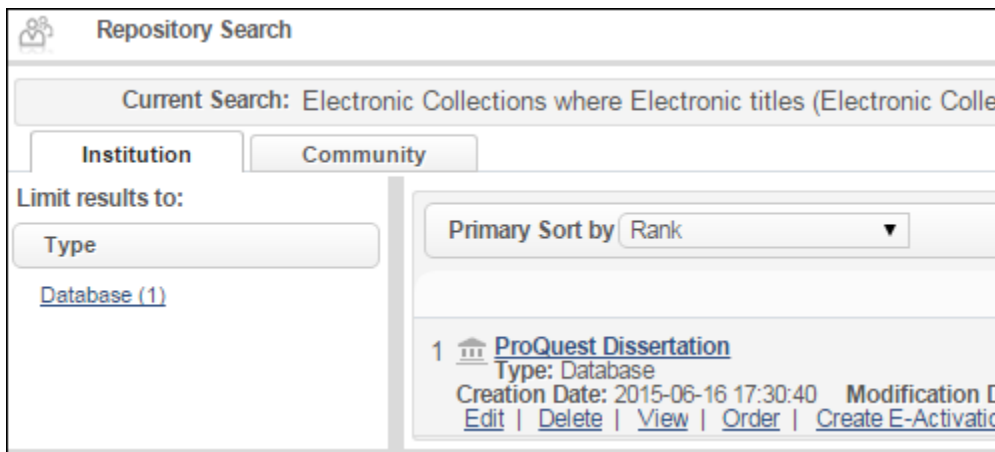


Figure 27 - Saved Database Electronic Collection Appears on the Repository Search Page

- 7 Click **Edit**.
- 8 Click **Contribute and Continue**.

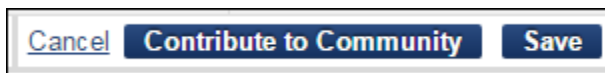


Figure 28 - Contribute to Community Button

The **Contribute to Community** confirmation message appears.

**Confirmation Message**

You are about to contribute the following electronic collection to the community:  
ProQuest Dissertation

Number of portfolios:  
0

Number of bibliographic records:  
1

Indicate how you want to handle matching bibliographic records:  
☒ Use community record 
 ☐ Do nothing

Note to ExLibris

Your contribution will be reviewed by ExLibris. You will be notified of the review results.

Are you sure you want to continue?

**Cancel** **Confirm**

Figure 29 - Contribute to the Community Confirmation Message

- 9 In the case where Alma finds a match in the Community Zone for the contributed bibliographic record, you can choose to use the Community Zone record and replace your existing bibliographic record or do nothing, in which case, the bibliographic record for the electronic collection will be the Community Zone-matched bibliographic record and your own local bibliographic record will remain.
- 10 Click **Confirm**. The system displays a successful contribution message and flags your contribution for review by Ex Libris.

**Electronic Collection Editor**

**i** The collection contribution job submitted successfully.

Figure 30 - Successful Contribution Message

Subsequently, anyone searching the Community tab for your collection will see the **Under Review** status until Ex Libris has completed the review and removed this status label.

Repository Search

Current Search: Electronic Collections where Electronic titles (Electronic Co

Institution **Community**

Limit results to:

Type

[Database \(1\)](#)

Primary Sort by Rank ▼

1	ProQuest Dissertation Contributed by Boston College (Small) Type: Database <a href="#">Activate</a>   <a href="#">Order</a>   <a href="#">Send To Ex Libris</a>	<b>Status: Under Review</b>
---	--	-----------------------------

Figure 31 - Status of Under Review

When other community members activate your database electronic collection (by clicking the **Activate** link in the Community tab search results), the Activation Wizard displays the **Electronic Collection Level URL** and **Additional descriptive information** that you were required to enter in order to contribute your database electronic collection. Also, the same parameters are provided in the **Local Electronic Collection Information** section of the wizard in order to give the Community members the option to override the parameters provided in the Community Zone.

Activation Wizard: Electronic Collection and Services Setup

**Electronic Collection Information**

Electronic Collection name ProQuest Dissertation

Type Database

**Electronic Collection Level URL** <http://www.google.com>

**Additional descriptive information** Maine Memory Network.

**Local Electronic Collection Information**

Public name

Library

Electronic Collection Level URL

Additional descriptive information

Electronic Collection Proxy Enabled ☒ No ☐ Yes

Figure 32 - Activation Wizard for a Database Electronic Collection



# Importing KORMARC Records with External Search

## Description

With the July release, Alma provides support for importing records from KERIS (Korea Education and Research Information Service), a service that contains bibliographic records in both KORMARC and MARC 21 formats. The External Search Resources and External Search Profile capabilities in Alma have been expanded to support importing KERIS records. With this new capability, staff are able to do copy cataloging from KERIS and thereby improve their productivity when creating new records in Alma.

## Step-by-Step Instructions

The following roles can search external resources in the MD Editor:

- Cataloger
- Catalog Manager
- Catalog Administrator

The following roles can configure search external resources for KERIS:

- Cataloger Administrator
- General System Administrator

---

**Note:** To work with KORMARC records in Alma, your Active Registry needs to have the KORMARC bibliographic registry activated by Ex Libris.

---

## To configure External Search Resources for working with KORMARC records in KERIS:

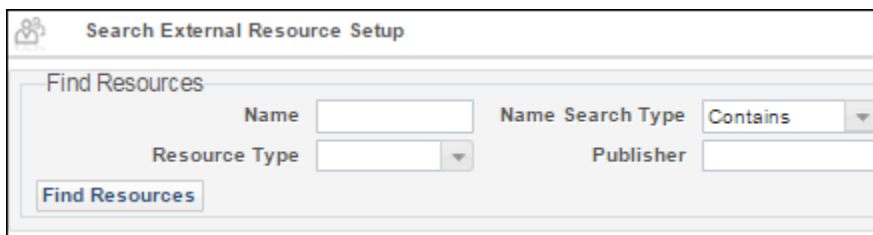
- 1 Click **External Search Resources** from the **Search Configuration** section of Resource Management Configuration (**Resource Management > Resource Configuration > Configuration Menu**). The Search External Resource Setup page appears.



	Resource Name
1	<a href="#">British Library Public Catalog</a>
2	<a href="#">Google Book Search</a>
3	<a href="#">Google Scholar</a>

Figure 33 - Search External Resource Setup Page

- 2 Click **Add External Resource**. The Find Resources section appears.



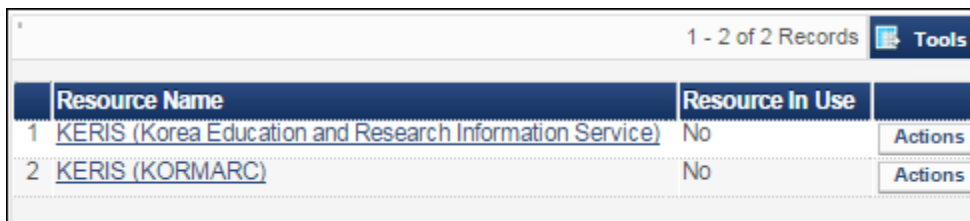
Find Resources

Name  Name Search Type

Resource Type  Publisher

Figure 34 - Find Resources

- 3 In the **Name** parameter, enter KERIS and click **Find Resources**. The system finds the following resources:
  - KERIS (Korea Education and Research Information Service) – MARC 21 record format
  - KERIS (KORMARC) – KORMARC record format



	Resource Name	Resource In Use	
1	<a href="#">KERIS (Korea Education and Research Information Service)</a>	No	<input type="button" value="Actions"/>
2	<a href="#">KERIS (KORMARC)</a>	No	<input type="button" value="Actions"/>

Figure 35 - Find Resources Results

- 4 Select **Actions > Select Resource** to configure the external resource for Alma. The External Resource Details and Institution Details sections appear.

External Resource Details	
Resource ID	XXX03446
Authorized Resource Name	KERIS (KORMARC)
Creator	Korea Education and Research Information Service
Publisher	-
Resource Type	Library
Free/By Subscription	By Subscription
Description	KERIS (Korea Education & Research Information Service, Korean: 한국교육학술정보원, Hanja: 韓國教育學術情報院) is a governmental organization under the South Korean Ministry of Education, Science and Technology that develops, proposes, and advises on current and future government policies and initiatives regarding education in South Korea.
Search Hints	-
URL Site	<a href="http://unicat.riss.kr/index.jsp">http://unicat.riss.kr/index.jsp</a>

Institution Details	
Resource Name	<input type="text" value="KERIS (KORMARC)"/>
Normalization Process	<input type="text"/>
Merge Method	<input type="text"/>
Credentials	<input type="text"/>

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

Figure 36 - External Resource Details and Institution Details

- 5 Select the **Normalization Process** and **Merge Method** that you prefer to use when importing KORMARC records, enter your **Credentials** for accessing KERIS, and click **Save**. The **Resource in Use** column displays **Yes** for the KERIS (KORMARC) setup that you saved.
- 6 If you want to import KERIS records that are stored in the MARC 21 record format, repeat these configuration steps for the **KERIS (Korea Education and Research Information Service)** resource in the Find Resources results list.
- 7 Click **Back** and observe that the KERIS resources have been added to the External Resource List.

 Search External Resource Setup	
External Resource List	
Add External Resource	
	Resource Name
1	<a href="#">British Library Public Catalog</a>
2	<a href="#">Google Book Search</a>
3	<a href="#">Google Scholar</a>
4	<a href="#">KERIS (Korea Education and Research Information Service)</a>
5	<a href="#">KERIS (KORMARC)</a>
6	<a href="#">Library of Congress (United States Library of Congress (LOC))</a>
7	<a href="#">Swinburne Library - Swinburne University of Technology</a>
8	<a href="#">WorldCat (OCLC)</a>

Figure 37 - KERIS Resources Added to the External Resource List

#### To configure KERIS external search profiles for the MD Editor:

- 1 Click **External Search Profile** from the **Search Configuration** section of Resource Management Configuration (**Resource Management > Resource Configuration > Configuration Menu**). The External Search Profile List page appears.

 External Search Profile List	
Add External Search Profile	
	Name
1	<a href="#">British Library</a>
2	<a href="#">Google Book Search + Google Scholar</a>
3	<a href="#">Google Scholar</a>
4	<a href="#">Library of Congress</a>
5	<a href="#">OCLC</a>

Figure 38 - External Search Profile List Page

- 2 Click **Add External Search Profile**. The **General Information** section of the **External Search Profile Details** appears.

External Search Profile Details

1 2 Cancel Next

General Information

Name \*

Description \*

Figure 39 - External Search Profile Details - Step 1

- 3 Enter the **Name** and **Description** for your KERIS (KORMARC) profile and click **Next**. The page with your available External Resource Pool appears.

External Search Profile Details

1 2 Back Cancel Save

Name KERIS KORMARC Profile Description KERIS KORMARC Profile

External Resources Selected

No records were found.

Internal Resources Pool

		Resource Name	
1	<input type="checkbox"/>	Community Catalog	View

Add to Selection

External Resources Pool

Find :  in : Resource Name ▼ Go

1 - 8 of 8 Records Tools

		Resource Name	
1	<input type="checkbox"/>	British Library Public Catalog	View
2	<input type="checkbox"/>	Google Book Search	View
3	<input type="checkbox"/>	Google Scholar	View
4	<input type="checkbox"/>	KERIS (Korea Education and Research Information Service)	View
5	<input type="checkbox"/>	KERIS (KORMARC)	View
6	<input type="checkbox"/>	Library of Congress (United States Library of Congress (LOC))	View
7	<input type="checkbox"/>	Swinburne Library - Swinburne University of Technology	View
8	<input type="checkbox"/>	WorldCat (OCLC)	View

Add to Selection

Figure 40 - External Resources Pool

- 4 Select the **KERIS (KORMARC)** resource from the pool and click **Add to Selection**.

External Search Profile Details	
Name KERIS KORMARC Profile	
External Resources Selected	
1	Resource Name KERIS (KORMARC)

Figure 41 - External Resources Selected Section

- 5 Click **Save**. Your KERIS KORMARC profile is added to the External Search Profile List.

External Search Profile List	
Add External Search Profile	
	Name
1	<a href="#">British Library</a>
2	<a href="#">Google Book Search + Google Scholar</a>
3	<a href="#">Google Scholar</a>
4	<a href="#">KERIS KORMARC Profile</a>
5	<a href="#">Library of Congress</a>
6	<a href="#">OCLC</a>

Figure 42 - KERIS KORMARC Profile Added to the List

- 6 If you want to have a profile for the **KERIS (Korea Education and Research Information Service)** resource, repeat these steps and select the **KERIS (Korea Education and Research Information Service)** resource from the External Resources Pool section. Optionally, you may choose to create a profile where you have both the KERIS (KORMARC) and **KERIS (Korea Education and Research Information Service)** resources selected from the External Resources Pool section.

#### To import KORMARC records using the MD Editor Search External Resource option:

- 1 Open the MD Editor (Resource Management > Cataloging > Open Metadata Editor).
- 2 Select **Tools > Search External Resources**.
- 3 For the **Search Cataloging Profile** option, select the KERIS profile that you created.

File Edit Tools

Search Cataloging Profile **KERIS KORMARC Profile**

Find: Any Field Contains Phrase

AND Title Contains Phrase

AND Creator Contains Phrase

AND Subjects Contains Phrase

AND ISBN Contains Phrase

AND ISSN Contains Phrase

AND System Number Contains Phrase

AND Year of Publication Equals

Cancel Clear Search

Figure 43 - Search Cataloging Profile Selected

- 4 Enter your search criteria and click **Search**. The KERIS search results appear.

File Edit Tools

KERIS (KORMARC)(63)

[Refine Search](#)

1 **미집트. 이스라엘**  
 (Visual material World Digital Entertainment, [서울] :, [2005])  
 Other System Number: (KERIS)BIB000010769838  
[View](#) | [Import](#)

Figure 44 - KERIS Search Results

- 5 Click **Import** for the record that you want. The record appears in the MD Editor editing section and is stored in the **KORMARC Bibliographic** folder that appears in the left pane of the MD Editor.



Figure 45 - KORMARC Record Imported from KERIS

When you import KERIS records using the KERIS (Korea Education and Research Information Service) profile, the records are stored in the MARC21 Bibliographic folder, since using the KERIS (Korea Education and Research Information Service) profile indicates to Alma that you are importing a record in the MARC 21 record format.

- 6 Complete working with this record as you normally would in the MD Editor and click **Save** when you are finished.

## Digital Inventory and Collection Enrichment for Publishing Profiles

### Description

It is now possible to enrich publishing profiles for digital inventory for the purpose of integrating with third-party systems. This enhancement now completes the inventory enrichment of Alma's Publishing platform, so that an institution can publish its inventory incrementally and on an ongoing basis.

### Step-by-Step Instructions

The following roles can create a publishing profile:

- Catalog Administrator
- Repository Administrator



- General System Administrator

### To enrich publishing profiles for digital inventory:

- 1 On the Publishing Profiles page (**Resource Management > Resource Configuration > Configuration Menu > Record Export > Publishing Profiles**), click **Add Profile > General Profile**. The first page of the Publishing Profile Details wizard appears.
- 2 Fill in the fields as described in the **Publishing and Inventory Enrichment** section of the *Alma Integrations with External Systems* guide or the Alma online help.
- 3 Click **Next**. The second page the Publishing Profile Details wizard appears with the new **Digital Inventory Enrichment** and **Collection Enrichment** sections.

The screenshot shows the 'Publishing Profile Details' wizard, Step 2. At the top, there's a header with a user icon, the title 'Publishing Profile Details', step indicators '1' and '2', and buttons for 'Back', 'Cancel', and 'Save'. Below the header, the form is organized into sections:

- Profile Information:** Fields for 'Profile Id', 'Profile Name', and 'General Profile'.
- Bibliographic Normalization:** A section with a dropdown menu labeled 'Correct the data using normalization rules'.
- Physical Inventory Enrichment:** Contains two checkboxes: 'Add Holdings information' and 'Add Items Information'.
- Electronic Inventory Enrichment:** Contains one checkbox: 'Add Electronic Portfolio Information'.
- Digital Inventory Enrichment:** This section is highlighted with a red box. It contains two checkboxes: 'Add Digital Representation Information' and 'Add Remote Representation Information'.
- Collection Enrichment:** This section is also highlighted with a red box. It contains one checkbox: 'Add Collection Information'.

At the bottom of the form, there are buttons for 'Back', 'Cancel', and 'Save'.

Figure 46 – Publishing Profile Details

- 4 Select the following options to add digital, remote, and collection information:
  - Add Digital Representation Information
  - Add Remote Representation Information
  - Add Collection Information

The repeatable fields and subfields that will hold the digital and collection information appear:

Digital Inventory Enrichment

Add Digital Representation Information ☒
Add Remote Representation Information ☒

Repeatable field

Internal Identifier (PID) Subfield

Thumbnail Url Subfield

Public Note Subfield

Usage Type Subfield

Delivery Description Subfield

Delivery Url Subfield

Label Subfield

Library Subfield

Entity Type Subfield

Repository Code Subfield

Originating Object ID Subfield

Linking Parameter 2 Subfield

Linking Parameter 4 Subfield

Repository Name Subfield

Linking Parameter 1 Subfield

Linking Parameter 3 Subfield

Linking Parameter 5 Subfield

Collection Enrichment

Add Collection Information ☒

Repeatable field

Collection Name Subfield

Collection ID Subfield

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

Figure 47 – Digital Inventory and Collection Enrichment Fields

- 5 Indicate the subfields to contain the information, or retain the defaults.
- 6 Click **Save**.

The publishing profile has been enriched with the digital inventory and collection information.

## Publishing OAI-DC in OAI-PMH

### Description

Alma publishing platform now supports OAI-DC, which can be useful when integrating Alma with third-party systems.

### Step-by-Step Instructions

The following roles can create a publishing profile:

- Catalog Administrator
- Repository Administrator

- General System Administrator

### To publish in OAI-DC:

- On the Publishing Profiles page (**Resource Management > Resource Configuration > Configuration Menu > Record Export > Publishing Profiles**), click **Add Profile > General Profile**. The first page of the Publishing Profile Details wizard appears.

**Publishing Profile Details** 1-2 Cancel Next

Profile Id - Profile Name -

Profile Name \*

Profile Description

Status ☒ Active ☐ Inactive

Scheduling  Email Notifications

**Content**

Set name \*

Publish on: ☒ Bibliographic level  
☐ Holdings/Portfolio/Representation level  
☐ Item/Portfolio level

Output format

**Publishing Protocol**

FTP ☐

OAI ☐

Cancel Next

Figure 48 –Publishing in OAI-DC

- In the **Output format** field, select **Dublin Core (Simple)**.
- Fill in the rest of the fields as described in the **Publishing and Inventory Enrichment** section of the *Alma Integrations with External Systems* guide or the Alma online help.
- Click **Next**. The second page of the wizard appears.

**Publishing Profile Details** 1 2 [Back](#) [Cancel](#) [Save](#)

Profile Id - Profile Name General

**Bibliographic Normalization**

Correct the data using normalization rules

**Digital Inventory Enrichment**

Add Digital Representation Information ☒

Add Remote Representation Information ☒

Repeatable field

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

Figure 49 – Digital Inventory Enrichment

Add Digital Representation Information and Add Remote Representation Information are both selected and the Repeatable field is set to dc:identifier, by default.

- 5 Click **Save** to save the publishing profile.

---

**Note:** Print and electronic resources do not have any enrichment available in OAI-DC format.

---

## Mapping Digital Resources to Collections During Import

You can now add an imported bibliographic record of a digital item to an existing collection based on metadata content. This enhancement will allow an improved, dynamic mapping of a resource to a collection as part of the ongoing metadata import processes. This eliminates the need to perform any retrospective, post load collection assignment of materials loaded.

If the **dcterms:isPartOf** fields of the imported DC records contain the name of an existing top-level collection in the MARC 852b field, the imported records are assigned to that collection. If no collections are found, the imported records are assigned to a default collection.

The default collection is defined in the fifth step of the Import Profile Details Wizard (**Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles > Add New Profile**):

Figure 50 – Default Collection Assignment

## Enhanced Sorting for Scandinavian Languages and German

The sorting of results in Scandinavian languages and German has been enhanced to follow the conventions of those languages for special characters.

The following is an example of the enhanced sorting functionality for Swedish characters:

166748	<u>Äventyr i två världar / A. J. Cronin, [övers. av Nils Holmberg]</u>	<b>Book</b> By Cronin, A. J., (Stockholm : Tiden 1952) <b>Edition:</b> 3. uppl. <b>Subject:</b> Physicians personal narratives -- Career mobility personal na <b>Availability:</b> <a href="#">Physical version</a> at <b>SOLNA: cmask; Camera Obscura H</b> <a href="#">Edit</a>   <a href="#">Request</a>   <a href="#">Document Delivery</a>   <a href="#">Holdings</a>   <a href="#">Items</a>   <a href="#">More in</a>
166749	<u>Äventyr med omöjliga figurer / Bruno Ernst, översättning av Pe</u>	<b>Book</b> By Ernst, Bruno, (Stockholm : Fabel 1986) <b>ISBN:</b> 91-7842-069-5 <b>Subject:</b> Fysiologisk psykologi: syn -- Synen -- Psykologi Fysiologisk S <b>Availability:</b> <a href="#">Physical version</a> at <b>HUDDINGE: cno; Do</b> (1 copy, 1 availa <a href="#">Edit</a>   <a href="#">Request</a>   <a href="#">Document Delivery</a>   <a href="#">Holdings</a>   <a href="#">Items</a>   <a href="#">More in</a>
166750	<u>Öar / Anders Källgård ; [fotografier av författaren]</u>	<b>Book</b> By Källgård, Anders, (Göteborg : Korpen 1994 ;) <b>ISBN:</b> 91-7374-624-X (inb.) <b>Series:</b> Öbiblioteket, 1 <b>Subject:</b> Geography personal narratives -- Travel personal narratives <b>Availability:</b> <a href="#">Physical version</a> at <b>SOLNA: cbbot; Böttigersaml.</b> (1 cop <a href="#">Edit</a>   <a href="#">Request</a>   <a href="#">Document Delivery</a>   <a href="#">Holdings</a>   <a href="#">Items</a>   <a href="#">More in</a>

Figure 51 – Sorting for Swedish Characters

---

**Note:** To have this enhancement implemented for your institution, contact Ex Libris Support.

---

## New MARC 21 Indexes

- With the July release, the following new MARC 21 indexes are available in Alma's advanced repository search:
  - Bibliographic
    - 655 x-z (added to the Genre Form index)
    - 034 b, d, e, f, g, j, k, m, n, p, r, s, t, x, y, z (Coded Cartographic Mathematical Data new index)
    - 255 a, b, c, d, e, f, g (Cartographic Mathematical Data new index)
    - 542 r and j (added to the Search – Copy Rights Notes 542 index)
    - 008/021 (Granular Resource Type new index)
  - Holdings
    - 008 - Fixed-Length Data Elements-General Information (NR)  
Example Use Case: Find all records that are in a given location that have a lending policy (position 20) of `will lend` and a reproduction policy (position 21) of `will reproduce`.
- With the July release, the following fields have been indexed in the Keyword search:
  - 505 a, g, r, t and 520 a, b – indexed as Description
  - 773 x, z – indexed as Standard Number

Re-indexing to incorporate these new indexes will begin after the July release has been made available.

- With the July release, a new import profile for LIBRIS is being provided in the Community Zone. The new template is called **Import repository from Libris** and can be accessed by clicking **Import Profiles** from the **Record Import** section of Resource Management Configuration (**Resource Management > Resource Configuration > Configuration Menu**) and selecting the **Community** tab.

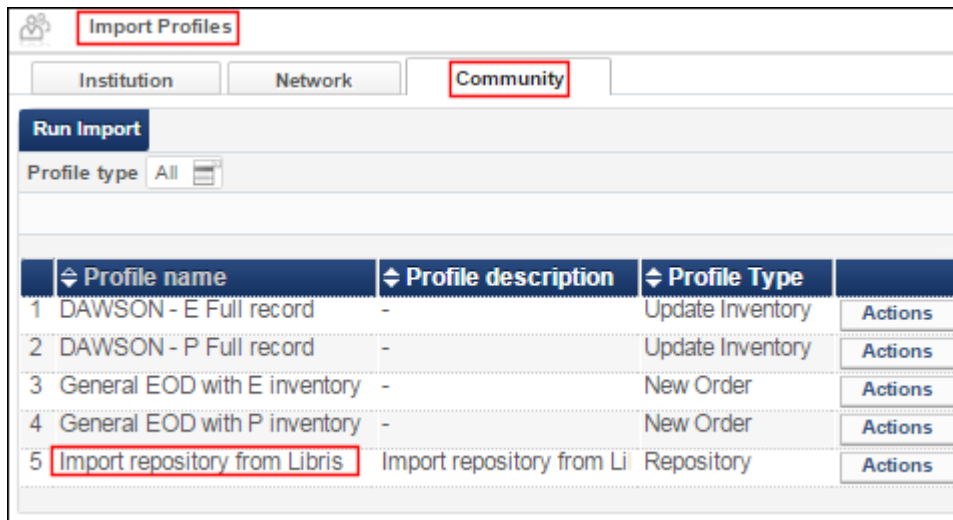


Figure 52 - New LIBRIS Import Profile Template in the Community Tab

## Other Resource Management Enhancements

- In the electronic Activation Wizard, the field Authentication note was changed to **Service authentication note** and the field Public note was changed to **Service public note**.
- The Alma link resolver now uses genre to help prioritize identifiers.
- The sort options available in an **All titles** repository search are now available for **Physical titles**, **Electronic titles**, and **Digital titles** searches in the Institution tab.
- The display of the repository search's title was extended and it now contains values from the following 245 subfields: a,b,n,p,c,f,g,h,k,s. Note that this will take effect after the July re-indexing process has completed.
- When publishing bibliographic records to OCLC, the maximum number of records per file that can now be published is 90K. This complies with OCLC standards (<http://www.oclc.org/content/dam/support/batchload/documentation/using/FTPinstructions.pdf>).

# Fulfillment

The following are enhancements for the Fulfillment functional area in the July 2015 release of Alma:

- Confirmation dialog boxes were added to the following pages:
  - Waiving fines in bulk (**Administration > User Management > Bulk Fine Waiving**)
  - Changing loan due dates in bulk (**Fulfillment > Advanced Tools > Bulk Change Due Dates**)
  - Executing transfer requests (**Fulfillment > Advanced Tools > Transfer Requests**)
- The **Fines and Fees** report now includes the column **Operator Name**, which is the name of the circulation desk operator that received the payment.
- The privilege **VIEW\_LOAN\_DETAILS\_PRIVILEGE** was added to all roles. To disable this privilege for selected roles, contact Ex Libris Support. If disabled, the **Loan** link is replaced by an unlinked loan status for the user (typically a circulation desk operator) on the following pages:
  - Repository search for physical items
  - List of Items
  - Physical Item Editor
- In the **Requests** tab in Manage Patron Services, it is now possible to sort by the **Resource Sharing** column (as well as by creation date).
- The button **Apply Rules** in Request Pickup Configuration (**Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Request Pickup Configuration**) was changed to **Calculate Existing Requests Retroactively**.
- It is now possible to set the scheduling for the Loans - Change to Lost job in Fulfillment Jobs Configuration (**Fulfillment Configuration > Configuration Menu > General > Fulfillment Jobs Configuration**).
- The **Do not pick from shelf** option was added as one of the parameters that can be selected for the Create Work Order for Physical Items job (**Manage Jobs > Run a Job > Create Physical Item Work Orders**).
- Alma Link Resolver requests are now enriched with the following data: publisher, publication date, place of publication. The fields are placed in the following attributes:
  - {rft.publisher} – publisher
  - {rft.pubdate} – publication date
  - {rft.place} – place of publication



These attributes can be used in the General Electronic Services configuration.

- The following information was added to the loan information on the Loan Audit Trail page (accessed from Manage Patron Services):
  - Loan status
  - Process ID
- The Active Hold Shelf list (**Fulfillment > Resource Requests > Active Hold Shelf**) now contains a **Place in Queue** attribute for each hold shelf item, with a link to the requests queue.
- The following modifications were made to request notifications:
  - The request type is now available in all request notifications, under **<notification\_data> > <request> > <request\_type>** in the XML. Possible values are:
    - PATRON\_PHYSICAL
    - GENERAL\_HOLD
    - WORK\_ORDER
    - PHYSICAL\_TO\_DIGITIZATION
    - ELECTRONIC\_TO\_DIGITIZATION
    - LIBRARY\_PHYSICAL\_DIGITIZATION
    - LIBRARY\_ELECTRONIC\_DIGITIZATION
    - STAFF\_PHYSICAL\_DIGITIZATION
    - STAFF\_ELECTRONIC\_DIGITIZATION
    - USER\_PURCHASE\_REQUEST
    - TRANSIT\_FOR\_RESHELVING
    - MOVE\_TO\_PERMANENT
    - MOVE\_TO\_TEMPORARY
    - RESTORE
    - RESOURCE\_SHARING\_PHYSICAL\_SHIPMENT
    - RESOURCE\_SHARING\_P2D\_SHIPMENT
    - RESOURCE\_SHARING\_E2D\_SHIPMENT
    - BOOKING
  - All request notifications now contain more complete metadata for the requested resource. The data is under **<notification\_data> > <request> > <request\_display\_section>** in the XML.

- All request notifications now contain pickup location information. The data is under **<notification\_data>** > **<request>** > **<delivery\_address>** in the XML. The field can contain a library name, a circulation desk name, a department name, or a patron home/work address (depending on the pickup location of the request).
- The Edit Reading List Citation page now contains two tabs: **Citation** and **Notes**. The **Notes** tab enables you to add notes to a citation.

# Resource Sharing

The following sections describe the features provided for the Resource Sharing functional area in the July 2015 release of Alma.

## Converting Hold Requests to Resource Sharing Borrowing Requests

### Description

When your library is not able to, or willing to, fulfill a hold request, you can now convert the request to a resource sharing borrowing request.

The link **Convert to Resource Sharing** appears on the Pick Up Requested Resources (**Fulfillment > Resource Requests > Pick From Shelf**) page beneath hold requests. On this page, if there are multiple requests aggregated into a single request, all of these requests are converted with this action.

In addition, the link appears on the Resource Request Monitoring (**Fulfillment > Resource Requests > Monitor Requests & Item Processes**) page beneath hold requests when all of the following are true:

- It is a **Hold** or **General Hold** request (request for holding without item)
- The workflow step is **Not Activated**, **Pickup-From Shelf**, or **Waiting for Remote Storage**.
- The user has the new **CONVERT\_HOLD\_TO\_BORROWING** privilege (see the **Role Privileges** table). This privilege was added by default to the **Fulfillment Services Manager** role. Contact Ex Libris to add this privilege to other roles.

When you click the link, Alma converts the request if:

- The request's **Date Needed By** has not passed.
- The requested pickup location is supported for resource sharing requests.

### Step-by-Step Instructions

The following role can convert a hold request to a resource sharing request:

- Fulfillment Services Manager

## To convert a hold request to a resource sharing request:

- 1 Locate the required request (**Fulfillment > Resource Requests > Monitor Requests & Item Processes** or **Fulfillment > Resource Requests > Pick From Shelf**).

The screenshot shows the 'Resource Request Monitoring' interface. On the left, there are filters for 'Material Type', 'Workflow Step', 'Request/Process Type', 'Request Date', 'Date Needed By', and 'Workflow Step Status'. The main area displays a list of requests. The second request, 'The Sage handbook of qualitative research /', has a red box around the 'Convert to Resource Sharing' link in its action menu.

ID	Title	Requester	Material Type	Pickup Location	Request Date	Process Status	Process Date	Expiration Date	Request Type	Actions
2214965541830001421	An advanced review of speech-language pathology : preparation for the PRAXIS and comprehensive examination /		Book	Callier Center Library--Dallas	09/11/2013	In Process	11/21/2013	11/22/2013	Transit for reshelving	Move To Task List   View Audit Trail   Update Expiry   Mark as Missing   Print Slip   View title in search
2214971281890001421	The Sage handbook of qualitative research /	Negash, Beza	Book	Eugene McDermott Library	09/12/2013	In Process	10/11/2013	10/12/2013	Transit for reshelving	Move To Task List   View Audit Trail   Edit   Cancel   Mark as Missing   View title in search   <b>Convert to Resource Sharing</b>
2214988676920001421	Introduction to the theory of nonparametric statistics /	Narayanan, Umamaheshwaran	Book	Eugene McDermott Library	09/16/2013	In Process	10/11/2013	10/12/2013	Transit for reshelving	Move To Task List   View Audit Trail   Edit   Cancel   Mark as Missing   View title in search   Convert to Resource Sharing
2215181134640001421	Poussin et la construction de l'Antique [SUPPRESSED] /		Book	Eugene McDermott Library	10/11/2013	In Process	10/11/2013	10/12/2013	Transit for reshelving	Move To Task List   View Audit Trail   Edit   Cancel   Mark as Missing   View title in search   Convert to Resource Sharing

Figure 53 - Hold Request in List

- 2 Click **Convert to Resource Sharing** underneath the request and click **Confirm** in the confirmation dialog box. The request is converted to a resource sharing request.

## Restricting Resource Requests to a Reading Room

### Description

Alma now supports restricting a patron's access for a received item from a resource sharing request to a reading room. When this feature is used, the patron's requested pickup location is replaced with the selected reading room location, thereby restricting the item's usage to a reading room only.

Several fields were added at different locations in the Alma user interface to support this feature.

## Step-by-Step Instructions

The following roles can restrict access to a patron's request to the reading room:

- Fulfillment Services Manager
- Fulfillment Services Operator

**To restrict access to a patron's request to the reading room:**

- 1 You can perform this action on any of three pages in the UI:
  - When editing a borrowing request (**Fulfillment > Resource Sharing > Borrowing Requests**, click **Edit** beneath a request), select **For Reading-Room Use Only** in the **Request Attributes** pane.

The screenshot shows the 'Request Attribute' form with the following fields and values:

- Title: Geoscience Canada.
- Specific Edition Only: ☒
- Requester\*: Daren, Aaron
- 252541
- Owner\*: Resource Sharing Library
- Partner: Boston College SHR
- Request Status: Renew requested
- External identifier: 23863889
- Internal Identifier: 426859990000121
- Requested Format: Physical
- Requested Media: Any
- Allow Other Format: ☐
- Preferred Send Method:
- Date Needed By:
- Delivery Location: ☒ Deliver to library ☐ Alternative address
- Requested Pickup Location\*: Resource Sharing Library
- For Reading-Room Use Only**: ☐ (highlighted with a red rectangle)
- Shipping Cost: USD
- Willing to Pay: ☐
- Agree to Copyright terms: ☒
- Needs patron information: ☐
- Request Note: Have a nice day
- Maximum Fee:

Figure 54 - Editing a Borrowing Request

Note that the name of the **Pickup At** field is now **Requested Pickup Location**.

- When receiving a borrowing request (**Fulfillment > Resource Sharing > Borrowing Requests**, click **Receive** beneath a request), select **For Reading-Room Use Only** in the **Received Items** pane.

**Received Items**

Automatically notify patron ☒

Received format ☐ Digital ☒ Physical ☐ Physical non-returnable

Title Geoscience Canada.

External identifier 23863889

Temporary barcode \* RS-23863889

Item policy Four Day Loan

Location Borrowing Resource Sharing Requests

Fulfillment note

Due date

Internal note

Note to partner

**For Reading-Room Use Only** ☐

Figure 55 - Receiving a Borrowing Request

- When receiving an item on the Receive Items page (**Fulfillment > Resource Sharing > Receiving Items**), enter the item information, click **OK**, and select **For Reading-Room Use Only** in the dialog box.

Title 121111111

External identifier EXLDEV10009887

Temporary barcode \* RS-EXLDEV10009887

Item policy Four Day Loan

Location Borrowing Resource Sharing

Fulfillment note

Due date

Internal note

**For Reading-Room Use Only** ☐

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

Figure 56 - Dialog Box on Receiving an Item

- When editing or when receiving a borrowing request, after you select **For Reading-Room Use Only**, the field **Actual Pickup Location** appears. Select the pickup location.

# Support for a Resource Sharing Renewal Fee

## Description

Alma now supports charging a fee when a patron renews a resource sharing item. The renew fee is added to the Borrowing Resource Sharing Terms of Use and automatically applied for any resource sharing renewal.

The fee is charged only when the item is renewed, not when the renew request is made, since the request may be rejected.

## Step-by-Step Instructions

The following roles can add a resource sharing renew fee to the Terms of Use:

- Fulfillment Administrator
- General System Administrator

### To add the resource sharing renew fee clause to the Terms of Use:

- 1 Ensure that you are logged in to a resource sharing library.
- 2 Edit a Terms of Use of type **Borrowing Resource Sharing** on the Terms of Use Management page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Terms of Use and Policies**). The Terms of Use Details page appears.

For more information, see **Configuring Terms of Use** in the *Alma Fulfillment Guide* or Alma online help.

Terms of Use Details		
Name *	Default terms of use	
Description	Default Outgoing Resource Sharing Requests To Other Institutions	
<a href="#">Tools</a>		
Allow Resource Sharing Requesting	Resource Sharing Allowed (Allow resource sharing requests)	<a href="#">Actions</a>
Resource Sharing Fee	No Resource Sharing Fee (No fee for resource sharing requests)	<a href="#">Actions</a>
Renew Fee	No Renewal Fee (Default No Renewal Fee)	<a href="#">Actions</a>
Resource Sharing Requests Limit	No Resource Sharing Limit (No resource sharing limit)	<a href="#">Actions</a>
Pickup Locations	Anywhere (Default value for Pickup - Anywhere)	<a href="#">Actions</a>
Personal delivery	Personal Delivery - None (Do not deliver items at all)	<a href="#">Actions</a>
Personal delivery fee	Personal Delivery Fee - No Fee (Personal delivery is not charged with a fee)	<a href="#">Actions</a>
<a href="#">Tools</a>		
<a href="#">Cancel</a> <a href="#">Next</a>		

Figure 57 - Renew Fee in Borrowing Resource Sharing Terms of Use Details

- 3 Select a **Renew Fee** policy from the existing list. To create a new policy:
  - a Select **Actions > Edit Policy via Add** in the **Renew Fee** line. The Policy Details page appears.

Policy Details

You are configuring: University of Texas at Dallas

Policy Type: Renew Fee

Policy Name: No Renew Fee

Policy Description:

Value Type: ☐ None ☒ Other

Value: 0.0

Default Policy: ☒ False ☐ True

Cancel Save

Figure 58 - Policy Details

- b Enter the new policy name and description, select **Other** for **Value Type**, and enter the value of the renew fee in the **Value** field.
  - c Select whether this is the default policy for resource sharing renewals.
  - d Click **Save**. The new policy is added. Ensure that the new policy is selected.
- 4 Click **Next** and click **Save**. The Terms of Use is updated.

### To manage the resource sharing renew fee for a specific user:

- The renew fee appears in the **Fines/Fees** tab on the User Details page. You can tell the difference between a standard loan renew fee and a resource sharing renew fee by the value in the **Comment** column.

User Details

Internal Name Implementer, Ex Libris User group Pullman Staff Primary identifier ext\_impl Record type Staff

General Information Contact Information Identifiers Notes Blocks Fines/Fees Demerits 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

	Creation Date	Fine/Fee type	Status	Status Date	Comment	Fee Owner	Title	Item Barcode	Orig
1	06/08/2015	Renew fee	Active	06/08/2015	External ID: 01ALLUANCEWSU0007008	Holland and Terrell Libraries	test_renew	453463465f	

Waive Execute

Currently filtered balance 10.00 USD

Currently filtered disputed balance 0.00 USD

Figure 59 - Resource Sharing Renew Fee in User Details

- You can refund a resource sharing renew fee like any other refundable fee.
- Additional configuration is available in the **Fine Fee Type Definition** table (**Administration > User Management Configuration > Configuration Menu > Patron Charges > Fines/Fees Behavior**). In this table, changes to **Renew Fee** apply to both standard loan and resource



sharing renew fees. For more information, see **Patron Charges** in the *Alma Administration Guide* or Alma online help.

## Other Resource Sharing Enhancements

- A new link was added to the Tasks menu: **Borrowing requests with active notes**. This link leads to the Resource Sharing Borrowing Requests page, filtered by **Notes from Partner**.
- A **Refresh** button was added to the borrowing and lending task lists.
- The Send Overdue Message to Borrower job name was changed to **Send Overdue Message to Resource Sharing Borrowing Partner**.
- As part of the locate process, Alma can now check whether serials are requestable and available.
- The ISO symbol field was renamed **Symbol** on the Organization Unit Details Summary tab (**Administration > General Configuration > Configuration Menu > Add a Library or Edit Library Information; Libraries** tab, edit resource sharing library).
- When the Primo resource sharing form defaults to the type **Article**, the **Format** under **Delivery Information** defaults to **Digital** and the **Delivery location** defaults to **Alternative address**.

# Administration

The following sections describe the features provided for the Administration functional area in the July 2015 release of Alma.

## Sending Notifications to Users

### Description

Alma can send notifications to a user-defined set of users.

The job **Update User Info** was changed to **Update/Notify Users**. The new **User Notification Types** table includes a default notification indicating that the receiver's password was changed. You can add additional notification types.

When running an **Update/Notify Users** job (see below), you can select the notification type.

### Step-by-Step Instructions

The following roles can configure user notifications:

- General System Administrator
- Letter Administrator

The following roles can run the **Update/Notify Users** job:

- User Manager
- User Administrator

#### To configure the notification types and letters:

- 1 Add, edit, or remove notification types in the **User Notifications Types** table (**Administration > User Management Configuration > Configuration Menu > General > User Notification Types**).

Code Table

CancelCustomize

You are configuring: Princeton University

Organization Unit List

Table Information

Sub System

USER\_MANAGEMENT

Table Name

User Notifications Types

Updated By

-

Updated on

-

Table Description

List of all the user notification types

Table code

UserNotificationsTypes

List of all the user notification types

Tools

Display	Order	Code	Description	Default Value	Updated By	Last Updated	
1		NOTIFY_PASSWORD_CHANGE	Notify password change		-	-	Delete

Create a New Code Table Row

Quick Add

Code

Description

Default Value

No

Add Row

CancelCustomize

**Figure 60 - User Notification Types**

2 When you are done, click **Customize**.

If you added a notification type, you will require its code in the following step.

3 Configure the User Notifications Letter and its fields for the Notify Password Change letter, as required:

- **Administration > General Configuration > Configuration Menu > General Configuration > Letter Emails**; select **Actions > Customize** in the **User Notifications Letter** row.

Add any required fields for any additional notification types you added in step 1.

Code Table Cancel Customize

You are configuring: Princeton University [Organization Unit List](#)

---

**Table Information**

Sub System: LETTER	Table Name: User Notifications Letter
Updated By: -	Updated on: -
Table Description: <input type="text" value="User Notifications Letter"/>	Table code: UserNotificationsLetter

**User Notifications Letter** Tools

	Enabled	Display	Order	Code	Description	Default Value	Updated By	Last Updated
1	<input checked="" type="checkbox"/>			Line_1	Your password has been changed to:	<input type="radio"/>	-	-
2	<input checked="" type="checkbox"/>	<input type="button" value="▲"/>		subject	Library Notice	<input type="radio"/>	-	-
3	<input checked="" type="checkbox"/>	<input type="button" value="▲"/>		Line_3	empty	<input type="radio"/>	-	-
4	<input checked="" type="checkbox"/>	<input type="button" value="▲"/>		Line_4	empty	<input type="radio"/>	-	-
5	<input checked="" type="checkbox"/>	<input type="button" value="▲"/>		Line_5	empty	<input type="radio"/>	-	-
6	<input checked="" type="checkbox"/>	<input type="button" value="▲"/>		Line_6	empty	<input type="radio"/>	-	-
7	<input checked="" type="checkbox"/>	<input type="button" value="▲"/>		Line_7	empty	<input type="radio"/>	-	-
8	<input checked="" type="checkbox"/>	<input type="button" value="▲"/>		Line_8	empty	<input type="radio"/>	-	-
9	<input checked="" type="checkbox"/>	<input type="button" value="▲"/>		Line_9	empty	<input type="radio"/>	-	-
10	<input checked="" type="checkbox"/>	<input type="button" value="▲"/>		Line_10	empty	<input type="radio"/>	-	-
11	<input checked="" type="checkbox"/>	<input type="button" value="▲"/>		Line_11	empty	<input type="radio"/>	-	-
12	<input checked="" type="checkbox"/>	<input type="button" value="▲"/>		Line_12	empty	<input type="radio"/>	-	-
13	<input checked="" type="checkbox"/>	<input type="button" value="▲"/>		Line_13	empty	<input type="radio"/>	-	-
14	<input checked="" type="checkbox"/>	<input type="button" value="▲"/>		Line_14	empty	<input type="radio"/>	-	-
15	<input checked="" type="checkbox"/>	<input type="button" value="▲"/>		Line_15	empty	<input type="radio"/>	-	-
16	<input checked="" type="checkbox"/>	<input type="button" value="▲"/>		Line_16	empty	<input type="radio"/>	-	-
17	<input checked="" type="checkbox"/>	<input type="button" value="▲"/>		Line_17	empty	<input type="radio"/>	-	-
18	<input checked="" type="checkbox"/>	<input type="button" value="▲"/>		Line_18	empty	<input type="radio"/>	-	-
19	<input checked="" type="checkbox"/>	<input type="button" value="▲"/>		Line_19	empty	<input type="radio"/>	-	-
20	<input checked="" type="checkbox"/>	<input type="button" value="▲"/>		Line_20	empty	<input type="radio"/>	-	-
21	<input checked="" type="checkbox"/>	<input type="button" value="▲"/>		Dear	Dear Sir/Madam	<input type="radio"/>	-	-
22	<input checked="" type="checkbox"/>	<input type="button" value="▲"/>		Sincerely	Sincerely	<input type="radio"/>	-	-
23	<input checked="" type="checkbox"/>	<input type="button" value="▲"/>		addressFrom	Your.Department@organization.com	<input type="radio"/>	-	-
24	<input checked="" type="checkbox"/>	<input type="button" value="▲"/>		letterName	Library Notice	<input type="radio"/>	-	-
25	<input checked="" type="checkbox"/>	<input type="button" value="▲"/>		Line_2	You may change your password in your nex	<input type="radio"/>	-	-

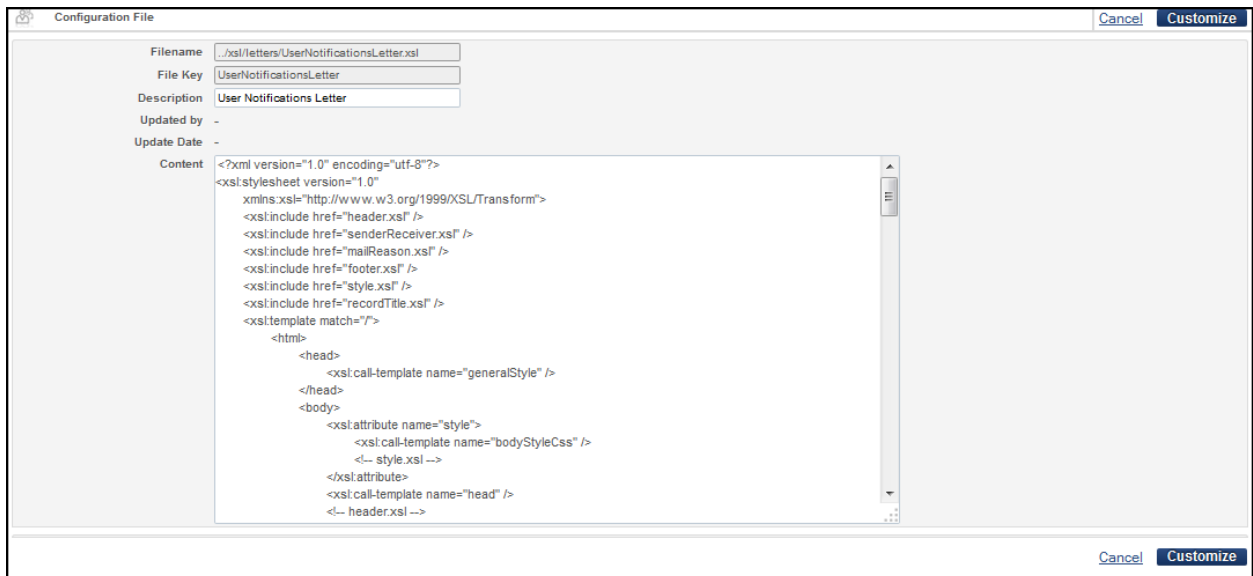
Tools Cancel Customize

Figure 61 - User Notifications Letter Fields

- Administration > General Configuration > Configuration Menu > General Configuration > Customize Letters; click **Customize** in the **User Notifications Letter** row.

Add any required XSL clauses for the new fields. For example, this is a conditional clause that inserts fields for the out-of-the-box notification NOTIFY\_PASSWORD\_CHANGE:

```
<xsl:choose>
  <xsl:when test="notification_data/notification_type =
'NOTIFY_PASSWORD_CHANGE' ">
    <tr>
      <td>
        <h3>@@Line_1@@</h3>
        <xsl:value-of select="notification_data/temp_password" />
      </td>
    </tr>
    <tr>
      <td>
        <h3>@@Line_2@@</h3>
      </td>
    </tr>
  </xsl:when>
</xsl:choose>
```



**Figure 62 - User Notifications Letter**

For more information on the above steps, see **Configuring Alma Letters** in the *Alma Administration Guide* or Alma online help.

### To send notifications to users:

- 1 Create the set of users to update; for more information, see **Users Sets** in the *Alma Administration Guide* or Alma online help.
- 2 Run an **Update/Notify Users** job; for more information, see **Running Jobs on Defined Sets** in the *Alma Administration Guide* or the Alma online help.

While configuring the job parameters, select the **Send Notification to User** check box and select the notification type to send to the users.

**Figure 63 - Update/Notify Job Parameters**

The users are notified.

## Converting Users from External to Internal in Bulk

### Description

Alma now enables you to convert a set of external patrons to be internal users. This is useful, for example, when a group of patrons is graduating from your university and will no longer be managed by the university system but you want to allow them to continue using the library. These patrons can continue to use Alma and retain their usage history, including any requests, checked-out books, fines, and so forth.

After making bulk changes on the set of patrons, Alma sets all of their passwords to `firstname_lastname` and (if the user selects to notify the users) notifies the users of the change in their credentials.

### Step-by-Step Instructions

The following role can convert users from external to internal in bulk:

- User Manager
- User Administrator

## To convert users from external to internal in bulk:

- 1 Create the set of external users to convert; for more information, see **Users Sets** in the *Alma Administration Guide* or Alma online help.
- 2 Run an **Update/Notify Users** job; for more information, see **Running Jobs on Defined Sets** in the *Alma Administration Guide* or Alma online help. While configuring the job parameters:

- a Select the **Set Account To** check box and select **Internal**.

Note that the **Set Account To** check box replaces the previous **Set to External Account** check box. Also, **Field Type** was changed to **Added/Changed Field**.

- b Optionally, select the **Send Notification to User** check box and select the notification type to notify the users after the change.
- c Select or enter all other required parameters and run the job.

Figure 64 - Update/Notify Job Parameters

The users are converted to internal users. If you selected to notify the users, notifications are sent to users whose accounts are changed.

## New HealthCheck Tool Tests

The following new HealthCheck tool tests have been added for the Acquisitions functional area:

- **Not able to create an invoice (manually and/or batch)** – Checks whether it is possible to create an invoice.

- **Not able to export an invoice for payment** – Checks whether it is possible to export invoices for payment.
- **Physical material can't be received** – Checks that all libraries are assigned to an acquisition department and that an operator is assigned to the department.
- **Global e-resources are not activated** – Checks the database to see that portfolios and e-collections have been activated and that there are operators in the library that can activate e-resources.

## Other Administration Enhancements

- A Confirmation dialog box was added to the Purge User Records page (**Administration > User Management > Purge User Records**).
- Demerits information for a user is now displayed in the **Demerits** tab on the User Details page. The tab is displayed only for Alma users with the privilege **VIEW\_DEMERITS\_TAB\_PRIVILEGE**. The new privilege was added to the following roles as disabled:
  - Circulation Desk Manager
  - Circulation Desk Operator
  - Circulation Desk Operator - Limited
  - Fulfillment Administrator
  - Fulfillment Services Manager
  - Fulfillment Services Operator

To enable this privilege for one of these roles, contact Ex Libris Support.



# Collaborative Networks and Multicampus Institutions

The following sections describe the features provided for the collaborative networks and multicampus institutions functional areas in the July 2015 release of Alma.

## Monitoring Collaborative Network Jobs Across Institutions

### Description

The Network Zone can now monitor the jobs run by member institutions of a collaborative network.

### Step-by-Step Instructions

The following roles have access to the Monitor Jobs page and can monitor the jobs that are relevant to their roles:

- General System Administrator
- Repository Manager
- Catalog Manager
- Catalog Administrator
- Requests Operator
- Purchasing Operator
- Purchasing Manager
- Acquisitions Administrator

### To access this feature:

From the Network Zone, open the Monitoring Jobs page (**Administration > Manage Jobs > Monitor Jobs**). The following enhancements have been made to the Running and History tabs:

- A new **Institution Name** filter has been added that allows you to filter the results to view jobs run by a member institution, the Network Zone, or all institutions.
- The existing filter has been renamed **Job Category** filter.

Monitor Jobs

Scheduled

SP Scheduled

Running

History

Submit Date from

06/08/2015

to

06/09/2015

Job Category Filter

All

Institution Name Filter

All

Refresh

All

Network Zone

Member 1

Member 2

	◆ Name	◆ Job ID	◆ Job Category
1	<a href="#">Distribute network Acquisition changes to men</a>	24743772460001451	Acquisition
2	<a href="#">Distribute network Acquisition changes to members</a>	24743749470001451	Acquisition
3	<a href="#">Distribute network Acquisition changes to members</a>	24743742520001451	Acquisition
4	<a href="#">Distribute network Acquisition changes to members</a>	24743668730001451	Acquisition

Figure 65 – Monitor Jobs – History Tab


Monitor Jobs			
Scheduled		SP Scheduled	
Running		History	
Job Category Filter All		Institution Name Filter All	
Refresh			
◆ Name	◆ Job Category	◆ Creator	
1 <a href="#">Distribute central resource sharing configuration</a>	Fulfillment	exl_support 	

Figure 66 – Monitor Jobs – Running Tab

### Notes:

- The Network Zone cannot abort a job run by member institutions.
- For the Network Zone, report and event data is read-only; there are no Actions buttons or links inside the report.

## Facilitate Switching Between Institutions

### Description

Members of a collaborative network can now easily switch between member institutions for which they have a user account.

In collaborative networks that use SAML single sign-on (SSO), users can switch between member institutions without having to log in separately to each institution.

## Step-by-Step Instructions

### To access this feature:

A new **Institutions** link now appears at the top of all pages in Alma for the Network Zone and member institutions in a collaborative network.



Figure 67 – Institutions Link

- 1 Click the **Institutions** link to display a drop-down list of all the institutions in the collaborative network.
- 2 Select the member institution to which you want to log in.

The Alma home page of the member institution you selected opens.

---

**Note:** You must have an account in the member institution to log in to it.

---

Additionally, you can configure a widget for the Alma home page that allows you to switch between member institutions.

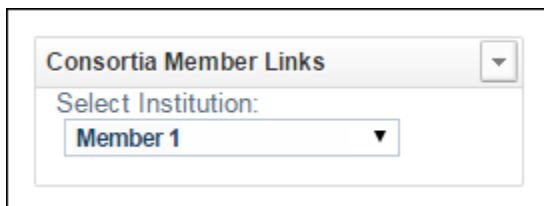


Figure 68 – Institutions Link - Widget

For more information about configuring widgets, see the **Widgets** section of the *Alma Administration Guide* or the Alma online help.

## Central Cataloging Enhancements

### Description

With the July release, Alma provides additional support for collaborative networks that, as a central cataloging policy, only permit cataloging in the Network Zone, not the Institution Zone. With this new capability, Alma provides a new parameter setting for central record

management that prevents institutions from creating local Institution Zone records. This affects the following areas where local Institution Zone records can be created:

- MD Editor new record creation/copy cataloging (import from an external resource)
- Metadata Import
- Quick Cataloging
- MARC Record Simple View copying

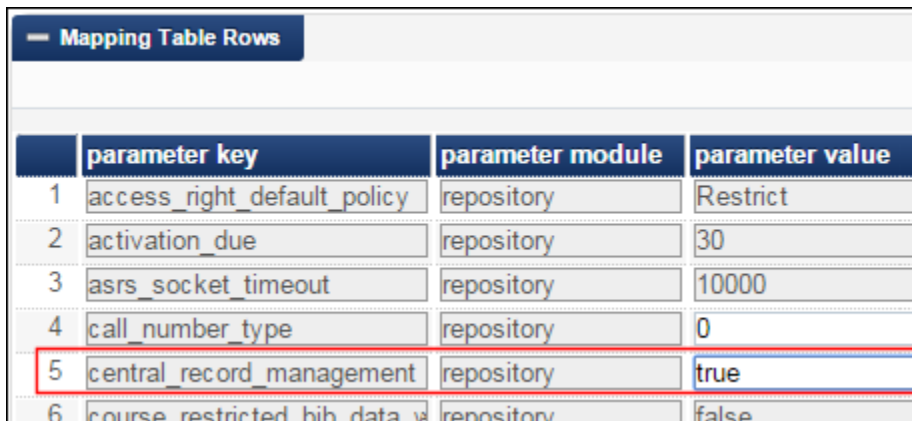
## Step-by-Step Instructions

The following roles can view/manage the new parameters related to central cataloging in the Network Zone:

- Catalog Administrator
- General System Administrator

### To set the `central_record_management` parameter from the Network Zone:

- 1 In the **General** section of Resource Management Configuration (**Resource Management > Resource Configuration > Configuration Menu**) click **Other Settings** to open the **Mapping Table** page.
- 2 Click **Customize** for the parameter key `central_record_management`.
- 3 Set the parameter value to `true`.



	parameter key	parameter module	parameter value
1	access_right_default_policy	repository	Restrict
2	activation_due	repository	30
3	asrs_socket_timeout	repository	10000
4	call_number_type	repository	0
5	central_record_management	repository	true
6	course_restricted_hib_data_v	repository	false

Figure 69 - `central_record_management` Parameter Set to True

The **Customize** button changes to **Actions** with the following options:

- Manage in Network
- Restore

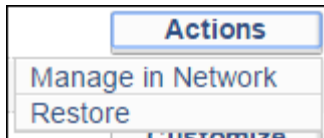


Figure 70 - Network Zone Actions Button

- 4 Select **Manage in Network** to identify this setting for distribution to the member institutions.

	parameter key	parameter module	parameter value	free text description	Managed in Network
1	access_right	repository	Restrict		
2	activation_due	repository	30		
3	asrs_socket_t	repository	10000		
4	call_number_t	repository	0		
5	central_record	repository	true		<input checked="" type="checkbox"/>
6	course_restric	repository	false		

Figure 71 - Network Zone Managed in Network Setting

- 5 Click **Save and Distribute** to have this setting copied to the member institutions (along with all the other settings identified as **Managed in Network**).

**To view the MD Editor changes when central\_record\_management is set to true:**

- 1 Open the MD Editor (**Resource Management > Cataloging > Open Metadata Editor**).
- 2 Select **File > Options**.

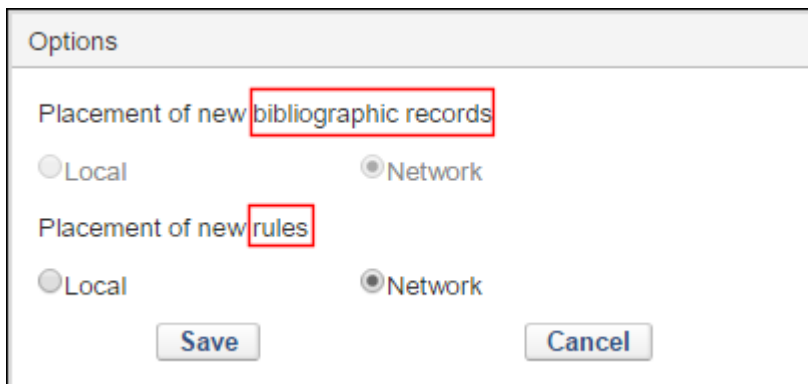


Figure 72 - MD Editor File Menu > Options

The placement of bibliographic records and rules can be handled independently. Since `central_record_management` is set to `true`, the placement of bibliographic records defaults to the Network Zone and cannot be changed, while the placement of rules can be done either locally or in the Network Zone.

### 3 View the File menu.

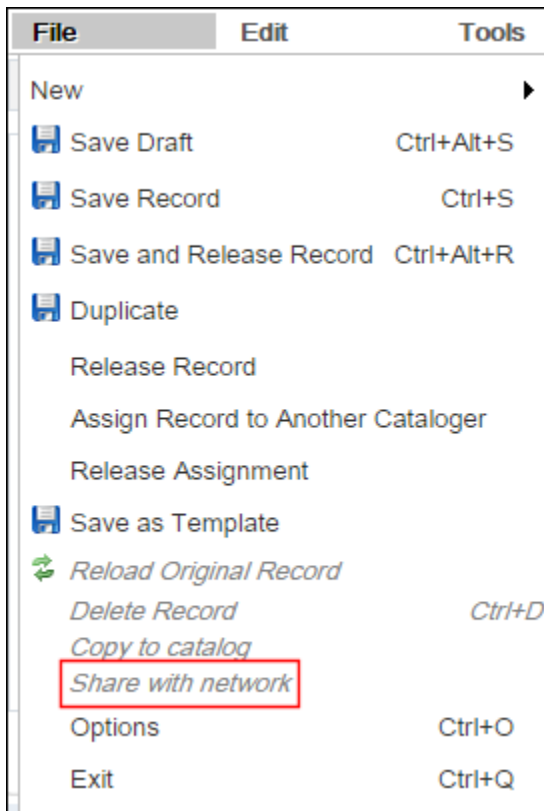


Figure 73 - MD Editor File Menu > Share with Network

The Share with Network option remains a part of the menu for times when member institutions may have local (Institution Zone) records that perhaps came across as part of the migration process and those records need to be shared with the Network Zone. This is not an available option for new records, and usually this is an inactive option when `central_record_management` is set to true.

#### To view the handling of local portfolios and their related bibliographic records when `central_record_management` is set to true:

- 1 Open the New Portfolio page (**Resource Management > Create Inventory > Add Local Portfolio**).
- 2 Create a new (local) portfolio and click **Save**. The new (local) portfolio appears in the Institution tab on the Repository Search page with the local icon.

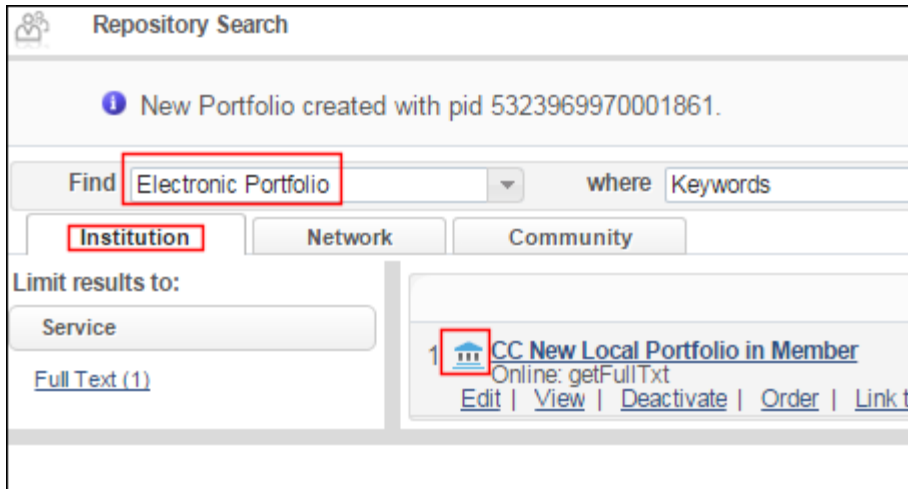


Figure 74 - New Local Portfolio in the Member Institution with central\_record\_management Set to True

- 3 Complete an **All titles** search for the new local portfolio in the Institution tab. The bibliographic record appears in the Institution tab on the Repository Search page with the Network icon showing that the bibliographic record for the newly created local portfolio was stored in the Network Zone.

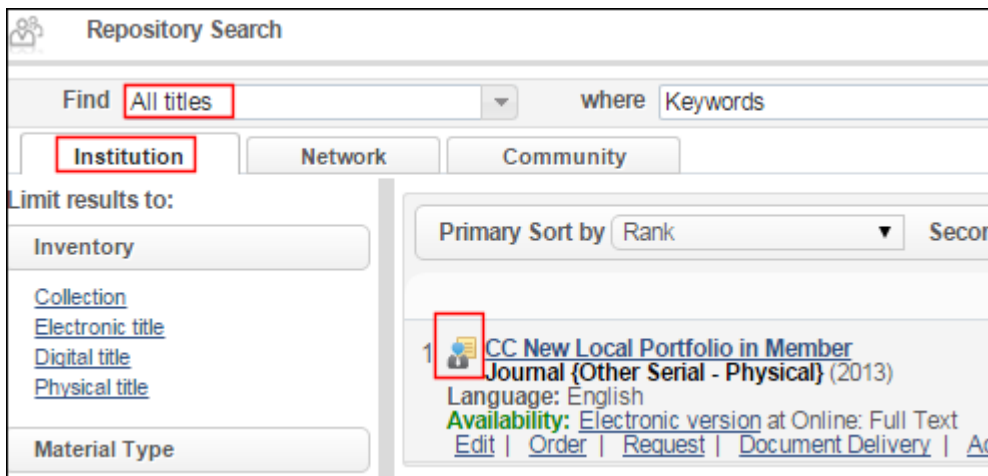


Figure 75 - All Titles Search for a New Local Portfolio in the Member Institution with central\_record\_management Set to True

- 4 Complete an **All titles** search for the new local portfolio in the **Network** tab. The bibliographic record appears in the Network tab on the Repository Search page with the local icon indicating that the institution has inventory associated with the network bibliographic record.

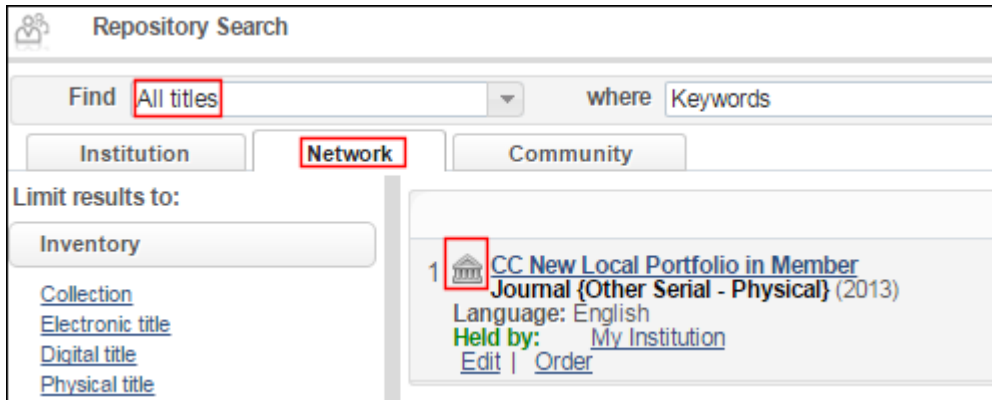


Figure 76 - All Titles Search in the Network Tab for a New Local Portfolio in the Member Institution with central\_record\_management Set to True

To view the handling of local portfolios and their related bibliographic records when central\_record\_management is set to false:

- 1 Open the New Portfolio page (Resource Management > Create Inventory > Add Local Portfolio). The new parameter, **Placement of new record**, appears enabling the user to select either the **Network** or **Institution** for the placement of the bibliographic record.

Figure 77 - Add New Local Portfolio with central\_record\_management Set to False

- 2 Select **Network** or **Institution** for your new title and complete the remainder of the parameters as you normally would.



To view the quick cataloging (Add Physical Item) changes when `central_record_management` is set to true:

- 1 Open the Quick Cataloging page (**Resource Management > Create Inventory > Add Physical Item**) by selecting **New** for **Choose Holding Type** and click **Choose**. Or open the Quick Cataloging page from patron fulfillment (**Fulfillment > Checkout/Checkin > Manage Patron Services**, enter the patron's ID, click **Go**, and click **Create Item**).

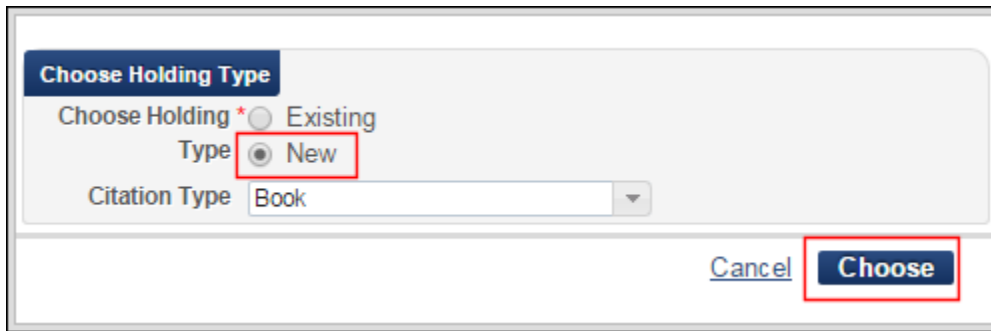


Figure 78 - Add Physical Item in the Member Institution with the `central_record_management` Set to True

- 2 Create a new (local) item and click **Save**.
- 3 Complete a **Physical items** repository search for the new (local) item. It appears in the Institution tab on the Repository Search page.

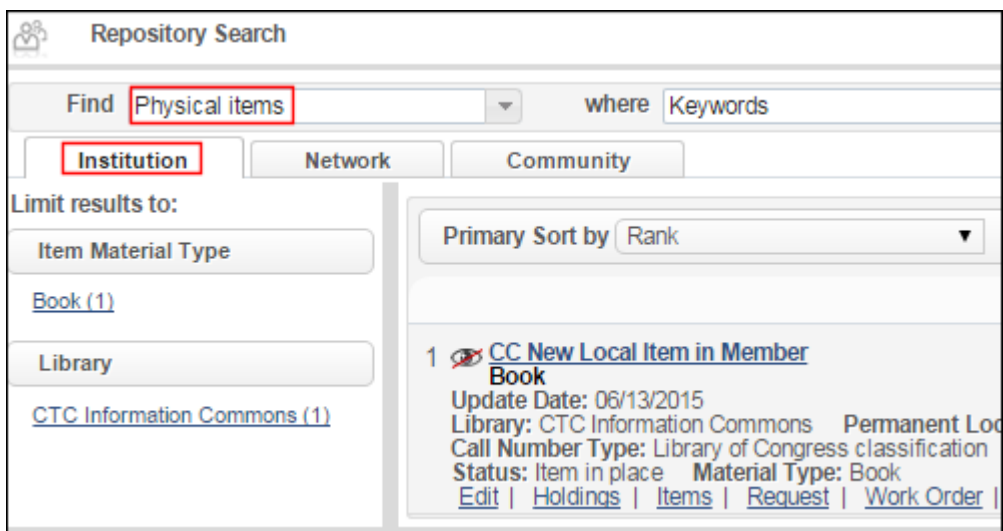


Figure 79 - New Local Item in the Member Institution with `central_record_management` Set to True

- 4 Complete a **Physical titles** search for the new local item in the Institution tab. The bibliographic record appears in the Institution tab on the Repository Search page with the Network icon showing that the bibliographic record for the newly created local item was stored in the Network Zone.

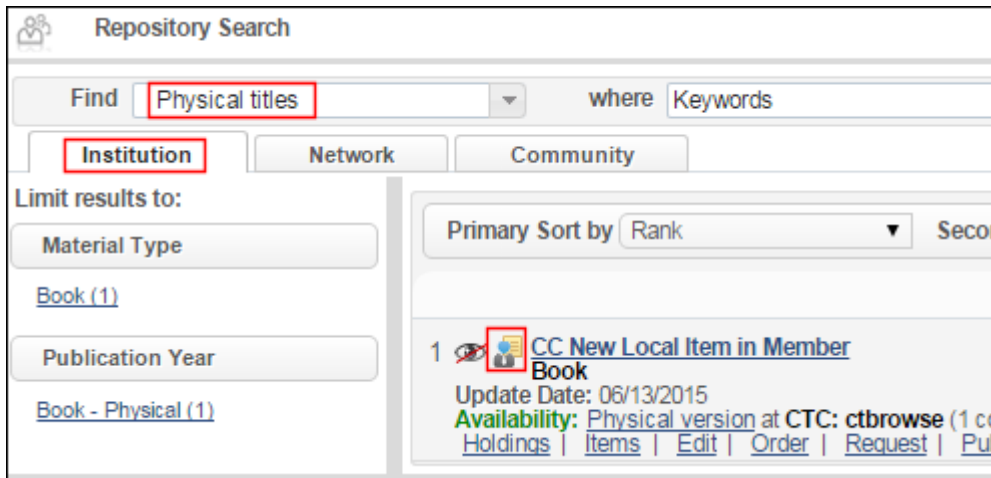


Figure 80 - All Titles Search for a New Local Portfolio in the Member Institution with central\_record\_management Set to True

- 5 Complete an **All titles** search for the new local item in the Network tab. The bibliographic record appears in the Network tab on the Repository Search page with the local icon indicating, that the institution has inventory associated with the network bibliographic record.

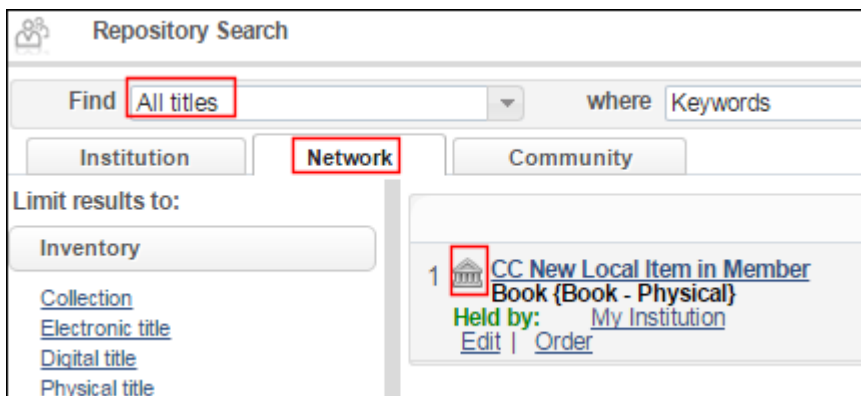


Figure 81 - All Titles Search in the Network Tab for a New Local Item in the Member Institution with central\_record\_management Set to True

### To view the MARC Record Simple View copying changes when central\_record\_management is set to true:

- 1 Complete an **All titles** search from the Community tab in the repository search.
- 2 Click the title link for a record in your search results to open the title in the MARC Record Simple View page. The MARC Record Simple View page provides only the **Copy to Network** option to enable creating/copying the record in the Network Zone (not the Institution Zone).

MARC Record Simple View				Back	Copy to network
Title	Love				
MMS ID	992550000000089390	Originating system	CKB	Originating system ID	2550000000089390
Suppress from publishing	No	Export to WorldCat	Don't publish	Brief record	No
LDR 02398nam a22003613u 4500					
001 992550000000089390					
005 20130418052958.0					
006 m d					
007 cr -n-----					
008 130418s2011       s       eng d					
020 __ e 1-283-95721-3					
020 __ e 1-78042-229-8					
020 __ a 1-84484-855-8					
035 __ a (CKB)2550000000089390					
035 __ a (EBL)7304367					

Figure 82 - MARC Record Simple View in a Member Institution with central\_record\_management Set to True

To view the import profile changes when central\_record\_management is set to true:

- 1 In the Record Import section of Resource Management Configuration (**Resource Management > Resource Configuration > Configuration Menu**) click **Import Profiles** to open the Import Profiles page.
- 2 Click **Add New Profile**.
- 3 Select the **Repository** profile type and click **Next**. The Import Profile Details page appears.

Import Profile Details	
Profile Type	Repository
<b>Profile Details</b>	
Use Network Zone	Yes
Profile name *	
Profile description	
Originating system *	
Import Protocol	Upload File/s
Physical source format	XML
Source format	MARC21 Bibliographic
Status	Active

Figure 83 - Use Network Zone Parameter Locked with the Yes Setting

The **Use Network Zone** parameter is locked with the **Yes** setting versus the optional check box setting (see below).

The screenshot shows a web form titled 'Import Profile Details'. At the top, there are tabs for 'Profile Type' and 'Repository'. Below these is a 'Profile Details' section. The 'Use Network Zone' checkbox is highlighted with a red box and is currently unchecked. Below this are fields for 'Profile Name\*' and 'Profile Description'. Further down are several dropdown menus: 'Originating System' (set to 'WorldCat'), 'Physical Source Format' (set to 'MARC21 XML'), 'Source Format' (set to 'MARC21 Bibliographic'), and 'Load File Source' (set to 'Upload File/s'). There are also 'File name patterns', 'Cross Walk' (radio buttons for 'Yes' and 'No', with 'No' selected), 'Target Format' (set to 'MARC21 Bibliographic'), and an 'Active' dropdown (set to 'True').

Figure 84 - Use Network Zone Parameter with the Optional Check Box

## Creating Records in the Network Zone with the Portfolio Loader

### Description

Central cataloging in collaborative networks is being enhanced with the ability to create and match bibliographic records in the Network Zone with the Alma Portfolio Loader.

When the `central_record_management` parameter is set to `true` and portfolios are imported locally using the Alma Portfolio Loader, the system checks for matching bibliographic records in the Network Zone; and when no bibliographic record match is found in the Network Zone, a new bibliographic record is added to the Network Zone to which the loaded portfolio is linked.

Staff will notice a new **Bibliographic** section in the Portfolio Loader wizard with the **Select catalog** options of **Institution** and **Network**. When the `central_record_management` parameter is set to `true`, the **Select catalog** option is set to **Network** and cannot be changed, thereby ensuring that bibliographic records are stored in the Network Zone (not the Institution Zone).

**Activation Wizard: File Upload**

**Electronic Collection Information**

Electronic Collection name Highwire Press Free

Type Selective package

Electronic Collection Level URL -

Additional descriptive information -

**Bibliographic**

Select catalog ☐ Institution ☒ Network

**Select File**

File \*

**Select Loading Policy**

Loading Policy Type ☒ Complete ☐ Incremental

Add local portfolios ☐

Update portfolios ☐

Delete portfolios ☐

Figure 85 - Activation Wizard: File Upload Page

When the `central_record_management` parameter is set to `false`, the **Select catalog** option can be set to either **Institution** or **Network** providing the option to store bibliographic records in either location. When **Institution** is selected, the Portfolio Loader will work as it did prior to this release.

## Step-by-Step Instructions

The following roles can work with the Alma Portfolio Loader:

- Electronic Inventory Operator
- Electronic Inventory Operator Extended (required for delete operations)

**To view the new capability for the Alma Portfolio Loader (when the `central_record_management` parameter is set to `true`):**

- 1 Complete a repository search to locate the electronic collection to which you want to load portfolios.
- 2 From the repository search results, click the **Edit Service** link for the electronic collection to which you want to load portfolios.

- 3 Select the **Portfolios** tab and click **Load Portfolios**. The Activation Wizard: File Upload page appears displaying the new **Bibliographic** section that contains the **Select catalog** options of **Institution** and **Network** with **Network** selected as the default and not changeable.

When portfolios are imported locally using the Alma Portfolio Loader (and the `central_record_management` parameter is set to `true`), the system checks for matching bibliographic records in the Network Zone and processes the results in the following manner:

- When no bibliographic record match is found in the Network Zone, a new bibliographic record is added to the Network Zone to which the loaded portfolio is linked.
  - When a single bibliographic record match is found in the Network Zone, a link to that matching bibliographic record is created.
  - When multiple bibliographic matches are found in the Network Zone, nothing is done (manual handling may be required).
- 4 Complete the remainder of the wizard for loading portfolios as you normally would.

## Linking Local Inventory to Bibliographic Records in the Network Zone or the Community Zone

### Description

With the July release, options are being provided for linking local portfolios and electronic collections to Network Zone or Community Zone bibliographic records.

### Step-by-Step Instructions

The following role can work with linking portfolios and electronic collections to the Network Zone or the Community Zone:

- Electronic Inventory Operator

#### To link local portfolios to the Network Zone or the Community Zone when creating local portfolios:

- 1 Click **Add Local Portfolio (Resource Management > Create Inventory)**. The New Portfolio page appears.
- 2 Select **Create new title** or **Use existing title** for the **Creation type**.
  - When you select **Create new title**, the **Placement of new record** options appear enabling you to select **Network** or **Institution** for the placement/linking of the bibliographic record for your portfolio.

If your institution has configured `central_record_management` to be `true` (refer to Central Cataloging Enhancements on page 75 for more information), the Placement of new record options do not appear on the New Portfolio page since choosing central record management would indicate that you want your bibliographic records managed only in the Network Zone and not the Institution Zone.

**New Portfolio**

**Descriptive Information**

Creation Type ☒ Create new title ☐ Use existing title

Placement of new record ☐ Network ☒ Institution

Choose Title

Title

Alternative Title 1

ISSN

ISBN



**General Information**

Figure 86 - New Portfolio Page Create New Title

- When you select **Use existing title** (see below), the **Placement of new record** options dynamically are removed from the page. Instead, when you browse to choose a title (bibliographic record to link to), the search options provide access to the bibliographic records in the Network tab and the Community tab. Previously, the system only provided browsing of the Institution Zone records.

**Descriptive Information**

Creation Type ☐ Create new title ☒ Use existing title

Choose Title   

Title

Alternative Title 1  Alternative Title 2

ISSN  e-ISSN

ISBN  e-ISBN

**General Information**

Figure 87 - New Portfolio Page Use Existing Title

Repository Search

Find  where  contains

Primary Sort by  Secondary Sort by

Figure 88 – Browse Network Tab and Community Tab for the Bibliographic Record to Which You Want to Link

### To link electronic collections to the Network Zone or the Community Zone:

- 1 Complete a search for the electronic collection that you want to link to a Network Zone or Community Zone bibliographic record.
- 2 From the search results, click the **Edit** link for the electronic collection that you want to link to a Network Zone or Community Zone bibliographic record. The Electronic Collection Editor page appears.
- 3 Select the **Additional Information** tab.

Electronic Collection Editor

Electronic Collection name

**Summary and Inventory Information**

Electronic Collection type

Interface Name

Figure 89 - Additional Information Tab

- 4 Browse the **Additional descriptive information** parameter to locate the Network Zone or Community Zone bibliographic record to which you want to link your electronic collection.



Figure 90 - Browse Additional Descriptive Information

Figure 91 - Network Tab and Community Tab Options

- 5 From the search results, select the bibliographic record to which you want to link and click **Select**.
- 6 Complete the remainder of any changes that you have in the Electronic Collection Editor as you normally would.

#### To link electronic collections to the Network Zone or the Community Zone from the Activation Wizard:

- 1 Click **Manage Electronic Resource Activation (Resource Management > Manage Inventory)** to locate the electronic collection that you want to activate. The **Electronic Resource Activation Task List** page appears.
- 2 From the task list, select **Actions > Activate** for the electronic collection you want to activate. The **Activation Wizard: Electronic Collection and Services Setup** page appears.


- 3 Browse the **Additional descriptive information** parameter to locate the Network Zone or Community Zone bibliographic record to which you want to link your electronic collection.

**Activation Wizard: Electronic Collection and Services Setup**

**Electronic Collection Information**

Electronic Collection name: GeoScienceWorld  
Type: Selective package  
Electronic Collection Level URL: -  
Additional descriptive information: -

**Local Electronic Collection Information**

Public name:   
Electronic Collection Level URL:   
**Additional descriptive information**:    
Electronic Collection Proxy Enabled: ☒ No ☐ Yes

**Full Text Service**

Figure 92 - Browse Additional Descriptive Information in the Activation Wizard

**Repository Search**

Find:  All titles  where:  Keywords  contains:

Institution:  **Network** **Community**

Primary Sort by:  Rank  Secondary Sort by:  Rank

Figure 93 - Network Tab and Community Tab Options

- 4 From the search results, select the bibliographic record to which you want to link and click **Select**.
- 5 Complete the remainder of the Activation Wizard as you normally would.

## Relinking Holdings to the Network Zone or the Community Zone

### Description

The holdings relinking capability is being expanded with the July release to provide the capability to relink to bibliographic records in the Network Zone or the Community Zone.

## Step-by-Step Instructions

The following roles can relink holdings records:

- Cataloger
- Catalog Administrator

**To relink holdings records to bibliographic records in the Network Zone or the Community Zone:**

- 1 Complete a **Physical titles** search in the Institution tab from the repository search (**Resource Management > Search and Sets > Repository Search**).
- 2 For the title that you want to relink, click the **Holdings** link.

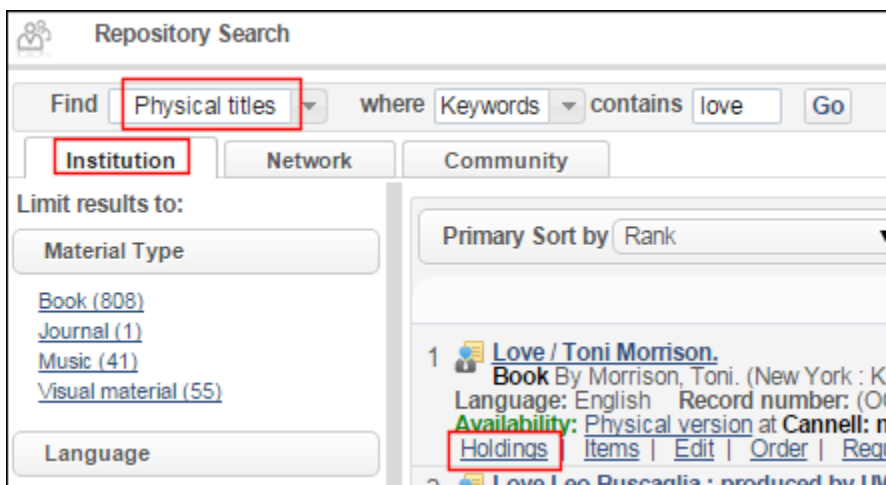


Figure 94 - Holdings Link

The MARC Record Simple View page appears.

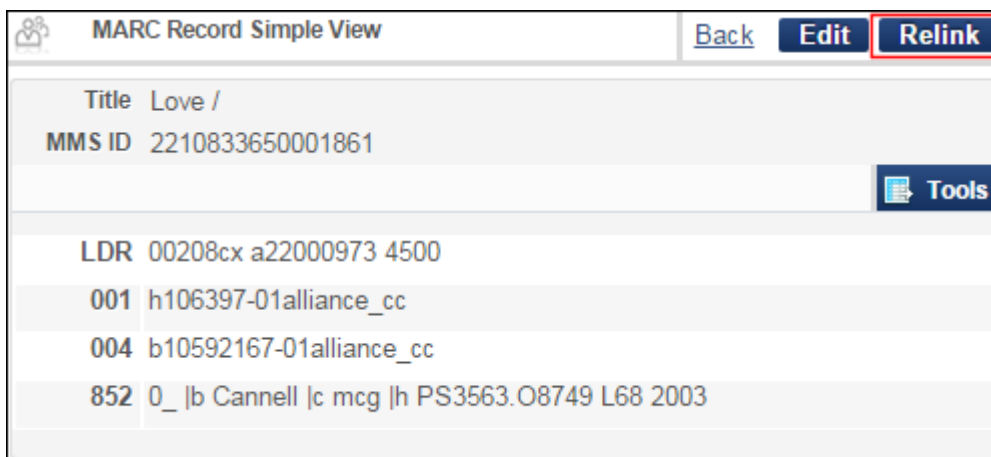
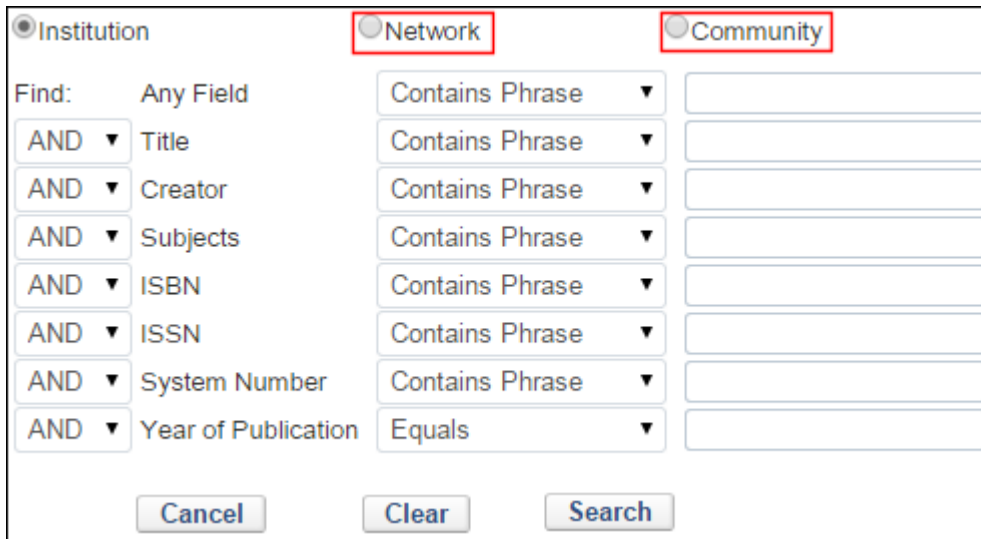


Figure 95 - Relink

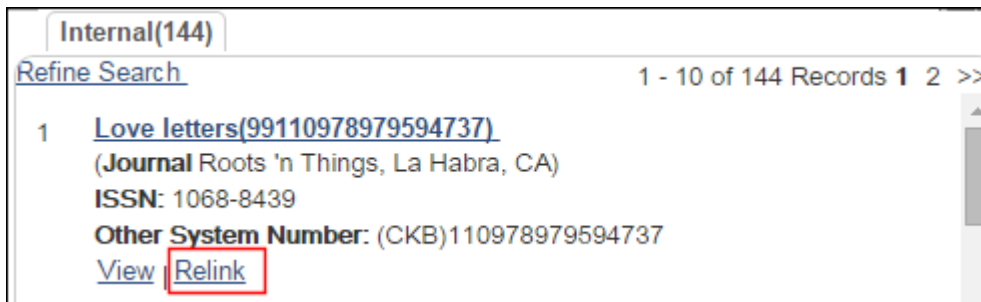
- Click **Relink**. The MD Editor opens with a search panel enabling you to locate a bibliographic record in the Network Zone or Community Zone in addition to the Institution Zone to which you can relink.



The image shows the MD Editor Relink Search Panel. At the top, there are three radio buttons: **Institution** (selected), **Network**, and **Community**. Below these are search criteria fields. The first row has 'Find: Any Field' and a dropdown menu set to 'Contains Phrase' with an empty text box. The next six rows have a dropdown menu set to 'AND' and a field name (Title, Creator, Subjects, ISBN, ISSN, System Number) followed by a 'Contains Phrase' dropdown and an empty text box. The last row has a dropdown menu set to 'AND' and a field name (Year of Publication) followed by a 'Equals' dropdown and an empty text box. At the bottom are three buttons: **Cancel**, **Clear**, and **Search**.

Figure 96 - MD Editor Relink Search Panel

- Select **Network** or **Community**, enter search criteria for a bibliographic record to which you want to relink, and click **Search**. The search results appear in the MD Editor from which you can identify the bibliographic record to which you want to relink.



The image shows the Relink Search Results panel. At the top, there is a text box containing 'Internal(144)'. Below this is a 'Refine Search' link and a status bar showing '1 - 10 of 144 Records' with links '1', '2', and '>>'. The main area displays a list of search results. The first result is '1 Love letters(99110978979594737)' with subtext '(Journal Roots 'n Things, La Habra, CA)', 'ISSN: 1068-8439', and 'Other System Number: (CKB)110978979594737'. At the bottom of the result are two links: 'View' and 'Relink'.

Figure 97 - Relink Search Results

- Click **Relink** for the bibliographic record to which you want to link in the Network Zone or Community Zone (depending on which zone you selected for your search). The record to which you did a **Relink** opens in the MD Editor.

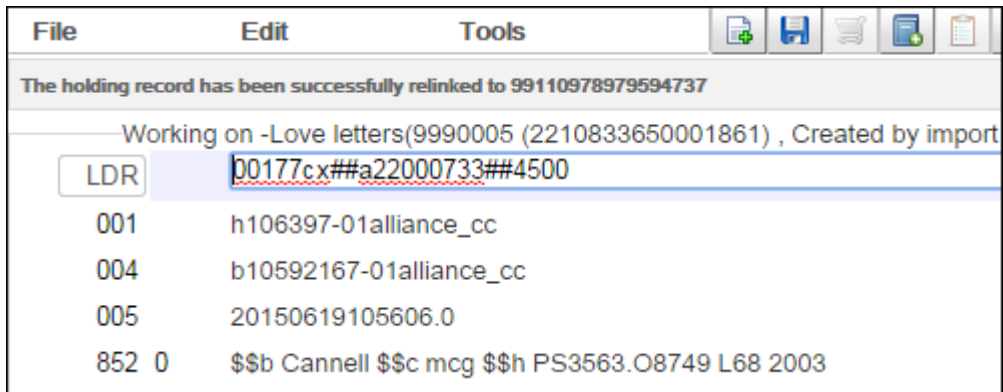


Figure 98 - Relinked Record Opens in the MD Editor

6 Click **Save**.

## Other Collaborative Network Enhancements

- The mapping table CustomerParameters (**Other Settings** link on all functional area Configuration Menu pages) can now be managed by the Network Zone administrator and the configurations can be distributed to all members of the collaborative network.

# Analytics

The following Analytics enhancements were made for the July 2015 release of Alma:

- The Create Date field in the Bibliographic Details folder (all subject areas) was renamed **Creation Date**.
- The User Name field in the Requester folder (Requests subject area) was renamed **Primary Identifier**.
- Under Fines and Fees, the Unit Owner folder was renamed **Owning Library**. Similarly, all fields containing the label Unit were renamed **Owning Library**. For example, the Unit Name field was renamed **Owning Library Name**.

# Alma Infrastructure

The following Alma infrastructure enhancements were made in the July 2015 release of Alma.

## Enhanced Support for SAML Logout

### Description

Alma enhanced its implementation of SAML single logout from an external system (see the May release notes for the initial implementation of this feature). Now, when you log out of Alma, Alma requests the IDP to log you out of the external system.

In a typical implementation, you are automatically logged out of the external system. Alternatively, the external system can present you with the option to log out from it (and may offer you to log out of additional systems).

If you already added support for SAML single logout (see the May release notes), this feature does not require any additional implementation; however, note that the **IDP Logout URL** field in the Actions tab of the SAML profile is now ignored. If you do not implement SAML single logout, the **IDP Logout URL** field continues to operate as before.

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**Note:** Before configuring SAML single logout, ensure that Ex Libris Support has configured the required support for this feature.

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## Other Alma Infrastructure Updates

- Alma has improved searching using characters with diacritics, as well as returning characters with diacritics when you search using standard English characters (for example, a search for “u” matches “u”, “ü”, and so forth), in the following areas:
  - The persistent search box, when searching for requests
  - The Resource Request Monitoring page (**Fulfillment > Resource Requests > Monitor Requests & Item Processes**)
  - The Patron Services page in the **Loans** tab (**Fulfillment > Checkout/Checkin > Manage Patron Services**; enter a patron, click **Go**, and select **All** in the **Loan Display** field) and the **Requests** tab.
  - The Resource Sharing Lending Requests Task List page (**Fulfillment > Resource Sharing > Lending Requests**)

- The Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**)

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**Note:** On the Resource Sharing Lending Requests Task List and Resource Sharing Borrowing Requests pages, searching in the **Notes** field matches special characters only in notes created starting with this release. Searching in any other field matches special characters in fields created before or after this release.

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# Alma APIs

For the July 2015 release, the following APIs were **added**:

- GET resource sharing borrowing request API. For detailed information, see <https://developers.exlibrisgroup.com/alma/apis/users>.
- Search and GET APIs for the management of licenses. For detailed information, see <https://developers.exlibrisgroup.com/alma/apis/acq>.

The following APIs were **changed**:

- An indication of whether the patron has pending loans or fines/fees was added to the GET User API. This information is especially important in determining whether deletion of particular patron is possible. In addition, a new field, **Fine Owner**, was added to the GET Fees API. For detailed information, see <https://developers.exlibrisgroup.com/alma/apis/users>.
- The GET Vendor API can now retrieve a list of PO lines and invoices being handled by the vendor:
  - GET /acq/vendors/[vendorCode]/po-lines
  - GET /acq/vendors/[vendorCode]/invoices
- The **Fund Type** field was added to the GET Funds API.
- The following changes were made to the GET Collection API:
  - Added a new parameter that determines how many levels of sub-collections are retrieved.
  - Bibs for a single collection are retrieved by GET /bibs/collections{collection ID}/bib
  - rest\_collection\_bib.xsd now includes the following fields: name, author, description, and collection thumbnail.

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

- The following GET loans and requests APIs are now available under /users, /bibs, and /bibs/{ID}/holdings{ID}/items{ID}:
  - GET .../loans
  - GET .../loans{loan ID}
  - GET .../requests
  - GET .../requests{req ID}

## Known Issues

- When importing an EOD file using the New Order profile, if the location of the item does not have a call number type, the call number type of the institution should be used as the alternative call number type. Currently, however, no alternative call number is used.
- Although resource sharing renewal requests are controlled by a partner's workflow profile, changing the due date using the Change Due Date option is possible even if the workflow profile does not allow this option.
- 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 they occur.
- In the Course Reserves subject area in Analytics, the **Reading List Owner** field in the **Reading List** dimension does not present updated values for changes performed as of the July release. This issue will be fixed in an upcoming release.
- The **Import** button in various code tables in Alma is currently not functional. This issue will be fixed in a future Alma release.