Alma June 2015 Release:
Celebrating George Orwell’s birthday
25th June
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About the Alma Release Notes

Alma release notes provide you with information regarding what you need to get up and running with the new features and enhancements in the latest Alma release.

These release notes include:

- Alma June 2015 Release Highlights
- Data Services
- Alma Videos
- Particular Issues to Note
- Feature/enhancement descriptions for the respective Alma functional areas:
  - Acquisitions
  - Resource Management
  - Fulfillment
  - Resource Sharing
  - Administration
  - Collaborative Networks and Multicampus Institutions
  - Analytics
  - Alma Infrastructure
  - Alma APIs
- Known Issues
Alma June 2015 Release Highlights

Acquisitions

- **Receive EDI Reports from Vendors** – Alma now supports EDI Order Report files, a type of EDI Order Response file. The types of EDI files now include Invoice and Order Response files sent from the vendor to Alma.

Resource Management

- **Enhancements to Itemized Set Creation** – A number of enhancements were implemented in order to improve the user experience related to the creation of an itemized set from a file.
- **Automatic Generation of Summary Holdings Statement Based on Items** – Alma now provides the ability to automatically generate a summary holdings statement based on items linked to the holdings record by creating and/or updating the MARC21 holdings 863, 864, and 865 fields.
- **Contributing Electronic Collections to the Community Zone** – Alma’s international user community has much insight into the needs of library patrons in their respective regions as well as globally. As such, libraries are now able to contribute entire electronic collections to the Community Zone, which allows all Alma users to benefit from this knowledge. Read more about this great new exciting option in the Release Notes.
- **UNIMARC and KORMARC Support** – Alma now supports the UNIMARC and KORMARC cataloging format. Similar to the support Alma provides for MARC 21, Alma provides support for UNIMARC/KORMARC cataloging, searching, import, export, validation, and normalization.

Fulfillment

- **Enhancements to the Overdue and Lost Loan Profile** – You can now configure different notification letters and fines for Overdue and Lost Loan Profiles. When configuring a profile, you can select an Overdue notification type to send a notification letter that the loan is overdue, and you can create a fine to append to the overdue letter. The letter and fine are generated when the Loans - Change to Lost job runs. You can also customize the content of the letter that is sent to patrons with overdue loans.
- **Configuring In-House Uses Update** – When scanning an item into Alma, you may only want to check the current status of the item and not create an In House Use indication. You
can now do this by selecting or clearing a check box to indicate whether or not scanned items should create a new In House Use indication.

**Resource Sharing**

- **Enhancements to the Send Query to Patron Capability** – The option to send a query to a patron from the borrowing requests task list has been enhanced. There are now far more customization options for the patron messages, using XSL forms for customizing the queries.

- **Enhanced Management of Electronic Resources in the Borrowing Locate Process** – Alma now allows you to more efficiently locate resource sharing materials during the locate process. When configuring a locate profile, you can configure the profile to check the peer partner for available and requestable physical inventory, ignoring the existence of electronic resources.

- **Integration with ILLiad** – Integration between ILLiad and Alma was enabled, utilizing the NCIP protocol. This impacts both borrowers and lenders in the resource sharing process, providing seamless integration between Alma and ILLiad so that work only needs to be done in one system at any stage of the workflow.

**Administration**

- **HealthCheck Tool** – Alma now includes a HealthCheck tool that allows Alma administrators to identify whether any issues exist with their configuration of Alma, such as missing or inconsistent settings.

**Collaborative Networks and Multicampus Institutions**

- **Centralized Management of Notification Letters** – Administrators of collaborative networks can now customize notification letter templates and distribute them automatically to member institutions in a collaborative network. This allows for easier coordination between member institutions and reduces duplication of effort.

- **Viewing Network Members’ Order Details** – Network members can now see if other members of the network placed an order for a resource, including the order details.
Alma Infrastructure

- The Alma instance for your institution (the group of servers serving your institution) was added to the bottom of the Help menu. This information can be used to cross-check with the current status of all Alma instances (http://status.exlibrisgroup.com/) to view any known issues with Alma’s performance in your institution.

- In various table pages, an Actions button appears. Until now, it was necessary to click the Actions button to open and close the list of action options. Now, once the list is open, clicking anywhere on the page closes the list.

Alma RESTful APIs

- The following API were added:
  - An API to retrieve loan information
  - An API to retrieve request information
  - APIs to create bibliographic and holdings records (with XML)
Data Services

New Electronic Collections Added to the Alma CKB

The following packages were added to the Alma CZ during the period 03 May 2015 through 24 May 2015:

- Brillonline Open Access Books
- Brillonline Open Access Journals
- Business & Economics
- CCC Get It Now American Journal of Health Promotion
- CCC Get It Now American Thoracic Society
- CCC Get It Now De Gruyter
- CCC Get It Now International Association of Food Protection
- CCC Get It Now Weston Medical Publishing
- CCC Get It Now Wichtig Editore
- CRKN Wiley Online Library Upgrade 2015
- EBSCOhost E-Journals
- Iberoamérica
- IngentaConnect UCLA Chicano Studies
- JSTOR Unlimited Usage DDA Book Titles
- MedicalFinder 法人サービス
- Religion & Theology
- Sage Humanities And Social Science Package 2015
- Wiley Online Library Cochrane Free

New External Resources that Are Open for Searching

The following external resources were added for this release:

- SBN (UNIMARC)
- Università di Pisa (UNIMARC)
- Università di Siena (UNIMARC)
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:

- Centralized Management of Notification Letters
- Contributing Electronic Resources to the Community Zone
- Support for Self-Pickup of Requests
- Enhancements to Itemized Set Creation
- Enhancements to the Overdue and Lost Loan Profile
Particular Issues to Note

Please note the following issues of note in the June release:

- The following areas of Alma, which were previously available only in English, are now available in German, Italian, and Korean if you have enabled Alma to display in these languages:
  - MD Editor
  - Wizards - numbered pages (1, 2, 3…) that take you through a workflow in Alma, such as the import profile wizard and e-resource activation wizard
  - Widgets - various elements that you can add to your Alma home page

- The option to use an old version of the export invoice XSD is no longer available in new Finance integration profiles. (New profiles automatically use the updated version.) The Use updated XSD format (the deprecated version 1 will no longer be supported as of 1/Jan/2015) label in existing profiles was updated to Use updated XSD format (previous version is deprecated).

- Spaces were added to the short loan XSL and removed from the letter (code_table_FulShortLoanLetter.xml). In addition, translation was added for notification_data/uom. If you use a customized short loan letter XSL or its code table, please verify that there are spaces between words.

- When using the tasks MARC21 Expand Holding By 866/7/8 Task and MARC21 Expand Holding By 863/4/5 Task, you must also select the MarcDroolNormalization task to handle removing the duplicate 863/864/865 and 866/867/868 fields that get created every time a record is saved using Marc21 Holding normalize on save, and re-sequence it to come before the MARC21 Expand Holding by 863/4/5 Task. For details, see the Automatic Generation of the Summary Holdings Statement Based on Items section below.

- The Crosswalk option in the import profile is not supported in the June release. If you are working with UNIMARC, you can import UNIMARC records only.

- As of the July release, you will be able to 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.
Acquisitions

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

Receive EDI Reports from Vendors

Description

Alma now supports EDI Order Report files, a type of EDI Order Response file. The types of EDI files now include:

Sent from Alma to the vendor:
- **Order**: Contains PO lines.

Sent from the vendor to Alma:
- **Invoice**
- **Order Response: Shelf-Ready** – Contains barcodes and other item information for delivered items.
- **Order Response: Order Report** (new) – Contains status information about orders: whether they were sent, backordered, or canceled, any fulfillment issues, if the delivery date changed, and so forth.

Typically, Order Reports are sent daily from the vendor. The vendor and institution can arrange for some other frequency, such as weekly, or only if there are problems with the order.

When an Order Report is received, the summary in the report is added as a note to the relevant PO lines. Alma has a new task list, where each line in the list corresponds to a line requiring attention in received Order Reports.

The status of items in the report may indicate that a PO line requires additional attention from the user.

A new page, Manage EDI Tasks, was added to manage the information returned from vendors using Order Reports.

Step-by-Step Instructions

The following roles can manage EDI Order Reports:
- **Purchase Manager**
- **Purchase Operator**
To manage EDI Order Reports:

Navigate to the Manage EDI Tasks page (Acquisitions > Purchase Order Lines > Manage EDI Reports).

Figure 1: Manage EDI Tasks Page

The page contains the list PO lines for which Order Reports were received in the last day. There are two tabs:

- **Review** – PO lines which require attention.
- **All** – All PO lines for which Order Reports were received.

You can filter the list of PO lines by:

- **Response type** – The status of the order at the vendor.
- **Response date** – The message date from the Order Report. Typically, this is the date that the report was created, but it may be a future or past date.

The fields that appear for each PO line are:

- **Order Number** – The PO line number
- **Order Description** – The PO line description
- **Vendor**
- **Response Summary** – A free text summary of the order status
- **Response Type** – The status of the order at the vendor
- **Ordered Items** – The number of ordered items
- **Discrete Items** – The number of ordered items, excluding multiple copies of the same items
- **Split Delivery Items** – The number of items that were split into multiple deliveries
- **Dispatched Items** – The number of dispatched items
- **Backordered Items** – The number of backordered items
- **Pieces Delivered** – The number of physical objects sent; for example, an encyclopedia might contain 30 physical books.

- **Expected Delivery** – The expected delivery date

For each line in the **Review** or **All** tab, you can click to view:

- The PO Line Summary page
- The MARC Record Simple View Page
- The Vendor Details page

In the **Review** tab, you can perform the following tasks.

**Edit a PO line:**

Select **Actions > Edit PO Line**.

This takes you to the PO Line Summary page.

**Change the expected date of a PO line:**

1. Select **Actions > Update Expected Receipt Date**.

   This is a shortcut that saves you from having to edit the entire PO line. A dialog box appears.

   ![Figure 2: Change Expected Release Date Dialog Box](image)

2. Enter a new expected release date, enter an optional note, and click **Save**. The expected receive date is changed in the PO line and the item.

**Cancel a PO line:**

Select **Actions > Cancel PO Line**.

**Defer a PO line:**

Select **Actions > Defer PO Line**.
Dismiss one or more notifications:

- To dismiss a single line, select **Actions > Dismiss**.
- To dismiss several notifications at once, select the items, select **Dismiss Selected** from the check box near the **Execute** button, and click **Execute**.
- To dismiss all alerts, select **Dismiss All** and click **Execute**.

Edit an item:

Select **Actions > Edit Resource**

This takes you to the relevant editor page. For example, for physical items, this takes you to the **Physical Items Editor** page.

**Enhanced Vendor EDI Job Reports**

**Description**

The EDI Job Report page containing summary information about the vendor’s EDI files was enhanced to include information about all of the types of EDI files sent by that vendor.

**Step-by-Step Instructions**

The following role can manage view Enhanced EDI Job Reports:

- **Vendor Manager**

**To view EDI jobs for a vendor:**

1. On the Search Vendors page, locate the vendor whose EDI jobs you want to monitor and select **Actions > View history** (available only for EDI-enabled vendors).

   The Monitor Jobs page appears. You can filter the list to display only jobs with errors or only jobs whose name, details, or ID matches a regular expression.

The Job Reports page includes some of the following sections and fields, depending on the type of EDI file processed:

- A green banner if the job completed successfully, or a red banner if the job completed unsuccessfully
- **Name** – The job name
- **Created by** – The user that created the job
- **Process ID** – The job ID
- **Total run time**
- **Started on** – The job start date and time
- **Finished on** – The job end date and time

### Alerts

If the job completed with errors, this section appears and contains a list of alerts about the file. Additional information is available in the second *Alerts* section below.

### Job Results Summary

- **Total records processed**
- **Total files handled**
- **Total invoices** – The number of EDI invoice files
- **Total shelf ready order responses** – The number of EDI shelf ready files
- **Total report task order responses** – The number of EDI Order Report files
- **Total PO lines** – The total number of PO lines mentioned in the Order Response. Appears only for Order Responses.

Alerts: For each alert, the following fields appear:
- Error description
- Error value
- Entity number [not invoices]

Invoice: Appears only for invoices. For each invoice, the following fields appear:
- Invoice number
- Number of invoice lines
- Number of related PO lines

Click **Preview Records** to view the invoice.

Order Response Report Task: Appears only for Order Response: Order Report files. For each PO line, the following fields appear:
- PO line in order response
- Tasks updated
- Tasks created

Click **Preview Records** to view the PO line.

Order Response Shelf Ready: Appears only for Order Response: Shelf ready files. For each PO line, the following fields appear:
- PO line in order response
- Items updated
- Items not updated

Click **Preview Records** to view the PO line.
Allow Invoice-Level Tax in an EDI to Not Be Expended from Funds

Description

Alma now allows you to set for a vendor whether the VAT specified at the invoice level in EDI invoices is expended from funds. When set, if the vendor’s EDI invoices contain VAT at the invoice level, the field Expended from Fund on the Invoice Details page is left unselected and a proportional amount of VAT is added in the Adjustment line for each invoice item.

A new field VAT expended from fund was added to the EDI Information tab of the Vendor Details page. This field is selected by default when creating the vendor, which corresponds to the current functionality.

Step-by-Step Instructions

The following role can configure whether VAT specified at the invoice level in an EDI invoice is expended from funds:

- Vendor Manager

To configure whether VAT specified at the invoice level in an EDI invoice is expended from funds:

While configuring vendor details, (see the Managing Vendors and Vendor Accounts section of the Alma Acquisitions Guide or the Alma online help), select or clear the field VAT expended from fund.

![Figure 4: VAT Expended from Fund Field](image)

The field is selected by default. If you clear the field, the field Expended from Fund on the Invoice Details page is left unselected when uploading EDI invoices, and a proportional amount of VAT is added in the Adjustment line for each invoice item.
Other Acquisitions Updates

- When an EDI invoice is loaded, if the total number of items in an invoice line is less than the number of items in the associated PO line, the PO line is marked **Partially invoiced**. If the number of invoice items is greater than the number of items in the PO line, an alert appears.

- The Notify upon renewal letter contains some additional fields: **UserID**, **price**, **fund code**, **fund name**, **amount**, and **currency**.

- A new widget line **Purchase Orders – review** is available in the **Tasks** widget on the home page and **Tasks** drop-down.

  ![Figure 5: Task Widget: Purchase Orders - Review](image)

- The Excel export file for invoice lines (**Acquisitions > Receiving and Invoicing > Search for Invoice**; search for invoices and select **Tools > Excel**) now includes the columns: **Description** and **PO Line #**.
Resource Management

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

Enhancements to Itemized Set Creation

Description
To improve the user experience involved with the creation of an itemized set from a file, the following enhancements were implemented.

- The import is now done in the background. This allows you to work while the import is running.
- The current limitation of 5k lines in the imported Excel has been removed. Note that the maximum file size is 10 MB.
- The Upload and Validate Set Content button was removed. The upload and validate set functionality is available by clicking Save.
- Clicking Add Members to Set no longer loads the import file. Only clicking Save loads the import file.
- The interface indicates that the maximum file size is 10 MB.

Step-by-Step Instructions
You can create sets from the Acquisitions, Resource Management, and Administration (Users) functional areas. The roles that allow you to create sets for the various functional areas can access this feature.

To access this feature:

1. Click the Manage Sets link from either the Acquisitions, Resource Management, or Administration functional areas.
2. Click Add Set. The following appears:
Fill in the fields as described in the Adding Itemized Sets section of the Resource Management Guide.

Click in the File field, and select a file to upload.

Click Save to create a set from the file.

The Add Members to Set job runs and creates a set from the file.

Note: If you click Add Members to Set after selecting a file, the file is not loaded. The following message appears:

A file was selected, but the set was not saved. The file content will be ignored. Are you sure you want to proceed?

Click Confirm to continue without loading the file.

The job is visible from the History tab on the Monitor Jobs page (Administration > Manage Jobs > Monitor Jobs) after it is completed.
Validation checks are conducted for items, PO lines, and users. To see a report, select **Actions > Report**. For example:

![Job Report](image)

**Automatic Generation of the Summary Holdings Statement Based on Items**

**Description**

Alma now provides the ability to automatically generate a summary holdings statement. This is enabled with the new normalization process task called **MARC21 Expand Holding By 863/4/5 Task** and the **Enhance the Record** function in the MD Editor.
The automatic generation is handled in the following manner:

- The normalization process task MARC21 Expand Holding By 866/7/8 Task (previously called marc21ExpandHoldingBy86XTask) uses the combination of the existing 853/854/855 field and the 863/864/865 field (automatically generated or manually entered) to create an 866/867/868 summary holdings field.

- The new normalization process task MARC21 Expand Holding By 863/4/5 Task is used to automatically generate the 863/864/865 field based on the existence and arrival of items linked to the 853/854/855 field in the holdings record.

- The 853/854/855 field is handled as part of the acquisitions process and managed in the following manner:
  - When items are created from a prediction pattern, the link to the 853/854/855 field in the holdings record is made automatically.
  - If the item is not created from a prediction pattern, the item’s pattern type and linking number need to be updated manually.

![Pattern Information Table](image)

**Figure 9 - Pattern Type and Linking Number**

**Step-by-Step Instructions**

The following roles can configure normalization process tasks related to the 863, 864, and 865 fields:

- Catalog Administrator
- General System Administrator

**To configure your normalization processes to generate an 863, 864, or 865 field:**

1. In the Cataloging section of the Resource Management Configuration page (Resource Management > Resource Configuration > Configuration Menu), click Metadata Configuration to open the Metadata Configuration List page.

2. Click the MARC21Holding link. The Profile Details page appears.

3. Select the Normalization Processes tab.
4 Select **Actions > Edit** for one of the normalization processes. The Process Details page appears.

5 Select the **Task List** tab.

6 Select **MARC21 Expand Holding by 863/4/5 Task** and click **Add to Selection**.

In the **Processes Selected** section of the Process Details page, you can re-sequence the order in which the normalization tasks are performed. When selecting the **MARC21 Expand Holding by 863/4/5 Task**, be aware that it needs to precede the **MARC21 Expand Holding By 866/7/8 Task** since the 863/4/5 (and 853/4/5) linked fields are used in generating the 866/7/8 fields.
When using the tasks **MARC21 Expand Holding By 866/7/8 Task** and **MARC21 Expand Holding By 863/4/5 Task**, also select the **MarcDroolNormalization** task to handle removing the duplicate 863/864/865 and 866/867/868 fields that get created every time a record is saved using **Marc21 Holding normalize on save** and re-sequence it to come before the **MARC21 Expand Holding by 863/4/5 Task**. Below is a sample normalization rule:

```
rule "delete 863 4 5 6 7 8 if it does not have subfield 8 9"
when
   (TRUE)
then
   removeField "863" if (not exists "866.8.9")
   removeField "864" if (not exists "867.8.9")
   removeField "865" if (not exists "868.8.9")
   removeField "866" if (not exists "866.8.9")
   removeField "867" if (not exists "867.8.9")
   removeField "868" if (not exists "868.8.9")
end
```

Refer to the *Automatically Generating Summary Holdings Statements Based on Items* document on the Customer Center (under Alma > Product Documentation > Resource Management > How To Documents and Presentations) for more information.

7 Click Save.

Now, for example, when you save a record in the MD Editor, Alma automatically generates an 863, 864, or 865 as part of the **MARC21 Holding normalize on save** process.

![Image of Holdings Record Before Save/Autogenerate](image-url)
To autogenerate an 863, 864, or 865 field in the MD Editor with Enhance the Record:

1. Open the holdings record for which you want to autogenerate the 863, 864, or 865 in the MD Editor.

2. Select Edit > Enhance the Record.
The Enhance the Record dialog box appears.

3 Select the **Marc21 Holding enhance by 863/4/5 fields** option. The 863 field is generated.

As you continue to work with the same holdings record over time, the **Enhance the Record** function adds a new 863/4/5 field (row) to the record that represents the most current set of holdings/items. This same logic applies to pre-existing manually entered records. When the **Enhance the Record** option is selected, a new 863/4/5 field is generated in addition to any
pre-existing, manually entered 863/4/5 field(s). To remove pre-existing 863/4/5 fields from the holdings record, create a normalization rule to do this and use the **Enhance the Record** option to select and execute the rule.

![Enhance the Record](image)

**Figure 18 - Execute Custom Normalization Rule with the Enhance the Record Function**

In the MD Editor, the following pop-up status information messages are provided for normalization processing:

- Record updated successfully
- Record updated successfully with the following errors:
  - This message is followed by a list of retrieved errors.
- Record failed to be updated:
  - This message is followed by a list of retrieved errors.

## Contributing Electronic Collections to the Community Zone

### Description

Alma’s international user community has much insight into the needs of library patrons in their respective regions as well as globally. As such, libraries are now able to contribute entire electronic collections to the Community Zone, which allows all Alma users to benefit from this knowledge.

Ex Libris requires that the submitted collections be:

- Academic in nature
- Relevant to other institutions (do not submit collections that are uniquely tailored to your institution)
- Not already found in the Community Zone
Collections that are contributed to the Community Zone should include:

- A bibliographic record describing the collection
- Portfolios that reflect all relevant content that can be acquired as part of the collection
- A full bibliographic record for each portfolio within the collection
- Linking information for each portfolio
- Coverage information for each portfolio (serial content only)

Every collection that is contributed to the Community Zone is reviewed by Ex Libris. The Ex Libris Data Services team responds to the submitter within five business days. Possible responses include:

- Contribution approved
- Contribution cannot be included in the Community Zone and a reason
- More information is required

**Note:** In an upcoming release, the ability to contribute a collection with no portfolios that represents a database will be included.

Refer to the [Community Zone Contribution Guidelines](#) page of the Alma online help for additional background information and service-level agreement (SLA) details.

**Step-by-Step Instructions**

The following role can contribute electronic collections to the Community Zone:

- Electronic Inventory Operator

**To contribute local electronic collections to the Community Zone:**

1. Locate and open the local electronic collection that you want to contribute to the Community Zone.
2. Click **Contribute to Community**.
The Confirmation Message dialog box appears.

The following appears in this dialog box:

- Name of the electronic collection selected for contribution to the Community Zone
- Number of portfolios in the electronic collection being contributed
- Number of bibliographic records associated with the electronic collection being contributed
- Notification that the contribution will be reviewed by Ex Libris

The contribution is approved by Ex Libris after confirming the following:
- Electronic collection is not already a part of the CKB
- Linking verification
- Note to Ex Libris

This note is viewable by Ex Libris during the review process.
- When Alma finds matches for the bibliographic records associated with the portfolios, the following options are available:
  - Use community record
  - Do nothing (don't link the local bibliographic records with the Community Zone records)

3 Click **Confirm** to submit your contribution request. The following message appears: *The collection contribution job submitted successfully.* This means that your contribution request was submitted to the Community Zone institution for review. Once the review is complete, you receive a separate message confirming that your contribution was added (or rejected) to the Community Zone.

After the electronic collection is submitted for review/contribution:
- The **Contribute to Community** button is no longer available for the specific collection.
- You can search for your contribution using the **Community** tab.

[Figure 21 - Community Tab Search](#)

Your contribution appears in the Community tab search results with the status notation of *Under Review*. In the illustration below, the information includes which institution made the contribution. This information is visible to all institutions searching the Community tab. If the contribution is rejected, it is deleted and not visible from the Community tab.
After the contribution is approved, the electronic collection becomes a standard Community Zone electronic collection.

For the contributor, the collection appears in the Community Zone with the institution icon (□) and is shown as linked to the Community Zone in the Institution tab with the Community Zone icon (□).

New OCLC Publishing Options

Description

The OCLC publishing profiles (Publish bibliographic record (Batchload) to OCLC and Publish your local holdings records (LHRs) to OCLC) were enhanced with new publishing options to provide more flexibility for the lifecycle of OCLC records. Specifically, the Alma publishing options were enhanced for customers who are migrating to Alma that have an existing account with OCLC and who want to continue to use their existing OCLC account after migrating to Alma.

Previously, the OCLC publishing profiles provided the Run full publishing option that included an incremental publishing component after the full publishing was completed. The Run full publishing option was renamed Full, and Incremental was added as an explicit option. Also, Baseline was added as a new option.
With these new options, you can now indicate how Alma should handle publishing OCLC records in the following manner:

- **Incremental** – Used to publish your ongoing OCLC record changes in Alma to the FTP server used for OCLC publishing and ultimately to OCLC for processing. The incremental schedule of the publishing job is determined by the scheduling option that you select in the OCLC publishing profile. This publishing mode is intended to be run on a regular basis.

- **Baseline** – A one-time-use option provided for institutions that are migrating from a different ILS where OCLC records were maintained and exchanged with OCLC; the goal is to continue the exchange of records with OCLC (using an existing OCLC account) on the Alma system from where the other ILS left off. This option is intended for use – once – immediately after the database is migrated to Alma and before any OCLC records are changed in Alma. This option publishes the whole set of OCLC records to an Alma publishing index, but does not create any files on the FTP server used for OCLC publishing. Once the publishing job completes, Alma automatically sets the **Publishing mode** in the OCLC publishing profile to **Incremental** for the ongoing incremental publishing updates with OCLC. (Note: The scheduling and running of the **Baseline** publishing job should be incorporated into the process for the Alma cutover to production.)

- **Full** – Alma publishes all the OCLC records to the FTP server used for OCLC publishing. This option is intended for institutions that created a new OCLC account for processing records. Once the publishing job completes, Alma automatically sets the **Publishing mode** in the OCLC publishing profile to **Incremental** for the ongoing incremental publishing updates with OCLC.
Step-by-Step Instructions

The following roles can view the new publishing options:

- Catalog Administrator
- Repository Administrator
- General System Administrator

To view the new OCLC publishing options:


2. Select **Actions > Edit** for one of the OCLC publishing profiles such as **Publish bibliographic record (Batchload) to OCLC**. The Publishing Profile Details page appears.

3. Locate the **Publishing mode** parameter to view the new OCLC publishing options.
UNIMARC and KORMARC Support

Alma provides support for the UNIMARC and KORMARC standards. The following list highlights the areas addressed by this additional capability:

- Profiles
  - Definition of fields, subfields, and controlled vocabulary
  - Normalization and validation rules

- Import
  - Import records in the MARC 21, KORMARC, and UNIMARC source format and convert them to the target format (basic crosswalk)

- Repository Search
  - Search for records and view the results
  - Related records
  - Display data from records including punctuation

- Manage Sets
  - Create and manage sets of records

- MD Editor
  - View and edit records; create merge and normalization rules
  - Form for 1XX field
  - Search external resources for source and target format that are not the same
  - Derive new record, related record
  - Find matches
  - Support for local fields for cached record of the network

- Export
  - Export records

- Publish to Primo
  - Publish records to different pipes according to their format
  - Publish related records

- General Publishing
  - Publish records using the general publishing mechanism
- Community Zone
  - Link to the Community Zone
  - Unlink a record from the Community Zone
- Quick Catalog
  - Quick catalog of a bibliographic record (reading list, fulfillment)
- Headings and Authorities
  - KORMARC headings and authority functionality including browse, F3, preferred-term correction, and so forth

Additional features will be provided in future releases.

### MARC 21 Authority Field Updates

#### Description
Alma authority support was updated with MARC 21 update 19 and additional changes as described in the table below.

<table>
<thead>
<tr>
<th>Changes</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added field 338</td>
<td><a href="http://www.loc.gov/marc/authority/adapndxf.html">http://www.loc.gov/marc/authority/adapndxf.html</a></td>
</tr>
<tr>
<td>Subfields i and 4 were added to field 700 and subfield g in fields X00 were made repeatable</td>
<td><a href="http://www.loc.gov/marc/authority/adx00.html">http://www.loc.gov/marc/authority/adx00.html</a></td>
</tr>
<tr>
<td>Subfields i and 4 were added to field 710 and subfield g in fields X10 were made repeatable</td>
<td><a href="http://www.loc.gov/marc/authority/adx00.html">http://www.loc.gov/marc/authority/adx00.html</a></td>
</tr>
<tr>
<td>Subfields i and 4 were added to field 711 and subfield g in fields X11 were made repeatable</td>
<td><a href="http://www.loc.gov/marc/authority/adx11.html">http://www.loc.gov/marc/authority/adx11.html</a></td>
</tr>
<tr>
<td>Changes</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Subfields i and 4 were added to field 730 and subfield g in fields X30 were made repeatable</td>
<td><a href="http://www.loc.gov/marc/authority/adx30.html">http://www.loc.gov/marc/authority/adx30.html</a></td>
</tr>
<tr>
<td>Subfields i and 4 were added to field 748</td>
<td><a href="http://www.loc.gov/marc/authority/adx48.html">http://www.loc.gov/marc/authority/adx48.html</a></td>
</tr>
<tr>
<td>Subfields i and 4 were added to field 750 and subfield g in fields X50 were made repeatable</td>
<td><a href="http://www.loc.gov/marc/authority/adx50.html">http://www.loc.gov/marc/authority/adx50.html</a></td>
</tr>
<tr>
<td>For fields 151, 451, 551 and 751, subfield g is now repeatable</td>
<td><a href="http://www.loc.gov/marc/authority/adx51.html">http://www.loc.gov/marc/authority/adx51.html</a></td>
</tr>
<tr>
<td>Subfields i and 4 were added to field 755 and subfield g in fields X55 were made repeatable</td>
<td><a href="http://www.loc.gov/marc/authority/adx55.html">http://www.loc.gov/marc/authority/adx55.html</a></td>
</tr>
<tr>
<td>Subfields i and 4 were added to field 762</td>
<td><a href="http://www.loc.gov/marc/authority/adx62.html">http://www.loc.gov/marc/authority/adx62.html</a></td>
</tr>
<tr>
<td>Subfields i and 4 were added to field 780</td>
<td><a href="http://www.loc.gov/marc/authority/adx80.html">http://www.loc.gov/marc/authority/adx80.html</a></td>
</tr>
<tr>
<td>Subfields i and 4 were added to field 781</td>
<td><a href="http://www.loc.gov/marc/authority/adx81.html">http://www.loc.gov/marc/authority/adx81.html</a></td>
</tr>
<tr>
<td>Subfields i and 4 were added to field 782</td>
<td><a href="http://www.loc.gov/marc/authority/adx82.html">http://www.loc.gov/marc/authority/adx82.html</a></td>
</tr>
<tr>
<td>Subfields i and 4 were added to field 785</td>
<td><a href="http://www.loc.gov/marc/authority/adx85.html">http://www.loc.gov/marc/authority/adx85.html</a></td>
</tr>
<tr>
<td>Subfield g was made repeatable for fields 400, 410, 411, 430, 450 and 451</td>
<td><a href="http://www.loc.gov/marc/authority/ad400.html">http://www.loc.gov/marc/authority/ad400.html</a></td>
</tr>
<tr>
<td></td>
<td><a href="http://www.loc.gov/marc/authority/ad410.html">http://www.loc.gov/marc/authority/ad410.html</a></td>
</tr>
<tr>
<td></td>
<td><a href="http://www.loc.gov/marc/authority/ad411.html">http://www.loc.gov/marc/authority/ad411.html</a></td>
</tr>
<tr>
<td></td>
<td><a href="http://www.loc.gov/marc/authority/ad430.html">http://www.loc.gov/marc/authority/ad430.html</a></td>
</tr>
<tr>
<td></td>
<td><a href="http://www.loc.gov/marc/authority/ad450.html">http://www.loc.gov/marc/authority/ad450.html</a></td>
</tr>
<tr>
<td></td>
<td><a href="http://www.loc.gov/marc/authority/ad451.html">http://www.loc.gov/marc/authority/ad451.html</a></td>
</tr>
<tr>
<td>Subfield g was made repeatable for fields 500, 510, 511, 530, 550 and 551</td>
<td><a href="http://www.loc.gov/marc/authority/ad500.html">http://www.loc.gov/marc/authority/ad500.html</a></td>
</tr>
<tr>
<td></td>
<td><a href="http://www.loc.gov/marc/authority/ad510.html">http://www.loc.gov/marc/authority/ad510.html</a></td>
</tr>
<tr>
<td></td>
<td><a href="http://www.loc.gov/marc/authority/ad511.html">http://www.loc.gov/marc/authority/ad511.html</a></td>
</tr>
<tr>
<td></td>
<td><a href="http://www.loc.gov/marc/authority/ad530.html">http://www.loc.gov/marc/authority/ad530.html</a></td>
</tr>
<tr>
<td></td>
<td><a href="http://www.loc.gov/marc/authority/ad550.html">http://www.loc.gov/marc/authority/ad550.html</a></td>
</tr>
<tr>
<td></td>
<td><a href="http://www.loc.gov/marc/authority/ad551.html">http://www.loc.gov/marc/authority/ad551.html</a></td>
</tr>
</tbody>
</table>
### Changes

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added subfield i and subfield 4 to fields 748, 750, 751, 755, 762, 780, 781, 782 and 785</td>
</tr>
<tr>
<td><a href="http://www.loc.gov/marc/authority/ad748.html">http://www.loc.gov/marc/authority/ad748.html</a></td>
</tr>
<tr>
<td><a href="http://www.loc.gov/marc/authority/ad750.html">http://www.loc.gov/marc/authority/ad750.html</a></td>
</tr>
<tr>
<td><a href="http://www.loc.gov/marc/authority/ad751.html">http://www.loc.gov/marc/authority/ad751.html</a></td>
</tr>
<tr>
<td><a href="http://www.loc.gov/marc/authority/ad755.html">http://www.loc.gov/marc/authority/ad755.html</a></td>
</tr>
<tr>
<td><a href="http://www.loc.gov/marc/authority/ad762.html">http://www.loc.gov/marc/authority/ad762.html</a></td>
</tr>
<tr>
<td><a href="http://www.loc.gov/marc/authority/ad780.html">http://www.loc.gov/marc/authority/ad780.html</a></td>
</tr>
<tr>
<td><a href="http://www.loc.gov/marc/authority/ad751.html">http://www.loc.gov/marc/authority/ad751.html</a></td>
</tr>
<tr>
<td><a href="http://www.loc.gov/marc/authority/ad781.html">http://www.loc.gov/marc/authority/ad781.html</a></td>
</tr>
<tr>
<td><a href="http://www.loc.gov/marc/authority/ad782.html">http://www.loc.gov/marc/authority/ad782.html</a></td>
</tr>
<tr>
<td><a href="http://www.loc.gov/marc/authority/ad785.html">http://www.loc.gov/marc/authority/ad785.html</a></td>
</tr>
<tr>
<td>Added subfield 4 to field 788</td>
</tr>
<tr>
<td><a href="http://www.loc.gov/marc/authority/ad788.html">http://www.loc.gov/marc/authority/ad788.html</a></td>
</tr>
</tbody>
</table>

### Step-by-Step Instructions

The following roles can view the authority field changes:

- Cataloging Administrator
- General System Administrator

To view the authority field changes:

2 Click the **MARC21 Authority** link. The MARC 21 authority Profile Details page appears with the **Fields** tab.

![Field Details Page](image)

**Figure 26 - Fields Tab on the MARC 21 Authority Profile Details Page**

3 Use the **Find** option to locate a specific field.

![Field Details Page](image)

**Figure 27 - Field 100 Example**

4 Select **Actions > View**. The Field Details page appears.

![Field Details Page](image)

**Figure 28 - Field Details Page**
5 Expand the **Subfield, First Indicator, and Second Indicator** sections to view the changes for a specific field.

### Other Resource Management Enhancements

- Alma finds special characters when you search using standard English characters. For example, a search for “u” matches “ü”, “ü”, and so forth. If the users in your institution search using special characters, you may want to contact Ex Libris to configure your system so that searches for regular characters match regular characters and searches for special characters match special characters. Search language configuration is available for German, Norwegian, Swedish, and Korean.

- **Master Thesis** was added as an electronic material type. It appears as an option in the **Material type** drop-down in **E-Book Mapping** when configuring **Inventory Operations** of an import profile.

The following physical material types were added in the **Physical Material Type** table (Resource Management > Resource Configuration > Configuration Menu; click Physical Material Type Descriptions under General). They appear as options in the **Material type** drop-down in **Physical Item Mapping** when configuring **Inventory Operations** of an import profile.

- 16 mm film
- Article
- Atlas
- Audio Recorder
- Blu-Ray
- Blu-Ray And DVD
- Box
- Camera
- Camcorder
- Ereader
- Film Reel
- Government Document
- Keys
- Looseleaf
- LP
- Microcard
- Mobile Device
- Newspaper
- Projector
- Tablet
- Video Game

Changed fields in the Physical Item Editor page:

- **Pattern Type** is now a drop-down that contains a list of unique 85X fields from the item’s holdings record. For example, if the holdings record contains 853 and 854 fields, the list contains 3 853 and 4 854.

- **Linking Number** is now a drop-down that contains the list of subfields $8 from the currently selected 85X fields. For example, if **Pattern Type** is 3 853, and the holdings record contains two 853 fields with subfields $8 with values "1" and "2", the list contains 1 and 2.

- **Type of Unit** was moved to the **Pattern Information** section and is now a read-only field populated on the fly by the FIRST subfield $o of the relevant **Pattern Type** and **Linking Number**.

- **Access type** was added as a new parameter for electronic collections. This parameter allows you to explicitly identify the licensing rights of a collection when, for example, a one-time purchase fee agreement was made for perpetual access to the electronic collection. The default setting for **Access type** is **Current**. **Access type** data is also available in Analytics. See [Access Type Field Added to E-Inventory Subject Area](#) for more information.

![Figure 29 - Access Type Parameter](#)

- The snippet functionality was removed from the **Edit > Add Rule** menu option when working with normalization rules in the MD Editor. Instead, sample normalization rules may be selected, to be copied into the normalization rule you are editing.
When importing records, if Alma identifies more than 150 matches for a record being imported, it does not import that record and marks it as a multmatch in the import report for manual handling.

The button to save changes when creating or editing a controlled vocabulary (Resource Management > Resource Configuration > Configuration Menu; select Cataloging > Controlled Vocabulary Registry and add or edit a controlled vocabulary) was changed from Edit to Save.

Some users use the holdings form for editing holdings (use_holdings_form is set to true in Resource Management > Resource Configuration > Configuration Menu > Other Settings). For these users, when editing a holdings record, the Summary text box, which sets subfield $x of field 866, was renamed Nonpublic note. You can also use the new text box Textual holdings to set subfield $a and the new text box Public note to set subfield $z (both of field 866).

Alma now supports Korean as a search language. To invoke this functionality, contact Ex Libris Support.

When editing general publishing profile (Resource Management > Resource Configuration > Configuration Menu > Record Export > Publishing Profiles; select Actions > Edit for a general profile and select the Data Enrichment tab), if Add Electronic Portfolio Information is selected, you can now enter the Portfolio PID.

The option Portfolio linking parameters update was added as an option in both the Review and All tabs of the Community Zone Updates Task List page (Resource Management > Manage Updates > Community Zone Updates Task List)
There was a limit of 5,000 lines for files when creating an itemized set. This limit was removed.

**Figure 31: Community Zone Updates Task List - Portfolio Linking Parameters Update Option**
Fulfillment

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

Support for Self-Pickup of Requests

Description

A library can now configure rules that determine how different aspects of request workflows are managed. Using these rules, libraries can better control how and when requests expire, how they appear on the pickup shelf, and whether the item is to be considered missing if it was not fulfilled within a specified number of days.

Step-by-Step Instructions

The following roles can set request pickup configuration:

- General System Administrator
- Fulfillment Administrator

To set request pickup configuration:

1. On the Request Pickup Configuration page (Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Request Pickup Configuration), click Add Rule. The Request Pickup Configuration page appears.

2. In the Name field, enter a name for the request pickup configuration rule.
3 In the Input Parameters section, specify the components of the input parameters (Name, Operator, and Value). A set of input parameters may look like this: User Group = Graduate student.

The available Name input parameters are:

- Location
- Request Type
- User Group

4 In the Output Parameters section, you can specify the following parameters that are to apply to the indicated Location, Request Type, or User Group:

- **Consider as missing when expired** - Whether the requested item is considered missing if it is not fulfilled within a specified number of days.
- **Show in ‘Pick From Shelf’ list** - Whether the requested item appears on the Pick From Shelf list.
- **Expiry time for ‘Pick From Shelf’ (in days)** - The number of days after which the request is considered expired. For example, if you specify 5 in this field, once a requested item is not picked up within 5 days, the request is considered expired.

When the item’s expiration time arrives, the **Requests — Handle Expiration Step** job cancels the requests (Administration > Manage Jobs > Monitor Jobs).

5 Click **Save**. The rule appears on the Request Pickup Configuration page.

![Figure 33 – Request Pickup Configuration Page — Enabled Rule](image)

6 In the **Enabled** column, select the check mark to enable to rule. Enabled rules are indicated by a yellow check mark.

   If you defined more than one rule, use the Move Up and Move Down arrows to set the order of the rules. The order of the rules is important, since the system applies the first (and only the first) appropriate, enabled rule.

7 Click **Apply Rules** to apply the enabled rules.
Enhancements to the Overdue and Lost Loan Profile

**Description**

You can now configure different notification letters and fines for Overdue and Lost Loan Profiles. When configuring a profile, you can select an **Overdue notification type** to send a notification letter that the loan is overdue, and you can create a fine to append to the overdue letter. The letter and fine are generated when the **Loans — Change to Lost** job runs. You can also customize the content of the letter that is sent to patrons with overdue loans.

**Step-by-Step Instructions**

The following roles can enable enhancements to the Overdue and Lost Loan Profile:

- General System Administrator
- Fulfillment Administrator

The following roles can configure fines in a loan Terms of Use (TOU) to append to an Overdue and Lost Loan Profile:

- General System Administrator
- Fulfillment Administrator

The following roles can modify the content of letters sent to patrons with overdue and lost items:

- General System Administrator
- Letter Administrator
The following role can monitor the Loans — Change to Lost job:

- General System Administrator

To create an enhanced Overdue and Lost Loan profile:

1. On the Overdue and Lost Loan Profile List page (Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Overdue and Lost Loan Profile), click Add Overdue and Lost Loan Profile. The Overdue and Lost Loan Profile Record page appears.

2. In the Profile Type field, select a notification type:
   - Change to lost — Changes the loans’ status to Lost.
   - Overdue notification type 1
   - Overdue notification type 2
   - Overdue notification type 3
   - Overdue notification type 4
   - Overdue notification type 5

   Notification types send a notification that the loan is overdue.

3. Select Send Notification to send a notification email to the patron, informing them that their loan is overdue (or lost, if Change to lost was selected).
4. Select **Create Fine** to create a fine when an overdue message is sent.

5. Click **Save**. The profile appears on the Overdue and Lost Loan Profile List page, with the **Profile Type** and **Create Fine** values specified accordingly.

```
<table>
<thead>
<tr>
<th>Enabled</th>
<th>Name</th>
<th>Profile Type</th>
<th>Create Fine</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>JJ Test - Overdue Notifications</td>
<td>Overdue notification type 1</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Leah's Lost Loan Profile</td>
<td>Overdue notification type 1</td>
<td>✓</td>
<td>Leah's Lost Loan Profile</td>
</tr>
<tr>
<td>3</td>
<td>Lost Loan Rules</td>
<td>Change to Lost</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Students Lost 45 Days</td>
<td>Change to Lost</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Students Notify 30 Days</td>
<td>Overdue notification type 1</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Visitors 14 Days</td>
<td>Change to Lost</td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>
```

*Figure 35 – Overdue and Lost Loan Profile List Page — Profile Type and Create Fine Columns*

**To configure fines for the selected notification types:**

1. On the Terms of Use Management page (Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Terms of Use and Policies), filter by Terms of Use Type = Loan.

```
<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>TOU Owner</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Days Faculty Limited</td>
<td>Loan</td>
<td>Institution</td>
<td>1 Days Faculty Limited</td>
</tr>
<tr>
<td>2 Hours Students Limited</td>
<td>Loan</td>
<td>Institution</td>
<td>1 Hours Students Limited</td>
</tr>
<tr>
<td>3 Hours Visitors Limited</td>
<td>Loan</td>
<td>Institution</td>
<td>1 Hours Visitors Limited</td>
</tr>
<tr>
<td>4 Month Students General</td>
<td>Loan</td>
<td>Institution</td>
<td>1 Month Students General</td>
</tr>
<tr>
<td>5 Month Visitors Closed</td>
<td>Loan</td>
<td>Institution</td>
<td>1 Month Visitors Closed</td>
</tr>
<tr>
<td>6 Hours Staff Limited</td>
<td>Loan</td>
<td>Institution</td>
<td>2 Hours Staff Limited</td>
</tr>
<tr>
<td>7 Hours Visitors Short Loan</td>
<td>Loan</td>
<td>Institution</td>
<td>2 Hours Visitors Short Loan</td>
</tr>
<tr>
<td>8 Week Visitors General</td>
<td>Loan</td>
<td>Institution</td>
<td>2 Week Visitors General</td>
</tr>
<tr>
<td>9 Days Visitors Media</td>
<td>Loan</td>
<td>Institution</td>
<td>3 Days Visitors Media</td>
</tr>
<tr>
<td>10 Month Staff Closed</td>
<td>Loan</td>
<td>Institution</td>
<td>3 Month Staff Closed</td>
</tr>
<tr>
<td>11 Month Staff General</td>
<td>Loan</td>
<td>Institution</td>
<td>3 Month Staff General</td>
</tr>
<tr>
<td>12 Month Students Closed</td>
<td>Loan</td>
<td>Institution</td>
<td>3 Month Students Closed</td>
</tr>
<tr>
<td>13 Hours Faculty Short Loan</td>
<td>Loan</td>
<td>Institution</td>
<td>4 Hours Faculty Short Loan</td>
</tr>
<tr>
<td>14 Hours Staff Short Loan</td>
<td>Loan</td>
<td>Institution</td>
<td>4 Hours Staff Short Loan</td>
</tr>
</tbody>
</table>
```

*Figure 36 – Terms of Use Management Page*

2. Select **Actions > Edit** for the relevant TOU. The Terms of Use Details page appears.
Locate the relevant **Overdue Notification Fine Type** entry on the bottom of the page, and select **Actions > Add Policy**. The Policy Details page appears.

Enter a **Name** and **Value** in the relevant fields, and ensure that **Value Type = Other**.

Click **Save**. The policy is added to the notification fine type on the Terms of Use Details page.
Additionally, the configured TOU appears on the Fulfillment Configuration Utility page (Fulfillment > Advanced Tools > Fulfillment Configuration Utility) when you enter a Patron Identifier and Item Barcode.
The amount configured for **Overdue Notification Fine Type 1** is charged if an Overdue and Lost Loan Profile configured with **Overdue Notification Fine Type 1** triggers a message for a loan that is linked to a TOU with this policy.

Similarly, the amount configured for **Overdue Notification Fine Type 2** is charged if an Overdue and Lost Loan Profile configured with **Overdue Notification Fine Type 2** triggers a message for a loan that is linked to a TOU with this policy. The same applies for the other Overdue Notification Fine types.
To modify overdue and lost loan letters:


![Code Table](image)

**Figure 41 – Ful Lost Loan Notification Letter Code Table Page**

2. Click Customize to modify the Notification type code entries:
   - `additional_info_1_type1…5` and `additional_info_2_type1…5` — Text that will be applied to one of the respective 1-5 types. This applies to the entries in cells 8-13, 15, and 17-19 in the image above.
   - `inform_you_item_below_type1…5` — Text that will be applied to a message of one of the respective 1-5 types before listing the loan’s details.
- `charged_with_fines_fees_type1...5` — Text that will be applied to a message of one of the respective 1-5 types before listing the loan’s charges.

The text that you enter appears in the Ful Lost Loan Notification Letter that is sent to patrons. Only those settings that correspond to the selected Profile type, configured during configuration of the selected Overdue and Lost Loan Profile, take effect in the letter. For example, if you selected Overdue notification type 1 as your profile type during profile configuration, only those settings ending in `type1` take effect in the Ful Lost Loan Notification letter.

**To monitor loans changed to lost or overdue:**

1. On the Monitor Jobs page (Administration > Manage Jobs > Monitor Jobs), click the History tab and locate the Loans - Change to Lost job.


4 In the Change to Lost – by Profile and Fines created – by Profile sections, click the Actions button and select either View failed records or View succeeded records to view the page listing the Job Events.

5 Click the link to view the Events Report page with information on the event.
Configuring In-House Uses Update

Description

When scanning an item into Alma, you may want to check the current status of the item without creating an in-house indication. You can now select or clear a check box to indicate whether you want scanned items to automatically create a new in-house indication.

Step-by-Step Instructions

The following role can block creation of a new in-house indication when scanning an item:

- Requests Operator

To block in-house use indication when scanning an item:

1. On the Scan In Items page (Fulfillment > Resource Requests > Scan In Items), locate the Register in-house use check box.

   ![Scan In Items Page — Register in-house use Check Box]

   **Figure 46 – Scan In Items Page — Register in-house use Check Box**

2. Do one of the following:

   - Clear the check box to ensure that scanning an item does not create a new in-house use indication. When this box is cleared, the **Number of in-house uses** value on the More Info pop-up window (displayed when clicking **More Info** on the Repository Search page) remains the same after scanning an item.

   - Select the check box to register a new in-house use indication when scanning an item. When the box is selected, the **Number of in-house uses** value on the **More Info** pop-up window updates after scanning an item.
Other Fulfillment Enhancements

- On the Service Details tab of a General Electronic Service (Fulfillment > Fulfillment Configuration > Configuration Menu > Discovery Interface Display Logic > General Electronic Services, select Actions > Edit for a service), the URL Template field supports the {inventory_id} attribute.

- The following fields were added to the On Hold Shelf XML notification data:
  - The <item_loan_due_date_policy> element

  The following were added to the <phys_item_display> section:
  - <item_policy>
  - <public_note>
  - <fulfillment_note>
  - <statistics_note1>, <statistics_note2>, and <statistics_note3>
  - <internal_note1>, <internal_note2>, and <internal_note3>

- Request and work order cancelation reasons can be customized by Ex Libris Support.

- The Requester field on the Resource Request Monitoring page (Fulfillment > Resource Requests > Monitor Requests & Item Processes) now appears with an icon next to the Requester’s name. Click the icon to view a user info pop-up window.

- When configuring loan limit rules, you can now select an item policy.

- French translations were added for work order cancellation reasons in a Ful Cancel Request Letter.
Resource Sharing

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

Attaching Notes to Partner Actions

Description
Actions performed during the resource sharing process (such as shipping and receiving) may require additional information to include with the action. You can now include notes with workflow steps to provide updates to peer partners.

You can add notes when performing the following workflow steps:

- Ship Item
- Receive
- Renew
- Return
- Check In
- Reject
- Cancel

Step-by-Step Instructions
The following roles can attach notes to partner actions:

- Fulfillment Services Operator
- Fulfillment Services Manager

To attach notes to actions performed during the resource sharing process:

2. Click Add Partner to add a partner to a request.
3. On the Resource Sharing Lending Requests Task List page (Fulfillment > Resource Sharing > Lending Requests) or Resource Sharing Borrowing Requests page (Fulfillment > Resource Sharing > Borrowing Requests), click one of the actions listed above for the request you created. The relevant dialog box appears with the following new fields:
- **Note to partner** – The note that is sent to the partner. This note appears in the Notes tab of both the sender of the note and the receiver of the note, and on the request’s Audit tab (that is, **Only in reading room**).

  This note appears in the following format: `<Name of partner><Note text>`

- **Internal note** – A note that appears only on the side from which it is sent (that is, when configuring a note from the borrower, the note appears only in the list of borrowing requests. When configuring a note from the lender, the note appears only in the list of lending requests). These notes do not appear on the Audit tab, and are to be used for notes not intended to be publicized (that is, they are not sent to the peer partner). An example of a note would be a borrower writing, **This lender has historically been difficult to deal with.**

  Additionally, on a request’s Notes tab, you can assign notes as active, or you can dismiss notes by selecting the relevant option in the drop-down at the top of the page (Activate Notes or Dismiss Notes), and clicking Save. Notes received from a peer member are automatically labeled as Active. A new Active Notes facet can be used to find requests with active notes.

  You can dismiss Active notes. Dismissed notes are excluded from the Activate Notes facet, but are still included with their respective requests (they are not deleted).

### Enhancements to the Send Query to Patron Capability

#### Description

The Send query to patron option on the borrowing requests task list was enhanced. There are now more customization options for the patron messages, by using XSL forms for customizing the queries.

The `send_query_to Patron_use_xsl` parameter on the Customer Parameters Mapping Table page enables you to configure Patron Query Types. If set to `false`, the previous query-to-patrons configurations continue to take effect. If set to `true`, you have new options for selecting the types of queries-to-patron to select from, the content of each query type, and its format. You can select query types to be available for the operator to choose from, and you can customize each type using highly customizable XSL style sheets.

#### Step-by-Step Instructions

The following roles can configure the setting which enables configuring of patron query types:

- General System Administrator
- Fulfillment Administrator
The following roles can configure patron query types:

- General System Administrator
- Fulfillment Administrator

The following roles can modify the format and content of the Query to Patron letter:

- General System Administrator
- Letter Administrator

**To enable configuring of patron query types:**

1. On the Customer Parameters Mapping Table page (Fulfillment > Fulfillment Configuration > Configuration Menu > General > Other Settings), locate the `send_query_to_patron_use_xsl` parameter.
2. Click Customize to modify the value of this parameter.
   - For existing Alma users, this parameter is by default set to `false`.
   - For new Alma users, this parameter is by default set to `true`.

When this parameter is set to `false`, the previously existing Patron Query Templates configuration option appears on the Fulfillment Configuration menu (Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Patron Query Templates), where you configure the template to define the appearance of queries to be sent to patrons.

When this parameter is set to `true`, the Patron Query Templates configuration option is replaced by the Patron Query Types option on the Fulfillment Configuration menu (Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Patron Query Types), where you configure the types of queries to select from when sending a query to patron. The queries are sent using the enhanced XSL based Query to Patron letter.
3 Click Save.

To configure patron query types:

1 Ensure that you configured send_query_to_patron_use_xsl in the Customer Parameters Mapping Table to true, as described in the previous procedure.

2 On the Patron Query Types Code Table page (Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Patron Query Types), select the check mark in the Enabled column to enable the relevant patron query types. Enabled entries appear with a yellow check mark.

![Figure 48 – Patron Query Types Code Table Page](image)

You can modify the enabled entries’ textual description on the Patron Query Types Code Table page. Notice that the Description column’s text appears in the drop-down of query types (as shown in the image below), and the code enables you to map the exact text to be used for each query type, as described in the following procedure.

You can select enabled entries as templates for the Send Query to Patron email, and can modify the entries on the Query to Patron Letter Code Table page (see the relevant procedure, below).

3 On the Resource Sharing Borrowing Requests page (Fulfillment > Resource Sharing > Borrowing Requests), click Send query to patron for a request to view the query types that you configured. The Select Email Template dialog box appears, where you select the email template you want to be used for the query.

![Figure 49 – Select Email Template Dialog Box](image)
If only one type is enabled, no dialog box appears and the query is sent to the patron immediately, based on the enabled type/template.

4 Select an email template and click **Send Email**: An email is sent to the requesting patron, based on the selected template.

**To modify the text of the Query to Patron letter:**

1 On the All Code Tables page (Administration > General Configuration > Configuration Menu > General Configuration > Letter Emails), select Actions > Customize for the **Query to Patron Letter** entry. The Query to Patron Letter Code Table page appears.

![Query to Patron Letter Code Table](figure50.png)

**Figure 50 – Query to Patron Letter Code Table Page**

2 In the **Description** column, modify the content corresponding to the relevant **Code** entry.

The entries in the **Code** column (**Type_1**, **Type_2**, **Type_3**, and so forth) correspond to the Patron Query Types you select in the Patron Query Types Code Table page (see the procedure above). For example, if you defined **Type_1_query_name** as enabled, you can configure the **Type_1_xxx** entries in this table to configure the text lines to be part of this type of query. Only patron query types marked as **Enabled** on the Patron Query Types Code Table page appear in the Query to Patron Letter.

3 Click **Customize**.
To modify the format of the Query to Patron letter:

1. On the Configuration Files page (Administration > General Configuration > Configuration Menu > General Configuration > Customize Letters), locate the Query to Patron Letter entry and click Customize. The Configuration File page appears.

![Figure 51 – Configuration File Page]

2. In the Content field, modify the XSL to change the format of your letter.

3. Click Customize.

The same XSL file is used to format all of the query types. Condition clauses may be used in the XSL file using the previously-described code table codes, for example:

```xml
<xsl:when test="notification_data/query_type = 'Type_1_query_name'">
  ... special configurations for type 1 queries ....
</xsl:when>
```

Note: The previous method for configuring queries to patrons is still useable, but will be removed as a configuration option in a future release.
Automatic Issuing of Overdue Notices

Description
Alma now automatically marks ISO and email lending requests whose due date has arrived as Overdue request. In addition, Alma automatically sends ISO and email messages about these requests to the borrower. When using ISO, Alma automatically updates the borrower’s request status based on this message.

This functionality is provided by the new scheduled job Send Overdue Message to Borrower. You can view a report about the job in Alma.

You can also manually set these requests to Overdue request.

Overdue requests also appear in the Tasks list on the Alma main menu.

Note: As a result of the Overdue request status being generated automatically, the Overdue item step can no longer be added to workflow profiles (Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Workflow Profiles).

Step-by-Step Instructions
The following roles can manage lending requests whose date has arrived:

- Fulfillment Services Operator
- Fulfillment Service Manager

The following role can view a report on the job that automatically processes these requests:

- General System Administrator

To view requests marked as Overdue request:

On the Resource Sharing Lending Requests Task List page (Fulfillment > Resource Sharing > Lending Requests), locate a request whose due date is earlier than the current date. The request’s status is Overdue request.
Figure 52 – Resource Sharing Lending Request — Overdue Request

To manually change a request’s status to Overdue request:

Perform one of the following:

- Select **Overdue request** in the drop-down at the top of the Resource Sharing Lending Requests Task List page. Messages are sent accordingly, as described above.

- Click **Edit** for a request and manually change the **Request status** value to **Overdue request**. Only the status of the request is changed; no messages are sent as a result of this action.

To view a report about the job that labels requests with a past due date as Overdue:

1. On the Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs**), click the **History** tab and ensure that a **Send Overdue Message to Borrower** job ran.

Enhanced Management of Electronic Resources in the Borrowing Locate Process

Description

Alma now provides you with more efficiency to locate resource sharing materials during the locate process. When configuring a locate profile, you can configure the profile to check the peer partner for available and requestable physical inventory, while ignoring electronic resources.

Step-by-Step Instructions

The following roles can manage electronic resources in the borrowing locate process:

- Fulfillment Services Operator
- Fulfillment Services Manager
To ignore a peer partner’s electronic inventory when running the locate process:

1. On the Locate Profiles List page (Fulfillment > Fulfillment Configuration > Resource Sharing > Locate Profiles), click Add Profile. The Locate Profile Details page appears. This is the first page of a two-page wizard.

![Locate Profile Details Page — Page 1 of Wizard](image)

2. Configure a profile of Type = Alma, and click Next. The second page of the Locate Profile Details Wizard appears.

![Locate Profile Details Page — Page 2 of Wizard](image)

3. In the Server field, enter the URL of the target Alma. Optionally, enter other information in the other fields on the page, as required.

4. Select the Check Availability/Requestability check box. The Ignore Electronic and Digital Resources check box appears.

5. Select the Ignore Electronic and Digital Resources check box, and click Save.

The profile checks only for physical items, and any partner that contains only electronic and/or digital items is skipped in the rota.
Note: If a physical match exists, electronic and digital resources are located even if this check box is selected.

Support for Resource Sharing in NCIP Remote Storage

An NCIP enabled remote storage facility now triggers the direct shipping of lending resource sharing requested items to the requesting peer member.

When the NCIP enabled remote storage system sends a CheckOutItem message to Alma and the item has an active resource sharing lending request, the item is immediately considered shipped, and the lending request’s workflow status becomes Shipped Physically. For more information, see Remote Storage in the Alma Developers Network.

Integration with ILLiad

Integration between ILLiad and Alma was enabled, using the NCIP protocol. This impacts both borrowers and lenders in the resource sharing process. This provides seamless integration between Alma and ILLiad so work only needs to be done in one system at any stage of the workflow. For details, see ILLiad Add-on for NCIP Based Integration with Alma in the Alma Developers Network.

Other Resource Sharing Enhancements

- General Messages are now limited to 1000 characters.
- The Resource Sharing Lending Requests Task List Page (Fulfillment > Resource Sharing > Lending Requests) was updated as follows:
  - The Request Printed and Active Partner facets now appear closer to the top of the facets list.
  - Requests now contain the indicators Request Printed (Yes/No) and Request Reported (Yes/No).
  - When Request Printed = Yes, the print date appears in the Task Information on the Task List. Print dates appear only for slips printed from June 2015 and onward.
Administration

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

Enhancements to the Users Profile Reports

Description

Alma now includes additional information in the report on the Users IMPORT and Users SYNCHRONIZE jobs. You can view information on problems that occurred with the job, as well as information on users processed by the job.

Step-by-Step Instructions

The following role can view the report for the Users IMPORT and Users SYNCHRONIZE jobs.

- General System Administrator

To view enhanced functionality on the IMPORT and SYNCHRONIZE reports:

1. On the Monitor Jobs page (Administration > Manage Jobs > Monitor Jobs), click the History tab to see a list of the jobs that ran.
2 Locate the import/synchronize job, and select **Actions > Report**. The Job Report page appears, displaying information on the report.

The Job Report page displays the following new sections:

- **Alerts** – Information about problems that occurred as a result of the job.
- **Job Results Summary** – Information on the users processed by the job.

**HealthCheck Tool**

**Description**

Alma now provides a HealthCheck tool that allows Alma administrators to identify whether any issues exist with their configuration, such as missing or inconsistent settings.
Step-by-Step Instructions

The General Administrator role can access this feature.

To access the HealthCheck tool:

From the Alma main menu, select Administration > Advanced Tools > HealthCheck Dashboard. The HealthCheck Dashboard appears.

The System Status section lists the information of the last job run. Click Report to display the report of the last job run.

The HealthCheck Tool can be run manually or automatically on a fixed schedule.

To run the HealthCheck tool manually:

1. From the Entity Name section, select the functional areas on which you want to run the HealthCheck tool. The available options are:
   - Fulfillment
   - Acquisitions
   - User management
2. Click Run.
To schedule a recurring run of the HealthCheck Tool:

1. Select Active.
2. Select one of the following options from the Scheduling drop-down list.
3. Click Email Notifications to have a report of the job sent to an email address.
4. Click Save.

Note: Scheduled jobs run on all functional areas.

To view job and test reports:

1. As the job runs, the results appears under the Job History section. Click Refresh as the job runs to refresh the results.
2. Click View to display a job report. For example:

![Job Report](image)

Figure 60 – Job Report
3 Click a functional area to display a list of the tests run on that area and the number of failures.

**Note:** The number of failures for each test is limited to 100.

4 Click **View Error Events** to display a description of the test error. For example:

![Events Report](image)

**Figure 61 – Events Report**

**Other Administration Enhancements**

- When registered Alma users who do not have working Alma permissions log into Alma (for example, users who have only the Patron or Trial Participant roles), a page appears indicating that they are not authorized to access Alma. When Alma is configured with either internal or LDAP authentication, a **Return to Login Page** link appears. When working with SAML authentication, this link does not appear.

- The Bulk Fines Waiving job now waives fines with a status of **In Dispute**.

- The **Fulfillment — Handle Historical Archiving** job can now be run daily, weekly, or monthly.

- Changes made on the Calendar Management page (**Administration > General Configuration > Configuration Menu > Libraries > Add a Library or Edit Library Information**; click the **Calendar Management** tab) now invoke the **Apply Calendar Changes** job. You monitor this job on the Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs**).

- Searching for a user from the persistent search box now searches all user properties, including email and identifiers. **All** was added as the default option when using the **Find and Manage Users** filter.
Collaborative Networks and Multicampus Institutions

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

Centralized Management of Notification Letters

Description
Alma produces a variety of letters as a means of notification. Institutions that administer the Network Zone in a collaborative network can now customize notification letter templates and distribute them automatically to member institutions in a collaborative network. This allows for easier coordination between member institutions and reduces duplication of effort.

The following conditions apply:

- If a member institution customizes a letter, changes from the Network Zone do not overwrite the changes to the letter.
- If a member institution does not want to receive customization changes from the Network Zone, it can customize the letter (without necessarily changing any data), which blocks it from receiving Network Zone customizations.
- If a member institution later decides to receive customizations from the Network Zone, it can perform a restore, which changes the configurations for the letter to the Network Zone customizations and allows that letter to receive Network Zone configurations in the future.
- If a member institution customizes a letter that is managed by the Network Zone and wants to return the settings of that letter to the original settings before any customizations (OTB), it must do so manually (the Restore button does not have this functionality for letters managed by the Network Zone).
- If a Network Zone administrator clicks Restore and Distribute for a letter, the settings in the member institution are restored to the original settings before any customizations (OTB) of that letter if the member institution did not perform any customizations.
- If a Network Zone administrator clicks Stop Network Management and Distribute, changes performed in the Network Zone are no longer distributed to member institutions. This action leaves member institution data unchanged—that is, a restore is not performed.
- The Distribute Network Letter Template Changes to Members job distributes any changes made to letters in the Network Zone to the member institutions.
Step-by-Step Instructions

The following roles can access this feature:

- General System Administrator
- Letter Administrator

To access this feature:

1. From the Network Zone, select the letter template that you want to distribute to member institutions (Administration > General Configuration > Configuration Menu > General Configuration > Customize Letters):

![Figure 62 – Manage in Network](image)

2. Select Customize > Actions > Manage in Network for the letter that you want to manage in the Network Zone.

   A green check mark appears in the Managed in Network column for the letter that indicates that that letter is managed by the Network Zone.

![Figure 63 – Managed in Network](image)
3 Perform any customizations that you want to distribute to member institutions.

4 Click **Distribute** to distribute the configuration changes. Click **Confirm** in the confirmation dialog-box to run the job that distributes the changes to member institutions.

The configuration changes are distributed to the member institutions when the job runs. **Network** appears in the Updated By column both in the Network Zone and the member institution.

5 To stop centralized management of notification letter templates, click **Stop Network Management** for the letter, and then click **Distribute** and **Confirm** in the confirmation dialog-box.

![Figure 64 – Stop Network Management](image)

Letter customizations changes performed in the Network Zone are no longer distributed to member institutions.

### Viewing Network Members’ Order Details

#### Description

Network members can now see if other members of the network placed an order for a resource including the order details.

#### Step-by-Step Instructions

Any role can complete a repository search and view order information.
To view the order information for a title held by a different member:

1. As a member institution, complete a titles search from the Network tab for a title that is held by another institution.

2. Click the Held by link for the other institution. The Held By Details Page appears.

3. Click the Orders tab.
4  View the order information.

**Other Collaborative Network Enhancements**

- When working in a Network Zone, the following configuration options were added to the Fulfillment menu:
  - Advanced Tools > Distribute Fulfillment Network Configuration, for users with General System Administrator or Fulfillment Administrator privileges.
  - Advanced Tools > Distribute Resource Sharing Network Configuration, for users with General System Administrator, Fulfillment Administrator, or Resource Sharing Partners Manager privileges.

- When working in a Network Zone, the Acquisitions menu contains the following option: Advanced Tools > Distribute Acquisition Network Configuration

  This option is available to users with **Vendor Manager** privileges.
Analytics

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

Access Type Field Added to E-Inventory Subject Area

Description

The Access Type field was added to the Electronic Collection dimension of the E-Inventory subject area. This field indicates whether the electronic collection access level license right is current or perpetual.

![Figure 67 – Access Type](image)

Step-by-Step Instructions

The Design Analytics role can access this enhancement. The following is an example of a report that displays the access type:
Other Alma Analytics Updates

- The Patron Details field in Fulfillment will not be deprecated, and is no longer marked as such.
- The Alma logo in Analytics was changed to Ex Libris.
Alma Infrastructure

For the June 2015 release, the following Alma infrastructure enhancements were made:

- The Alma instance for your institution (the group of servers serving your institution) was added to the bottom of the Help menu. This information can be used to cross-check with the current status of all Alma instances (http://status.exlibrisgroup.com/) to view any known issues with Alma’s performance in your institution.

- When running a job (Administration > Manage Jobs > Run a Job), the number of members in the set appears in step 3 of the wizard (Run a Job - Enter Task Parameters), and a pop-up confirmation dialog box appears in step 5 of the wizard (Run a Job - Review and Confirm).

- In various table pages, an Actions button appears. Until now, it was necessary to click the Actions button to open and close the list of action options. Now, once the list is open, clicking anywhere on the page closes the list.
Alma APIs

For the June 2015 release, the following APIs were added:

- An API to retrieve loan information was added:
  
  GET /almaws/v1/bibs/mms_id/holdings/holding_id/items/item_pid/loans/loan_id

- An API to retrieve request information was added:
  
  GET /almaws/v1/bibs/mms_id/holdings/holding_id/items/item_id/requests/request_id
  GET /almaws/v1/bibs/mms_id/requests/request_id
  GET /almaws/v1/users/user_id/requests/request_id

- APIs to create bibliographic and holdings records (with XML) were added:
  
  POST /almaws/v1/bibs/{mms_id}/holdings
  POST /almaws/v1/bibs

For more information on the above APIs, see

https://developers.exlibrisgroup.com/alma/apis/bibs

The following APIs were changed:

- call_number_type was added as a request field to the API that retrieves item information (/almaws/v1/items).

- The table code of a code table now appears in the UI (as Table Code). You can use the code as an input to the get code tables API (/almaws/v1/conf/code-tables).

- The fields returned from the get bibliographic record API (/almaws/v1/bibs) now include linked_record_id with the Network Zone or Community Zone record ID, indicating a linked record, if any.

- override was included as a new request field in the update user API (/almaws/v1/users). Its values include library managed fields, separated with commas, that you wish to overwrite using the API. The available fields are: user_group, campus_code, rs_libraries, and preferred_language.

- pin_number was added as a return field to the get user API (/almaws/v1/users).

- A second order_by field, for secondary ordering, is available for the APIs courses, users, and users/id/loans.
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 June release. This issue will be fixed in an upcoming release.

Fixed Issues

The following previously known issue was fixed for the June release:

- Related to the feature for contributing portfolios to the Community Zone, a Community Zone portfolio with multiple rows of to/from coverage information before a contribution is made, appears as only a single row of to/from coverage information after the contribution and the Community Zone portfolio is updated.