

Ex Libris Confidential



CONFIDENTIAL INFORMATION

The information herein is the property of Ex Libris Ltd. or its affiliates and any misuse or abuse will result in economic loss. DO NOT COPY UNLESS YOU HAVE BEEN GIVEN SPECIFIC WRITTEN AUTHORIZATION FROM EX LIBRIS LTD.

This document is provided for limited and restricted purposes in accordance with a binding contract with Ex Libris Ltd. or an affiliate. The information herein includes trade secrets and is confidential.

DISCLAIMER

The information in this document will be subject to periodic change and updating. Please confirm that you have the most current documentation. There are no warranties of any kind, express or implied, provided in this documentation, other than those expressly agreed upon in the applicable Ex Libris contract. This information is provided AS IS. Unless otherwise agreed, Ex Libris shall not be liable for any damages for use of this document, including, without limitation, consequential, punitive, indirect or direct damages.

Any references in this document to third-party material (including third-party Web sites) are provided for convenience only and do not in any manner serve as an endorsement of that third-party material or those Web sites. The third-party materials are not part of the materials for this Ex Libris product and Ex Libris has no liability for such materials.

TRADEMARKS

"Ex Libris," the Ex Libris Bridge to Knowledge, Primo, Aleph, Voyager, SFX, MetaLib, Verde, DigiTool, Rosetta, bX, URM, Alma, and other marks are trademarks or registered trademarks of Ex Libris Ltd. or its affiliates. The absence of a name or logo in this list does not constitute a waiver of any and all intellectual property rights that Ex Libris Ltd. or its affiliates have established in any of its products, features, or service names or logos.

Trademarks of various third-party products, which may include the following, are referenced in this documentation. Ex Libris does not claim any rights in these trademarks. Use of these marks does not imply endorsement by Ex Libris of these third-party products, or endorsement by these third parties of Ex Libris products.

Oracle is a registered trademark of Oracle Corporation.

UNIX is a registered trademark in the United States and other countries, licensed exclusively through X/Open Company Ltd.

Microsoft, the Microsoft logo, MS, MS-DOS, Microsoft PowerPoint, Visual Basic, Visual C++, Win32, Microsoft Windows, the Windows logo, Microsoft Notepad, Microsoft Windows Explorer, Microsoft Internet Explorer, and Windows NT are registered trademarks and ActiveX is a trademark of the Microsoft Corporation in the United States and/or other countries.

Unicode and the Unicode logo are registered trademarks of Unicode, Inc. Google is a registered trademark of Google, Inc.

Copyright Ex Libris Limited, 2015. All rights reserved. Document updated: June 2015

Web address: http://www.exlibrisgroup.com

Table of Contents

1	About the Alma Release Notes	5
2	Alma June 2015 Release Highlights	6
	Acquisitions	6
	Resource Management	6
	Fulfillment	6
	Resource Sharing	7
	Administration	7
	Collaborative Networks and Multicampus Institutions	7
	Alma Infrastructure	8
	Alma RESTful APIs	8
3	Data Services	9
	New Electronic Collections Added to the Alma CKB	9
	New External Resources that Are Open for Searching	9
4	Alma Videos	10
5	Particular Issues to Note	11
6	Acquisitions	12
	Receive EDI Reports from Vendors	12
	Enhanced Vendor EDI Job Reports	15
	Allow Invoice-Level Tax in an EDI to Not Be Expended from Funds	18
	Other Acquisitions Updates	19
7	Resource Management	20
	Enhancements to Itemized Set Creation	20
	Automatic Generation of the Summary Holdings Statement Based or Items	n 22
	Contributing Electronic Collections to the Community Zone	28
	New OCLC Publishing Options	32
	UNIMARC and KORMARC Support	35
	MARC 21 Authority Field Updates	36

	Other Resource Management Enhancements	40
8	Fulfillment	44
	Support for Self-Pickup of Requests	44
	Enhancements to the Overdue and Lost Loan Profile	46
	Configuring In-House Uses Update	55
	Other Fulfillment Enhancements	56
9	Resource Sharing	57
	Attaching Notes to Partner Actions	57
	Enhancements to the Send Query to Patron Capability	58
	Automatic Issuing of Overdue Notices	63
	Enhanced Management of Electronic Resources in the Borrowing Locate Process	65
	Support for Resource Sharing in NCIP Remote Storage	67
	Integration with ILLiad	67
	Other Resource Sharing Enhancements	67
10	Administration	68
	Enhancements to the Users Profile Reports	68
	HealthCheck Tool	69
	Other Administration Enhancements	72
11	Collaborative Networks and Multicampus Institutions	73
	Centralized Management of Notification Letters	73
	Viewing Network Members' Order Details	75
	Other Collaborative Network Enhancements	77
12	Analytics	78
	Access Type Field Added to E-Inventory Subject Area	78
	Other Alma Analytics Updates	79
13	Alma Infrastructure	80
14	Alma APIs	81
15	Known Issues	82
	Fixed Issues	82

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 (<u>http://status.exlibrisgroup.com/</u>) 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**).

Manage EDI Task	S										Dismiss Selected	Execute
Review	All											
Response date from	01/03/2015		to 05/05/2015		🗐 🕩 Apply Filte	er						
Response Type All 🚍												
0 rows selected											1 - 1 of 1 Records	Tools
🔲 Order Number	Order Description	Vendor	Response Summary	Response Type	Ordered Item	s Discrete Items	Split Delivery Item	is Dispatched Iten	s Backordered Iten	ns Pieces Delivere	ed Expected Delivery	
1 🔄 POL-47697	BIOLOGY OF THE INVERTEBRATES. NEW PORK. MCGRAW-HILL, 2015, 9780073524184, ISBN	52 WOMEN - name	Order number POL-11111. Accepted as is. Not yet published. Backordered - awaiting supply. EXPECTED- AVAILABILTY-DATE: 20151230.	Accepted as is	1	0	0	0	0	0	30/12/2015	Actions
											Dismiss Selected	Execute

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.

Expected Receipt Date*	02/03/2015 🔲 🚿
Note	
	Cancel Save

Figure 2: Change Expected Release Date Dialog Box

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.

2 To view details about a job, click **Report** in the job row. The Job Report page appears.

Completed Successfully	Name EDI - I Process ID 97954 Started on 29/04	.oad Files 000VOLEE 6270000121 2015 11:49:44 AM IDT	Created by ext_impl (29/04/2015) Total run time 9 Seconds Finished on 29/04/2015 11:49:54 Al	II MIDT
ob Results Summary				E Tools
Total records processed			1	
Total files handled			1	
Total invoices			1	
Total Shelf ready Order re	sponses		0	
Total Report task Order res	ponses		0	
Error Description		Error Value		Tools
1 No transaction created	for invoice line number	Invoice Line number :1 Invoice	Number : 9609410	
2 Error edi file translation from edi to xml UNH - INVOIC unsupported versic 1430297384980121.000VOLEE			sion.D :96A:UN: : Invoice Number : E. 1430297384292.invoice52women_1556150.edi	
Invoice				💽 Tools
	Number o	Invoice Lines	Number of related PO Lines	
Invoice Number	number o			and a second sec

Figure 3: EDI Job Report Page: Invoice

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 Reponses.

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**.

 Invoice job parameters 					
Status	Active Inactive	Schedule	Not scheduled	*	Run Now
Upload EDI		Add and Execute			
VAT expended from fund					
Do not prorate					

Figure 4: VAT Expended from Fund Field

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: User ID, 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

 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 entrancements 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:

හි Set Details	9	Cancel	Add Men	bers to Set	Save	
Set name -	Se	et type	Itemized		Set ID -	
General Informatio	n					
Set name	*]
Description]
Note						٦
					,	
Set content type	* Authorities	-	Private ON	lo ⊚Yes		
Status	●Active ○Ina	ictive	Status date	05/07/2015 05	:14:32 PD1	Г
Created by	Ex Libris		Updated by	Ex Libris		
Add Contents from	File to Set					
	File		ת 🕕	he maximum file siz	te is 10 MB.	
		Cance	Add Me	mbers to Set	Save	

Figure 6 –Set Details

- **3** Fill in the fields as described in the **Adding Itemized Sets** section of the *Resource Management Guide*.
- 4 Click in the **File** field, and select a file to upload.
- 5 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.

Monitor Jobs				
Scheduled SP Scheduled	Running	History		
Submit Date from 06/05/2015	📰 🖋 to	07/05/2015	📰 🕩 🛛 Apply	Filter
Filter : All		Find	: in : [N	lame 🔻 Go
Refresh			1 - 13 of 13 Jo	obs 🖪 Tools
⇔ Name	≑ Job ID	Job Category	♦ Status	
1 Add Members to Set	16429240000121	Repository	U Completed with Errors	Actions
2 Notifications - Send Due Date Reminders	16425950000121	Fulfillment	Scompleted Successfully	Actions
3 PO Line - Claiming	16425900000121	Acquisition	Scompleted Successfully	Actions

Figure 7 – Monitor Jobs

6 Validation checks are conducted for items, PO lines, and users. To see a report, select **Actions > Report**. For example:

තී Job Report				
Completed Successfully Rec	Process ID Started on Total run time Status ords processed	16429440000121 07/05/2015 11:56:44 IDT 0.072 Seconds Completed Successfully 1	Name Finished on Created by Status date Records with exceptions	Add Members to Set 07/05/2015 11:56:44 IDT exl_impl 07/05/2015 11:56:44 IDT 0
Counters				
Set nam	e: User set 2			
Total added to se	t: 1			
Total inval	d: 0			
Total failed for technical reason	s: 0			

Figure 8 – Job Report

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 Info	rmation			
Pattern Type	3 (853)	Linking Number	1	
Type of Unit	-			

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:

- 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.

\$	Profile	Details					Bac
		Profile	MARC21 Holding		Family	y MARC	
		Туре	Holding		Usage	e HOLDING	
F	leids	Norma	lization Processes	Validation i	Processes	Validation Exception Profile List	
Add	d Process	5					🔝 Tool
Ada	d Process Active	Name			Description	n	Tool
Add	d Process Active	Name Marc2	1 Holding enhace b	y 863/4/5 fields	Description for release r	n review	Actions
Add	d Process Active	Name Marc2	1 Holding enhace b 1 Holding normalize	y 863/4/5 fields from <u>BIB</u>	Description for release r Normalize M	n review Marc 21 Holding from BIB	Actions Actions
Adda 1 2 3	Active	Name Marc2 Marc2 Marc2	1 Holding enhace b 1 Holding normalize 1 Holding normalize	y 883/4/5 fields from BIB on save	Description for release n Normalize N	n review Marc 21 Holding from BIB Marc 21 Holding while saving	Actions Actions Actions

Figure 10 - Normalization Processes Tab

- 4 Select **Actions > Edit** for one of the normalization processes. The Process Details page appears.
- 5 Select the **Task List** tab.

Å.	Proces	s Details				
	General	Information	Task List Task	Parameters		
		Busine	ss Entity Holding		Type Marc 21 holding normalization	
			Name Marc21 Holding norm	alize on save		
-	Processes	Selected				
			Nama		Dessister	
			Name		Description	
1		*	marc21HoldingClearEmptyFiel	dslask	Delete empty fields	
2			852 field normalization		Fill subfields according to first indicator	
-	Process Li	lat Pool				
		Name		Description		
1		852 field nor	rmalization	Fill subfields a	ccording to first indicator	
2		MARC21 E	pand Holding By 866/7/8 Task	Create 886/887/888 Textual Holdings fields		
3		MarcDroolN	ormalization	Marc Drool No	rmalization	
4		marc21Hold	ingClearEmptyFieldsTask	Delete empty f	ields	
5		marc21Hold	ingResequenceTask	Re-sequence fi	ields	
6		MARC21 E	kpand Holding By 863/4/5 Task	Create 863/864	#/865 Summary statement Holdings fields	
A	dd to Sele	ction				

Figure 11 - Process Details 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 "866" 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.

File	e		Edit	Tools	6	H	1		1	3	1		
You	have 5 v	aming(s) in your record										
[005	Worki	ng on -The nation 201505051038	nahj9913769 (2244) 21.0	90849100010	021),	, Crea	ated t	by ex	:l_sup	port	(28/0	4/2015 11:
	LDR	DR 00525nx##a22000971n#4500											
	008		1011252u####8###4001uueng0000000										
	852	0	\$\$b ONL \$\$c 5	STACK \$\$t 1									
9	853		\$\$8 1 \$\$a v. \$\$b no. \$\$u 36 \$\$v r \$\$i (year) \$\$j (month) \$\$k (day) \$\$w j \$\$y pd0101,0110,0120,0201,0210,0220,0301,0310,0320,0401,0410,0420,0501,0510,0520,0601										
	590		\$\$a Published	3 times a month or	the 1st, 10th	n and	20th	; beg	ins v	vith v	.1:no	.1(20	15:Jan.1).

Figure 12 - Holdings Record Before Save/Autogenerate

File	B		Edit	Tools		H	31			3	0	Ê	10
Reco	ed was sa	800	essfully enhanced										
	٧	Nor	rking on -The na	ational(9913769 (2244	9084910001	021)	, Cre	ated	by e	kl_su	pport	(28/04/20)15 1
	005		201505051	61751.0									
	LDR		00587nx##;	a22001211n#4500									
	800		1011252u#	###8###4001uueng00	000000								
	852	0	\$\$b ONL \$9	C STACK \$\$L1									
853 \$\$8 1 \$\$a v. \$\$b no. \$\$u 36 \$\$v r \$\$i (year) \$\$j (month) \$\$k (day) \$\$w j pd0101 0110 0120 0201 0210 0220 0301 0310 0320 0401 0410 0420 05					/j \$\$) 0501	y ,0510,052	0,06						
ſ	590		\$\$a Publish	red 3 times a month o	n the 1st, 10	th an	id 20	th; be	gins	with	v.1:n	io.1(2015:	Jan
	863	4	0 \$\$8 1.1 \$\$3	1 \$\$b 1-2 \$\$w g									

Figure 13 - Holdings Record After Save/Autogenerate

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.

File	•	Edit	Tools	8	H	1	3 🛙	3			
You h	You have 11 warning(s) in your record - Draft auto-saved at 16:19:34.										
	Working on -The national(9913769 (22449084910001021) , Created by exl_support (28/04/2015 11								4/2015 11:		
	005	201505051	61751.0								
	LDR	00587nx##a22001211n#4500									
	008	1011252u#	###8###4001uueng000	00000							
	852 0	\$\$b ONL \$	\$c STACK \$\$t 1								
3	853	\$\$8 1 \$\$a v. \$\$b no. \$\$u 36 \$\$v r \$\$i (year) \$\$j (month) \$\$k (day) \$\$w j \$\$y pd0101,0110,0120,0201,0210,0220,0301,0310,0320,0401,0410,0420,0501,0510,0520,0601									
	590	\$\$a Publist	hed 3 times a month on	the 1st, 10	th and	i 20th;	begins	with	v. 1 :n	o.1(20	15:Jan.1).

Figure 14 - Record to be Enhanced with 863

2 Select Edit > Enhance the Record.



Figure 15 - Select Enhance the Record

The Enhance the Record dialog box appears.

Enhance the Record					
Choose	Marc21 Holding enhace by 883/4/5 fields				
Normalization Type:					
0	Ok				

Figure 16 - Enhance the Record Dialog Box

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



Figure 17 - Generated 863 Field

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					
Choose	86X normalization process	1			
Normalization	86X normalization process	Ĺ			
Туре:	Add 866 vol 1-10 Hol NOrmalization taskchain				
0	Marc21 Holding normalize from BIB				
	Marc21 Holding normalize on save Marc21 Holding Re-sequence And Clear empty fields				

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 <u>Community Zone Contribution Guidelines</u> 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.

🖉 Electronic C	ollection Editor		Cancel Contribut	e to Community	Save
Electronic Collection name	c CC Medical Collec	tion Premier			
Electronic Collec	tion Description	General Information	HAdditional Information	ENotes IIIHist	tory
Summary and Inve Electronic Collection type Interface Name	ntory information Selective package	Services	Full Text		
Process type	-				
Access type	Current OPerpeti	ual			
Acquisitions and L	Icense Information				
PO Line		PO line details			
Activation date	[[Expected activation date			
License		Diew license details			
Authentication note					
Public note					1
			Cancel Contribut	e to Community	

Figure 19 - Contribution to Community Button

The **Confirmation Message** dialog box appears.

Confirmation Message				
You are about to contribute the following collection the community: CC Medical Collection Premier				
Number of portfolios: 1				
Number of Bibliographic records: 1				
Please indicate how you want to handle matching Bibliographic records:				
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 20 - Contribution Confirmation Dialog Box

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.

ති	Repository Search					
Fir	nd Electronic Collection	• where	Keywords	* contains	CC Medical Collection Prem	Go
Ir	Community					

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.

A Repository Search				
Find Electronic Collection	 where Keywords 	▼ contains	CC Medical Collection Premi	Go
Institution Community				
Limit results to:				
Туре	Primary Sort by Rank	•		
Selective package (1)				
	1 CC Medical Collection Pr Contributed by University Type: Selective package Portfolio List (1) Activate	remier tatus: Under Revie ervice: Full Text Order Send To	w Ex Libris	

Figure 22 - Contribution Status

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 (\square) and is shown as linked to the Community Zone in the Institution tab with the Community Zone icon (\square) .

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.

Publishing Profile Details		
- Profile Details		
Profile name *	Publish bibliographic	record (Batchload) to OCLC
Profile description	Synchronize your lo	ocal catalog with WorldCat
OCLC institution symbol *	PUL	
Dublishing and a t	<u> </u>	1
Publishing mode: *	Incremental	
	 Baseline 	
	Full	

Figure 23 - New Run Publishing (Publishing Mode) Options

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:

- Click the Publishing Profiles link in the Record Export section of Resource Management configuration (Resource Management > Resource Configuration > Configuration Menu). The Publishing Profiles page appears.
- 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.

Publishing Profile Details		
- Profile Details		
Profile name *	Publish bibliographic record	d (Batchload) to OCLC
Profile description	Synchronize your local o (see https://oclc.org/bat	atalog with WorldCat chload.en.html)
OCLC institution symbol *	PUL	Project number * P015516
Publishing mode: *	 Incremental Baseline Full 	
- Submission Format		
FTP configuration	OCLC 💌	Sub-directory PULtest2
Status Scheduling	Active Inactive Not scheduled	Email Notifications

Figure 24 – Publishing Profile Details Page

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.

Changes	Description
Added field 338	http://www.loc.gov/marc/authority/adapndxf.html
Fields 100, 110, 111, 130, 150, 151, 400, 500 and 700 subfield g are now repeatable	http://www.loc.gov/marc/authority/adx00.html http://www.loc.gov/marc/authority/ad100.html http://www.loc.gov/marc/authority/ad110.html http://www.loc.gov/marc/authority/ad111.html http://www.loc.gov/marc/authority/ad130.html http://www.loc.gov/marc/authority/ad150.html http://www.loc.gov/marc/authority/ad151.html
Subfields i and 4 were added to field 700 and subfield g in fields X00 were made repeatable	http://www.loc.gov/marc/authority/adx00.html
Subfields i and 4 were added to field 710 and subfield g in fields X10 were made repeatable	http://www.loc.gov/marc/authority/adx00.html
Subfields i and 4 were added to field 711 and subfield g in fields X11 were made repeatable	http://www.loc.gov/marc/authority/adx11.html
Changes	Description
---	--
Subfields i and 4 were added to field 730 and subfield g in fields X30 were made repeatable	http://www.loc.gov/marc/authority/adx30.html
Subfields i and 4 were added to field 748	http://www.loc.gov/marc/authority/adx48.html
Subfields i and 4 were added to field 750 and subfield g in fields X50 were made repeatable	http://www.loc.gov/marc/authority/adx50.html
For fields 151, 451, 551 and 751, subfield g is now repeatable	http://www.loc.gov/marc/authority/adx51.html
Subfields i and 4 were added to field 755 and subfield g in fields X55 were made repeatable	http://www.loc.gov/marc/authority/adx55.html
Subfields i and 4 were added to field 762	http://www.loc.gov/marc/authority/adx62.html
Subfields i and 4 were added to field 780	http://www.loc.gov/marc/authority/adx80.html
Subfields i and 4 were added to field 781	http://www.loc.gov/marc/authority/adx81.html
Subfields i and 4 were added to field 782	http://www.loc.gov/marc/authority/adx82.html
Subfields i and 4 were added to field 785	http://www.loc.gov/marc/authority/adx85.html
Subfield g was made repeatable for fields 400, 410, 411, 430, 450 and 451	http://www.loc.gov/marc/authority/ad400.html http://www.loc.gov/marc/authority/ad410.html http://www.loc.gov/marc/authority/ad411.html http://www.loc.gov/marc/authority/ad430.html http://www.loc.gov/marc/authority/ad450.html http://www.loc.gov/marc/authority/ad451.html
Subfield g was made repeatable for fields 500, 510, 511, 530, 550 and 551	http://www.loc.gov/marc/authority/ad500.html http://www.loc.gov/marc/authority/ad510.html http://www.loc.gov/marc/authority/ad511.html http://www.loc.gov/marc/authority/ad530.html http://www.loc.gov/marc/authority/ad550.html http://www.loc.gov/marc/authority/ad551.html

Changes	Description
Added subfield i and subfield 4 to fields 748,	http://www.loc.gov/marc/authority/ad748.html
750, 751, 755, 762, 780, 781, 782 and 785	http://www.loc.gov/marc/authority/ad750.html
	http://www.loc.gov/marc/authority/ad751.html
	http://www.loc.gov/marc/authority/ad755.html
	http://www.loc.gov/marc/authority/ad762.html
	http://www.loc.gov/marc/authority/ad780.html
	http://www.loc.gov/marc/authority/ad751.html
	http://www.loc.gov/marc/authority/ad781.html
	http://www.loc.gov/marc/authority/ad782.html
	http://www.loc.gov/marc/authority/ad785.html
Added subfield 4 to field 788	http://www.loc.gov/marc/authority/ad788.html

Step-by-Step Instructions

The following roles can view the authority field changes:

- Cataloging Administrator
- General System Administrator

To view the authority field changes:

1 On the Resource Management **Configuration** page (**Resource Management > Resource Configuration > Configuration Menu**), click **Metadata Configuration** in the Cataloging section. The Metadata Configuration List page appears.

	Configuration	⇔ Profile	Vocabulary	Family	\$ Type	ł
1	LC Subject (LCSH)	MARC21 Authority	LCSH	MARC	Authority	7
	LC Name (LCNAF)	MARC21 Authority	LCNAMES	MARC	Authority	A
	NLM MeSH 2013	MARC21 Authority	MESH	MARC	Authority	F
	Integrated Authority File (GND)	MARC21 Authority	GND	MARC	Authority	A
	MARC21 Holding	MARC21 Holding	-	MARC	Holding	H
	UNIMARC Bibliographic	UNIMARC Bibliographic	-	MARC	Bibliographic	E
Ē	MARC21 Bibliographic	MARC21 Bibliographic	-	MARC	Bibliographic	E
3	Qualified Dublin Core	Qualified Dublin Core	-	DCMI	Bibliographic	E

Figure 25 - Metadata Configuration List Page

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

Profile De	etails			
	Profile MARC21 Authority	Family MARC		
	Type Authority	Usage AUTHORITY_MMS		
Fields	Normalization Processes Validation Processes	8 Validation Exception Profile List		
Filter: All		Find :	in : Field	
		123 H H Go 1-2	0 of 242 Records	
≑ Field	Description	Filtering Group	Updated On	
1 001	CONTROL NUMBER	00X: Control Fields	03/04/2012	
2 <u>003</u>	CONTROL NUMBER IDENTIFIER	00X: Control Fields	03/04/2012	
3 <u>005</u>	DATE AND TIME OF LATEST TRANSACTION	00X: Control Fields	03/04/2012	
4 008	EIXED-LENGTH DATA ELEMENTS	00X: Control Fields	03/04/2012	

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

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

Profile De	etails		Back Deploy
	Profile MARC21 Authority Type Authority	Family MA Usage AU	RC THORITY_MMS
Fields	Normalization Processes V	/alidation Processes Validation	Exception Profile List
Filter: All		Find : 100	in : Fleld 🛛 🗸 Go
			1 - 1 of 1 Records 🔣 Tools
≑ Field	Description	Filtering Group	Updated On
1 <u>100</u>	HEADING-PERSONAL NAME	1XX, 3XX: Heading Informatio Fields	n 04/27/2015 Actions

Figure 27 - Field 100 Example

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

Å.	Field Details				Back
	Profile Type	MARC21 Authority Authority	Family MARC Usage AUTHORITY_	MMS	
	Tag Repeatable Mandatory Description Help URL	100 No HEADING-PERSONAL NAME -	Туре	Variable	
+ s. + FI + Se	ibfields rst indicator econd indicator				

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 "u", "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. 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 \$0 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.

Å.	Electronic Collection Edi	tor		
	Electronic Collection name	Sage Premier		
_			-	
	Electronic Collection Desci	iption 🛛 🔛 General Information	H	Additional Information 🔛 Notes
Su	mmary and inventory informs	ation		
	Electronic Collection type	Selective package	~	
	Electronic concerton type	Gelecilve package		
	Interface Name	SAGE		Services Full Text
	1			
	Process type	-		
	Access type			
Ac	quisitions and License infor	mation		
	POLine	720008		PO line details 720008

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 multimatch 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.

A Publishing Profile Details				 Cancel Save
Profile Id 2512182600	000121	Profile Name Pro	ofile 1	
Profile Details Data Enrichmer	nt			
Bibliographic Normalization				
Correct the data using			×	
Physical Inventory Enrichment				
Add Holdings information				
Add Items Information				
Electronic Inventory Enrichment				
Add Electronic Portfolio				
Information				
Repeatable field				
Portfolio PID				
Access URL subfield	Link Resolver Base U	IRL		
Collection Name subfield	Library subfi	eld		
Interface Name subfield	Public Note subfi	eld		
Coverage Statement subfield	CZ Collection Identifier subfi	eld		
				Cancel Save

Figure 30: Portfolio PID Field

 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)

Sub	omit	Date from 01	/01/2012	💓 to 02/04/20	14		Apply Filter	
Act	ion	All 📄						
		All						
		Electronic col	lection deleted					
ő		Electronic col	lection linking para	meters update			0	
	\$	Electronic col	ollection base url updated			Identifier	Submit Data	Be
		Portfolio adde	d to auto-active pa			Date		
1	Po	Portfolio adde	rtfolio added to non auto-active package				01/27/2014	nu
	CO	Portfolio cove	rage update					
0	D	Portfolio delet	Portfolio deleted from Auto active package				04/07/0044	A
2	Po	Portfolio delet	ted from non auto-a	ctive package		1660-4121	01/2//2014	AV
3	Pr	Portfolio linkir	ng parameters upda	ate		0147-7307	01/27/2014	Δν
9	CO	Electronic collection service deleted				0141 1001	0112112014	1.
4	Po cov	ortfolio JSTOR Early overage update Journal Content		<u>The auk</u>		0004-8038	01/27/2014	Av 1 u
5	Po	ortfolio deleted Free E-Journals Chemical s				1478-6524	01/27/2014	-

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

• There was a limit of 5,000 lines for files when creating an itemized set. This limit was removed.

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:

 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.

Request Pickup Configuration		
Request Pickup Configuration		
Name *		
Description		
Created By -	Created On 05/12/2015	
Updated By –	Updated On 05/12/2015	
No records were found.		
Name Operator	Value	
Possible Values >		Add Parameter
Output Parameters		
Consider as missing when expired Always		
Show in 'Pick From Shelf' list True		
Expiry time for 'Pick From Shelf'		
(in days)		

Figure 32 – Request Pickup Configuration Page

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.

2	A Request Pickup Configuration									
Rules List										
Fi	Iter All									
A	dd Rule							📑 Tools		
	Enabled	Move Up	Move Down	Rule Name	Description	Updated By	Update Date			
1	4		-	Test Rule 1	The first test rule	Implementer	05/12/2015	Actions		
2				Test Rule 2	The second test ru	le Implementer	05/13/2015	Actions		
	Apply Rules									

Figure 33 – Request Pickup Configuration Page — Enabled Rule

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.

Overdue and Lost I	Loan Profile Record				
- Overdue and Lost Loa	n Profile				
Name	*				
Description					
Active					
Profile Type	* Overdue notification type 1	-			
s	Send Notification]			
Days After Due Date			Days After Status Date		
Loan Status	Automatic renewal Claim returned Normal Claim returned with overdue charge Lost with overdue charge	4 III +	User Group	Academic Staff Alumni Consortium Member Part-time Faculty	
Library		*	Locations		-
Item policy	Special Manuscript Restricted 1 Day Loan Two Day Loan	* III *	Material Type	Room Video Disk Bound Issue Headphones Laptop	
Letter send format		•			

Figure 34 – Overdue and Lost Loan Profile Record Page

- 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.

ŝ	Overdu	ie and Lost Loan Profile List				Back	View Over
0\	verdue and l	ost Loan Profile List					
						Find :	
A	dd Overdu	e and Lost Loan Profile					1
					7		
	Enabled	a ⇔ Name	Profile Type	Create Fine	Description		
1	~	JJ Test - Overdue Notifications	Overdue notification		-		
			type 1				
2		Leah's Lost Loan Profile	Overdue notification		Leah's Lost Loan Profile		
			type 1				
3	~	Lost Loan Rules	Change to Lost		-		
4	~	Students Lost 45 Days	Change to Lost		-		
5	4	Students Notify 30 Days	Overdue notification		-		
			type 1				
6	1	Visitors 14 Days	Change to Lost		-		

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.

_					
ŝ	Terms of Use Management				Back
	You are configuring: Clean Trainir	ng		Organization Un	ittist
Fu	Ifillment Terms Of Use				
Ter	ms Of Use Type Loan 📑			Find :	in : Name 🔻 Ga
Ad	d a Terms Of Use			1 2 Go 1 - 20	0 of 22 Records 📑 Tools
	≑ Name	\$ Type	♦ TOU Owner	Description	
1	1 Days Faculty Limited	Loan	Institution	1 Days Faculty Limited	Actions
2	1 Hours Students Limited	Loan	Institution	1 Hours Students Limited	Actions
3	1 Hours Visitors Limited	Loan	Institution	1 Hours Visitors Limited	Actions
4	1 Month Students General	Loan	Institution	1 Month Students General	Actions
5	1 Month Visitors Closed	Loan	Institution	1 Month Visitors Closed	Actions
6	2 Hours Staff Limited	Loan	Institution	2 Hours Staff Limited	Actions
7	2 Hours Visitors Short Loan	Loan	Institution	2 Hours Visitors Short Loan	Actions
8	2 Week Visitors General	Loan	Institution	2 Week Visitors General	Actions
9	3 Days Visitors Media	Loan	Institution	3 Days Visitors Media	Actions
10	3 Month Staff Closed	Loan	Institution	3 Month Staff Closed	Actions
11	3 Month Staff General	Loan	Institution	3 Month Staff General	Actions
12	3 Month Students Closed	Loan	Institution	3 Month Students Closed	Actions
13	4 Hours Faculty Short Loan	Loan	Institution	4 Hours Faculty Short Loan	Actions
14	4 Hours Staff Short Loan	loan	Institution	4 Hours Staff Short Loan	Actions

Figure 36 – Terms of Use Management Page

2 Select **Actions > Edit** for the relevant TOU. The Terms of Use Details page appears.

Terms of Use Details			
Nam	* 3 Month Staff General		
Descriptio	a 3 Month Staff General		
			📑 Tools
Is Loanable	Loanable (Loanable)	v	Actions
Is Recallable	No Recall (Default Recall is not possible)	•	Actions
Due Date	3 Month Loan (3 Month Loan)	•	Actions
Requested Item Due Date	2 Week Requested Item Due Date (2 Week Requested Item Due Date)	•	Actions
Recall Period	2 Week Recall Period (2 Week Recall Period)	•	Actions
Renew Fee	No Renew Fee (No Renew Fee)	•	Actions
Lost Item Fine	No Lost Item Fine (No Lost Item Fine)	•	Actions
Lost Item Replacement Fee	75.00 Lost Item Replacement Fee (75.00 Lost Item Replacement Fee)	•	Actions
Lost Item Replacement Fee Refund Ratio	100 Percent Lost Item Refund (Default lost item replacement refund)	•	Actions
Maximum Fine	25.00 Maximum Fine (25.00 Maximum Fine)	•	Actions
Overdue Fine	2.50 Open Days Overdue Fine (2.50 Open Days Overdue Fine)	•	Actions
Recalled Overdue Fine	3.50 All Days Recalled Overdue Fine (3.50 All Days Recalled Overdue Fine)	•	Actions
Grace Period	1 Days Grace Period (1 Days Grace Period)		Actions
Is Renewable	Renewable (Is item renewable)		Actions
Maximum Renewal Period	365 Days Maximum Renewal Period (365 Days Maximum Renewal Period)		Actions
Closed Library Due Date Management	Move to the end of the next open day (Move to the end of the next open day)	*	Actions
Cancelled Recall Due Date	Attempt automatic renewal (This option will keep the due date and then check if automatic renewal should run based on the automatic	•	Actions
Overdue Notification Fine Type 1	No Overdue Fine (Default value - No Overdue Fine)	•	Actions
Overdue Notification Fine	No Overdue Fine (Default value - No Overdue Fine)	*	Actions
Overdue Notification Fine Type 3	No Overdue Fine (Default value - No Overdue Fine)	*	Actions
Overdue Notification Fine	No Overdue Fine (Default value - No Overdue Fine)	-	Actions

Figure 37 – Terms of Use Details Page

3 Locate the relevant **Overdue Notification Fine Type** entry on the bottom of the page, and select **Actions > Add Policy**. The Policy Details page appears.

ß	Policy Details	
	You are configuring:	Clean Training
Poli	icy Type: Overdue Notification Fi	ne Type 1
	Policy Name *	
	Policy Description	
	Value Type *	None Other
	Value *	
	Default Policy	●False True

Figure 38 – Policy Details Page

- 4 Enter a **Name** and **Value** in the relevant fields, and ensure that **Value Type = Other**.
- 5 Click **Save**. The policy is added to the notification fine type on the Terms of Use Details page.

Maximum Renewal Feriou	365 Days maximum kenewal Period (365 Days maximum kenewal Period)
Closed Library Due Date Management	Move to the end of the next open day (Move to the end of the next open day)
Cancelled Recall Due Date	Attempt automatic renewal (This option will keep the due date and then check
Overdue Notification Fine Type 1	5 Dollar Fine (A 5 dollar fine will be attached to the loan.)
Overdue Notification Fine Type 2	No Overdue Fine (Default value - No Overdue Fine)
Overdue Notification Fine Type 3	No Overdue Fine (Default value - No Overdue Fine)
Overdue Notification Fine Type 4	No Overdue Fine (Default value - No Overdue Fine)
Overdue Notification Fine Type 5	No Overdue Fine (Default value - No Overdue Fine)

Figure 39 – Terms of Use Details Page — Configured Policy

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.

Ě	Fulfillment Configuration Utility				
	The item is on loan for user : Imple	ementer. Due date	e : 08/13/2015 23:59:00	CDT.	
	Patron Identifier * Implementer - Staff - e	exl> 💉	Item Barcode * 36391	The South in Ameri 🔎 a 🛷 💷	
	Optional Return	(Calculate Overdue Fine	9	
	Date				
	Fulfillment Unit Name General				
	Fulfillment Unit Rule 3 Month	Staff General			
	Terms Of Use Name 3 Month 3	Staff General			
	Due date if the item would be 08/14/20	15 23:59:00 CDT			
	loaned now				
Ter	me of Ileo Dotaile				
161	ins of ose Details				
	Policy Type	Policy Name		Policy Description	
1	Is Loanable	Loanable		Loanable	
2	Is Recallable	No Recall		Default Recall is not possible	
3	Due Date	3 Month Loan		3 Month Loan	
4	Requested Item Due Date	2 Week Reques	sted Item Due Date	2 Week Requested Item Due Date	
5	Recall Period	2 Week Recall	Period	2 Week Recall Period	
6	Renew Fee	No Renew Fee		No Renew Fee	
7	Lost Item Fine	No Lost Item Fi	ne	No Lost Item Fine	
8	Lost Item Replacement Fee	75.00 Lost Item	Replacement Fee	75.00 Lost Item Replacement Fee	
9	Lost Item Replacement Fee Refund Ratio	100 Percent Lo	st Item Refund	Default lost item replacement refund	
10	Maximum Fine	25.00 Maximum	Fine	25.00 Maximum Fine	
11	Overdue Fine	2.50 Open Day	s Overdue Fine	2.50 Open Days Overdue Fine	
12	Recalled Overdue Fine	3.50 All Days R	ecalled Overdue Fine	3.50 All Days Recalled Overdue Fine	
13	Grace Period	1 Days Grace F	Period	1 Days Grace Period	
14	Is Renewable	Renewable		Is item renewable	
15	Maximum Renewal Period	365 Days Maxir	num Renewal Period	365 Days Maximum Renewal Period	
16	Closed Library Due Date Management	Move to the end	d of the next open day	Move to the end of the next open day	
17	Cancelled Recall Due Date	Attempt automa	tic renewal	This option will keep the due date and then	check if a
18	Overdue Notification Fine Type 1	5 Dollar Fine		A 5 dollar fine will be attached to the loan	ne Ioan. F
10	Overdue Notification Fine Type 1	No Overdue Fir	16	Default value - No Overdue Fine	
20	Overdue Notification Fine Type 2	No Overdue Fir		Default value - No Overdue Fine	
20	Overdue Notification Fine Type 0	No Overdue Fir		Default value - No Overdue Fine	
21	Overage Notification Fine Type 4	NO OVERUUE FIL		Derault value - NO Overdue Fille	

Figure 40 – Fulfillment Configuration Utility Page

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:

1 On the All Code Tables page (Administration > General Configuration > Configuration Menu > General Configuration > Letter Emails), select Actions > Customize for the Ful Lost Loan Notification Letter entry. The Ful Lost Loan Notification Letter Code Table page appears.

ŝ	🖄 Code Table					
	You are configuring: Clean Training					
Tabl	Table Information					
		Sub System LETTER	Table Name	Ful Lost Loan Notification Letter		
		Updated By -	Updated on	-		
		Patron Facing Yes	Table Description	Ful Lost Loan Notification Letter		
		Table code FulLostLoanNotificationLe	tter			
- 5	ullostioa	Notification Letter				
Filtor	English					
Filler	. English					
	Enabled	Code	Description	Translation		
1	~	by	Author	Author		
2		barcode	Barcode	Barcode		
3	~	call_number	Call Number	Call Number		
4		department	Circulation Department	Circulation Department		
5	~	dear	Dear Sir/Madam	Dear Sir/Madam		
6		description	Description	Description		
7	~	due_date	Due date	Due date		
8	~	additional_info_1_type5	EMPTY_STRING	EMPTY_STRING		
9	4	additional_info_2_type2	EMPTY_STRING	EMPTY_STRING		
10	~	additional_info_2_type3	EMPTY_STRING	EMPTY_STRING		
11	~	additional_info_2_type4	EMPTY_STRING	EMPTY_STRING		
12	~	additional_info_2_type5	EMPTY_STRING	EMPTY_STRING		
13	~	additional_info_1_type4	EMPTY_STRING	EMPTY_STRING		
14	~	additional_info_2	EMPTY_STRING	EMPTY_STRING		
15	4	additional_info_2_type1	EMPTY_STRING	EMPTY_STRING		
16		additional_info_1	EMPTY_STRING	EMPTY_STRING		
17	4	additional_info_1_type1	EMPTY_STRING	EMPTY_STRING		
18	4	additional_info_1_type2	EMPTY_STRING	EMPTY_STRING		
19	4	additional_info_1_type3	EMPTY_STRING	EMPTY_STRING		

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.
- 2 Select **Actions > Report** for the job. The Job Report page appears, displaying information on the job.

B	Job Report				
	Completed	Process ID	100765660000521	Name Loans - Change to	Lost
	Successfully	Started on	05/13/2015 08:57:37 CDT	Finished on 05/13/2015 08:59:2	21 CDT
		Total run time	1 Minutes 44 Seconds	Created by exl_impl	
		Status	Completed Successfully	Status date 05/13/2015 08:59:2	21 CDT
		Records processed	0	Records with 0	
				exceptions	
	View Alte	ernative Report			

Figure 42 – Job Report Page

3 Click **View Alternative Report**. The Job Report page refreshes, displaying additional data on the report.

ExLibris Alma -	D Tasks Currently at ONL - I	Default Circulation D	
තී Job Report			
Completed Successfully Job Results Summary	Name Loans - Change to Lost Process ID 108441540000121 Started on 20/04/2015 16:53:21 PM IDT		Created by exl_impl (20/04/2015) ▲ Total run time 3 Seconds Finished on 20/04/2015 16:53:25 PM IDT
1			
Total loans processed Total failed to change to lost Total overdue notifications failed to be sent Total affed to create fine Total succeeded to change to Lost			
6 Iotal overdue nothications succeeded to be sent 7 Total succeeded to create fine		1 1	
- Change to Lost - by Profile			
	Number succeeded	Number fa	niled
1 overdueProfile1	U	0	
- Fines created - by Profile			
	Number succeeded	Number fa	iled
1 overdueProfile1	1	0	

Figure 43 – Job Report Page

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.

හි Job Report	
Job Events Export To Excel	Created fine(1)

Figure 44 – Job Report Page

5 Click the link to view the **Events Report** page with information on the event.

🖄 Events Report							
- Created fine							
Description Created fine	Description Created fine						
Created fine	Created fine						
Primary identifier	Full patron name	Barcode					
1 exl_impl	Implementor, Ex Libris	39031029996519					

Figure 45 – Events Report Page

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.

ß	Scan In Items				
	Scan in Items	Change Item Information			
Scan	in Items				
		Automatically print slip ONO OYes			
		Register in-house use			
		Work Order Type	*		
		Scan item barcode *	2	OK	Create Item
		Scan request ID		OK	

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.

Title	The contours of American history.
Related Records	No Related Records
Orders	No Orders
Requests/Work orders	No Requests/Work orders
Number of loans	1
Last Loan Date	<u>05/1</u> 4/2015
Number of in-house uses	0
Last In house use date	-
Year-to-Date Loans	1
Courses	No Courses

Figure 47 – More Info Pop-Up Window — Number of In-House Uses Field

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>
- value
- <fulfillment_note>
- statistics_note1>, <statistics_note2>, and <statistics_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:

- 1 On the Resource Sharing Borrowing Requests page (Fulfillment > Resource Sharing > Resource Sharing Borrowing Requests), create a borrowing request.
- 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.

ŝ	Code Tal	ble					
		You are con	figuring:	Clean Training			
Tat	le Informatio	n					
		Sub S	System	FULFILLMENT	Table Name	Patron Query Types	
		Upda	ted By	exl_impl	Updated on	05/12/2015	
		Patron	Facing	No	Table Description	Patron Query Types	
		Table	e code	PatronQueryTypes			
-	Patron Query	y Types					
Filt	er: English						
Im	port						
	Enabled	Display	Orde	Code	Description	Translation	Defau
1	\sim		-	Type_5_query_name	[Please enter query name]	[Please enter query name]	
2	4	-	•	Type_1_query_name	Regarding your request	Regarding your request	(
3	4		-	Type_2_query_name	Dear Sir/Madam	Dear Sir/Madam,	(
4			-	Type_4_query_name	[Please enter query name]	[Please enter query name]	(
5	Ì			Type_3_query_name	[Please enter query name]	[Please enter query name]	(

Figure 48 – Patron Query Types Code Table Page

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.

Select email template	Regarding your request	*		
	Regarding your request Dear Sir/Madam		Cancel	Send Email

Figure 49 – Select Email Template Dialog Box

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:

 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.

ŝ	Code 1	Table						Cance	Customize
You are configuring: Clean Training							Organizatio	n Unit List	
Table	Informa	tion							
Table	: IIIUIIIa	Cub Cu	atom 15		Table Name C	New To Detrop Letter			
		Sub Sy	stem LE	TIER		query to Patron Letter			
		Update	ed By -		Updated on -				
		Patron Fa	acing Ye	es	Table Description	Query To Patron Letter			
		Table	code Q	ueryToPatronLetter					
— Q	uery To P	atron Letter	r.						
Filter	r : Englis	sh 🖃							
									Tools
									10015
E	Enabled	d Display	Order	Code	Description	Translation	Default Value	Updated By	Last Updated
1	1		-	Type_1_subject	Regarding your request %req	Regarding your request %reqld%:	0	-	-
2	1		-	Type_1_header	Dear Sir/Madam,	Dear Sir/Madam,	\bigcirc	-	-
3	1	-	-	Type_1_query_line_1	[Please enter your query here	[Please enter your query here]	0	-	-
4	1		-	Type_1_query_line_2	[Please enter your query here	[Please enter your query here]	\bigcirc	-	-
5	1	-	-	Type_1_query_line_3	[Please enter your query here	[Please enter your query here]	0	-	-
6			-	Type_1_Sincerely	Sincerely	Sincerely	\bigcirc	-	-
7	-	-	-	Type_2_subject	Regarding your request %req	Regarding your request %reqld%:	0	-	-
8	1	-	-	Type_2_header	Dear Sir/Madam,	Dear Sir/Madam,	\bigcirc	-	-
9		-	-	Type_2_query_line_1	[Please enter your query here	[Please enter your query here]	\bigcirc	-	-
10		-	-	Type_2_query_line_2	[Please enter your query here	[Please enter your query here]	\bigcirc	-	-
11	1	-	-	Type_2_query_line_3	[Please enter your query here	[Please enter your query here]	\bigcirc	-	-
12	1	-	-	Type_2_Sincerely	Sincerely	Sincerely	\bigcirc	-	-
13		-	-	Type_3_subject	Regarding your request %req	Regarding your request %reqld%:	\bigcirc	-	-
14	1		-	Type_3_header	Dear Sir/Madam,	Dear Sir/Madam,	\bigcirc	-	-
15	1	-	-	Type_3_query_line_1	[Please enter your query here	[Please enter your query here]	0	-	-
16			-	Type_3_query_line_2	[Please enter your query here	[Please enter your query here]	\bigcirc	-	-
17	1		-	Type_3_query_line_3	[Please enter your query here	[Please enter your query here]	\bigcirc	-	-
18	~		-	Type_3_Sincerely	Sincerely	Sincerely	\bigcirc	-	-

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_xxxx** 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.

B	Configuration File		
	Filename	/xsl/letters/QueryToPatronLetter.xsl	
	File Key	QueryToPatronLetter	
	Description	Query To Patron Letter	
	Updated by	-	
	Update Date	-	
	Content	xml version="1.0" encoding="utf-8"?	
		<xsl:stylesheet <="" th="" version="1.0"><th></th></xsl:stylesheet>	
		xmlns:xsl="http://www.w3.org/1999/XSL/Transform">	
		<xsl:include href="header.xsl"></xsl:include>	
		<xsl:include href="senderReceiver.xsl"></xsl:include>	
		<xsl:include href="mailReason.xsl"></xsl:include>	
		<xsl:include href="footer.xsl"></xsl:include>	
		<xsl:include href="style.xsl"></xsl:include>	
		<xsl:include href="recordTitle.xsl"></xsl:include>	
		<xsl:template match="/"></xsl:template>	
		<html></html>	
		<head></head>	
		<xsl:call-template name="generalStyle"></xsl:call-template>	
		<body></body>	
		<xsl:attribute name="style"></xsl:attribute>	
		<xsi:call-template name="bodyStyleCss"></xsi:call-template>	
		style.xsi	
			_
		<xsr.call-template name="nead"></xsr.call-template>	-
		neader.xsi	.11

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:

<xsl:when test="notification_data/query_type = 'Type_1_query_name'">

... special configurations for type 1 queries

</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**.

Resource Sharing Lending	Requests Task List Cancel Being Processed Change Status Print Slip Report Print
Limit results to:	Assigned to Me Unassigned Assigned to Others
Status	Activity Status Active Find :
Overdue request (1)	Add
Request Printed	Search limited to: Due date: Older
<u>No (1)</u>	Select All
Request Reported	1 Flower painting / Clare Sydney,
<u>No (1)</u>	BOOK BY Sydney, Clare. (New York : Kizzoli 1966.) ISBN: 0847806952 (pbk.) : Subject Elloware in a dia - Bainting Modern 20th century - Watercolor painting 20th century
Active Partner	Subject i holi si rati i anting, Molen zur centary - realized panting zur centary. Availability: Physical version at MAIN: main; ND1400.534 1986
Library 2 (1)	Physical version at RES_SHARE: IN_RS_REQ; ND1400 .S94 1986 (1 copy, 0 available) Barcode: 68691 Due Date: 08/28/2014
Creation Date	External identifier: 1//TRAINING20000010
Older (1)	Request Status: Overlage request Resource Locate Status: Resource Located Requested Media: Any
Update Date	Request Printed: No Request Reported: No
Today (1)	Citation Move Request Completed Citation Move Request In Process
Requested Format	Creation Date: 06/24/2014 Update Date: 05/11/2015
Physical (1)	Edit Manage Fulfillment Options Duplicate Reassign Search Detach from MMS Print Slip Ship non-returnable General Message More details

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.

Å	Monitor Jobs								Cancel
Scheduled SP Scheduled Running History									
SI	ibmit Date from 05/10/2015	o 05/11/2015		Apply Filte	er				
Fi	lter : All						Find :	in : Name	▼ Go
R	efresh							1 - 5 of 5 Jobs	📑 Tools
	⇔ Name	\$ Job ID	♦ Job Category	⇔ Creator	🖨 Submit Date	🗢 Start Date	≑ End Date	\$ Status	
1	Send Overdue Message to Borrower	100757430000521	Fulfillment	exl_impl 🔊	05/11/2015 10:41:58 CDT	05/11/2015 10:41:58 CDT	05/11/2015 10:42:05 CDT	Successfully	Actions
2	PO Line - Packaging	100756400000521	Acquisition	exl_impl 🔊	05/11/2015 08:00:18 CDT	05/11/2015 08:00:19 CDT	05/11/2015 08:00:40 CDT	Successfully	Actions
3	Users SYNCHRONIZE using profile Student Information System	100751530000521	Users	exl_impl 🟝	05/10/2015 04:51:06 CDT	05/10/2015 04:51:06 CDT	05/10/2015 04:51:06 CDT	U Failed	Actions
4	Users IMPORT using profile Student Information System	100751270000521	Users	exl_impl 🟝	05/10/2015 04:24:07 CDT	05/10/2015 04:24:08 CDT	05/10/2015 04:24:09 CDT	J Failed	Actions
5	Manual Locate Job	100750250000521	Fulfillment	exl_impl 🟝	05/10/2015	05/10/2015	05/10/2015	Scompleted	Actions

Figure 53 – Monitor Jobs Page — Send Overdue Message to Borrower Job

2 Optionally, select **Actions > Report**. The Job Report page appears.

Job Report					Back
Completed Successfully	Name Send Overdue Process ID 10075743000 Started on 05/11/2015 10	Message to Borrower 1521 :41:58 CDT		Created by ext_impl (05/11/2015) Total run time 7 Seconds Finished on 05/11/2015 10:42:05 CDT	
Job Results Summary					
					📑 Tools
1 Total lending requests process	ed		3		
2 Total ISO requests processed			3		
3 Total Email requests processed	1		0		
- ISO Partner					
					Tools
Description		Count			
1 Request status was upda sent successfully	ted and overdue message	3			Preview records



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		
Name	- Description	-
General Information		
Name *		
Description *		
Туре	Alma	

Figure 55 – Locate Profile Details Page – Page 1 of Wizard

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

තී	Locate Profile Details		
	Name	Test 1 Description	Test 1
Gen	eral Information		
	Server		
	Port		
	Username		
	Password		
	Institution		
	Alma Network		
	Check Availability/Requestability		
	Ignore Electronic and Digital		
	Resources		
	Locate By Fields		
Т	est Connection		

Figure 56 – Locate Profile Details Page – Page 2 of Wizard

- 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 <u>Remote Storage</u> 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 <u>ILLiad Add-on for NCIP Based Integration with Alma</u> 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.

3	8 Monitor Jobs								
	Scheduled SP Scheduled Run	ning History							
Submit Date from 05/09/2015 to 05/10/2015 Apply Filter									
Fi	Iter : All						Find :	in : Name	▼ Go
F	lefresh							1 - 3 of 3 Jobs	📑 Tools
			1-b						
	⇔ Name	\$ Job ID	♦ Job Category	♦ Creator	🗢 Submit Date	Start Date	End Date		
1	Users SYNCHRONIZE using profile Student	100751530000521	Users	exl_impl 🔠	05/10/2015	05/10/2015	05/10/2015	Scompleted	Actions
	Information System				04:51:06 CDT	04:51:06 CDT	04:51:06 CDT	Successfully	
2	Users IMPORT using profile Student	100751270000521	Users	exl_impl 🟝	05/10/2015	05/10/2015	05/10/2015	👤 Failed	Actions
	Information System				04:24:07 CDT	04:24:08 CDT	04:24:09 CDT		
3	Manual Locate Job	100750250000521	Fulfillment	exl_impl 🔊	05/10/2015	05/10/2015	05/10/2015	I Completed	Actions
					02:08:18 CDT	02:08:19 CDT	02:08:31 CDT	Successfully	

Figure 57 – Monitor Jobs Page

2 Locate the import/synchronize job, and select **Actions > Report**. The Job Report page appears, displaying information on the report.

හි Job Report	
Completed with Errors View Alternative Kenorr View Alternative Kenorr	NIZE using profile Student Information System Created by ext_impl (11/05/2015) Total run time 1 Minutes 31 Seconds 59 IDT Finished on 11/05/2015 09:29:30 IDT
Alerts	
1 users were rejected	
Job Results Summary	
Iotal records processed Total users processed	3
3 Total users rejected	1
4 Total users updated successfully	0
5 Total users created successfully	2
- Job Parameters	Value
1 Schedule	OVERNIGHT
2 Input File Path	Import
3 User XSD Version	V1
4 External system type	USER
5 External action name	SYNCHRONIZE
7 External system code	uservame SIS
8 External system id	12889580000121
9 Record type	PUBLIC
10 Integration profile name	Student Information System
11 Copied file directory	J:\urm\dev\maven\bin_///1.0.0.2-URM/Alma_root\\110\121\temp\external_systems/temp/
- Created Users - By Files	
Ette Manual	
File Name	Count

Figure 58 – Job Report Page

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.

ŝ	HealthChe	ck Dashboard				Back Run	Refresh	Report
-	System Statu	s						
		Last Run St	atus -					
	Last Run Date 05/05/2015 03:49:22 CDT							
		Total run	time 5 Seconds					
		Completed T	ests 18/18					
-	Entity List							
Ru	n Refres	h						📑 Tools
	Entity N	amo						
1	Fulfillme	nt						
2	Acquisition	on						
3	User Mai	nagement						
		Status @Act	ive Olnactive					
		Scheduling Not s	cheduled		nail Notifications			Save
-	Job History							
						1-3	3 of 3 Record	is 📑 Tools
	♦ Creator	♦ Status	♦ Time Started	≑ Time Ended	Completed Tests	s 🗢 Tests with	Alerts	
1	exl_impl	Completed with Errors	05/05/2015 03:49:22 CDT	05/05/2015 03:49:27 CDT	18	11		View
2	exl_impl	Completed with Errors	05/05/2015 03:46:19 CDT	05/05/2015 03:46:32 CDT	18	11		View
3	exl_impl	Completed with Errors	05/05/2015 03:44:57 CDT	05/05/2015 03:45:14 CDT	9	5		View
						Back Run	Refresh	Report

Figure 59 – Health Check Dashboard

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:

ŝ	Job Report				
	Completed with Errors Process ID 251139350 Started on 05/05/2018 Total run time 5 Seconds Status Completed Records processed 18	0000121 5 03:49:22 CDT with Errors	Name Configuration - Run HealthCheck test Finished on 05/05/2015 03:49:27 CDT Created by exl_impl Status date 05/05/2015 03:49:27 CDT Records with exceptions 11	Run HealthCheck tests on the system 5 03:49:27 CDT 5 03:49:27 CDT ns 11	
Ale	erts				
	U Of the 18 records processed, 11 records failed. F	or more informat	ion view the report details (or contact Support	using the process ID).	
-	Fulfillment	Number Fa	iled		
1	Physical Locations with no Fulfillment Unit	2		View Error Events	
2	Fulfillment units with request policy conflict	0		View Error Events	
3	Libraries without Standard opening hours	1		View Error Events	
4	Physical Locations that are not associated to Circulation De	sk 13		View Error Events	
5	Library relationships are not mutual	0		View Error Events	
6	Self-Check circulation desks without SC profile	0		View Error Events	
7	Libraries without primary circulation desk	0		View Error Events	
8	Circulation desk operator with no role consistency	1		View Error Events	
9	Item policies that are not configured	2		View Error Events	
+	Acquisition				
+	User Management				

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:



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):

NE	TWORK	Alma -		P	Tasks	Help	Imple	menter, Ex
Ŝ	Configurati	on Files					Back	Distribute
	You	are configuring: Tra	aining - Network Zo	one - Clean				
								📑 Tools
	Customize	d 🔶 Filename		Description	Managed in N	etwork		
1		/xsl/letters/sm	s/SmsFulUser0	User Overdue Notice Letter	-		0	Customize
2	~	/xsl/letters/sm	s/SmsFulUserL	User Loans Courtesy Letter				Actions
3		/xsl/letters/sm	is/SmsFulUserB	User Borrowing Activity Letter			Edit	
4		/xsl/letters/sm	s/SmsFulPlace	Place On Hold Shelf Letter			Restore	e in Network
5		/xsl/letters/sm	s/SmsFulLostL	Lost Loan Notification Letter			View D	efault
6		/xsl/letters/sm	is/SmsFulLostL	Lost Loan Letter			(Customize
7		/xsl/letters/sm	is/SmsFulltemC	Item Change Due Date Letter			(Customize

Figure 62 – Manage in Network

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.

NE	TWORK	Alma -		2	Tasks	Help	Implen	nenter, Ex
තී	Configurat	tion Files					Back	Distribute
	You	u are configuring: Tra	aining - Network Zone	- Clean				
	Customize	d A Filonomo		Description	Mana	and in	Notwork	
	Customize			Description	Mana	gea m	Network	
1		/xsl/letters/sm	is/SmsFulUserO	User Overdue Notice Letter			1	Customize
2	×	/xsl/letters/sm	s/SmsFulUserL	User Loans Courtesy Letter		1		Actions
3		/xsl/letters/sm	is/SmsFulUserB	User Borrowing Activity Lett	er			Customize

Figure 63 – Managed in Network

- 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.

NETW	/ork	Alma -	.	Ð	Tasks	Analytics	Help	Implementer, Ex
Star C	Configurat	ion Files						Back Distribute
	You	are configuring: Tra	iining - Network Zone	- Clean				📕 Tools
Cu	ustomize	d 🗢 Filename		Description	Manage	d in Networ	k	
1		/xsl/letters/sm	s/SmsFulUserO	Sms Ful User Overdue Notice Letter				Customize
2	 Image: A second s	/xsl/letters/sm	s/SmsFulUserL	Sms Ful User Loans Courtesy Letter		~		Actions
3		/xsl/letters/sm	s/SmsFulUserB	Sms Ful User Borrowing Activity Letter			EC	lit
4		/xsl/letters/sm	s/SmsFulPlace	Sms Ful Place On Hold Shelf Letter			Re	op Network Management Istore
5		/xsl/letters/sm	s/SmsFulLostL	Sms Ful Lost Loan Notification Letter			Vi	ew Default
6		/xsl/letters/sm	s/SmsFulLostL	Sms Ful Lost Loan Letter				Customize

Figure 64 – Stop Network Management

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.

Repository Sear	ch			
Find All titles		• where	Keywords	-
Institution	Network	Community		
Limit results to:				
Inventory	Animal (vnorimontation	/ David M. Haugen, bo	ook editor
Collection Electronic title Digital title Physical title	Book (Detro ISBN: 97807 Series: Opp Subject: An Language: I Held by:	it : Greenhaven F 37733464 (hardc osing viewpoints imal experimenta English Record Training - Mem	Press c2007.) over : alk. paper) and o series (Unnumbered) ation Moral and ethical a <u>number:</u> (TrN)57241- ber 1	thers aspects Anim -train20072_c2dt
Material Type	Edit	in malining (D	uid M. Hausan haals	- dit - a
Book (3)	2 Alternati Book (Detro ISBN: 07377	it : Greenhaven F 38200 (hardcove	Press c2008.) r) and others	editor.
Language	Series: Opp Subject: Alt	ernative medicin	series (Onnumbered) e Chiropractic He	rbs Therapeutic
English (3)	Language: E Held by: Edit	English Record Training - Mem	<u>d number:</u> (TrN)62919- <u>ber 1</u>	-train20072_c2dt
Publication Year 2007 (2) 2008 (1)	3 <u>America</u> Book (Detro ISBN: 97807 Series: Opp Subject: Cu influences ar Language: I Held by: Edit	's global influen it : Greenhaven F '37734232 (hardc osing viewpoints lture and globaliz nd others English Recorr Training - Mem	ce / David M. Haugen Press c2007.) over) and others series (Unnumbered) ation Juvenile literature I number: (TrN)59655- ber 1	and Susan Mus a. United States - train20072_c2dt

Figure 65 - Network Tab Repository Search

- 2 Click the **Held by** link for the other institution. The Held By Details Page appears.
- 3 Click the **Orders** tab.

2	'Held By' Details
	Title Federal history Institution Open University
	Holdings(0) Portfolios(1) Representations(0) Electronic Collections(0) Orders(1)
1	100 Decisive Battles (ABC-CLIO History Reference Online Complete), 1999, 1-57607-075-1, ISBN Order/ Line status: In Review / Ready MMSID: 991684250000121 CKBID: 53100000002039080 Type: Electronic Book - Subscription Standard number: 1-57607-075-1 Order/Line: PO-18027 / POL-16222 Vendor/Account: O'niel / Ebsco - Education Library 0-123-124 Vendor reference ID: - Expected activation: - License status: - Activation status: Not Activated E-Resource Renewal date: 19/03/2012

Figure 66 - 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

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:

Figure 68 – Access Type Example Report

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 (<u>http://status.exlibrisgroup.com/</u>) 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, job_category, campus_code, pin_number, 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.