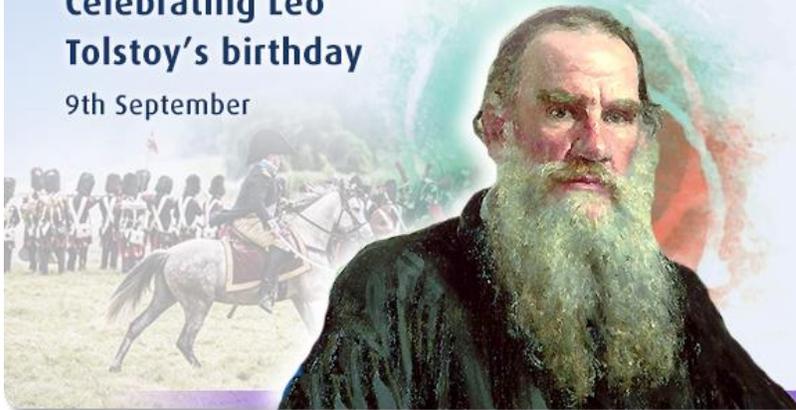


Alma September 2015 Release:
**Celebrating Leo
Tolstoy's birthday**
9th September



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Alma September 2015 Release Highlights

Acquisitions

- **Sending Order Cancellations to Vendors Using EDI** - Alma now supports sending order cancellations via EDI. A new **Order cancellation** field in the EDI Information tab of the Vendor record supports this feature.
- **Export PO Lines to ERP (Enterprise Resource Planning) Systems – Closed/Canceled Orders** – It is now possible to send closed or canceled PO lines to a financial system, similar to the existing feature that enables sending submitted POs. A new section Export PO Lines (POL) was added to the Actions tab of the Finance integration profile. In addition, a new job, Export PO Lines, runs according to the schedule set by the user.

Resource Management

- **Import: Prevent Older Records from Overlaying or Merging with Newer Records** - Alma now provides additional import configuration options that enable you to prevent older bibliographic records from overlaying or merging with newer records when a match occurs. This new capability enables the upload of records in the correct sequence by preventing the update of an existing record with an older version of the same record.
- **Additional Publishing Modes for the General Publishing Profile** – There are new publishing modes for a general publishing profile. Until now, Alma published incremental changes to records only. Alma now supports additional options such as full publishing, publishing with a date range, or publishing a defined set.
- **Inventory Numbers for Physical Items** - An administrator can now set multiple number sequences to apply to physical items. Each sequence may include a prefix. You can configure a sequence to start at any number, as well as the total length of the prefix + number. In addition, you can set an inventory price for physical items. This is useful for institutions that would like to create a report on the value of all or some of their physical inventory.
- **Autocomplete Functionality for UNIMARC** - As part of the continuing support for UNIMARC in Alma, the autocomplete functionality will assist catalogers by providing content suggestions for certain UNIMARC fields. Similar to the pop-up assistance capability

in Alma's MD Editor for several MARC 21 fields, this same pop-up suggestion feature is available for working with the equivalent UNIMARC fields.

- **Regensburger Verbundklassifikation (RVK) Authority Record Classification** - The Regensburger Verbundklassifikation (RVK) classification system (a shelf mark notation/classification method) has been enabled in Alma's MD Editor. With this new classification system, you can create RVK authority records that contain call number headings in the 153 field. Subsequently, bibliographic records can be created in the MD Editor and F3 can be used while entering the bibliographic 084 field to perform a check against the authority 153 field for authority call number headings.
- **MSC Classification** - This enhancement adds the ability to catalog bibliographic records using the Mathematics Subject Classification (MSC) scheme, which enables the call number to be copied from the bibliographic record to the holdings records and also allows library staff to browse for MSC call numbers on the MD Editor page.

Fulfillment

- **Copyright Management Rules** - You can now set up Digitization Profile Rules to automatically trigger a copyright clearance approval task for each submitted digitization request, depending on parameters such as when the digitized resource was published or how many digitization requests have been previously handled for the given resource.

Resource Sharing

- **Enabling Lender to Update Borrowing Request with a Will Supply Message** - If a lender is going to supply a requested resource that has not yet been shipped, the lender can now update the request with a new status "Will Supply." A reason must be supplied when the Will Supply action is used. The action will stop the request from expiring if ISO-based automatic expiry is set up. All lenders may use this feature. However, communications resulting from the status change are applicable only to ISO partners.
- **Integration with ILLiad as a Supplier of Last Resort** - ILLiad can now be fully integrated with Alma in a peer-to-peer rota as a supplier of last resort. If all rota partners fail to fulfill the request, it can be automatically transferred to ILLiad where the request can be attempted within the broader ILLiad managed rota. This will save a step for the patron that previously received an email saying that the request could not be fulfilled, with a link to ILLiad.

Administration

- **Job Alerts Dashboard Widget** - There is a new dashboard widget, **System Jobs Status** that presents the status of scheduled jobs that are running or have completed within the last five days. While this widget helps to make you aware of any recently failed jobs, a user will see information only about the jobs that are relevant to the user's roles. Clicking a job category opens the Monitor Jobs page with that category preselected. Clicking an error icon opens a pop-up with the names of any failed jobs. Clicking **More Info** opens the Monitor Jobs page with these jobs preselected.
- **Resending Patron Notifications** - If a patron does not receive a notification email that was sent by Alma, you may now easily resend an attachment to the patron's preferred email address.

Analytics

- **New Link Resolver Usage Subject Area** - A new Link Resolver Usage subject area was added to Alma Analytics. The fields of this subject area can be used to create reports that provide both specific details of link resolver usage as well as a broad perspective of how the Alma link resolver is used. This provides libraries with a useful means of determining proper electronic collection development.
- **New Inventory Price Field** - The new Inventory Price field has been added to the Physical Items subject area.
- **Support for Book Report 1 and 2 Usage Reports** - Analytics now supports usage data associated with eBook usage reports (Book Report 1 and Book Report 2) that are provided by UStat.

Alma Interface Updates

- **Customization of List Tables** - Enhancements were made to list tables throughout Alma, enabling you to perform customizations such as changing the width and order of table columns. Columns can be hidden or redisplayed using a new **Columns** drop-down list. Changes are retained after moving to another page.

Alma Show Me How and Videos

The following sections describe Alma Show Me How and videos for the September 2015 release of Alma.

Alma Show Me How – September

Description

Alma Show Me How provides a menu-driven interface to prompt you through the steps of new or common tasks, or to point out new options, such as a check box, and direct you to the documentation that describes the new options in further detail.

Step-by-Step Instructions

Each Show Me How scenario may address different areas of Alma. The authorizations required to access the Show Me How scenarios are specific to the functional areas of the scenario.

To access Show Me How:

- 1 From the Alma home page, click the **Show Me How** button.
The How Can We Assist You? pop-up window displays.
- 2 Select one of the processes in order to start the prompted step-by-step instructions.

For the September release, the following Show Me How scenarios are available:

- **Resend Patron Notifications**
- **Import: Prevent Older Records from Overlaying or Merging with Newer Records**

The following pop-up is also available:

- **New: Customizing Lists and Tables** – To activate, open a page with a list or table (for example, Acquisitions > Import > Import)

Alma Videos – September

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

- [Sending Order Cancellations to Vendors Using EDI](#)
- [Export PO Lines to ERP Systems – Closed/Canceled Order](#)
- [Import: Prevent Older Records from Overlaying or Merging with Newer Records](#)
- [Resending Patron Notifications](#)
- [Customizing Lists and Tables](#)

Making the Most of This Release

The following release note features require actions or decisions on the part of your institution in order to implement:

| Action Items |
|---|
| <input type="checkbox"/> You can now customize many lists in your Alma work environment and adapt them to your library and personal preferences. For detailed information, see Customizing List Tables . |
| <input type="checkbox"/> Sending Order Cancellations to Vendors Using EDI – This great new EDI enhancement will help you improve the workflow with your vendors. |
| <input type="checkbox"/> A new integration point between Alma and ERP systems allows the later to track when orders have been fully invoiced and received/activated, or canceled by the library. For detailed information, see Export PO Lines to ERP Systems – Closed/Canceled Orders . |
| <input type="checkbox"/> Prevent importing outdated bibliographic records by making use of the new import profile parameter Do not override/merge record with an older version . For detailed information, see Import: Prevent Older Records from Overlaying or Merging with Newer Records . |
| <input type="checkbox"/> Need to synchronize your electronic holdings with OCLC? Need to publish your holdings to Rapid ILL? New publishing platform options can help you better manage ongoing data exchange with various ILLs and third-party systems. With the new publishing platform option type that enables full publishing, you can publish your complete electronic holdings to OCLC or publish your print holdings to Rapid ILL. For detailed information, see Additional Publishing Modes for the General Publishing Profile . |
| <input type="checkbox"/> Enabling Lender to Manage a 'Will Supply' Status – If your resource sharing rota management includes a lender expiration step that speeds up the rota processing, this new feature will enable better control of the process by allowing the lender to mark requests as “not to be expired.” If your workflow is ISO-based, using this new feature fits into the automated workflow as well, enabling an automatic “stop the clock” on the expiration of lending requests. |

Action Items

- [Integration with ILLiad as a Supplier of Last Resort](#) – If you’re an ILLiad user, this new feature will let you set up a seamless and fully integrated workflow with ILLiad. This feature, along with the previously released ILLiad NCIP integration, allows the process to be fully automated.
- You can now personalize your communications and notifications to patrons by making use of the new option to assign a title to each user—for example, by configuring your notices to include titles such as “Dear Prof. Smith.” For detailed information, see [Title Field added to User Record](#).
- Interested in better analyzing vendor usage? Alma now supports the loading of COUNTER book reports 1 and 2. For detailed information, see [Support for Book Report 1 and 2 Usage Reports](#).

Acquisitions

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

Sending Order Cancellations to Vendors Using EDI

Description

Alma now supports sending order cancellations using EDI.

A new **Order cancellation** field in the EDI Information tab of the Vendor Details page enables you to select whether the vendor supports this feature. When the user selects the **Send cancellation to vendor** field in the Cancellation Information dialog box, if the vendor is configured for EDI cancellations, the cancellation message is sent to the vendor using EDI.

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

The EDI job report was updated to include EDI cancellations.

Step-by-Step Instructions

The following roles can configure EDI cancellations for a vendor:

- Vendor Manager

To configure a vendor to support EDI cancellations:

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

The screenshot shows the 'Vendor Details' page for 'Aberdeen University Library' with vendor code 'ABERDEEN'. The 'EDI Information' tab is active, displaying various fields for configuring EDI communication. The 'Order Cancellation' checkbox is highlighted with a red box.

| Vendor EDI Attributes | |
|-------------------------|--------------------------|
| EDI code | <input type="text"/> |
| EDI type | <input type="text"/> |
| EDI naming convention | Standard |
| EDI vendor format | Other |
| Incoming | |
| Incoming | <input type="checkbox"/> |
| Shelf Ready | <input type="checkbox"/> |
| Parameters | |
| Outgoing | |
| POs | <input type="checkbox"/> |
| Additional order number | <input type="checkbox"/> |
| Include fund code | <input type="checkbox"/> |
| Claims | <input type="checkbox"/> |
| Order Cancellation | <input type="checkbox"/> |

Figure 1 - EDI Information – Order Cancellation Field

3 Complete configuring EDI communication as described in the documentation.

Export PO Lines to ERP Systems – Closed/Canceled Orders

Description

Alma now supports sending closed or canceled PO lines to a financial system, similar to the existing feature that enables sending submitted POs. This enables Enterprise Resource Planning systems (ERPs) to receive an indication from Alma when a PO line is fully received/activated and invoiced or canceled.

To support this feature, a new section **Export PO Lines (POL)** was added to the Actions tab of the Finance integration profile.

In addition, a new job, **Export PO Lines**, runs according to the schedule set by the user (see below) to export the PO lines. The report for this job includes:

- Total records processed
- Total files sent
- Total POs processed
- Total PO lines processed
- For each PO, the number of PO lines
- Alerts raised when running the job, if any

Note: The job **Export PO Lines** can export only up to 1,000 PO lines. If more than 1,000 PO lines are marked for export, the job exports 1,000 of them and the job report page includes an alert suggesting that the user rerun the job to export any remaining PO lines.

Step-by-Step Instructions

The following roles can configure sending closed or canceled PO lines to a financial system:

- General System Administrator

To configure sending closed or canceled PO lines to a financial system:

- 1 Follow the steps in the **To configure the export and import of orders and invoices** procedure in the **Financial Systems** section of the *Alma Integration with External Systems Guide* or the Alma Online Help.

| External System | | |
|---|--|--------------------------|
| Code | Itay Test | Name Itay Test |
| | | Integration Type Finance |
| General Information | Actions | Contact Info |
| Actions | | |
| Import Payment Confirmation | | |
| Active * | <input type="radio"/> Active <input checked="" type="radio"/> Non Active | |
| Plugin | [Dropdown] | |
| Input File Path | a | |
| Run | | |
| Schedule | Not scheduled | |
| Export Invoices For Payment | | |
| Active * | <input type="radio"/> Active <input checked="" type="radio"/> Non Active | |
| Plugin | [Dropdown] | |
| Output File Path | b | |
| Run | | |
| Schedule | Not scheduled | |
| Use updated XSD format (previous version is deprecated). | <input checked="" type="checkbox"/> | |
| Funds Allocation Loader | | |
| Active * | <input type="radio"/> Active <input checked="" type="radio"/> Non Active | |
| Plugin | [Dropdown] | |
| Input File Path | c | |
| File Extensions * | <input type="radio"/> Csv <input checked="" type="radio"/> Excel | |
| Run | | |
| Schedule | Not scheduled | |
| Export Orders (PO) | | |
| Active * | <input checked="" type="radio"/> Active <input type="radio"/> Non Active | |
| Plugin | [Dropdown] | |
| Output File Path * | test_po | |
| Rerun failed orders | | |
| Export PO Lines (POL) | | |
| Active * | <input checked="" type="radio"/> Active <input type="radio"/> Non Active | |
| Plugin | [Dropdown] | |
| Output File Path * | Test_pol | |
| Run | | |
| Schedule | Every day at 11:00 | |

Figure 2 - Finance Integration Profile Actions Tab

- 2 In step 6, complete the **Export PO Lines (POL)** section. The fields in this section are identical to the fields in other sections on the page and are already described in the procedure.
- 3 Continue with the rest of the procedure.

Other Acquisitions Enhancements

- The Create PO Line API, `POST /almaws/v1/acq/po-lines`, can now create items as received. For detailed information, see the Create PO Line API information on the Developer Network: <https://developers.exlibrisgroup.com/alma/apis/acq>. For more information about receiving, see **Receiving Material** in the *Alma Acquisitions Guide*.

Resource Management

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

Import: Prevent Older Records from Overlaying or Merging with Newer Records

Description

With the September release, Alma provides additional import configuration options that enable you to prevent older bibliographic records from overlaying or merging with newer records when a match occurs. This new capability enables the upload of records in the correct sequence by preventing the update of an existing record with an older version of the same record. You may find this useful for record imports, in certain cases, where the vendor supplies enriched records.

This feature is enabled through a new metadata record field called **Originating System Version**, which is created from the record's 005 control field the first time the record is imported.

Related to this new feature, there is a known issue that has been identified and is scheduled to be fixed in the November release. Refer to the Known Issues section of these release notes for detailed information.

Step-by-Step Instructions

The following roles can work with import profiles:

- Catalog Administrator
- General System Administrator

Setting Up the Initial Originating System and Originating System Version

Since existing records do not have the Originating System Version information, Alma provides the ability to set up this information using a process automation job. For records that are

imported as of the September release, the Originating System and Originating System Version are added automatically.

Note: As you process existing records, be aware that the normalization task will not modify any records linked to the Community Zone.

To configure normalization for managing the Originating System and Originating System Version information from the Process List:

- 1 Click **Processes** in the General section of Resource Management Configuration (**Resource Management > Resource Configuration > Configuration Menu**) to open the Process List page.
- 2 Click **Add Process**.
- 3 Select the following options identified for the parameters below and click **Next**:
 - Business Entity – Bibliographic title
 - Type – Marc 21 Bib normalization (or the UNIMARC or the KORMARC option depending on your environment)
- 4 Complete the General Information section and click **Next**.

The screenshot shows the 'Process Details' page in a web application. At the top, there is a header with a home icon, the title 'Process Details', and a breadcrumb navigation with steps 1, 2, 3, and 4. Step 2 is highlighted. To the right of the breadcrumb are buttons for 'Back', 'Cancel', and 'Next'. Below the breadcrumb is a table with two columns: 'Business Entity' and 'Type'. The 'Business Entity' column contains 'Bibliographic title' and the 'Type' column contains 'Marc 21 Bib normalization'. Below the table is a section titled 'General Information'. This section contains several fields: 'Name*' with the value 'CC MARC 21 Normalization', 'Description*' with the value 'CC MARC 21 Normalization', 'Status' with a dropdown menu set to 'Active', and 'Status Date' with a '-' symbol. There is also a small icon in the bottom right corner of the description field.

Figure 3 - Process Details Page General Information Section

- 5 Select **Update originating system information** and click **Add to Selection**.

Process Details 1 2 3 4 Back Cancel Next

Business Entity Bibliographic title Type Marc 21 Bib normalization

Name CC MARC 21 Normalization

Processes Selected

No records were found.

Process List Pool Columns Tools

| | Name | Description |
|---|---|--|
| 1 | <input type="checkbox"/> marc21BibResequenc... | MARC21 BIB Re-Sequence task |
| 2 | <input type="checkbox"/> MarcDroolNormalization | Marc Drool Normalization |
| 3 | <input type="checkbox"/> marc21BibClearEmpty... | MARC21 BIB Clear Empty Fields task |
| 4 | <input type="checkbox"/> MmsTagSuppressed | Sets the Suppressed flag of MMS |
| 5 | <input type="checkbox"/> MmsTagSyncExternal | Sets the SyncExternal flag of MMS |
| 6 | <input type="checkbox"/> MmsIdentifyingBriefRe... | Calculates if a record is brief or not |
| 7 | <input type="checkbox"/> MmsTagSyncNational... | Sets the Sync National Catalog flag of MMS |
| 8 | <input type="checkbox"/> marc21createControlN... | MARC21 BIB Create Control Number task |
| 9 | <input checked="" type="checkbox"/> Update originating system information | Update the originating system and originating system version information |

Add to Selection

Figure 4 - Select the Update Originating System Information and Add to Selection

- 6 Click Next.
- 7 Select the check box for either or both of the **Originating System** and **Originating System Version** parameters and enter values for these parameters as described below.

Note: When you select a check box, its associated parameter must be specified. Leaving the parameter blank is not an option.

Process Details

1 2 3 Back Cancel Save

Business Entity Bibliographic title Type Marc 21 Bib normalization

Name CC 005 Control Field Normalization

Originating system

Originating System Version

Figure 5 - Select Originating System and/or Originating System Version

- **Originating System** – Use this parameter to identify the originating system that you want identified in the imported record's metadata.

Originating system

Originating System Version

WorldCat

Other

Library of Congress

Figure 6 - Select Originating System Option

MARC Record Simple View

Title From Alice to Harry Potter : children's fantasy in Engla

MMS ID 99724528310001041

Originating system WorldCat

Originating syste

Suppress from publishing No Export to Wor

Record Format marc21

LDR 02901cam 2200613 a 4500

001 99724528310001041

005 20140113085714.0

Figure 7 - Originating System Metadata in Search Results

- **Originating System Version** – Use this parameter to specify the date that you want stored in the record’s metadata. This date is used when you select the prevent overlay/merge options in your import profile for processing record matches as described in [Configuring the Import Profile for Version Prevention](#) on page 24).



Figure 8 - Originating System Version Date Specified

The format of this date parameter is MM/DD/YYYY. The format of the Originating System Version is YYYYMMDDhhmmss.f (where hhmmss.f is hours, minutes, seconds, and a fraction of a second and the 24-hour clock is used). When normalization occurs with this parameter specified, the system enters YYYYMMDD000000.0. Zeroes are entered for the hhmmss.f portion of the Originating System Version.

Note: When using metadata import, the system pulls the date and time (that is formatted as YYYYMMDDhhmmss.f) from the 005 control field of the imported record for the Originating System Version field. Refer to the figure below for an example of the 005 control field and the date/time format.



Figure 9 - 005 Control Field

The normalization process updates the Originating System Version field according to the date entered or selected from the calendar in the **Originating System Version** parameter above.

When you run a **Marc 21 Bib normalization** job (**General > Manage Jobs > Run a Job**) that uses a normalization process with a date selected for the **Originating System Version** parameter, the date that you specify is applied to all the records in the set that you select for the job.

- 8 Click **Save**.

To run the process job that you created:

- 1 Run a job (**Administration > Manage Jobs > Run a Job**).
- 2 Filter the list of jobs by selecting the **Marc 21 Bib normalization** type.

- 3 Select the process job that you created for normalizing the Originating System/Originating System Version information and click **Next**.

Run a Job - Select Job to Run

Job List

Type: Marc 21 Bib normalization Source type: All

| | Name | Description |
|---|---------------------------------------|--------------------------------------|
| 1 | Synchronize MMS with national catalog | Mark MMS as synchronized |
| 2 | Set Bib Records Cataloging Level | Set the MMS records cataloging level |
| 3 | CC MARC 21 Normalization | CC MARC 21 Normalization |

Figure 10 - Normalization Job that You Created

- 4 Select the set of records to be normalized and click **Next**. The Update Originating System Information section appears.

Run a Job - Enter Task Parameters 1 2 3 4 5 Back Cancel Next

The selected set contains 1 members.

Update originating system information

Originating system

Originating System Version 07/08/2015

Figure 11 - Override the Originating System/Originating System Version Parameters

- 5 Optionally, modify/override the **Originating System/Originating System Version** parameters set in the normalization process that you previously created/saved in the procedure above, and click **Next**.
- 6 Schedule the job and click **Next**.
- 7 Review your job settings and if all the settings are correct, click **Submit** and click **Confirm** in the confirmation dialog box. The job runs.
- 8 After the job has completed, locate the updated record(s) and confirm that the **Originating System/Originating System Version** information has been modified to match your settings.

| MARC Record Simple View | | | Back | Edit |
|-----------------------------------|-------|-----------------------|---------------|----------------------------|
| Title Update Order Automation | | | | |
| MMS ID 9925808500121 | | | | |
| Originating system | OTHER | Originating system ID | 9925808500121 | Originating System Version |
| Suppress from publishing | No | Export to WorldCat | Don't publish | Brief record No |
| Record Format marc21 | | | | |
| Tools | | | | |
| LDR 01604cam a2200169 a 4500 | | | | |
| 001 9925808500121 | | | | |
| 005 20150808071231.0 | | | | |
| 008 061108s2005 enk b 001 0 eng | | | | |
| 020 __ a NewISBN133452344563 | | | | |
| 100 1_ a Baggins, Wallis E. A. . | | | | |

Figure 12 - Check Originating System/Originating System Version Metadata

Configuring the Import Profile for Version Prevention

To configure an import profile to prevent overlay/merge of an older record:

- 1 Click **Import Profiles** in the Record Import section of Resource Management configuration (**Resource Management > Resource Configuration > Configuration Menu**) to open the Import Profiles page.
- 2 Click **Add New Profile**.
- 3 Select **Repository** for the profile type and click **Next**.
- 4 Enter the required **Profile name** and **Originating system** parameters and complete the remainder of the Profile Details section to match your requirements.

Import Profile Details 1 2 3 4 5 6 Cancel Save Draft Next

Profile Type Repository

Profile Details

Profile name* CC WorldCat Import

Profile description

Originating system* WorldCat File name patterns

Import Protocol Upload File/s Cross walk No Yes

Physical source format XML

Source format MARC21 Bibliographic Target format MARC21 Bibliographic

Status Active

Figure 13 - Profile Details Section of the Import Profile

- 5 Click **Next** and select the normalization and validation parameters as needed to meet your requirements.
- 6 Click **Next**. The page on which you can select the record match parameters appears.

Import Profile Details 1 2 3 4 5 6 Back Cancel Save Draft Next

Profile Type Repository Profile name CC WorldCat Import

Match Profile

Serial match method 001 To MMS_ID Match Me

Non Serial match method 001 To MMS_ID Match Me

Match Actions

Handling method Automatic Manual

Upon match Merge Overlay Do Not Import Import New Record

Merge/Overlay

Merge method Overlay all fields but local

Allow bibliographic record deletion

Do not override/merge a non-brief record with a brief version

Unlink bibliographic records from community zone

Do not override/ merge record with an older version Disabled Consider Originating System Ignore Originating System

Automatic Multi-Match Handling

Disregard matches for bibliographic CZ linked records

Disregard invalid/canceled system control number identifiers

Prefer record with the same inventory type (electronic/physical)

Unresolved Records

Skip and do not import

No Match

Upon no match Do Not Import Import

Figure 14 - Import Profile Match Page

- 7 Select one of the following new options for **Do not override/merge record with an older version** when **Merge** or **Overlay** are selected for the **Upon match** parameter:
 - **Consider Originating System** – When a matching record is found, the system does not overlay or merge an older record with a newer record if the **Originating System** value in the existing record and the imported record are the same and the **Originating System Version** date in the existing record is newer than the date in the 005 field of the imported record. This option should be chosen when you want to compare the dates of matching records that originated from the same source.
 - **Ignore Originating System** – When a matching record is found, the system does not overlay or merge an older record with a newer record if the **Originating System Version** date in the existing record is newer than the date in the 005 field of the imported record. The value of the **Originating System** metadata field is ignored when determining whether to overlay or merge an older record. This option should be chosen when you want to compare the dates for any matching record with no relation to the source of the record.

A time when you may want to use this option is when YBP, for example, distributes a record with an OCLC number and that record is an OCLC record which YBP is redistributing with additional information. The fact that the record originated in OCLC should not prevent the overlay of the OCLC record by the YBP record when the YBP record is newer.
 - The **Disabled** option is the default and continues the match functionality in place prior to the September 2015 release of Alma. When a matching record is found, the **Disabled** option causes the system to ignore the **Originating System Version** date of the existing record and overlays or merges the external record with the Alma repository record according to the profile definition.
- 8 Complete the remainder of the matching parameters as you normally would for this page to meet your requirements and click **Next**.
- 9 Complete the remainder of the import profile parameters and click **Save**.

Reviewing Import Reports Containing Version Prevention Information

To view the report of records not imported due to version prevention:

- 1 Click **Import Profiles** in the Record Import section of Resource Management configuration (**Resource Management > Resource Configuration > Configuration Menu**) to open the Import Profiles page.
- 2 For the import job that you ran using the import profile configured with prevent overlay/merge of older records onto newer records, select **Actions > Job History**.



Figure 15 - Select Actions > Job History

The Job History page appears.

- 3 Select **Actions > Report** in the row containing the import job. The Job Report page appears.
- 4 Expand the **Records Not Imported** section to view the report information related to the records prevented from overlaying or merging when a match was found during import.

| Records Not Imported | | | Tools |
|----------------------|--|-------|--|
| | | Count | |
| 1 | Total records not imported/deleted | 0 | Actions |
| 2 | Records not imported upon no match | 0 | Actions |
| 3 | Records not imported, too many multi-matches results | 0 | Actions |
| 4 | Records not added (manual match) | 0 | Actions |
| 5 | Records not added (manual validation) | 0 | Actions |
| 6 | Records not added (automatic match) | 0 | Actions |
| 7 | Records not added (automatic multi-match) | 0 | Actions |
| 8 | Total records matched and skipped | 5 | Actions |
| 9 | Records locked by user/process | 0 | Actions |
| 10 | Records linked to CZ | 0 | Actions |
| 11 | Records duplicated in Job | 0 | Actions |
| 12 | Records not deleted since profile not allowing | 0 | Actions |
| 13 | Records with newer version in repository | 2 | Actions Download sources (XML) Download sources (binary) |
| 14 | Records with brief/non brief conflict | 3 | |
| 15 | Records failed | 0 | Actions |
| 16 | Records rejected | 0 | |
| 17 | Records skipped by filter | 0 | Actions |

Figure 16 - Records Not Imported Report

The **Records with newer version in repository** row shows the number of records that were not overlaid or merged as a result of the prevent option being selected in the import profile.

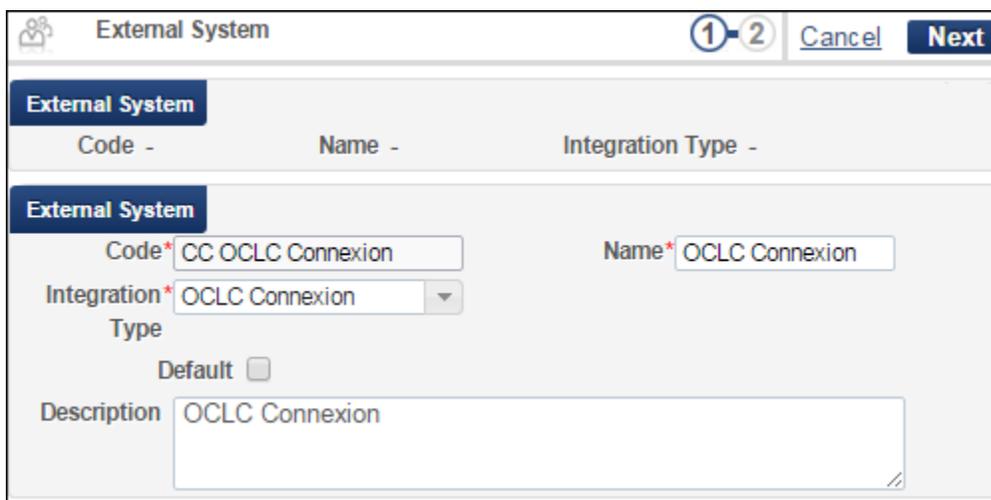
The **Total records matched and skipped** row includes as part of that number the records counted in the **Records with newer version in repository** row.

Using the **Actions** options, you can download an XML or binary file of the records identified in the report.

Configuring the OCLC Connexion External System Profile for Version Prevention

To configure version prevention in the OCLC Connexion external system profile

- 1 Click **Integration Profiles** in the External Systems section of the General configuration (General > General Configuration > Configuration Menu) to open the Integration Profile List page.
- 2 Click **Add Integration Profile**.
- 3 Enter the External System section parameters to include, selecting **OCLC Connexion** as the integration type.



The screenshot shows a web form titled "External System" with a progress indicator (1-2) and "Cancel" and "Next" buttons. The form has a table header with columns "Code -", "Name -", and "Integration Type -". Below the header, the form fields are: "Code*" with the value "CC OCLC Connexion", "Name*" with the value "OCLC Connexion", "Integration*" with a dropdown menu showing "OCLC Connexion", "Type" with a "Default" checkbox, and "Description" with the value "OCLC Connexion".

Figure 17 - OCLC Connexion Integration Type

- 4 Click **Next**. The External System Actions section appears.

External System
1 2 Back Cancel Save

External System

| | | | | | |
|------|----------------------|------|----------------|------------------|-------------------|
| Code | CC OCLC Connexion | Name | OCLC Connexion | Integration Type | OCLC Connexion |
|------|----------------------|------|----------------|------------------|-------------------|

Actions

Normalization

Correct the data using

Validation

Check the data using

Merge

Serial match method

Non Serial match method

Merge method

Do not override/merge a non-brief record with a brief version

Do not override/merge record with an older version

Disabled Consider Originating System

Ignore Originating System

Management Tags

Synchronize with* External Catalog?

Authorization

Password*

Figure 18 - External System Actions Section

- 5 Select one of the **Do not override/merge record with an older version** options described in the first procedure above to prevent overlay/merge of an older record with a newer record when a match occurs.
- 6 Complete entering the remaining parameters to meet your requirements, and click **Save**.

Additional Publishing Modes for the General Publishing Profile

Description

You can now select alternative publishing modes for a general publishing profile. Until now, Alma published incremental changes to records only (for general profiles): changes since the last time the publishing profile was run.

The new modes enable you to publish:

- All records (full) – In some situations, the external system requires the full set of records every time, and not only the changes since the last time. (The external system generally deletes the institution’s data before loading the new file.) This option enables the publishing of electronic holdings to OCLC. For detailed information, see the Publishing to OCLC section of the *Integrations with External Systems Guide* or Alma Online Help.
- All records changed within a certain date range – This is useful, for example, when a set of records within a specific date range became lost or corrupted in the external system.
- All records of a defined subset – This is useful, for example, when changes were made on the holdings level and Alma does not consider the bibliographic records changed.

A new set of fields was added to the Publishing Profile Details page for a general profile.

Step-by-Step Instructions

The following roles can configure the additional modes in a publishing profile:

- Cataloging Administrator
- General System Administrator

To configure the additional modes in a publishing profile:

- 1 When configuring a general publishing profile (**Resource Management > Resource Configuration > Configuration Menu > Record Export > Publishing Profiles**; select **Add Profile > General Profile**), select one of the following options for **Publishing Mode**:

Publishing Profile Details 1-2 Cancel Next

Profile Id - Profile Name -

Profile Name *
Profile Description

Status Active Inactive
Scheduling Not scheduled [Email Notifications](#)

Content

Set name *
Publish on: Bibliographic level
 Holdings/Portfolio/Representation level
 Item/Portfolio level
Output format MARC21 Bibliographic

Please note that choosing this mode limits scheduling options

Publishing Mode Incremental Full Date Range Republish Set
Set name *

Publishing Protocol

FTP
OAI
Z39.50

Cancel Next

Figure 19 - Publishing Profile Details for General Profile

- **Incremental** – Publish changed records since the last time the profile was run
This is the default selection.
- **Full** – Publish all records
When selected, the **Scheduling** field is limited to **Not Scheduled** and **On the 01 of Every Month**.
- **Date Range** – Publish all records between two dates
Enter or select the dates in the **From date** and **To date** fields (not shown). When selected, the profile cannot be scheduled; it is run once when the configuration is complete.
- **Republish set** – Publish a specific (sub)set of records
You must have already created the set. Enter or select the set in the **Set name** field.
When selected, the profile cannot be scheduled; it is run once when the configuration is complete.

- 2 Continue configuring the profile as required. For more information, see **Configuring Publishing Profiles** in the *Alma Resource Management Guide* or the Alma Online Help.

Inventory Number for Physical Items

Description

As an administrator, you can now set sequential inventory numbers for physical items.

You can set multiple number sequences that you can then apply to the items. Each sequence may include a prefix. You can configure a sequence to start at any number, and you can configure the total length of the prefix + number. While you were able to enter inventory numbers in previous versions, this greatly simplifies the numbering process and enables you to use the numbers for filtering purposes when creating Analytics reports.

This feature provides libraries with the ability to comply with inventory control regulations by providing an additional, unique inventory number for each physical item.

In addition, you can now set an inventory price for physical items. This is useful for institutions that would like to create a report on the value of all or some of their physical inventory.

The fields **Inventory Number** and **Inventory Date** in the **General Information** tab of the Physical Item Editor page were moved to a new section and the field **Inventory Price** was added. In addition, a new Inventory Number Configuration page was added to enable configuring number sequencing.

Note that you may use the same inventory number for multiple physical items, if you want to.

Step-by-Step Instructions

The following roles can configure physical item number sequencing:

- Cataloging Administrator
- General System Administrator

The following role can configure inventory number and pricing for a physical item:

- Physical Inventory Operator

To configure physical item number sequencing:

- 1 Open the Inventory Number Configuration page (**Resource Management > Resource Configuration > Configuration Menu > General > Inventory Number**).

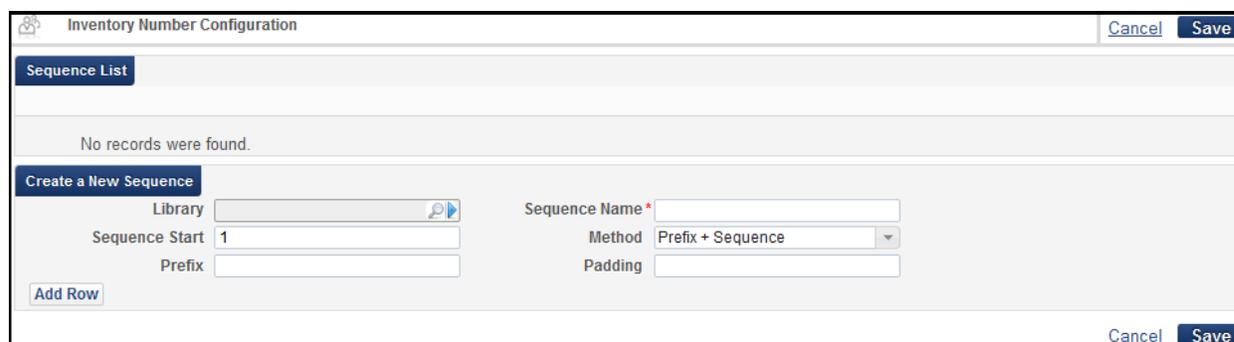


Figure 20 - Inventory Number Configuration Page

- 2 In the **Library** field, select the library for which this sequencing will be available. Multiple sequences can be available to each library. If you do not select a library, the sequence is available to all libraries.
- 3 In the **Sequence name** field, enter a unique name for this sequence.
- 4 In the **Sequence start** field, enter the first number for sequencing—for example, **1** or **1000**. This number must be a positive integer. Numbers increment by integers.
Only one method is currently available (**Prefix + Sequence**).
- 5 In the **Prefix** field, enter a prefix to identify physical items that receive a number from this sequence in Analytics reports. For example, **USED-**.
- 6 In the **Padding** field, enter the total (minimum) length of the sequence number. **0s** are added before the digits to ensure that the sequence number has as many characters as the padding. For example, if the prefix is **USED-**, the sequence start is **1**, and the padding is **10**, the first number in the sequence will be **USED-0000000001**.
- 7 When you are done, click **Add Row**. The sequence is saved.
- 8 Repeat steps 2 through 7 for each sequence. When you are done, click **Save**.

To delete a physical item number sequence:

To delete a sequence from this page, select **Actions > Delete** in the sequence row. This remove the sequencing option from the Physical Item Editor page. It does not remove the sequence numbers from any items.

To reset the numbering in a physical item number sequence:

At some point you may want to restart sequence numbering for a sequence. To do this, select **Actions > Set Next Sequence Value** in the sequence row, enter the new value in the Set Next Number Value dialog box, and click **Save**.

A screenshot of a dialog box titled "Set Next Number Value". The dialog box has a title bar with the text "Set Next Number Value" in white on a dark blue background. Below the title bar is a text input field with the placeholder text "New value" and a vertical cursor. At the bottom right of the dialog box are two buttons: "Cancel" in blue text and "Save" in white text on a dark blue background.

Figure 21 - Set Next Number Value Dialog Box

To add inventory information to a physical item:

- 1 Open the **General Information** tab on the Physical Item Editor Page. For example, search for a physical item and click **Edit** beneath the item in the search results.

Physical Item Editor Cancel Save

Resource description [The Urantia Book. Urantia Foundation Chicago, 1955. \[9780911560022\]](#)

Holding [Mugar: boss-Stacks: BP605.U75 U7 1955](#) [View all holdings](#)
Barcode 11719016643316 [View all items](#)
Process type -

Summary | General Information | ENUM/CHRON information | Notes | History

Barcode 11719016643316 Copy ID 1
Material type Book Item policy general circulation
Provenance Is Magnetic
PO line
Receiving date 08/21/2002 Expected receiving date
Enumeration A Enumeration B
Chronology I Chronology J
Description Generate Clear
Pages Pieces
Replacement cost Receiving operator
Process type
Issue Date

Inventory Number Information:
Inventory number Allocate Clear
Inventory date Inventory price

Location Information
Permanent Location Information:
Permanent library* Mugar Permanent location* boss-Stacks
Alternative call number type Alternative call number
Storage Location ID

Additional Information
Temporary Location Information:
Item is in temporary location No Yes
Temporary Library Temporary location
Temporary call number type Temporary call number
Temporary item policy Due Back Date

Cancel Save

Figure 22 - Physical Item Editor Page - General Information Tab

2 Enter an inventory number in one of the following ways:

- Manually.
- Click **Allocate**. If one numbering sequence is defined for the library, the next number in the sequence appears in the **Inventory number** field. If no sequences are defined for the library, Alma displays an error message. If more than one numbering sequence is defined for the library, select the desired sequence from the Sequence List dialog box and click **Select**.

| Sequence List | | | | | | |
|---------------|----------------------------|-------------------|--------|---------------|-----------|-------|
| | | | | | Columns ▾ | Tools |
| | Sequence Name | Method | Prefix | Next Sequence | Padding | |
| 1 | <input type="radio"/> Used | Prefix + Sequence | USED- | 1 | 10 | |
| 2 | <input type="radio"/> New | Prefix + Sequence | NEW- | 1 | 10 | |

Figure 23 - Sequence List Dialog Box

The inventory date is populated with today's date and the inventory price is populated with the list price from the PO line, if one exists.

- 3 If required, select an alternate date for the **Inventory date**.
- 4 If you must change the default value, in the **Inventory price** field, enter a numerical price. The value is assumed to be the default currency for your institution. For more information, see **Configuring Currency Subsets** in the *Alma Acquisitions Guide* or the Alma Online Help.

To clear all fields in the **Inventory Number Information** section in this tab, click **Clear**.

- 5 Make any other required changes on the page and click **Save**.

For an example inventory report in Analytics, see [New Inventory Price Field](#).

Updates to the MARC 21 Profile

Description

As of the September release, Alma is current with the MARC 21 updates (through April 2015) as identified by the Library of Congress in <http://www.loc.gov/marc/status.html>. The updates include:

- 037 first indicator
 - Indicators
 - 0371st indicator (Source of acquisition sequence):
 - # - Not applicable/No information provided/Earliest
 - 2 - Intervening

3 - Current/Latest

- 037 subfields
 - \$e Number of ensembles (R) in 382 (Medium of Performance)
 - \$3 Materials specified (NR) in 037 (Source of Acquisition)
 - \$5 Institution to which field applies (R) in 037 (Source of Acquisition)
- New field 884
 - Field indicators, subfields, and so forth added per <http://www.loc.gov/marc/bibliographic/bd884.html>.
- 382 subfield added
 - \$e - Number of ensembles (R)
- Updated the 082, 083, and 092 first indicator as follows:
 - 7 - Other edition specified in subfield \$2
- Field 008 – Music, Position 20, added the following:
 - k - Vocal score
- Field 852 (holdings profile) subfields added as follows:
 - \$t - Copy number (NR)
 - \$x - Nonpublic note (R)
 - \$z - Public note (R)
- Subfields added to the 097 field like the ones in field 91
 - This is a general definition for the subfields, not specific.
- Update the first indicator in field 648 to:
 - # - Undefined
 - (This is the only value for this indicator.)

Step-by-Step Instructions

The following roles can work with cataloging metadata:

- Cataloging Administrator
- General System Administrator

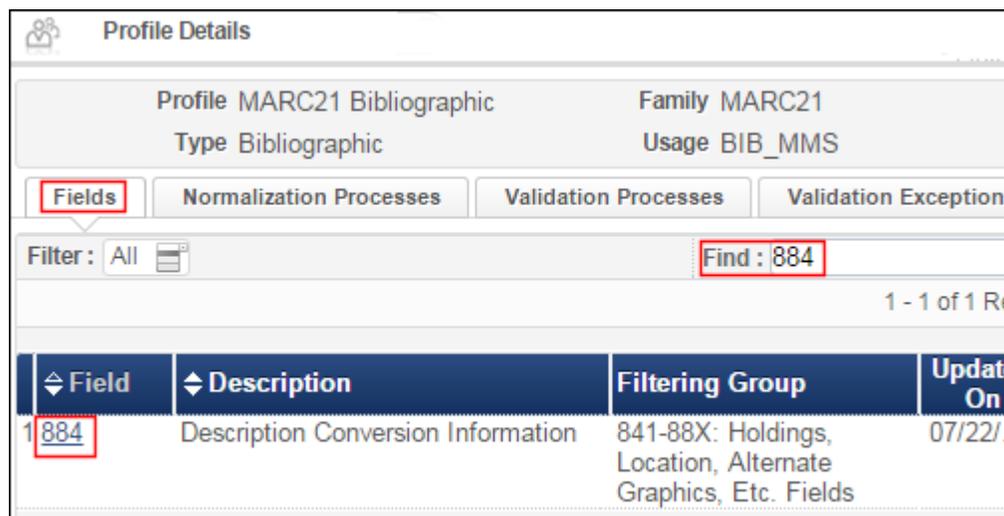
To view the MARC 21 updates using the new 884 field as an example:

- 1 Click **Metadata Configuration** in the Cataloging section of Resource Management Configuration (**Resource Management > Resource Configuration > Configuration Menu**) to open the Metadata Configuration List page.
- 2 Click the **MARC21 Bibliographic** link. The Profile Details page opens on the Fields tab.
- 3 Locate the 884 field using **Find**.



A search interface with a text input field containing '884', a dropdown menu set to 'Field', and a 'Go' button.

Figure 24 - Find a Field on the Fields Tab



The screenshot shows the 'Profile Details' page for a MARC21 Bibliographic profile. The 'Fields' tab is selected. A search filter is applied to find the field '884'. The search results show one entry for field '884' with the description 'Description Conversion Information' and a filtering group of '841-88X: Holdings, Location, Alternate Graphics, Etc. Fields'. The update date is '07/22/...'.

| Field | Description | Filtering Group | Update On |
|-------|------------------------------------|--|-----------|
| 1 884 | Description Conversion Information | 841-88X: Holdings, Location, Alternate Graphics, Etc. Fields | 07/22/... |

Figure 25 - 884 Field Appears on the Profile Details Page

Autocomplete Functionality for UNIMARC

As part of the continuing support for UNIMARC in Alma, the autocomplete functionality will assist catalogers by providing content suggestions for certain UNIMARC fields. Similar to the pop-up assistance capability in Alma’s MD Editor for several MARC 21 fields (refer to the figure below), this same pop-up suggestion feature is available for working with the equivalent UNIMARC fields in the MD Editor.

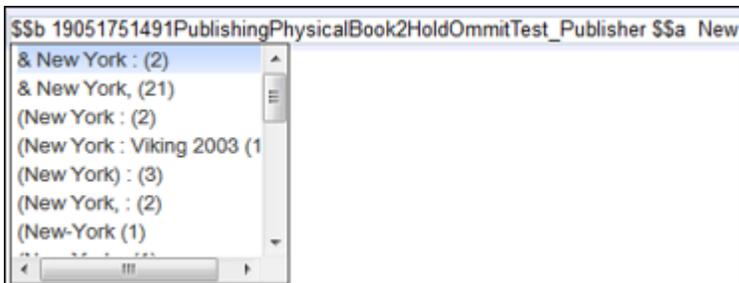


Figure 26 - Pop-up Assistance in the MD Editor

Refer to the table below for a list of the comparable fields in MARC 21 that are being provided for UNIMARC with the autocomplete feature. After typing the first three characters, the system attempts to provide a suggestion for the field/subfield being entered.

| MARC 21 Bibliographic Fields | UNIMARC Fields |
|------------------------------|----------------|
| 260 \$a | 210 \$a |
| 260 \$b | 210 \$c |
| 260 \$e | 210 \$e |
| 260 \$f | 210 \$g |
| 505 \$r | 327 \$z |
| 505 \$t | 327 \$a |
| 505 \$t | 327 \$b |
| 561 \$a | 317 \$a |

(User assistance is not being provided for the 4XX UNIMARC fields.)

Refer to the Known Issues section of these release notes where a known issue related to this announcement has been identified.

Local Fields Added to the UNIMARC Profile

Description

As part of UNIMARC support in Alma, the UNIMARC metadata profile has been updated with standard UNIMARC local fields. Specifically, the 9XX local fields have been added to the UNIMARC profile. This includes subfields a through z and 0 through 9, plus blank and 0 through 9 values for the first and second indicators. With this change, the system will no longer generate the **not listed in profile** warning message when entering UNIMARC 9XX fields.

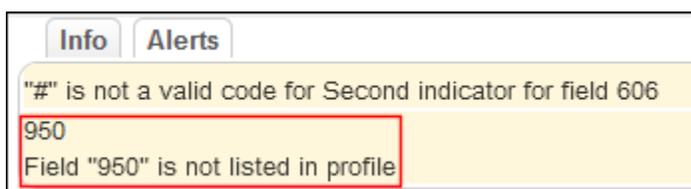


Figure 27 - Not Listed in Profile Warning Message (Prior to September 2015 Release)

Step-by-Step Instructions

The following roles can work with cataloging metadata:

- Cataloging Administrator
- General System Administrator

To view the 9XX UNIMARC profile changes using the 950 field as an example:

- 1 Click **Metadata Configuration** in the Cataloging section of Resource Management Configuration (**Resource Management > Resource Configuration > Configuration Menu**) to open the Metadata Configuration List page.
- 2 Click the **UNIMARC Bibliographic** link. The Profile Details page opens on the Fields tab.
- 3 Locate the 950 field using **Find**.



Figure 28 - Find a Field on the Fields Tab

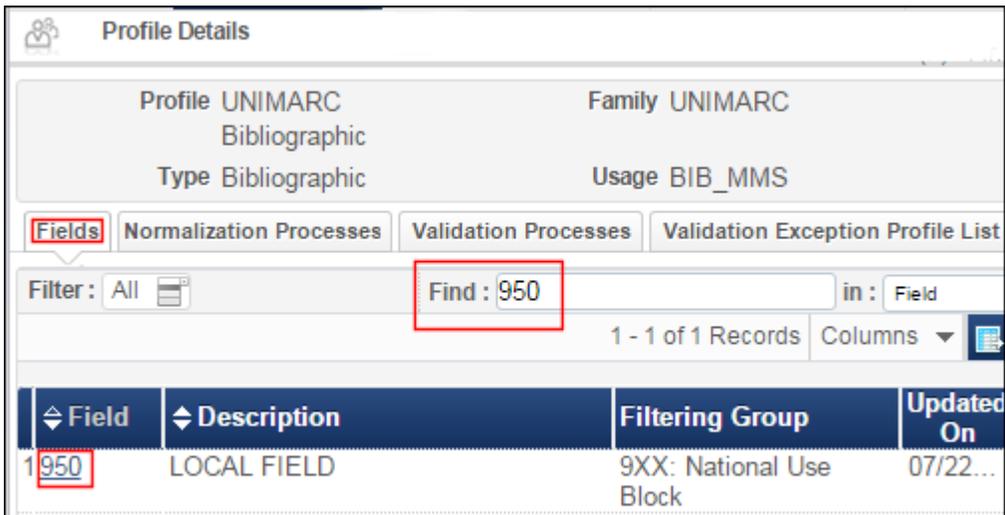


Figure 29 - 950 Field Appears on the Profile Details Page

- 4 Select **Actions** > **Customize** to view the subfields and indicators available for customizing.

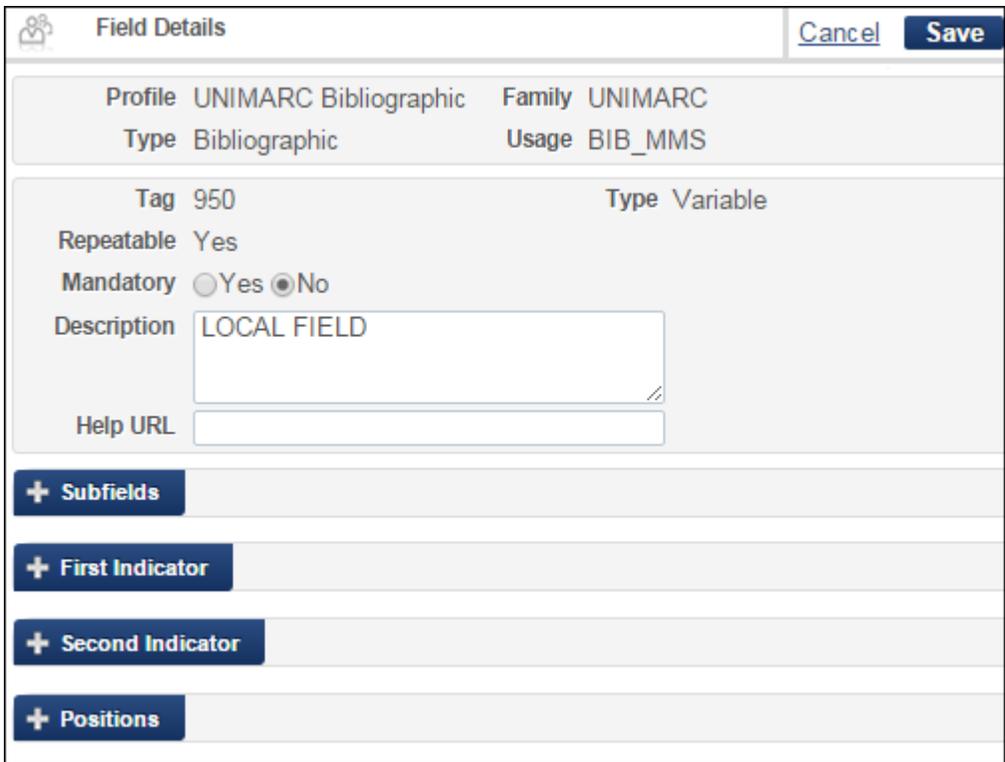


Figure 30 - 950 Field Details

- Expand the Subfields, First Indicator, and Second Indicator sections to view the customizable options.

UNIMARC Punctuation Support

As part of UNIMARC support in Alma, the correct punctuation displays with fields in UNIMARC records. Where the contents of UNIMARC records are displayed in Alma as in the repository search results, Alma formats the displayed text with the appropriate punctuation (refer to the table below). For example, the rows below show a bibliographic record's content and its display format.

Bibliographic format:

```
710 $$a Cardiff Roundtable in Language and Communication $$d 2nd $$e Cardiff University $$f 1997
```

Display format:

```
Cardiff Roundtable in Language and Communication (2nd ; Cardiff University ; 1997) .
```

| UNIMARC Mapping | Punctuation | Explanations |
|--|---|--|
| 700ab, 701ab, 710a,b,c,d,f,e, 711a,b,c,d,f,e if \$7=ba or does not exist | 70X a, b Example: Vian, Boris 71X a. b. c (d ; e ; f) Example: Canadian andrology society. Meeting (4th ; 1976 ; Toronto) | 70X b is prefixed with ,^ (where ^ is a space) 71X b is prefixed with .^ c is prefixed with .^ e is prefixed with ^;^ f is prefixed with ^;^ Subfield group def is prefixed with (and suffixed with) - Note that the 3 subfields are not always present and could be (d) or (d ; f) or (d ; e ; f) etc. |

| UNIMARC Mapping | Punctuation | Explanations |
|---|------------------------------------|--|
| 700a-z, 701a-z, 710a-z, 711a-z if \$7=ba or does not exist | All subfields a to z are displayed | 70X subfields bc are prefixed with , ^ Subfields fg are prefixed with (and suffixed with) All other subfields are prefixed with ^ 71X b is prefixed with . ^ c is prefixed with . ^ e is prefixed with ^ ; ^ f is prefixed with ^ ; ^ Subfield group def is prefixed with (and suffixed with) - Note that the 3 subfields are not always present and could be (d) or (d ; f) or (d ; e ; f) etc. All other subfields are prefixed with ^ |
| 500a-z (first indicator = 1) if \$7=ba or does not exist | all subfields a to z are displayed | m is prefixed with (and suffixed with) i is prefixed with , if behind h. If not, i is prefixed with . ^ All other subfields (but subfield a) are prefixed with . ^ |
| 200a,e if \$7=ba or does not exist | 200 a : e | e is prefixed with ^ : ^ (where ^ is a space) |
| 200a,e | 200 a : e | e is prefixed with ^ : ^ (where ^ is a space) |

| UNIMARC Mapping | Punctuation | Explanations |
|--|----------------------------------|---|
| 200a,b,c,e,d,h,i,f,g if \$7=ba or does not exist | 200 a [b] . c : e d .h, i /f ; g | b is prefixed with [and suffixed with] c is prefixed with .^ d is not prefixed, the punctuation is cataloged in the record e is prefixed with ^: f is prefixed with ^/ g is prefixed with ^; h is prefixed with .^ i is prefixed with , if behind h. If not, i is prefixed with .^ |
| 200a,b,e,h,i,f,g if \$7=ba or does not exist | 200 a [b] : e .h, i /f ; g | b is prefixed with [and suffixed with] e is prefixed with ^: f is prefixed with ^/ g is prefixed with ^; h is prefixed with .^ i is prefixed with , if behind h. If not, i is prefixed with .^ |
| 205a if \$7=ba or does not exist | | |
| 205a,b,f,g if \$7=ba or does not exist | 205 a b / f ; g | f is prefixed with ^/ g is prefixed with ^; |
| 206a-z, 208a,b, 230a | | |
| 210a if \$7=ba or does not exist | | |
| 210c if \$7=ba or does not exist | | |
| 210d | | |
| 328a-z, 210c if \$7=ba or does not exist | each subfield is prefixed with ^ | All subfields are prefixed with ^ |

| UNIMARC Mapping | Punctuation | Explanations |
|---|-------------------------------------|---|
| 210d (1),h (2), 100/09-16 (3), 207a (4) | 100/09-12 - 13-16 | 100/09-16 has a hyphen added between position 12 and 13 Example: 1981-2003 |
| 326a | | |
| 326b | | |
| 3XX -3X9 -39X,327,330 | each subfield is prefixed with ^ | |
| 3X9, 39X | each subfield is prefixed with ^ | |
| 225a,e,i | 225 a : e . i | e is prefixed with ^:^ (where ^is a space) i is prefixed by .^ 225 field is prefixed with (and suffixed with) |
| 225v | | |
| 60Xa-z -23, 616a-z -23, 617a-z -23, 610a | each subfield is prefixed with ^ | |
| 69X and 6X9 | each subfield is prefixed with ^ | |
| 010a | | |
| 019 (Sudoc) | | |
| 011a,f | | |
| 011f if LDR/06 is not 1 | | |

| UNIMARC Mapping | Punctuation | Explanations |
|---|------------------------------------|--|
| /001 | | |
| 200b | | |
| 327a-z, 330a | each subfield is prefixed with ^ | |
| LDR | | |
| 101a | | |
| 700a-z, 701a-z, 710a-z, 711a-z if \$7 exists and is not equal to ba | All subfields a to z are displayed | <p>70X subfields bc are prefixed with ,^</p> <p>Subfields fg are prefixed with (and suffixed with)</p> <p>All other subfields are prefixed with ^</p> <p>71X</p> <p>b is prefixed with .^</p> <p>c is prefixed with .^</p> <p>e is prefixed with ^;^</p> <p>f is prefixed with ^;^</p> <p>Subfield group def is prefixed with (and suffixed with) -</p> <p>Note that the 3 subfields are not always present and could be (d) or (d ; f) or (d ; e ; f) etc.</p> <p>All other subfields are prefixed with ^</p> |

| UNIMARC Mapping | Punctuation | Explanations |
|---|----------------------------------|---|
| 500a-z if \$7 exists and is not equal to ba | | m is prefixed with (and suffixed with) i is prefixed with , if behind h. If not, i is prefixed with .^ All other subfields (but subfield a) are prefixed with .^ |
| 200a,e if \$7 exists and is not equal to ba | 200 a : e | e is prefixed with ^:^ (where ^ is a space) |
| 200a,e if \$7 exists and is not equal to ba | 200 a : e | e is prefixed with ^:^ (where ^ is a space) |
| 200a,b,c,d,e,h,i,f,g if \$7 exists and is not equal to ba | 200 a [b] . c : e d .h, i /f ; g | b is prefixed with [and suffixed with] c is prefixed with .^ d is not prefixed; the punctuation is cataloged in the record e is prefixed with ^:^ f is prefixed with ^/ g is prefixed with ^;^ h is prefixed with .^ i is prefixed with , if behind h. If not, i is prefixed with .^ |
| 205a if \$7 exists and is not equal to ba | | |
| 205a,b,f,g if \$7 exists and is not equal to ba | 205 a b / f ; g | f is prefixed with ^/ g is prefixed with ^;^ |
| LDR/06 | | |
| LDR/07 | | |

| UNIMARC Mapping | Punctuation | Explanations |
|----------------------|----------------------------------|--|
| 200 \$b | | |
| 100a/08 | | |
| 100a/09-12 | | |
| 100a/13-16 | | |
| 102a,c | | |
| 010a,z | | |
| 200a,b,c,d,e,h,i,f,g | 200 a [b] . c : e d .h, i /f ; g | <p>b is prefixed with [and suffixed with]</p> <p>c is prefixed with .^</p> <p>d is not prefixed; the punctuation is cataloged in the record</p> <p>e is prefixed with ^: ^</p> <p>f is prefixed with ^/ ^</p> <p>g is prefixed with ^; ^</p> <p>h is prefixed with .^</p> <p>i is prefixed with , if behind h. If not, i is prefixed with .^</p> |
| 020a | | |
| 035a(1),z (2) | | |

| UNIMARC Mapping | Punctuation | Explanations |
|--------------------------------|------------------------------------|--|
| 700a-z, 701a-z, 710a-z, 711a-z | All subfields a to z are displayed | <p>70X subfields bc are prefixed with ,^</p> <p>Subfields fg are prefixed with (and suffixed with)</p> <p>All other subfields are prefixed with ^</p> <p>71X</p> <p>b is prefixed with .^</p> <p>c is prefixed with .^</p> <p>e is prefixed with ^;^</p> <p>f is prefixed with ^;^</p> <p>Subfield group def is prefixed with (and suffixed with) -</p> <p>Note that the 3 subfields are not always present and could be (d) or (d ; f) or (d ; e ; f) etc.</p> <p>All other subfields are prefixed with ^</p> |
| 410 a,t,o,h,i,x | 400 a t : o. h, i | <p>h is prefixed with .^</p> <p>i is prefixed with , if behind h. If not, i is prefixed with .^</p> <p>o is prefixed with ^:^</p> |
| 203a,b | | |
| 203c | | |
| No match | | |
| 126a,b | | |
| 125a,b | | |
| 115a,b | | |

| UNIMARC Mapping | Punctuation | Explanations |
|-----------------|-------------|--------------|
| 115a,b | | |
| 135a, 230a | | |
| No match | | |
| 145a-i,146a-i | | |

Regensburger Verbundklassifikation (RVK) Authority Record Classification

Description

The Regensburger Verbundklassifikation (RVK) classification system (a shelf mark notation/classification method) has been enabled in Alma's MD Editor. With this new classification system, you can create RVK authority records that contain call number headings in the 153 field. Subsequently, bibliographic records can be created in the MD Editor and **F3** can be used while entering the bibliographic 084 field to perform a check against the authority 153 field for authority call number headings.

With this implementation, Alma provides a default RVK template for creating RVK authority records. This template can be duplicated for you to modify, or you can create a new RVK template to match your template requirements.

The RVK authority file will be provided using the Community Zone in a future release.

Step-by-Step Instructions

The following roles can work with RVK records and the RVK template:

- Cataloger
- Catalog Manager
- Catalog Administrator

To work with the Regensburg Classification System (RVK) template:

- 1 Open the MD Editor (**Resource Management > Cataloging > Open Metadata Editor**).
- 2 Click the **Templates** tab. The list of templates appear that include the default RVK template provided in Alma.

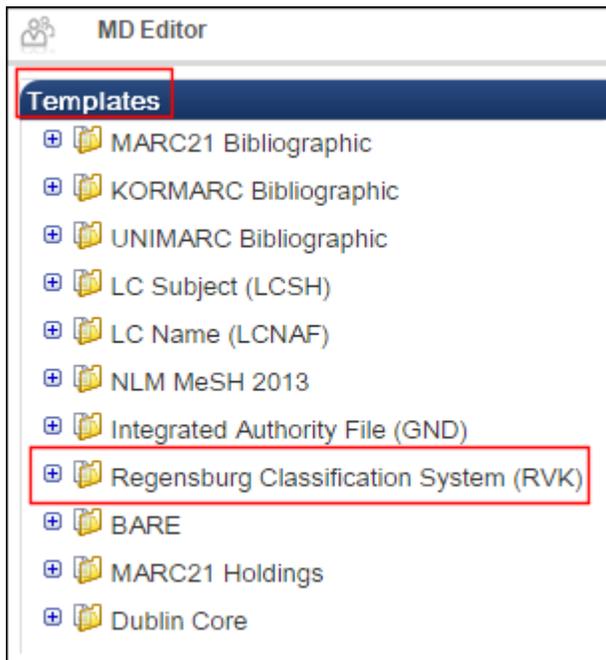


Figure 31 - Regensburg Classification System (RVK) Template

If you want to modify this template or create a new RVK template, refer to **Working with Templates** in the *Alma Resource Management Guide* or Alma Online Help for more information.

To create an RVK local authority record:

- 1 Open the MD Editor (**Resource Management > Cataloging > Open Metadata Editor**).
- 2 Select **File > New > Regensburg Classification System (RVK)**.

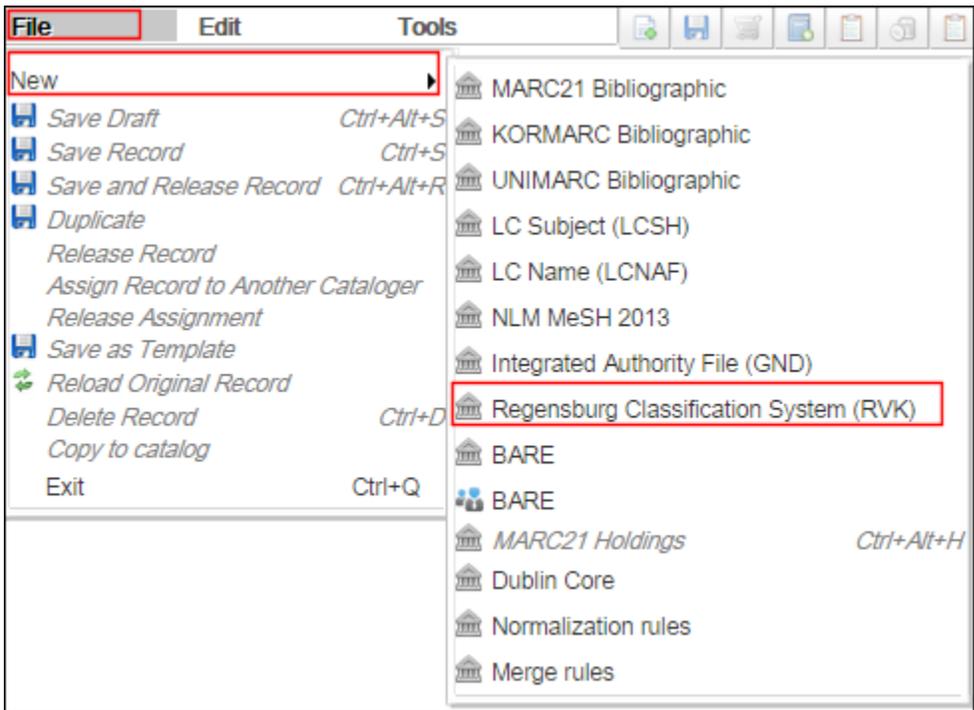


Figure 32 - Creating a New RVK Local Authority Record

Alma loads the RVK form in which you can enter the RVK local authority record.

| File | Edit | Tools |
|---------------------------------------|-----------------------------------|-------|
| You have 4 warning(s) in your record | | |
| Working on -No Title (98506030801021) | | |
| LDR | #####nw##a22#####n##4500 | |
| 008 | ##### ac nnbbbn a na #d | |
| 084 | \$\$a RVK | |
| 153 | \$\$a \$\$j | |
| 453 | \$\$a | |
| 553 | \$\$a \$\$j | |

Figure 33 - RVK Form for Entering a Local Authority Record

3 Enter the data for your authority record.

4 Select **File > Save and Release Record**.

Using the repository search, you should be able to locate the RVK authority record with an Authorities search.

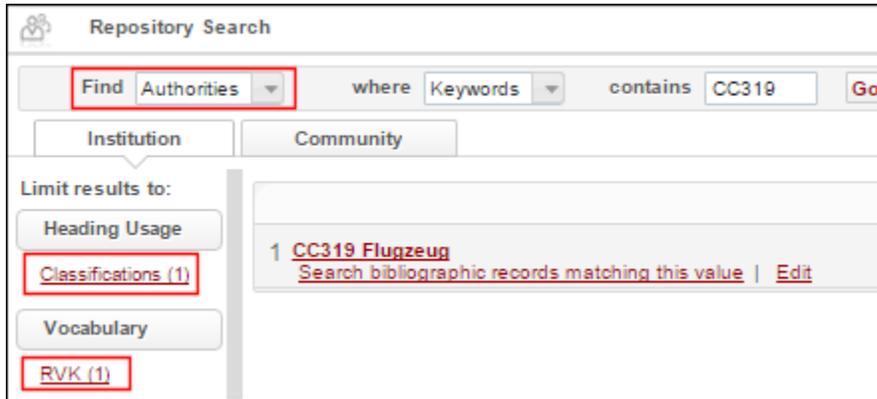


Figure 34 - RVK Authority Record

To perform an RVK 084 headings check for a bibliographic record:

- 1 Use the repository search to locate the bibliographic record with which you want to work and click **Edit** to open the record in the MD Editor.
- 2 Select **Edit > Add Field** to add the 084 field.
- 3 Enter \$2 with `rvk`.
- 4 When you enter \$a, press **F3** to check for preferred terms.

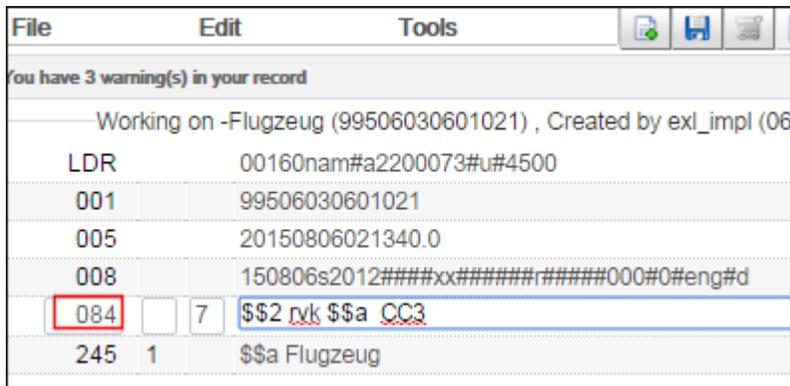


Figure 35 - Entering the Bibliographic 084 Field

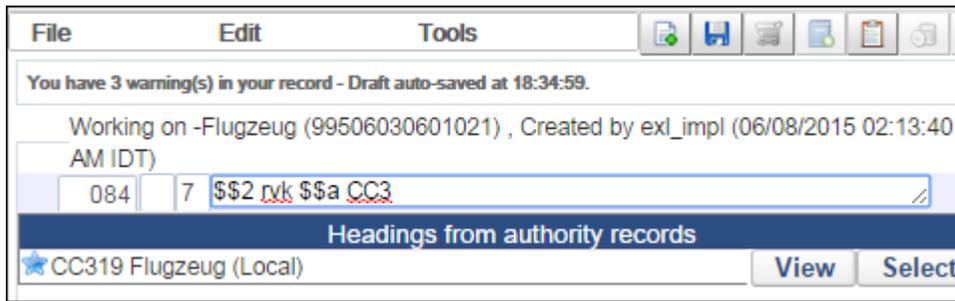


Figure 36 - 084 \$a Preferred Term Check Using F3

Refer to the **Creating Bibliographic Records** section in the *Alma Resource Management Guide* or Alma Online Help for more information regarding using F3 when creating/editing bibliographic records.

Description Field Added When Creating New Collections

A new **Description** field has been added under the **Item Information** section when adding and a new collection (**Resource Management > Create Inventory > Create Top Level Collection**) or editing an existing collection. This field has a limit of 1000 characters.

The addition of this field allows for better handling of long descriptions and line breaks than is possible with the **Description** field in the bibliographic record. It also allows the API and the Digital Resource Editor to access the description information.

In addition, the **Description** field has been removed from the **Resource Information** section. Description bibliographic information can be added from the MD editor.

Add New Collection Cancel Save and continue Save

Resource Information

Collection Parent: Top Level Collection

Collection Title *

Collection Record Format: MARC21 Bibliographic

Item Information

Collection Name *

Description

External Id

External System

Library *

Cancel Save and continue Save

Figure 37 – Description Field

MSC Classification

This enhancement adds the ability to catalog your bibliographic records using the Mathematics Subject Classification (MSC) classification scheme, which enables the call number to be copied from the bibliographic record to the holdings records and also allows library staff to browse for MSC call numbers on the MD Editor page (Alt+C).

The following example shows how the MSC classification is defined in subfield \$\$2 of the MARC 084 field:

```
084 _7 |a 00A22 |2 msc
```

The following row was added to the Call Number Mapping mapping table (**Resource Configuration > Configuration Menu > General > Call Number Mapping**) to copy the call number from the MARC 084 field in the bibliographic record to the 852 field in the holdings record:

| Call Number Mapping | | | | | | |
|---------------------|-------------|----------------|-------------------|-----------------------|--------------------------|------------------------------------|
| | 852 1st Ind | 852 Subfield 2 | Bib Field To Copy | Bib Subfields To Copy | 852 Subfield Destination | Description |
| 1 | 0 | - | 090?? | a,b | h,i | Library of Congress Classification |
| 2 | 7 | - | 084?? | a,2 | h,2 | Source specified in subfield \$2 |

Figure 38 – New Row in Call Number Mapping Page

Other Resource Management Enhancements

- Alma provides additional inventory updates to the Dematic Automated Storage Retrieval System (ASRS) database when the call number, author, or title changes for an item in the ASRS. These ASRS remote storage inventory updates are in addition to the existing updates that are triggered when there is a change to an item's barcode or when items are added or removed from the remote storage inventory. With this additional function, be aware that changes in title or author resulting from a relink holdings operation is not a part of this new inventory update capability.
- When using either SRU or Z39.50 to perform exports from an Alma institution, the system will now return the MMS ID of the institution's record (not the MMS ID of the Network Zone record) in the MARC 001 field. In addition, the associated control ID from the Community Zone or Network Zone is returned in a 035 field:

```

▼<searchRetrieveResponse xmlns="http://www.loc.gov/zing/srw/">
  <version>1.2</version>
  <numberOfRecords>2581</numberOfRecords>
  ▼<records>
    ▼<record>
      <recordSchema>marcxml</recordSchema>
      <recordPacking>xml</recordPacking>
      ▼<recordData>
        ▼<record xmlns="">
          <leader>00654cam a2200265 u 4500</leader>
          <controlfield tag="001">99943225450470220</controlfield>
          <controlfield tag="005">20140714143546.0</controlfield>
          <controlfield tag="007">ta</controlfield>
          <controlfield tag="007">cr|||||||||||||</controlfield>
          <controlfield tag="008">140714s1967 xx#|||| | |||||000|u|nob|</controlfield>
          ▼<datafield tag="035" ind1=" " ind2=" ">
            <subfield code="a">943225450-47bibsys_ntnu_ub</subfield>
          </datafield>
          ▼<datafield tag="035" ind1=" " ind2=" ">
            <subfield code="a">(NO-TrBIB)943225450</subfield>
          </datafield>
          ▼<datafield tag="035" ind1=" " ind2=" ">
            <subfield code="a">(NO-TrBIB)11224422x</subfield>
          </datafield>
          ▼<datafield tag="035" ind1=" " ind2=" ">
            <subfield code="a">(EXLNZ-47BIBSYS NETWORK)99943225450470220</subfield>
          </datafield>
        </record>
      </recordData>
    </record>
  </records>
</searchRetrieveResponse>

```

Figure 39 – SRU Response

The following prefixes are used for the MMS IDs:

- CZ – (EXLCZ) CZ_MMS_ID
- NZ – (EXLNZ-Network_Code) NZ_MMS_ID
- Korean characters are now tokenized to provide results for partial title matches when searching for PO lines. For example, if you create a PO line for title 토지공법연구, a match should be found when searching for the following Korean characters: 토지공.
- On the New Portfolio page (**Resource Management > Create Inventory > Add Local Portfolio**), the following fields were added:
 - An **Author** field, below the Title field.

For MARC21 records, the author is created in field 1001. If there is an Author field, the Title field is created in 24510. If there is no Author field, the Title field is created in 24500.

For UNIMARC records, the author is created in field 700, with an empty first indicator and 1 in the second indicator. If there is an Author field, the Title field is created in 200 with 0 in the first indicator and an empty second indicator. If there is no Author field, the Title field is created in 200, with 1 in the first indicator and an empty second indicator.

- A **Record type** field, with the options **Continuing** and **One Time** (when **Create new title** is selected as the creation type). If **One Time** is selected, the LDR of the created record will have **m** in pos. 7. If **Continuing** is selected, the LDR of the created record will have **s** in pos. 7. Note that 008 and pos. 23 will be **o** (online).

The screenshot shows the 'New Portfolio' page with the 'Descriptive Information' tab selected. The 'Creation Type' section has 'Create new title' selected. The 'Record Type' section has 'One Time' selected. There are input fields for 'Choose Title', 'Title', 'Author', 'Alternative Title 1', 'Alternative Title 2', 'ISSN', 'e-ISSN', and 'ISBN'.

Figure 40 – Author Field on New Portfolio Page

- A new out-of-the-box template was added to the MD Editor list of templates (**Edit > Expand from Template**). The template, **Serial prediction daily omits Sunday**, is designed to be used for a publication (such as a newspaper) that is published daily except for Sunday. The template contains the following fields:

```
85300 $$8 1 $$u313 $$vr $$i (year) $$j (month) $$k (day) $$w d $$y odsu
590 $$a Daily publication published 313 times a year (365-52) omitting
daily Sunday
```

- In the MD Editor, when you catalog the field 264 subfield b, a drop-down list opens according to the data indexed for this field in another bibliographic record in the catalog (using the cataloging auto-completion tool).
- In the MD Editor, when using the F3 functionality, the number of displayed bibliographic headings that match the characters typed by the cataloger has increased so that the cataloger now has more results from which to choose.

- You can customize the **Sublocation or collection (b)** and **Shelving location (c)** drop-down lists in the MD Editor form editor to display the location's code, name, or code + name. You perform this customization on the Library/Location Display page (**Resource Management > Resource Configuration > Configuration Menu > General > Library/Location Display**).

The screenshot shows a form editor interface with two columns of fields. The left column contains standard MARC fields such as Location (a), Shelving location (c), Address (e), Non-coded location qualifier (g), Item part (i), Call number prefix (k), Call number suffix (m), Piece designation (p), Copyright article-fee code (s), Uniform Resource Identifier (u), Public note (z), Materials specified (3), and Sequence number (8). The right column contains fields for Sublocation or collection (b), Former shelving location (d), Coded location qualifier (f), Classification part (h), Shelving control number (j), Shelving form of title (l), Country code (n), Piece physical condition (q), Copy number (t), Nonpublic note (x), Source of classification or shelving scheme (2), and Linkage (6). The 'Sublocation or collection (b)' field is set to 'ULAW Law Library' and the 'Copy number (t)' field is set to '1'.

Figure 41 – Form Editor Fields Customized to Display Code + Description

- The Repository Search configuration page that was added for the August 2015 release was moved from the General section to the **Search Configuration** section on the Resource Management configuration menu (**Resource Management > Resource Configuration > Configuration Menu**).
- The value of the **network_label** customer parameter (if this is set in **Resource Management > Resource Configuration > Configuration Menu > General > Other Settings**) is now displayed instead of **Network** in the **Placement of new record** section (for collaborative network member institutions only) on the Quick Cataloging (**Resource Management > Create Inventory > Add Physical Item**) and New Portfolio (**Resource Management > Create Inventory > Add Local Portfolio**) pages.

The screenshot shows the 'New Portfolio' page with a 'Descriptive Information' tab selected. Under the 'Placement of new record' section, there are three radio button options: 'University Network' (unselected), 'Institution' (selected), and 'Community' (unselected). The 'Creation Type' section has 'Create new title' selected and 'Use existing title' unselected. The 'Record Type' section has 'Continuing' unselected and 'One Time' selected.

Figure 42 – Example of network_label Value Displayed on New Portfolio Page

- The ability to set a default search tab (Institution, Network, or Community) using the Repository Search configuration page (**Resource Management > Resource Configuration > Configuration Menu > Search Configuration > Repository Search**) was applied to the

Choose title selection field (displayed when **Use existing title** is selected under **Creation type** on the New Portfolio page).

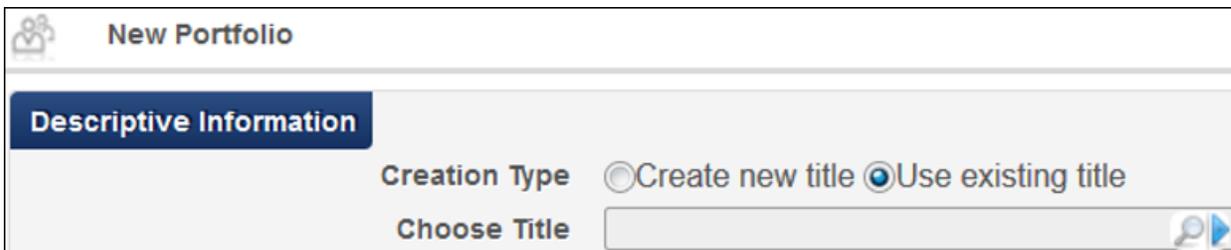


Figure 43 – Choose Title Selection Field

- You can now customize the link to the full text in the Primo **View It** tab. The default text for the link is **view full text** (when the e-collection does not have an interface name):



Figure 44 – View Full Text Link in View It Tab

To configure the link's text, customize the new configuration parameter **c.uresolver.missingParameter** (**Fulfillment > Fulfillment Configuration > Configuration Menu > Discovery Interface Display Logic > Labels**).

| | | | | | |
|-----|--|---|---|---|-----------|
| 300 | c.uresolver.viewit.license.NONRNOI.CE.DD | Non-Renewal Notice Period Unit Of Measure | - | - | Customize |
| 301 | c.uresolver.viewit.license.title | License Terms | - | - | Customize |
| 302 | c.uresolver.viewit.license.show_license | Show license | - | - | Customize |
| 303 | c.uresolver.viewit.license.hide_license | Hide license | - | - | Customize |
| 304 | c.uresolver.missingProvider | See the full text | - | - | Restore |

Figure 45 - Discovery Interface Labels Page



Figure 46 – Customized Text in View It Tab

- The field **Record format** was added to the MARC Record Simple View page. Possible values are **marc21**, **unimarc**, and so forth.

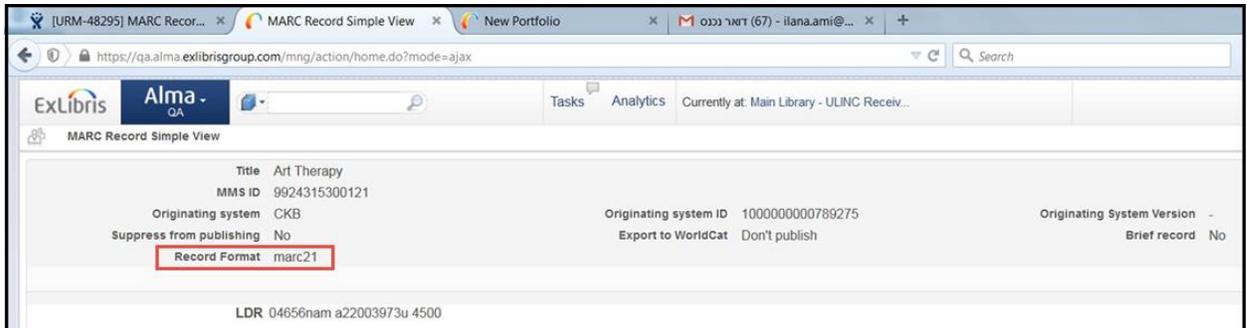


Figure 47 - MARC Record Simple View Page

Fulfillment

The following section describes the new functionality provided for the Fulfillment functional area in the September 2015 release of Alma.

Reading List Citation's Default Copyright Status

Description

You can now configure the default option selected for a reading list citation's copyright status. This default can differ for repository, non-repository, and brief citations.

A new configuration page, **Default Copyright Status**, was added to support this feature.

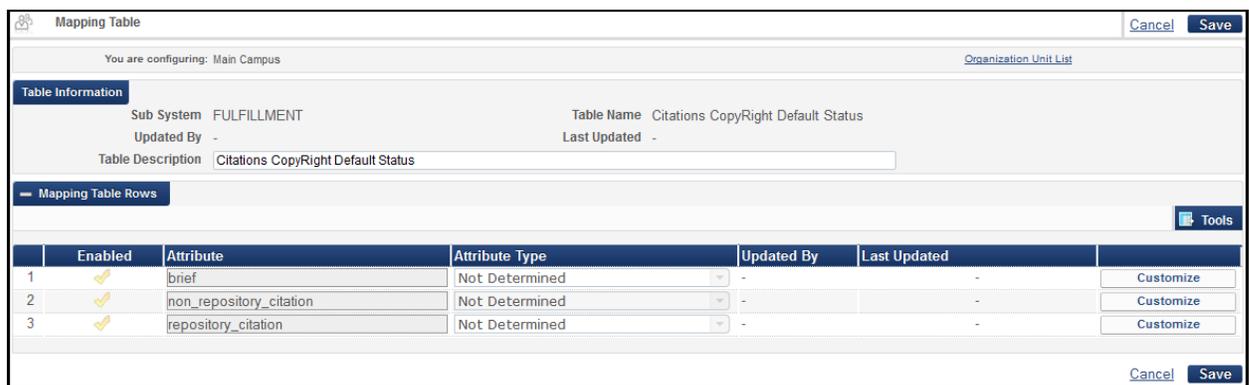
Step-by-Step Instructions

The following roles can configure the default copyright status for citations:

- Fulfillment Administrator
- General System Administrator

To configure the default copyright status for citations:

- 1 Open the Citations Copyright Default Status table (**Fulfillment > Fulfillment Configuration > Configuration Menu > Course > Default Copyright Status**).



The screenshot shows a web interface for configuring a mapping table. At the top, it says "You are configuring: Main Campus" and "Organization Unit List". Below this is a "Table Information" section with the following details:

- Sub System: FULFILLMENT
- Table Name: Citations CopyRight Default Status
- Updated By: -
- Last Updated: -
- Table Description: Citations CopyRight Default Status

Below the table information is a section for "Mapping Table Rows" with a "Tools" button. The table has the following columns: Enabled, Attribute, Attribute Type, Updated By, Last Updated, and a "Customize" button for each row.

| Enabled | Attribute | Attribute Type | Updated By | Last Updated | |
|---------|-------------------------|----------------|------------|--------------|-----------|
| 1 | brief | Not Determined | - | - | Customize |
| 2 | non_repository_citation | Not Determined | - | - | Customize |
| 3 | repository_citation | Not Determined | - | - | Customize |

Figure 48 - Citations Copyright Default Status Table

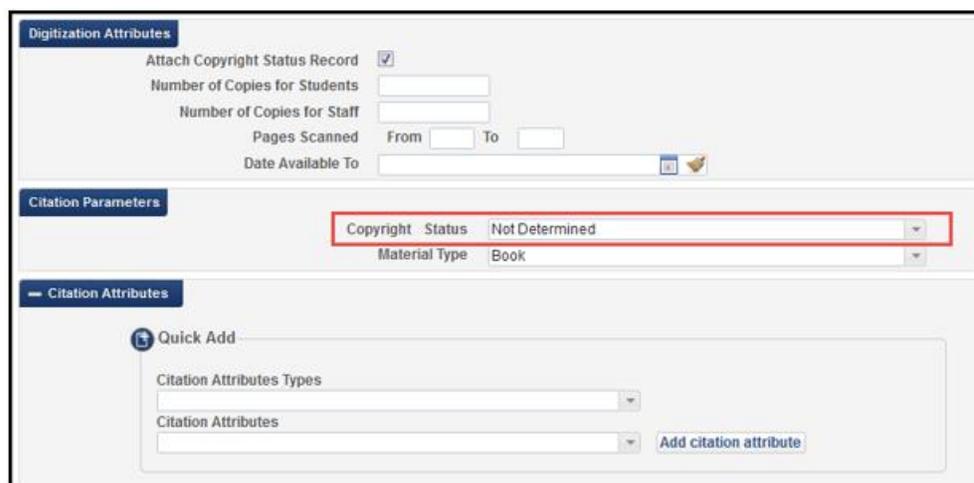
2 For each citation type that you want to configure:

- a Click **Customize** in the citation type's row.
- b Select the default copyright status in the **Attribute Type** column.

To restore a default, click **Restore** in the citation type's row. Note that the checkmarks in each row are non-functional and that you cannot add or delete copyright statuses.

3 When you are done, click **Save**.

The status you selected appears as the default value for **Copyright status** when creating a new reading list citation, such as on the Add Non-Repository Citation Page.



The screenshot displays the 'Add Non-Repository Citation Page' interface. It is divided into three main sections: 'Digitization Attributes', 'Citation Parameters', and 'Citation Attributes'.
1. **Digitization Attributes**: Contains a checked checkbox for 'Attach Copyright Status Record', and input fields for 'Number of Copies for Students', 'Number of Copies for Staff', 'Pages Scanned' (with 'From' and 'To' sub-fields), and 'Date Available To'.
2. **Citation Parameters**: Features a dropdown menu for 'Copyright Status' currently set to 'Not Determined', and another dropdown for 'Material Type' set to 'Book'.
3. **Citation Attributes**: Includes a 'Quick Add' section with a 'Citation Attributes Types' dropdown, a 'Citation Attributes' input field, and an 'Add citation attribute' button.

Figure 49 - Add Non-Repository Citation Page

Copyright Management Rules

Description

You can now set up Digitization Profile Rules to automatically trigger a copyright clearance approval task for each submitted digitization request, depending on parameters such as:

- When was the digitized resource published?
- How many digitization requests have been previously handled for the given resource?

For example, a rule may be set up to as follows: "If the record is published after 1976 and two digitization requests have already been processed for this record, then create an Approval task". The digitization request will not be completed until the approval task is completed.

Step-by-Step Instructions

The following roles can configure the default copyright status for citations:

- Fulfillment Administrator
- General System Administrator

To configure copyright management rules:

- 1 Access the digitization profile rules (**Fulfillment > Configuration Menu > Digitization Profile Rules**).
- 2 Add a new rule or edit an existing rule.

The Publication Date input parameter can be used to set up rules for records published before or after a given year.

The screenshot shows the 'Digitization Workflow Rule Editor' interface. At the top, the 'Name' field is populated with 'Publication date = 1955'. Below it, the 'Description' field is empty. The 'Created By' and 'Updated By' fields are both empty, while 'Created On' and 'Updated On' are both set to '03/08/2015'. The 'Input Parameters' section shows a table with columns for 'Name', 'Operator', and 'Value'. The 'Name' column contains 'Publication Date', the 'Operator' column contains '=', and the 'Value' column contains '1955'. A 'Possible Values >' button is next to the 'Value' field, and an 'Add Parameter' button is to the right. Below the table, the 'Workflow Setup' section is visible, with a list of options: 'Approval', 'CopyrightsClearance', 'Deposit', 'Document Delivery', and 'Remote Digital Storage'. The 'Remote Digital Storage' option is selected with a radio button. A red box highlights the 'Operator' dropdown menu, which is open and shows the following options: '<', '=', '>', and 'Not Equals'. The '=' option is currently selected. At the bottom right of the interface, there are 'Cancel' and 'Save' buttons.

Figure 50 – Publication Date Rule

The Number of Requests parameter can be used to set up rules if a required number of requests have already been processed.

Digitization Workflow Rule Editor

Name * Requests > 10

Description

Created By - Created On 03/08/2015

Updated By - Updated On 03/08/2015

Input Parameters

No records were found.

| Name | Operator | Value |
|--------------------|----------|-------|
| Number Of Requests | > | 10 |

Possible Values > Add Parameter

Workflow Setup:

- Approval
- CopyrightsClearance
- Deposit
- Document Delivery
- Remote Digital Storage

Cancel Save

Figure 51 – Number of Digitization Requests Rule

The Copyright Previously Approved parameter may be used to set rules for cases where a similar request has been previously approved.

Digitization Workflow Rule Editor

Name * Approved

Description

Created By - Created On 03/08/2015

Updated By - Updated On 03/08/2015

Input Parameters

No records were found.

| Name | Operator | Value |
|----------|----------|-------|
| Approved | = | False |

Possible Values > Add Parameter

Workflow Setup:

- Approval
- CopyrightsClearance
- Deposit
- Document Delivery
- Remote Digital Storage

Cancel Save

Figure 52 – Copyright Previously Approved Rule

Other Fulfillment Enhancements

- A description field has been added to the Pick Up Requested Resources (**Fulfillment > Resource Requests > Pick From Shelf**) and Request Queue pages (accessed from the Requests link on the Pick Up Requested Resources page). The **Description** field includes the descriptions of all the items that are requested.

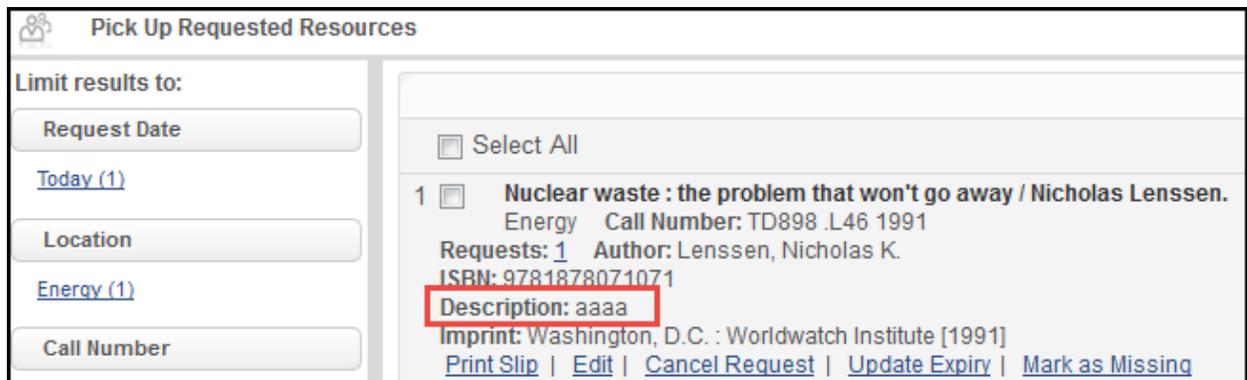


Figure 53 – Description on Pick Up Requested Resources Page



Figure 54 – Description on Request Queue Page

- The **Request note** element was added to the FulTransitLetter XSL and will be displayed as part of the letter unless the letter was customized not to display the element.
- The value **Early Autumn** is a new value for **Terms list** in the Manage Course Information page (**Fulfillment > Course Reserves > Courses**; select **Actions > Edit** in a course).

Manage Course Information

| | | |
|------------------------|----------------|------------------------------|
| Course Code: 0000 | Section: - | Course Name: General Reserve |
| Processing Course Unit | Instructors: - | |
| Department: | | |

Course Information
Notes

| | | |
|------------------------------------|--------------|---------------------|
| Code* 0000 | Section | Academic Department |
| Name* General Reserve | | General Reserves |
| Processing Department* Course Unit | Terms list | |
| | Autumn | |
| | Early Autumn | |
| | Semester 1 | |
| | Semester 2 | |

| | |
|---|--------------------------|
| Status <input type="radio"/> Inactive <input checked="" type="radio"/> Active | End date |
| Start date 05/13/2015 | 08/01/2016 |
| Number of participants 0 | Weekly hours 0 |
| Year 2015 | |
| Creator - | Creation Date 06/01/2015 |

| | |
|----------------|--|
| Searchable IDs | |
| | |
| | |

Figure 55 - Manage Course Information Page

Resource Sharing

The following sections describe the functions provided for Resource Sharing in the September 2015 release of Alma.

Pickup Location Facet on the Borrowing Requests Task List

Description

There is now a new facet on the Borrowing Requests task list to filter by pickup locations. Libraries, reading rooms, and personal delivery are all included in the facet.

Step-by-Step Instructions

The following roles can submit or view borrowing requests:

- Fulfillment Services Operator
- Fulfillment Services Manager

To filter borrowing requests from the facets:

- 1 View all borrowing requests on the Resource Sharing Borrowing Requests page. Note the pickup location facet at the bottom of the left column.

The screenshot displays the 'Resource Sharing Borrowing Requests' interface. On the left, a facet menu titled 'Limit results to:' includes various filters such as Status, Active Partner, Creation Date, Update Date, Requested Format, Supplied Format, Due date, Last Interest Date, Need patron information, and Owning Library. The 'Pickup Location' facet at the bottom is circled in red and shows three options: 'Branch Library (BRC) (1)', 'Graduate Library (GRAD) (2)', and 'Main Library (1)'. The main content area on the right shows a list of four borrowing requests, each with details like title, author, ISBN, subject, internal identifier, request status, requested media, requester, pickup location, and creation/update dates. Each request entry includes action links: 'Edit', 'Cancel', 'Duplicate', 'Send query to patron', 'Reject', and 'View Local Resources'.

| Request ID | Title | Author | ISBN | Subject | Internal Identifier | Request Status | Requested Media | Requester | Pickup At | Creation Date | Update Date | Action |
|------------|--|--|------------|--|-----------------------|---------------------------|-----------------|--------------------|-------------------------|---------------|-------------|--|
| 1 | Sport marketing / | Mullin, Bernard James.; | 0873224493 | Sports Marketing. | 69978610000521 | Created borrowing request | Any | Support, Ex Libris | Graduate Library (GRAD) | 10/09/2013 | 10/09/2013 | Edit Cancel Duplicate Send query to patron Reject View Local Resources |
| 2 | The College blue book. | (Macmillan Information etc 1923-) | 0069-5572 | LCCN: 24000223 //r533 | 115805630000301 | Created borrowing request | Any | Benny, Jack | Main Library | 27/07/2015 | 27/07/2015 | Edit Cancel Duplicate Send query to patron Reject View Local Resources |
| 3 | White devil : a true story of war, savagery, and vengeance in colonial America / | Brumwell, Stephen, (Da Capo Press 2005.) | 0306813890 | LCCN: 2005277336 | OCLC Number: 57655778 | Created borrowing request | Any | Hargrave, Victor | Branch Library (BRC) | 27/07/2015 | 27/07/2015 | Edit Cancel Duplicate Send query to patron Reject View Local Resources |
| 4 | this title | | 0094-1700 | Arts and Humanities Performing Arts, Travel and Leisure -- Arts and Humanities | 60517010000521 | Created borrowing request | Any | Tester, Automatic | Graduate Library (GRAD) | 28/07/2013 | 28/07/2013 | Edit Cancel Duplicate Send query to patron Reject View Local Resources |

Figure 56 – Borrowing Requests List with Pickup Location Facet

- 2 Click one of the locations. Note the top line of the listing. Requested items are now displayed only for the selected location.

The screenshot displays the 'Resource Sharing Borrowing Requests' interface. On the left, a sidebar titled 'Limit results to:' contains various filter buttons such as 'Status', 'Active Partner', 'Creation Date', 'Requested Format', and 'Need patron information'. The main content area shows a list of requests. At the top, there is a search bar with the text 'Search limited to: Pickup Location: Graduate Library (GRAD)'. Below this, there are two request entries. The first entry is for 'Sport marketing / Book' by Mullin, Bernard James, with ISBN 0873224493. The second entry is for 'this title Book' with ISSN 0094-1700. Each entry includes details like 'Request Status', 'Requested Media', 'Requester', 'Pickup At', and 'Creation/Update Date'. Action links like 'Edit', 'Cancel', 'Duplicate', 'Send query to patron', 'Reject', and 'View Local Resources' are provided for each request.

Figure 57 – Borrowing Requests List with a Filter Selected

Enabling Lender to Manage a 'Will Supply' Status

Description

If a lender is going to supply a resource but has not shipped it yet, the lender can now update the request with a new status, **Will Supply**. A reason must be supplied when the Will Supply action is used. The action will stop the request from expiring if ISO-based automatic expiry is

set up. The new action also has a corresponding new workflow profile step that must be added to the borrower’s workflow profile.

All lenders may use this feature. However, an automatic message is generated only for ISO partners.

Step-by-Step Instructions

The following roles can add the workflow profile step:

- Fulfillment Administrator
- General System Administrator

The following roles can update the request with a “Will Supply” status:

- Fulfillment Services Operator
- Fulfillment Services Manager

To configure the new workflow step:

- 1 Access the Workflow Profiles page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Workflow Profiles**).
- 2 Select **Actions > Edit**.

| Workflow Profile | Type | Steps | Actions |
|--|-----------|--|---|
| 1 Auto_WorkflowProfile_Default_Borrowing | Borrowing | Automatic renew, Cancel request not accepted, Cancelled By Patron, Cancelled by partner, Cancelled by staff, Declared lost by partner, Lender check in, Manual renew, Recalled by partner, Renew requested, Report damaged item to partner, Report lost item to partner, Request accepted, Waiting for cancel response | <input type="button" value="Edit"/> <input type="button" value="Delete"/> |
| 2 Auto_WorkflowProfile_Default_Lending | Lending | Cancel reply, Lender check in, Patron renewal, Recalled item, Renewal response, Staff renewal | <input type="button" value="Actions"/> |
| 3 assaf_bor | Borrowing | Cancel request not accepted, Cancelled By Patron, Cancelled by partner, Cancelled by staff, Declared lost by partner, Lender check in, Renew requested, Report damaged item to partner, Request accepted, Waiting for cancel response, Recalled by partner, Report lost item to partner | <input type="button" value="Actions"/> |

Figure 58 – Edit Workflow Profile

- 3 Add **Will Supply** to the list of items in the workflow and click **Save**.

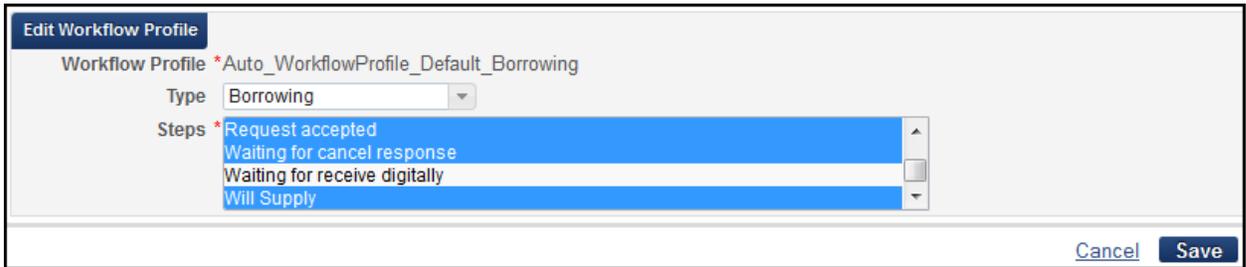


Figure 59 – Workflow Profile – New Step of Will Supply

To update a request with the Will Supply status:

- 1 Select **Lending Requests** from the main menu. For those requests that have Will Supply in their borrowing partner’s workflow and that have not yet shipped, click **Will Supply** from the task list below the request.



Figure 60 – Lending Request Showing the Will Supply Action

- 2 Select a reason from the list and type a note if desired. If the partner is ISO, a message is sent.

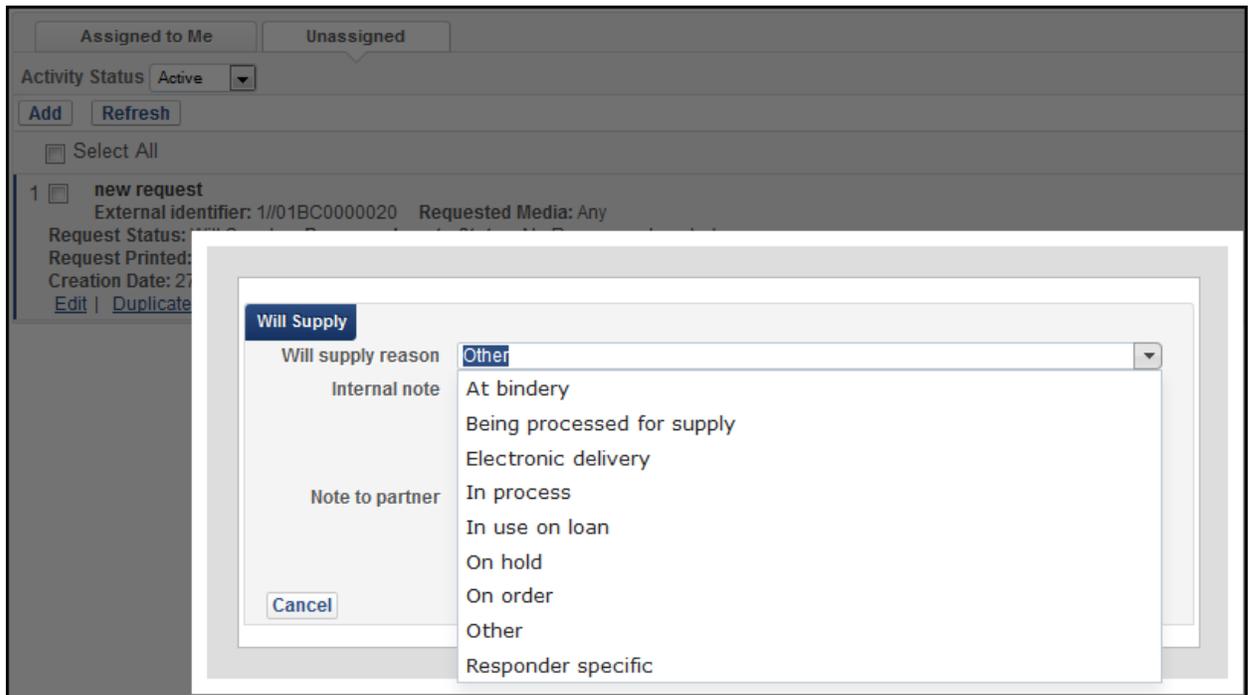


Figure 61 – Will Supply Reason

If the partner uses ISO, the borrower side request is automatically updated with an equivalent “Will Supply” status. (Note that the status can also be manually updated on the borrower side.)

Content Indicators Added to Resource Sharing Pages

The Resource Sharing pages will now differentiate between informational tabs that have content and those that do not. After you add a note, for instance, the indicator on the tab will change to let you know that the tab contains notes (without having to open it). These tabs display the following icons to indicate the status of the lists within a tab:

-  - The list in the tab has no content.
-  - The list in the tab has content.

The following is an example of the Notes tab for a borrowing request before a note exists for the request.



Figure 62 – Borrowing Request with No Notes

The following is an example of the Notes tab for a borrowing request after a note exists for the request.

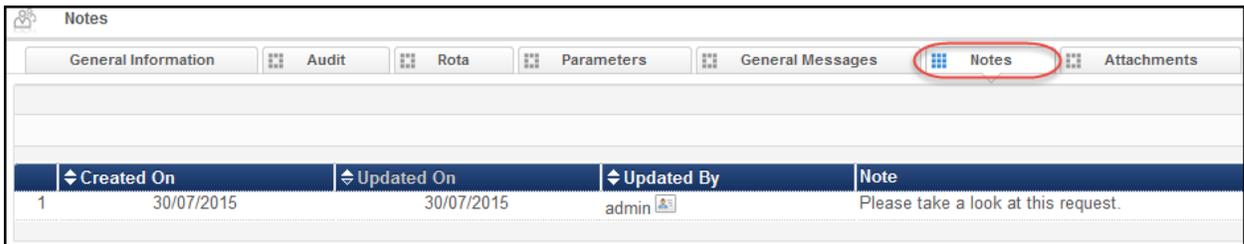


Figure 63 – Borrowing Request with Notes

Integration with ILLiad as a Supplier of Last Resort

Description

ILLiad may now be fully integrated with Alma in a peer-to-peer rota as a supplier of last resort. If all rota partners fail to fulfill the request, it can be automatically transferred to ILLiad where the request can be attempted with the broader ILLiad managed rota. This will save a step for the patron that previously received an email saying that the request could not be fulfilled with a link to ILLiad.

The send process continues to function as it has previously. However, if the partner is defined as ILLiad in the System Type field, the Send action generates a message with the request details and the metadata of the request that is sent directly to a configured email address. ILLiad should be configured to upload emails from that email address and create internal borrowing requests based on the emails' content. The metadata that is sent is dependent on the fields that are available in the request.

Step-by-Step Instructions

The following role can configure resource sharing partners:

- Resource Sharing Partners Manager

To configure ILLiad partner:

- 1 Select **Fulfillment > Resource Sharing > Partners** and edit an ILLiad partner (that is, a partner with the Profile Type set to NCIP and the System Type set to ILLiad).
- 2 Click the **Parameters** tab.

At the bottom of the page, there is a new section, **Export to Third Party**. The export option is set by default to **No**.

- 3 Click **Yes** and enter the email address for ILLiad request notifications. Note that ILLiad must be configured to upload emails sent to the configured address and use them to create an internal borrowing request.

The **Close Request when Exported** defines whether the borrowing request will be closed after export to ILLiad or will be managed under the same borrowing request. If ILLiad NCIP integration has been configured, setting the **Close Request when Exported** parameter to false will enable to continue receiving updates about the request from ILLiad via NCIP throughout its ILLiad lifecycle.

Partner Code: ILLiad Partner Name: Interlibrary Loan

General Information Contact Information Parameters Notes

General Information

User identifier type * Primary Identifier

Request pushing method * Open URL Link

URL template

Add user auto login to URL No Yes

Enable service for guest user No Yes

Disable service when

- Never
- When resource is owned by the campus
- When resource is owned by the campus and available
- When resource is owned by the institution
- When resource is owned by the institution and available

Loan period

[Download Certificate](#) Default library owner * Resource Sharing Library

Request Item

Bibliographic record ID type * OCLC Number

Support Borrowing

Check-Out Item

Default location * Borrowing Resource Sharing Requests

Default item policy * 4 day Loan

Accept Item

Default location * Borrowing Resource Sharing Requests

Default pickup library Main Library

Automatic receive

Look Up User

Require Authentication No Yes

Export to Third Party

Export to third party No Yes

Export email address * |

Close request when exported

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

Figure 64 – ILLiad Configuration

Other Resource Sharing Enhancements

- A new workflow profile action, **Mediated Patron Renewal**, will enable non ISO users to allow requesting renewals from Primo in a three-step renewal process:
 - 1 Patron requests renewal in Primo or in Manage Patron Services. This changes the request status to **Mediated Patron Renewal**. Requests of this type will have a **Request Renew** action.
 - 2 The staff member processes the renew request and sends the renew request to the lending partner (as before).
 - 3 The staff member commits the renew request when the response arrives (as before).
- A new partner, SLNP, was created for communication with the ZFL server for the German libraries' resource sharing workflow.

The full integration details will be available as of August 30, 2015 in the Alma Developer Network at

https://developers.exlibrisgroup.com/alma/integrations/resource_sharing/broker/SLNP.

For information about configuring the partner profile, see the **Resource Sharing Requests** section of the *Alma Integrations with External Systems Guide* or the Alma Online Help (as of August 30th).

- The layout of the Resource Sharing Lending and Borrowing Requests lists changed to group in one line fields that are logically related. In addition, the **Alert** label on the Resource Sharing Lending Requests page is now displayed in blue.

The following information is consolidated per line on the borrowing task list:

- ISBN/ISSN, LCCN, OCLC Number
- External Identifier, Internal Identifier
- Request Status, Partner
- Requested Media, Requester
- Barcode, Due Date, Pickup At
- Creation Date, Update Date

The following information is consolidated per line on the lending task list:

- ISBN/ISSN, LCCN, OCLC Number
- External Identifier, Requested Media
- Barcode, Due Date
- Request Status, Resource Locate Status
- Creation Date, Update Date

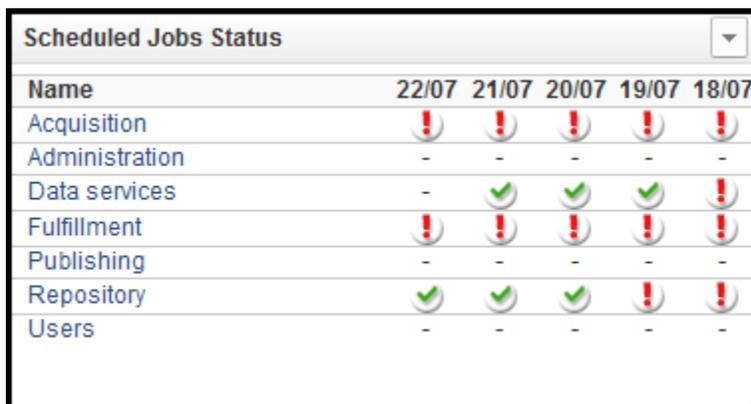
Administration

The following enhancements have been made to the Administration functional area in the September 2015 release of Alma:

System Job Status Widget

Description

There is a new dashboard widget, **System Jobs Status**, which presents the status of scheduled jobs that are running or have completed within the last five (5) days (including today). This widget can make you aware of any recently failed jobs.



| Scheduled Jobs Status | | | | | |
|-----------------------|-------|-------|-------|-------|-------|
| Name | 22/07 | 21/07 | 20/07 | 19/07 | 18/07 |
| Acquisition | ! | ! | ! | ! | ! |
| Administration | - | - | - | - | - |
| Data services | - | ✓ | ✓ | ✓ | ! |
| Fulfillment | ! | ! | ! | ! | ! |
| Publishing | - | - | - | - | - |
| Repository | ✓ | ✓ | ✓ | ! | ! |
| Users | - | - | - | - | - |

Figure 65 - Scheduled Job Status Widget

All roles can add the widget to their homepage. However, they will only see information about jobs that are relevant to their role. The list does not include any MD import jobs, but it does include publishing jobs such as jobs that publish to Primo or Google Scholar.

Clicking a job category opens the Monitor Jobs page with that category preselected. The categories are the same ones that can be used as filters on the Monitor Jobs page.

Clicking an error icon  opens a pop-up with the names of any failed jobs. Click **More Info** to open the Monitor Jobs page with these jobs preselected.

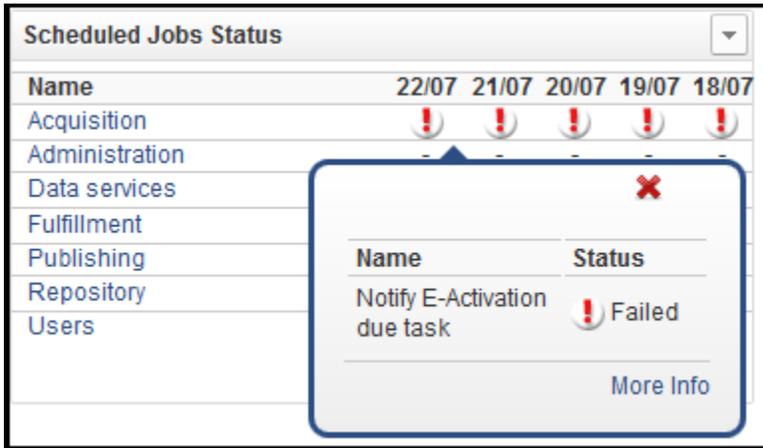


Figure 66 - Scheduled Job Status Widget with Failed Job Pop-up

Content Indicators Added to User Record Pages

The user record pages will now differentiate between informational tabs that have content and those that do not. After you add a note, for instance, the indicator on the tab will change to let you know that the tab contains notes (without having to open the tab). These tabs display the following icons to indicate the status of the lists within a tab:

-  - The list in the tab has no content.
-  - The list in the tab has content.

The following is an example of the Notes tab for a user before a note has been added for the user.

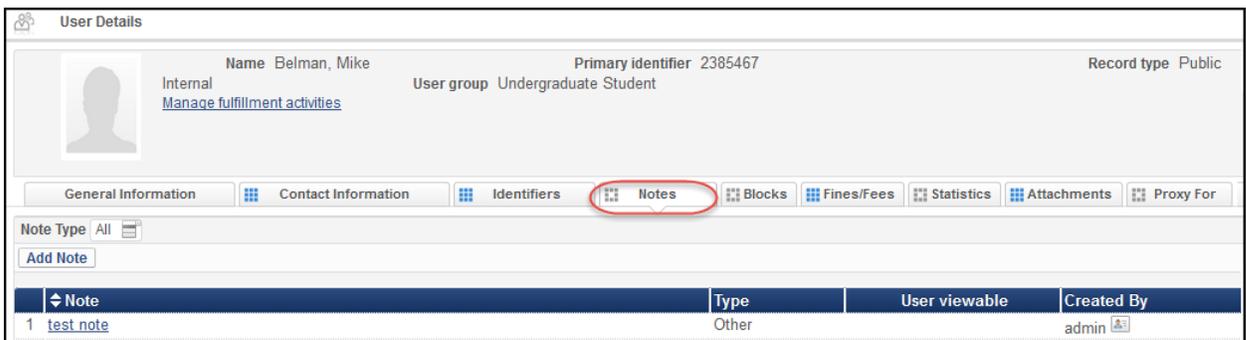


Figure 67 – User Details with No Notes

The following is an example of the Notes tab for a user after a note has been added for the user.

User Details

Name Belman, Mike Primary identifier 2385467 Record type Public
 Internal User group Undergraduate Student
[Manage fulfillment activities](#)

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

Note Type All

[Add Note](#)

| Note | Type | User viewable | Created By |
|-----------------------------|-------|---------------|------------|
| 1 test note | Other | | admin |

Figure 68 – User Details with Notes

Title Field added to User Record

Description

It is now possible to set a Title on a user record, selecting from a configurable list of user titles. Like all other user information, the title information may be received in the SIS feed. The Title information that is received in the feed can be overridden by library, and may also be updated via the Users API. It can also be set by the bulk Users Update job.

The User Title is included in the XML of the Alma letters, and may be added to the printouts by updating the relevant XSL files.

In the SIS load, the title will be updated with Import and Synchronize. The title will be retrieved with Export Users.

The API considers title in the Update, Create, and Get routines. The API also contains an override parameter. If `Override=user_title`, the title will be updated even if the user is external and the title field is internal.

The title field is now also included in the Update/Notify user job.

Step-by-Step Instructions

The following roles can configure the title:

- User Administrator
- General System Administrator

The following roles can update the user record:

- User Manager
- User Administrator

To configure the user titles:

- 1 Open the User Titles code table (**Administration > User Management Configuration > Configuration Menu > User Details > User Titles**).

Table Information

| | | | |
|---------------|-----------------|-------------------|-----------------------------------|
| Sub System | USER_MANAGEMENT | Table Name | User Titles |
| Updated By | - | Updated on | - |
| Patron Facing | No | Table Description | List of all available user titles |
| Table code | UserTitles | | |

List of all available user titles

Filter: English

| Display | Order | Code | Description | Translation | Default Value | Updated By | Last Updated | |
|---------|-------|------|-------------|-------------|----------------------------------|------------|--------------|--------|
| 1 | ▼ | MR | Mr. | Mr. | <input checked="" type="radio"/> | - | - | Delete |
| 2 | ▲ | MRS | Mrs. | Mrs. | <input type="radio"/> | - | - | Delete |
| 3 | ▲ | PROF | Prof. | Prof. | <input type="radio"/> | - | - | Delete |
| 4 | ▲ | DR | Dr. | Dr. | <input type="radio"/> | - | - | Delete |
| 5 | ▲ | MISS | Miss. | Miss. | <input type="radio"/> | - | - | Delete |

Create a New Code Table Row

Quick Add

| | | | |
|----------------------|----------------------|---------------|---------|
| Code | Description | Default Value | |
| <input type="text"/> | <input type="text"/> | No | Add Row |

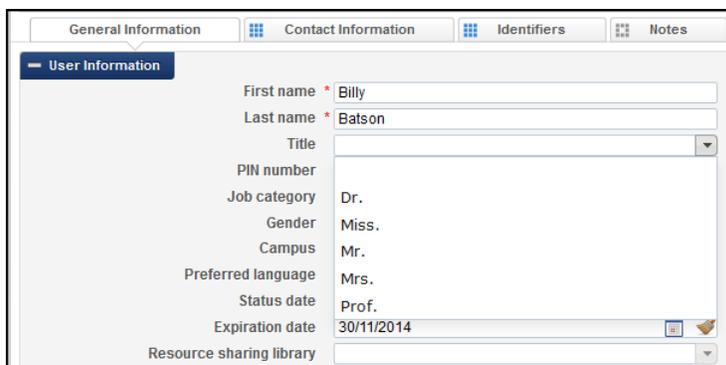
Cancel Customize

Figure 69 – User Titles Code Table

- 2 Change the title description as required in the **Description** column.
- 3 When changes are complete, click the **Customize** button.

To add a title to a user:

Edit the user from any user list, select the title from the drop-down list, and click **Save**. Once the record is saved, if the title was modified, it is now marked as internal.



The screenshot shows a user information form with the following fields and values:

| Field | Value |
|--------------------------|------------------|
| First name | Billy |
| Last name | Batson |
| Title | [Drop-down menu] |
| PIN number | |
| Job category | Dr. |
| Gender | Miss. |
| Campus | Mr. |
| Preferred language | Mrs. |
| Status date | Prof. |
| Expiration date | 30/11/2014 |
| Resource sharing library | [Drop-down menu] |

Figure 70 – Title Drop-Down List

Resending Patron Notifications

Description

If a patron does not receive a notification email that was sent by Alma, you may now easily resend an attachment to the patron's preferred email address.

The current email format is: **Dear Sir/Madam, Please find attached a resend of a previously sent message. Sincerely <'From' element- blank by default>**.

The code table for customizing the resent letter is accessible from **Administration > General Configuration > Configuration Menu > Letter Emails > Resend Notification Letter**.

The XSL is accessible from **Administration > General Configuration > Configuration Menu > Customize Letters > ResendNotificationLetter.xsl**.

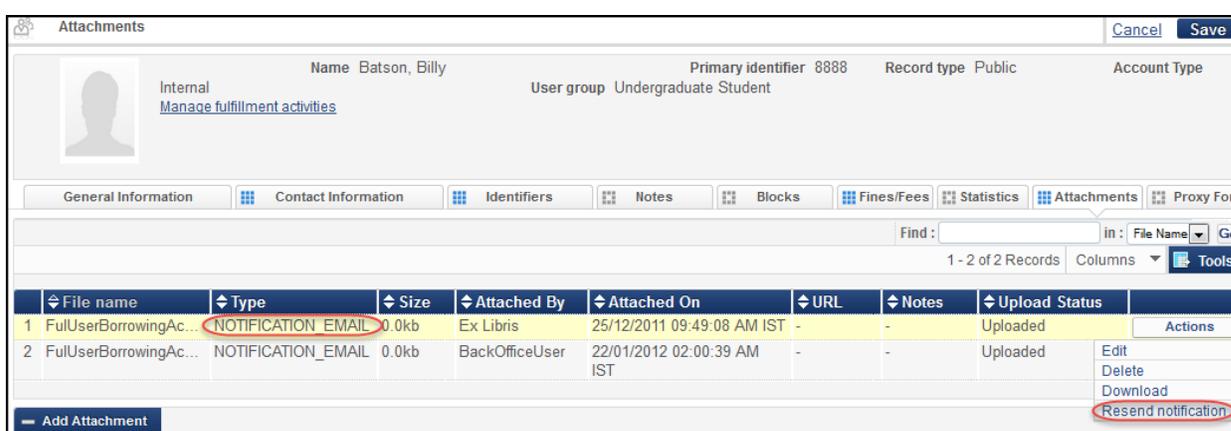
Step-by-Step Instructions

The following roles can resend a patron notification:

- User Manager
- User Administrator

To resend a patron notification:

- 1 On the Find and Manage Users page (**Administration > User Management > Find and Manage Users**), select the user and click the **Attachments** tab. For any attachments that were sent, clicking **Actions** will show an option to resend the notification.



The screenshot shows the 'Attachments' page for a patron named Billy Batson. The page includes a search bar, a table of attachments, and a 'Resend notification' button. The table has the following data:

| File name | Type | Size | Attached By | Attached On | URL | Notes | Upload Status | Actions |
|-----------------------|--------------------|-------|----------------|----------------------------|-----|-------|---------------|---|
| FulUserBorrowingAc... | NOTIFICATION_EMAIL | 0.0kb | Ex Libris | 25/12/2011 09:49:08 AM IST | - | - | Uploaded | Actions |
| FulUserBorrowingAc... | NOTIFICATION_EMAIL | 0.0kb | BackOfficeUser | 22/01/2012 02:00:39 AM IST | - | - | Uploaded | Edit Delete Download Resend notification |

Figure 71 – Patron Attachments

- 2 Select **Resend Notification**. Alma attempts to resend the email to the patron's preferred email address. The status appears in the upper left-hand portion of the page.

Attachments Cancel Save

Notification failed to be sent.

Name: Batson, Billy Primary identifier: 8888 Record type: Public Account Type: Internal
 User group: Undergraduate Student
[Manage fulfillment activities](#)

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

Find: In: File Name Go

1 - 2 of 2 Records Columns Tools

| File name | Type | Size | Attached By | Attached On | URL | Notes | Upload Status | Actions |
|-----------------------|--------------------|-------|----------------|----------------------------|-----|-------|---------------|---------|
| FulUserBorrowingAc... | NOTIFICATION_EMAIL | 0.0kb | Ex Libris | 25/12/2011 09:49:08 AM IST | - | - | Uploaded | Actions |
| FulUserBorrowingAc... | NOTIFICATION_EMAIL | 0.0kb | BackOfficeUser | 22/01/2012 02:00:39 AM IST | - | - | Uploaded | Actions |

Figure 72 – Patron Attachments with Resend Status

- If the notification was sent:
 "Notification was resent successfully" is displayed.
- If the notification was not sent because the user profile does not have an email address:
 "Notification failed to be sent. User doesn't have email address" is displayed.
- If the notification was not sent because the user email address is invalid:
 "Notification failed to be sent." is displayed.

The notification is sent as an attachment in a new email.

Other Administration Enhancements

- The following new HealthCheck tool tests were added:

| Test | Description | Functional Area |
|--|--|-----------------|
| Not able to place an order (manually and/or via EOD) | Checks that all active POs have active funds | Acquisitions |
| Users not updated in the last month | Checks that users can be managed in Alma | User Management |

| Test | Description | Functional Area |
|--|---|-----------------|
| Student Information System connection is not working | Checks the integration between Alma and the student management system | User Management |

- A filter for job status was added to the Monitor Jobs page:

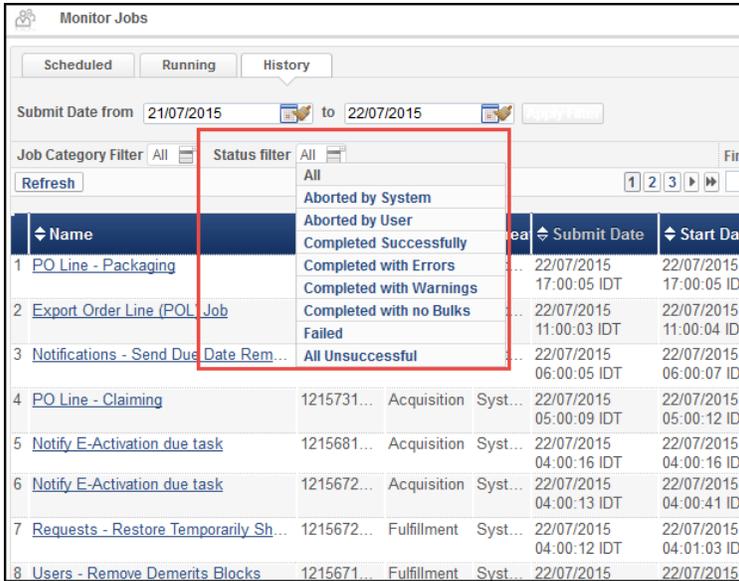


Figure 73 - Monitor Jobs Page

The filter allows you to restrict the jobs that appear based on their status. **All Unsuccessful** displays jobs with any unsuccessful status (anything except **Completed Successfully**).

- **Alternative** has been added as a new email type for Public and Staff users.

Collaborative Networks and Multicampus Institutions

The following enhancements were made for collaborative networks and multicampus institutions in this release of Alma:

- A new column, **Institution**, was added to the History tab of the Monitor Jobs page in the Network Zone. The column displays the name of the institution for each job. It is hidden by default and can be displayed using the new table column customization feature.
- When distributing configuration tables, an option was added to allow the Network Zone to force an update for a member institution and ignore the member institution's customization.

Analytics

The following sections describe the functions provided for Analytics in the September 2015 release of Alma.

New Link Resolver Usage Subject Area

Description

A new Link Resolver Usage subject area was added to Alma Analytics. The fields of this subject area can be used to create reports that provide both specific details of link resolver usage as well as a broad perspective of how the Alma link resolver is used. This provides libraries with a useful means of determining proper electronic collection development.

Notes:

- This new subject area supplements the existing Usage Data subject area. The existing Usage Data subject area includes data from vendors and is loaded weekly by way of UStat, while the Link Resolver Usage subject area takes data directly from the Alma link resolver.
- For the September release, the Link Resolver Usage subject area includes data in your institution from August. A future release will add previous data.

The following are example business questions that can be answered from the Link Resolver Usage subject area:

- How many times did users click **View It** in all sources over a specified period of time?
- How many times did users click **View It** in a specific source?
- How many times did users click **View It** and no results were produced?
- How many times did users click **View It** for a particular source that resulted in no full text?
- How many times did users click **View It** for the most frequently requested full-text journals from a particular source?

Step-by-Step Instructions

The Design Analytics role can access this enhancement.

To access the Link Resolver Usage subject area in Alma Analytics:

- 1 Access Alma Analytics (**Administration > Analytics > Design Analytics**).
- 2 Select **New > Analysis**.



Figure 74 – New > Analysis Option

The Select Subject Area options appear.

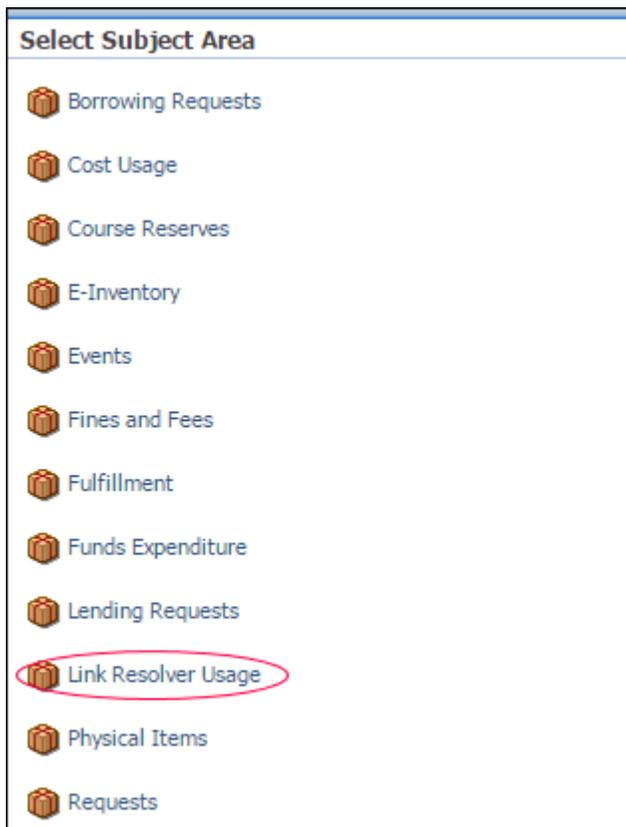


Figure 75 – Select Subject Area

3 Select **Link Resolver Usage**.

The following dimensions are available:

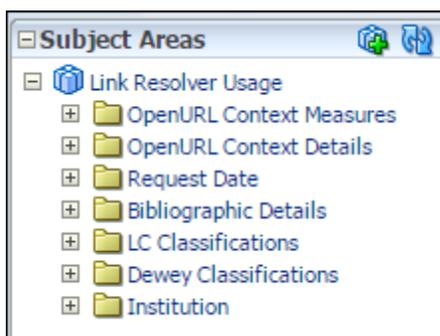


Figure 76 – Link Resolver Usage Subject Area

New Inventory Price Field

The Inventory Price field has been added under the Physical Items subject area to display the price of the physical inventory for each physical item, which is provided by Alma.

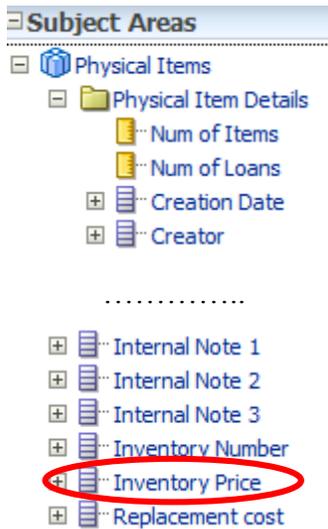


Figure 77 – New Inventory Price Field

The following results include data from the new field:

| MMS Id | Inventory Price |
|-------------------|-----------------|
| 99121584900001021 | 34.56 |
| 99121588680001021 | 7.07 |
| 99121694660001021 | 22.00 |
| 99121810920001021 | 20.20 |
| 99122476220001021 | 15.30 |

Figure 78 – Example Results Showing Inventory Price Column

Support for Book Report 1 and 2 Usage Reports

Analytics now supports usage data associated with eBook usage reports (Book Report 1 and Book Report 2) that are provided by UStat. To support the new usage data, the following changes have been made to Analytics:

- In the Usage Data Details dimension under the Usage Data subject area, replaced the **DB or Journal Indicator** field with the **Material Type Indicator** field and added the following types that were supported by the old field: **DB** and **Journal**.

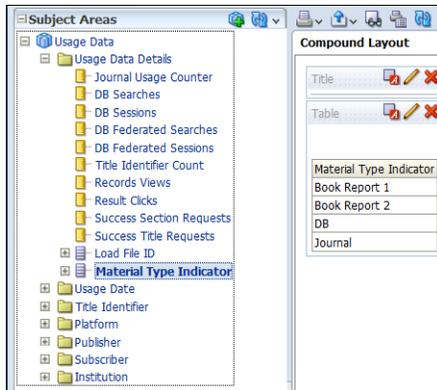


Figure 79 – New Material Type Indicator Field

- Added the following types to the **Material Type Indicator** field in the Usage Data Details dimension under the Usage Data subject Area: **Book Report 1** and **Book Report 2**.
- Added the following fields to the Title Identifier dimension under the Usage Data subject area:
 - **Origin ISBN** – Displays the original ISBN (with dash) for the title.
 - **Normalized ISBN** – Displays the normalized ISBN (without dash) for the title.

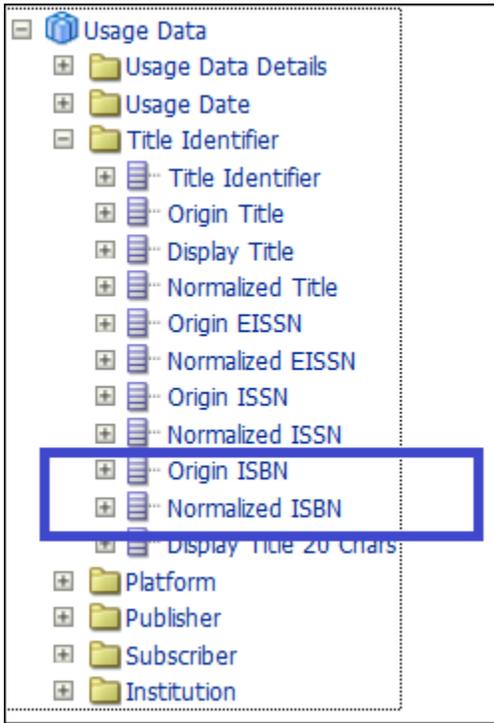


Figure 80 – New Title Identifier Table Fields

- Added the following measures to the Usage Data Details dimension under the Usage Data subject area:
 - **Successful Title Requests** – Displays the number of successful title requests by month and title for the Book Report 1 material type.
 - **Successful Section Requests** – Displays the number of successful section requests by month and title for the Book Report 2 material type.

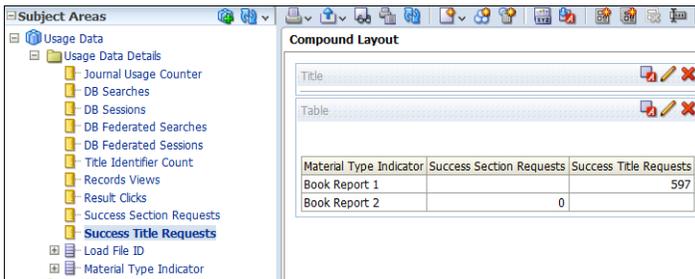


Figure 81 – New Usage Data Details Measures

- Added the following tabs to the out-of-the-box Usage dashboard:

- **Book Reports** – Contains the following reports associated with Book Report 1:
 - Book Reports - Annual Trends
 - Most Frequently Used Book Reports
 - Book Report Usage – titles
- **Book Report Sections** – Contains the following reports associated with Book Report 2:
 - Book Report Sections - Annual Trends
 - Most Frequently Used Book Report Sections
 - Book Report Sections Usage – titles

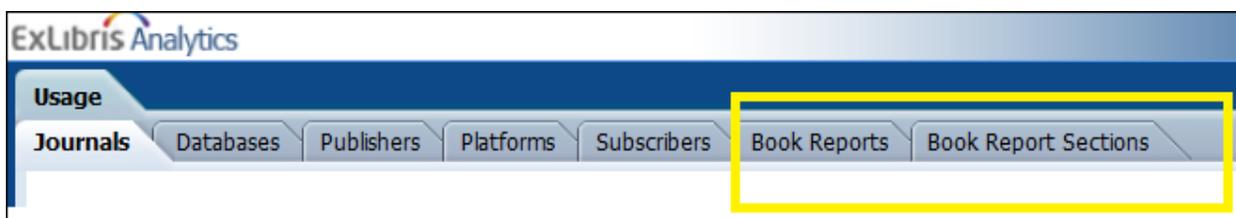


Figure 82 – New Tabs on Usage Dashboard

Other Analytics Enhancements

- The **Lifecycle** field has been added to the **Items Added** out-of-the-box report, located under **Alma > Inventory > Reports**. This field provides a clear indication as to whether the added item was subsequently deleted.

Alma APIs

For this release, the following APIs were **added**:

- An API, `GET /conf/libraries/{library code}/open-hours`, that retrieves a library's open hours for a specific date range. For detailed information, see <https://developers.exlibrisgroup.com/alma/apis/conf>.
- An API, `GET /conf/departments`, that retrieves a list of digitization departments. For detailed information, see <https://developers.exlibrisgroup.com/alma/apis/conf>.
- The first Linked Data API, GET BIB API, is now available (https://developers.exlibrisgroup.com/alma/integrations/linked_data). This API returns bibliographic information, including URIs in JSON-LD format. Read more about Alma and Linked Data at: <https://developers.exlibrisgroup.com/blog/Linked-Library-Data>.

The following APIs were **changed**:

- Digital availability was added to the Retrieve Bib Record API. For detailed information, see <https://developers.exlibrisgroup.com/alma/apis/bibs>.
- The Get User Details API now fetches a list of "Proxy For" users for a retrieved user. For each such user, the primary ID and full name are displayed. For detailed information, see <https://developers.exlibrisgroup.com/alma/apis/users>.
- The Retrieve Users API now enables the use of search indexes such as name, email address, and IDs—for example, `GET /almaws/v1/users?q=first_name~John`. This is useful for extracting a list of users from Alma for integration purposes (for example, integration with Sentry or other access control software). For detailed information, see <https://developers.exlibrisgroup.com/alma/apis/users>.

Alma Interface Updates

The following section describes an Alma interface update enhancement provided in the September 2015 release.

Customizing List Tables

Enhancements were made to list tables throughout Alma, enabling you to perform the following customizations:

- Change the width of table columns.
- Change the order of table columns.
- Retain changes to the sort order of columns after moving to another page.
- Hide and display columns using a new **Columns** drop-down list:

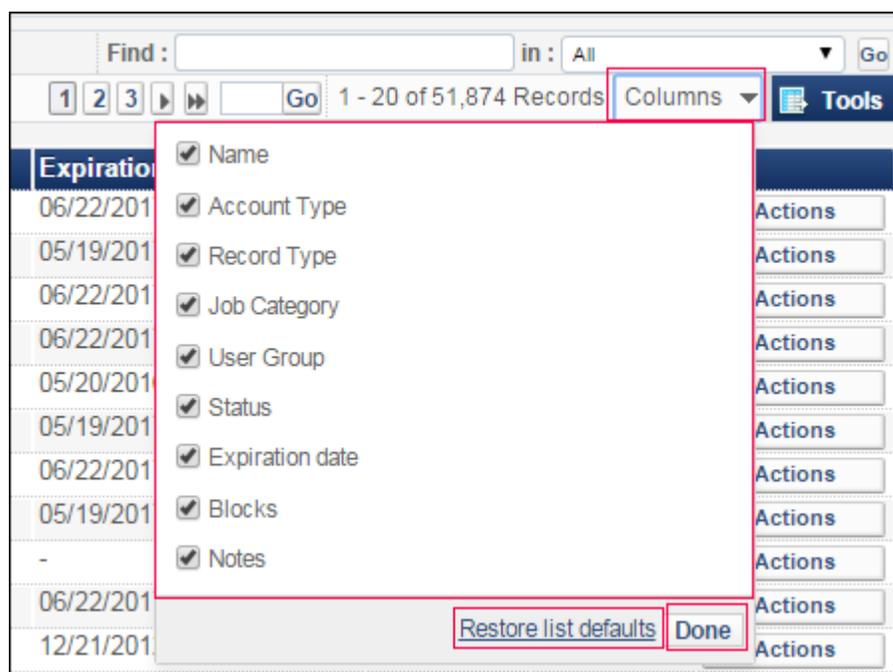


Figure 83 – Column Display

- Clear the check box of a column and click **Done** to hide the column.

- Select the check box of a hidden column and click **Done** to have it appear.
 - Click **Restore list defaults** to restore all of the changes made to a table.
 - When exporting the table (**Tools > Excel**), the table is exported according to the customization currently in effect.
-

Notes:

- Customizations are retained for each user and for each list after moving to another page, logging out, and so forth.
 - Exporting a table with the **Tools** button exports the current customizations and not the default configuration.
-

Known Issues

- When importing an EOD file using the New Order profile, if the location of the item does not have a call number type, the call number type of the institution should be used as the alternative call number type. Currently, however, no alternative call number is used.
- Related to merging bibliographic records in the MD Editor, if there are no requests, the Merge Records and Combine Inventory pop-up window does not display a count of 0 (zero) requests. The count appears for requests only when it is greater than 0 (zero). The count should also appear as 0 (zero) requests when they occur.
- The **Import** button in various code tables in Alma is currently not functional. This issue will be fixed in a future Alma release.
- Fixed position fields cannot be modified using the extension loader (extension packs) at this time.
- MARC extensions cannot currently be loaded into authority profiles.
- Regarding the autocomplete/pop-up assistance being provided for several UNIMARC fields in the MD Editor, there is a known issue related to UNIMARC 327 \$a and 327 \$b. These subfields are based on the same functionality and as a result, the pop-up suggestions in the MD Editor suggests both subfields' values when entering content in either the 327 \$a or the 327 \$b.
- When a member runs an import profile with the option of **Use Network Zone** and chooses to use the new functionality of **Do not override/ merge record with an older version**, the import will not create purchase order lines or inventory. The issue is scheduled to be fixed in the November release.

Fixed Issues

The following previously known issues have been fixed:

- When creating a bibliographic record using quick cataloging or the Portfolio Loader, the sorting of MMS fields is incorrect when the bibliographic record is opened in View mode.
- When contributing portfolios to the Community Zone, only local coverage is contributed when the coverage option selected is **Global and Local**.

Data Services

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

New Electronic Collections Added to the Alma CKB

The following packages were added to the Alma CZ during the period 27 July 2015 through 23 August 2015:

- American Society Of Civil Engineers ASCE Standards
- CCC Get It Now Alcohol Research Documentation
- CCC Get It Now Allerton Press
- CCC Get It Now American Academy of Cosmetic Dentistry
- CCC Get It Now Berghahn Books
- CCC Get It Now Journal of Allied Press
- CCC Get It Now Journal of Neurosurgery Publishing Group
- CCC Get It Now Journal of Orthopaedic And Sports Physical Therapy
- CCC Get It Now PNG Publications
- CCC Get It Now Quintessence Publishing Company Inc.
- CCC Get It Now The Institution of Engineering and Technology
- CCC Get It Now Vendome Group
- EBSCOhost Book Collection Nonfiction: Elementary School Edition (Grades 1-4)
- EBSCOhost Book Collection Nonfiction: High School Edition (Grades 9-12)
- EBSCOhost Book Collection Nonfiction: Middle School Edition (Grades 5-8)
- GWLA SpringerLink Upgrade collection
- Key Note Market Reports
- Loeb Classical Library
- Morgan & Claypool Synthesis Collection Six

- ProQuest Social Sciences Premium Collection New Platform
- Royal Society of Chemistry eBook Collection 2015
- TAEBC Taiwan Academic Online Books
- Taylor & Francis Expert Opinion Modern Archive
- Taylor & Francis Expert Review Modern Archive
- Taylor & Francis Medical Classic Archive
- Taylor & Francis Medical Library
- Taylor & Francis Medical Modern Archive
- Thieme Chemistry E-Books
- Thieme Clinical Collections
- Thieme E-Book Library Veterinärmedizin
- WiLS Springer Journal Package

Note: No new external resources were added for the September release.
