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

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Alma October 2014 Release Highlights

Acquisitions

- Real-Time Acquisitions

  Real-time acquisitions is a recent development by Ex Libris, working with academic library service providers, to streamline acquisitions workflows. It incorporates standard ordering and loading technologies with APIs to speed the availability of resources, increase the efficiency of integrating records, and enhance data enrichment.

- Support for ONIX-PL-Formatted Licenses

  The ability to load licenses in an ONIX format has been added. Alma creates a DLF license from an ONIX-PL license by mapping fields from the ONIX-PL XML file to fields in the DLF license template.

Resource Management

- Added Information Pop-Up to Electronic Inventory Editors

  Alma now allows staff users to view electronic inventory information (such as the creation date, creator, and Alma ID) in the following electronic inventory editors: Electronic Collection Editor, Electronic Service Editor, and Electronic Portfolio Editor.

- Improved Delete Confirmation for Electronic Collections

  Alma has added warning information to the Delete Confirmation dialog box to clarify what will happen when an electronic collection is deleted (for example, the PO lines that will be unlinked from their resources). In addition, the confirmation message includes the number of portfolios that will be deleted and an **Expected Activation Date** column has been added.

Resource Sharing

- Added Location to the Shipping Interface

  It is now possible to specify the temporary location for a resource sharing lending request item that is being shipped instead of accepting the default lending location for a resource sharing library. This allows lending libraries to temporarily move shipped items to different locations in the resource sharing library. For example, a library may want to distinguish between items that are shipped for long-term loans and those that are shipped for short-term loans, or to distinguish between items that are shipped to different borrowers.

Analytics

- Addition of Records Views and Result Clicks Fields to the Usage Data Details Dimension

  The Records Views and Result Clicks fields have been added to the Usage Data Details dimension of the Usage Data subject area. The information for these fields comes from UStat.

Alma APIs

- Alma RESTful APIs

  The following RESTful APIs have been added: Create Order API, Get Location API, and Library Request Digitization API. In addition, the Get User Loans Web services were converted to RESTful APIs.

Collaborative Networks and Multicampus Institutions

- Overlay Community Zone Records in the Network Zone

  This enhancement allows Institution Zone (IZ) members to import full bibliographic records and overlay the brief Community Zone (CZ) bibliographic records in the Network Zone (NZ) while retaining the member institutions that have activated the resources (indicated by the **Held By** field).

- Configuring a Rota Template from the Network Zone

  Rota templates and rota assignment rules can now be configured centrally for institutions that are part of a collaborative network.

- Adding Availability and "Requestability" Considerations to Alma Borrower Locate Profiles

  This feature enables borrower locate profiles (of type "Alma") to be used to query the potential suppliers on the rota for titles that are available and requestable. This is in addition to the previous functionality of the locate profiles that verified only the existence of the title, but not the availability and requestability of its inventory.

Data Services

The Alma September 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 31-August-2014 through 17-September-2014:

- AIP Scitation American Crystallographic Association
- Sage Clinical Medicine Package 2014
- Sage Clinical Medicine Backfile Package 2013
- Sage Clinical Medicine Backfile Package 2014
- Sage Deep Backfile Health Sciences Package 2013
- Sage Deep Backfile Health Sciences Package 2014
- Sage Deep Backfile Package 2014
- Sage Deep Backfile Upgrade Package 2014
- Sage Education Collection 2014
- Sage Health Sciences Package 2013
- Sage Health Sciences Package 2014
- Sage Humanities and Social Science Package 2013
- Sage Humanities and Social Science Package 2014
- Sage Management and Organization Studies Collection 2014
- Sage Nursing Public Health Collection 2014
- Sage Oncology Collection 2014
- Sage Orthopaedics and Sports Medicine Collection 2014
- Sage Palliative Medicine and Chronic Care Collection 2014
- Sage Pediatrics Collection 2014
- Sage Pharmacology and Biomedical Collection 2014
- Sage Politics International Relations Collection 2014
- Sage Psychology Collection 2014

- Sage Sociology Collection 2014
- Sage STM Backfile Package 2013
- Sage STM Backfile Package 2014
- Sage STM Package 2013
- Sage STM Package 2014
- Sage Theology Biblical Studies Collection 2014
- Sage Urban Studies and Planning Collection 2014
- Sage Clinical Medicine Package 2013
- Artech House
- World Bank eLibrary Journals
- ProQuest Advanced Technologies and Aerospace Journals
- British Nursing Index with Full Text
- ProQuest Art Design and Architecture Collection
- ProQuest Politics Collection
- Sage Reference Online 2014 Encyclopedia Collection
- Sage Reference Online Handbook Collection 2014
- Palgrave Connect eBooks International Relations and Development Collection 2014
- Palgrave Connect eBooks Political Science Collection 2014
- Liverpool University Press - Translated Texts for Historians E-Library

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

Alma Show Me How and Videos

The following sections describe Alma Show Me How and videos for the October 2014 release of Alma.

Alma Show Me How – October

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.

Technical 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 October release, the following Show Me How scenario is available:

   - Import ONIX-PL Licenses

   The following Show Me How pop-up is available in the Alma user interface, where relevant:

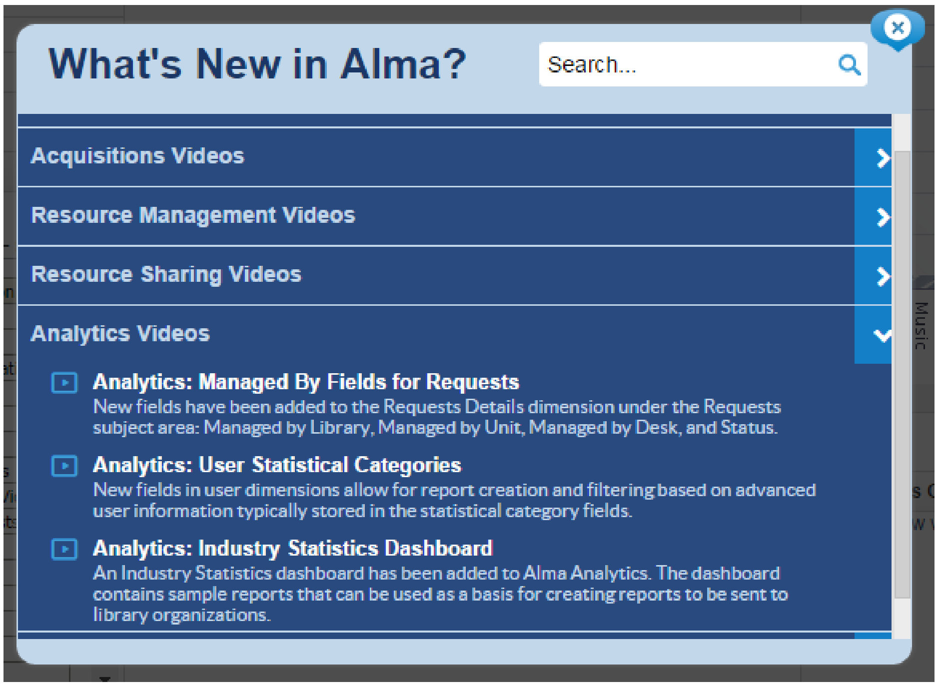
   - New: Shipping Items Location

Alma Videos – October

The following new videos are available when you select **Help > What's New Videos** in Alma:

- Load ONIX-PL Formatted Licenses
- Overlay Community Zone Records in the Network Zone

Note that these videos are now also available in the Show Me How menu. For example:



Particular Issues to Note

The following issues should be noted:

- The Primo Get It link that enables placing resource sharing requests is based on system checks that determine the patron's eligibility for placing a resource sharing request. These checks are based on:
  - The patron having a valid patron role that allows placing resource sharing requests
  - Fulfillment unit terms of use rules (of the type **Borrowing Resource Sharing**) that allow the placing of resource sharing requests

  These system checks have been incorrectly run at the scope of the institution, instead of being run at the scope of the resource sharing library. In other words, the patron role is checked at the scope of the institution instead of being checked at the resource sharing library. Likewise, the terms of use are not checked correctly at the resource sharing library's fulfillment unit, which can lead to miscalculated terms of use—for example, in the context of applying resource sharing request limits.

  The planned October change to this system behavior – to make use of the proper resource sharing library as the checked scope instead of the institution – will not be implemented this month. Given the fact that such a change requires institutions to make sure that all patrons eligible for resource sharing services have a valid patron role at the resource sharing library, and that the resource sharing library's terms of use rules of type **Borrowing Resource Sharing** are set up with the desired terms of use, we have decided to defer this change to the November release instead. In advance of the November release (November 2nd), ensure that the above conditions are met so that the new system behavior will be properly applied with the November release.

- For the Alma February release, an enhancement was developed to improve the sorting relevance of online services offered by the Alma Resolver Electronic Services page for OpenURLs coming from the Primo Central and EBSCO API. A new option, **Prefer source service**, was added to place the highest priority on services that match the source of the OpenURL. For example, if a user searching Primo Central discovers an article from Gale and the Alma Resolver can offer services from Gale and EBSCO, Alma places the service from Gale at the top of the services list, followed by the remaining electronic services, which are sorted as configured on the Online Services Order page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Discovery Interface Display Logic > Online Services Order**).

  Until now, the **Prefer source service** option on the Online Service Order page was set to **No** by default. As of the October release, the default option is set to **Yes** by default, as shown below. If you do not want to place the highest priority on services that match the source of the OpenURL, you must set this option to **No** instead.

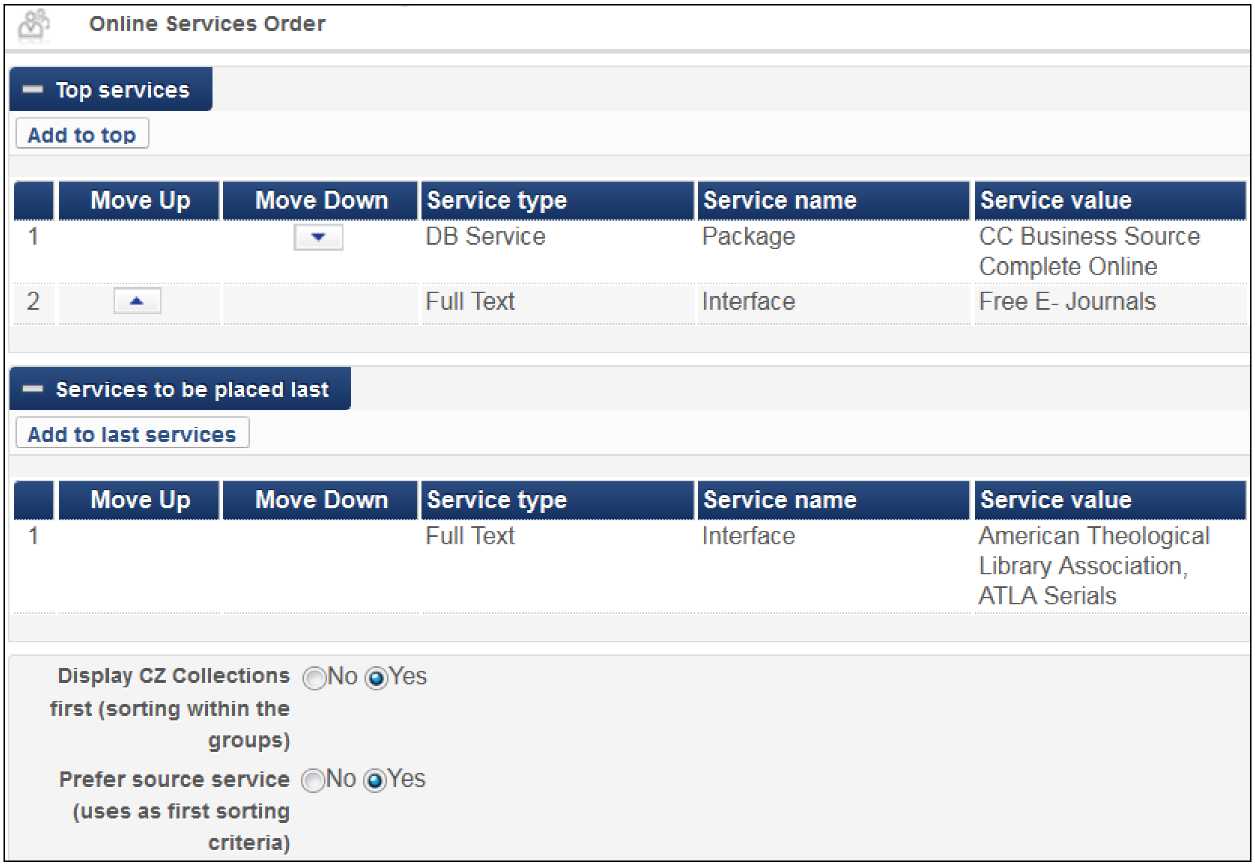


Figure 1 – Online Services Order Page – Prefer Source Service

Note: If a service has been hidden via the display logic rules, it will not display regardless of the **Prefer source service** option. That is, the library-defined display logic rules take precedence and may affect the impact of the **Prefer source service** option.

Acquisitions

The following section describes the features provided for the Acquisitions functional area in the October 2014 release of Alma.

Real-Time Acquisitions

Description

Real-time acquisitions is a recent development by Ex Libris, working with academic Library Service Providers (LSPs), to streamline acquisitions workflows. It incorporates standard ordering and loading technologies with APIs to speed the availability of resources, increase the efficiency of integrating records, and enhance data enrichment.

Currently, in typical situations, Alma uses batch ordering (EOD) or manual creation of PO lines. These methods can produce delays in records appearing in Alma, and they can lead to drawbacks of manually overlaying or merging records.

Workflow

An end-to-end real-time acquisitions workflow combines an LSP with Alma for product selection and ordering.

Note: This process begins in the LSP catalog but it can also include all available channels for new orders with LSPs.

1. The user searches for items and places them in the LSP shopping cart (or equivalent).
2. The user verifies fund codes, owning library, and location codes.
3. At checkout, the LSP sends the shopping cart data to Alma.
4. Alma completes validation checks and automates the order creation.
5. Alma attempts to match the records using standard identifiers. If no match is found, Alma creates a brief bibliographic record for the order.
6. Alma sends the newly created PO line number to the LSP.
7. The PO line is processed in Alma as other PO lines are processed. If an order requires manual review, Alma sends it to the In Review task list.

The following vendors currently support this integration:

- YBP Library Services
- Swets Information Services

Note: In order to allow API calls by LSP into Alma, an API key should be generated and supplied to the LSP. Generating an API key is done in the Developers' Network: `https://developers.exlibrisgroup.com`. For more details regarding API key generation and working with Alma APIs, see: `https://developers.exlibrisgroup.com/alma/apis`.

For setting up a real-time acquisitions workflow with YBP, contact a YBP Sales or Customer Service Representative.

For setting up a real-time acquisitions workflow with Swets, contact a Swets Sales or Customer Service Representative.

For general information about the API, see `https://developers.exlibrisgroup.com/alma/apis/acq`.

Technical Instructions

To enable subscription agents to send API calls to your institution's Alma, you must generate an API key and supply it to the agent.

Generating an API Key

Generating an API key is done in the [Developers' Network.]

To generate the API key:

1 Log on to the Developers' Network using your institution account.

2 Define an application with the name `subscription agent ACQ`:

- Add `Acquisition` API to the application.
- Define the appropriate API plan: read/write for your sandbox environment, or read/write for your production environment.

Note: Ex Libris recommends using the sandbox API plan in the first stage.

3 Copy the API key of the application. This is the API key that will be used as part of the subscription agent's API calls to identify your institution.

For more details regarding API key generation and working with Alma APIs, see: https://developers.exlibrisgroup.com/alma/apis.

New Order API Integration Profile

As part of the PO line details, the relevant metadata is sent to Alma, and Alma tries to match it with existing bibliographic records. If a matching bibliographic record exists, the new PO line is linked to that record. If not, a new bibliographic record that includes the relevant metadata is created.

By default, the following rules apply:

- The match is based on ISBN/ISSN.
- If a match is found, no merge is applied. The matched bibliographic record is linked to the PO line.
- In the case of a multiple match, Alma chooses one of the records randomly.
- If no match is found, a new bibliographic record is created, but with no validation or correction.

If you want the match, merge, or validation to be done in a different manner, you can define an integration profile with your preferred rules.

To define a New Order API integration profile:

1. On the General Configuration page (**Administration > General Configuration > Configuration Menu**), click **Integration Profiles** under **External Systems**.

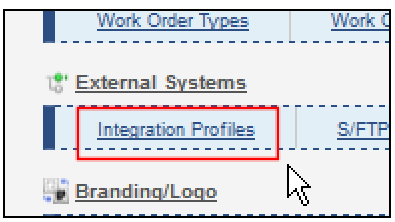


Figure 2 - Integration Profiles on the Administration Configuration Page

   The Integration Profile List page opens.

2. Click **Add Integration Profile** and select the **New Order API** profile type.

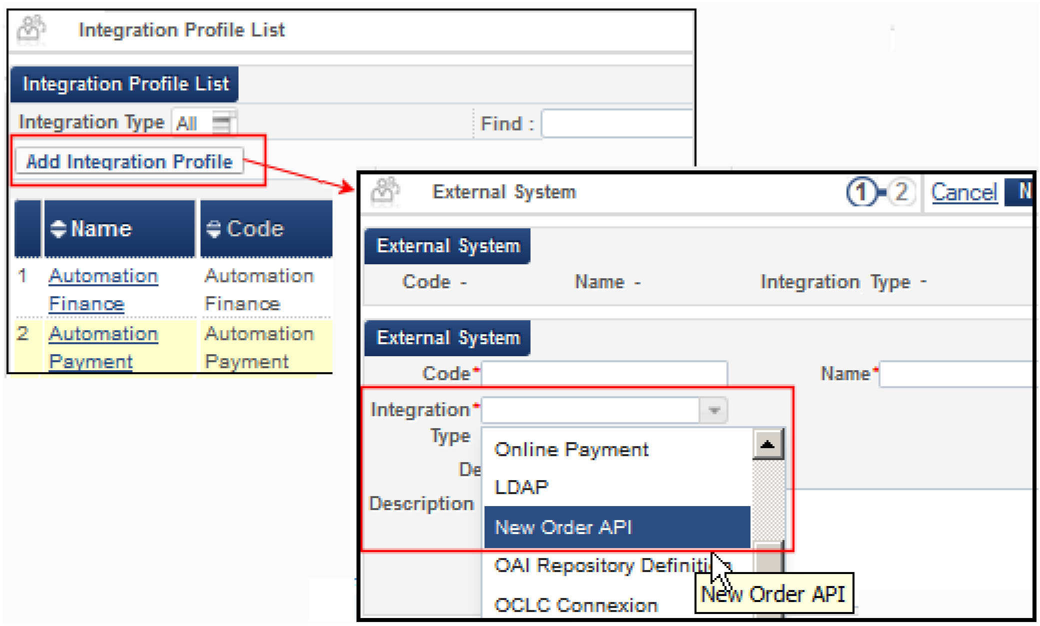


Figure 3 - Add Integration Profile of Type New Order API

3 Enter values in all required fields and click the **Next** button.

Step 2 of the wizard opens.

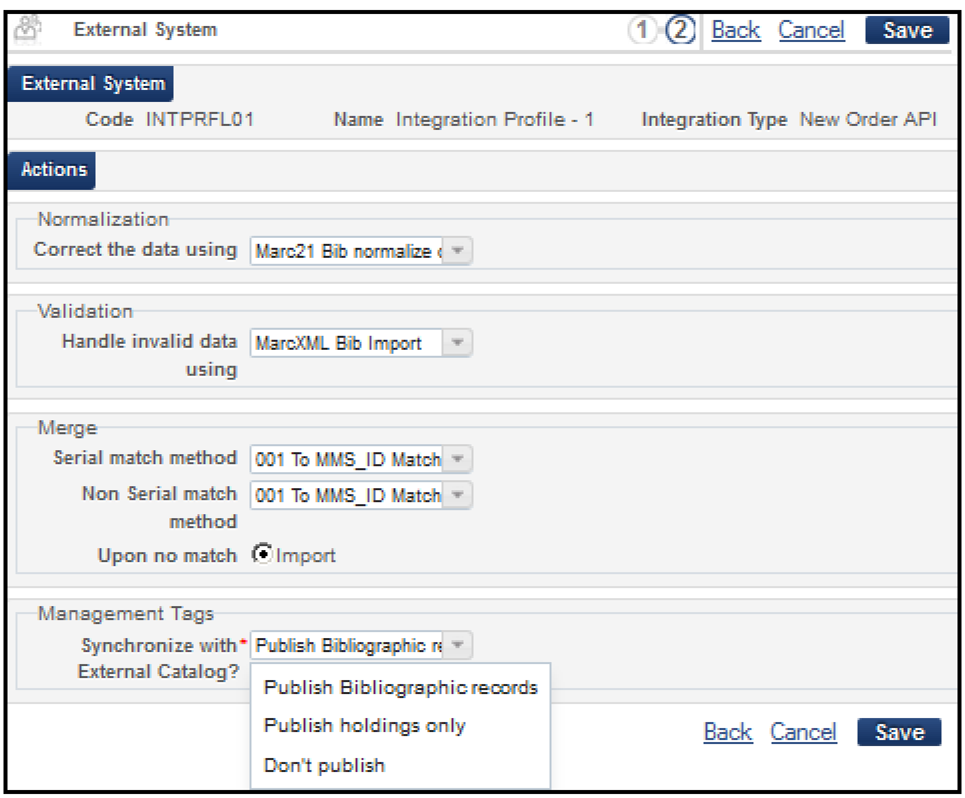


Figure 4 - External System Definitions for the Integration Profile

4 In the **Actions** section of the page, define the rules for normalization, validation, and merge. Enter a value for the required field under **Management Tags**.

5 Click **Save**.

The profile list page opens with your new integration profile in it.

Information That Should Be Supplied to the Library Service Provider (LSP)

The following information should be supplied to the LSP:

- Vendor code and Vendor account code. This information relates to the vendor record in Alma. It represents the subscription agent.

  The created PO line is related to this vendor and vendor account:

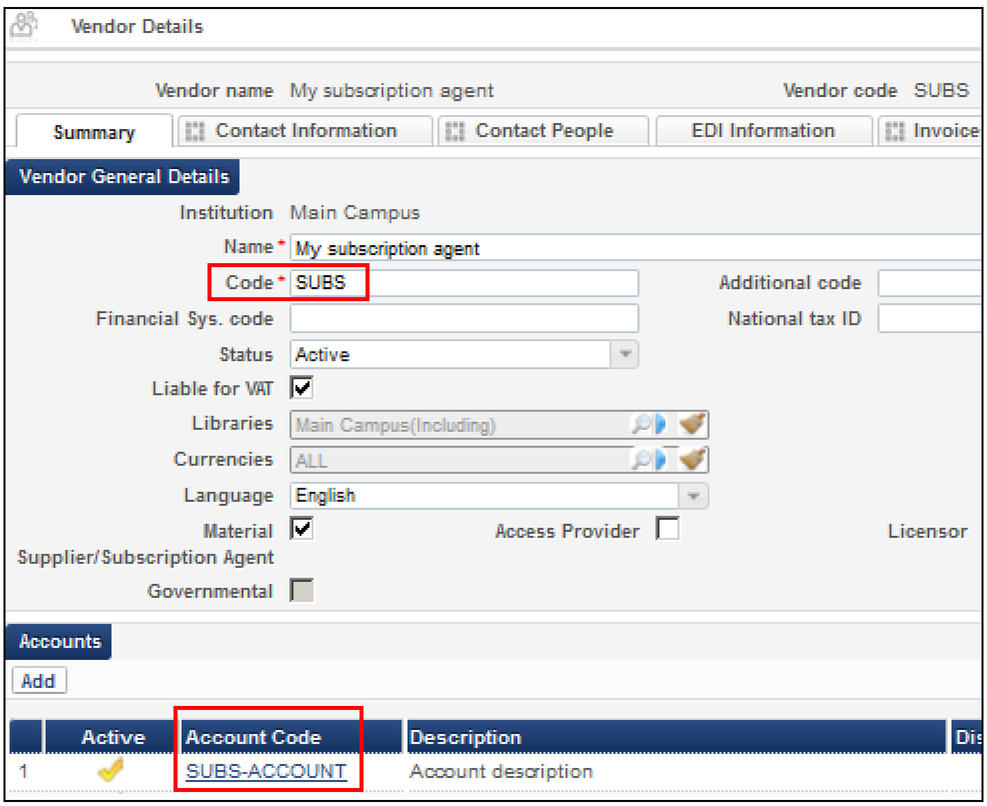


Figure 5- PO Line Vendor Details

- Owning library code(s). The library for which the created PO line is assigned:

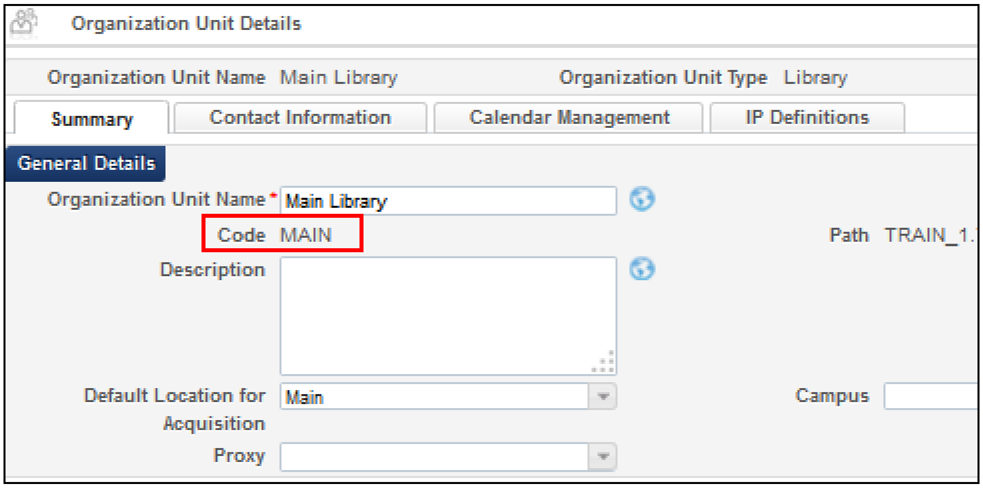


Figure 6 - Library of Assigned PO Line

- Location code(s). The location in which the related item(s) are created. Relevant only for physical material:

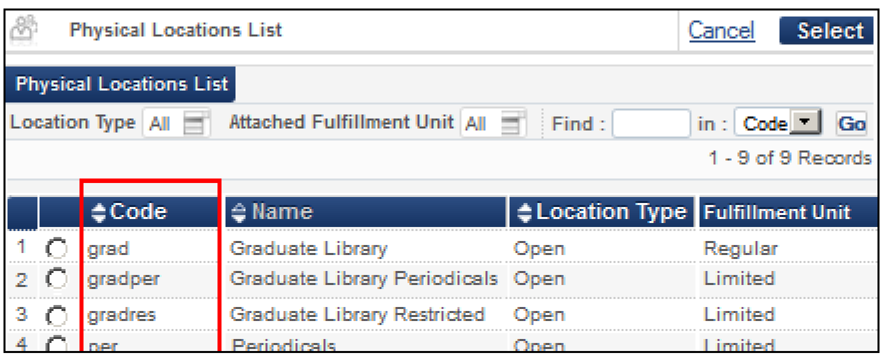


Figure 7 - Physical Locations Where the Related Items Are Created

Added PO Line Sent Date

With the October 2014 release, the sent date of an item is included in the PO line search results or in the claims task list, where relevant. (See below.)

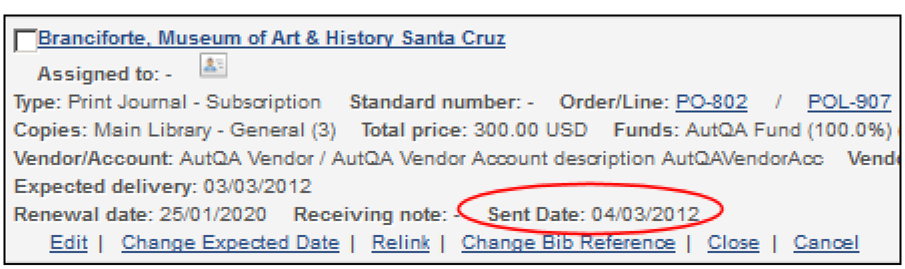


Figure 8 - Sent Date in a Claim

Additional User Information Pop-Ups

The PO line **Assigned to** field now has a standard user contact pop-up with a link to the contact's email.

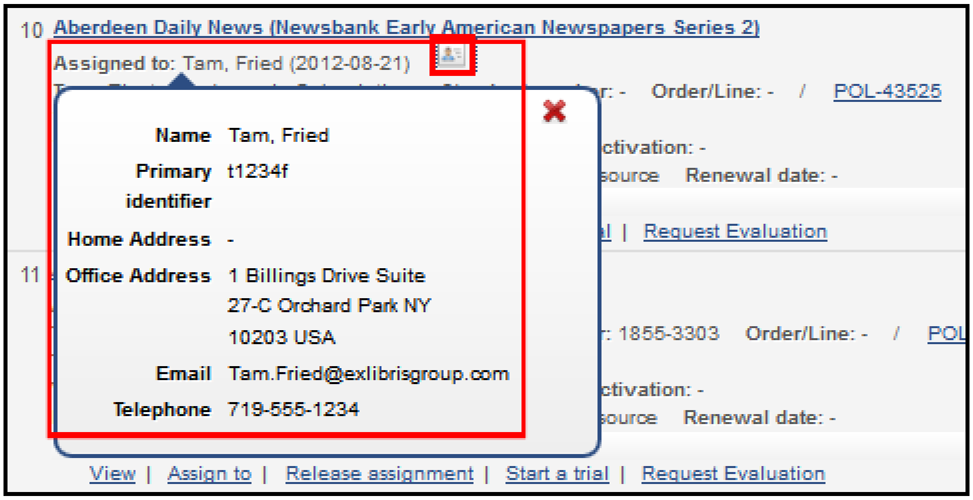


Figure 9 – User Information Pop-Up

The PO line **History** tab, **Operator** column, has the same pop-up.

PO Line Package Job Scheduling

Description

It is now possible to configure the time at which the PO Line Package job – the job that packages PO lines into POs – runs.

Technical Instructions

The following role can configure the PO Line Package job schedule:

- Acquisitions Administrator

To configure the time at which the PO Line Package job runs:

1 On the Acquisitions Configuration page (**Acquisitions** > **Acquisitions Configuration** > **Configuration Menu**), click **Acquisition Jobs Configuration** under **General**.

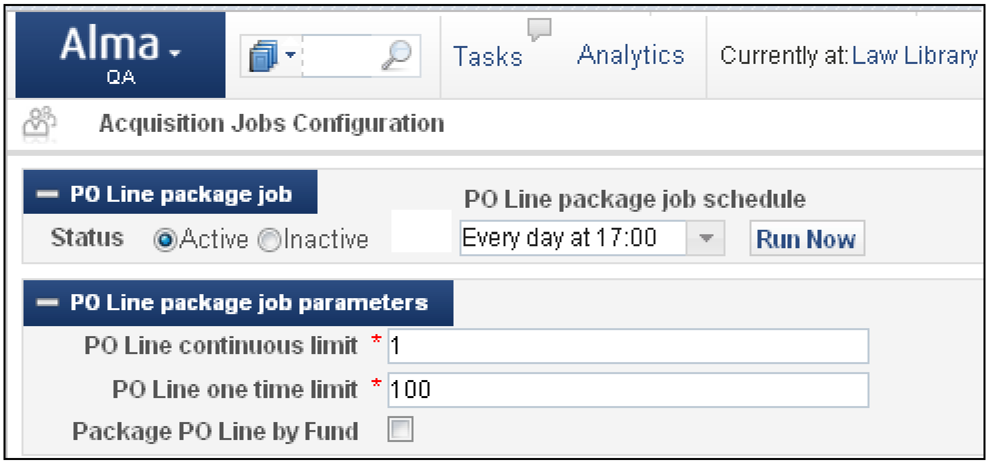


Figure 10 – Acquisitions Jobs Configuration

2 Under **Status**, select **Active** to make the job active or select **Inactive** to make the job inactive.

3 Under **PO Line Package job schedule**, select the time at which you want the job to run from the drop-down list.

If you want the job to run immediately, click **Run Now**.

4 In the **PO line continuous limit** field, enter the maximum number of continuous PO lines that can be packaged together in a PO.

5 In the **PO line one time limit** field, enter the maximum number of one-time PO lines that can be packaged together in a PO.

6 Select **Package PO line by fund** to package PO lines in a PO according to fund.

PO Emails Sent to Vendors Now Available as Attachments to the PO

PO emails that are sent to vendors are now available in the **Attachments** tab of the PO. This allows you to refer to the PO email for follow-up.

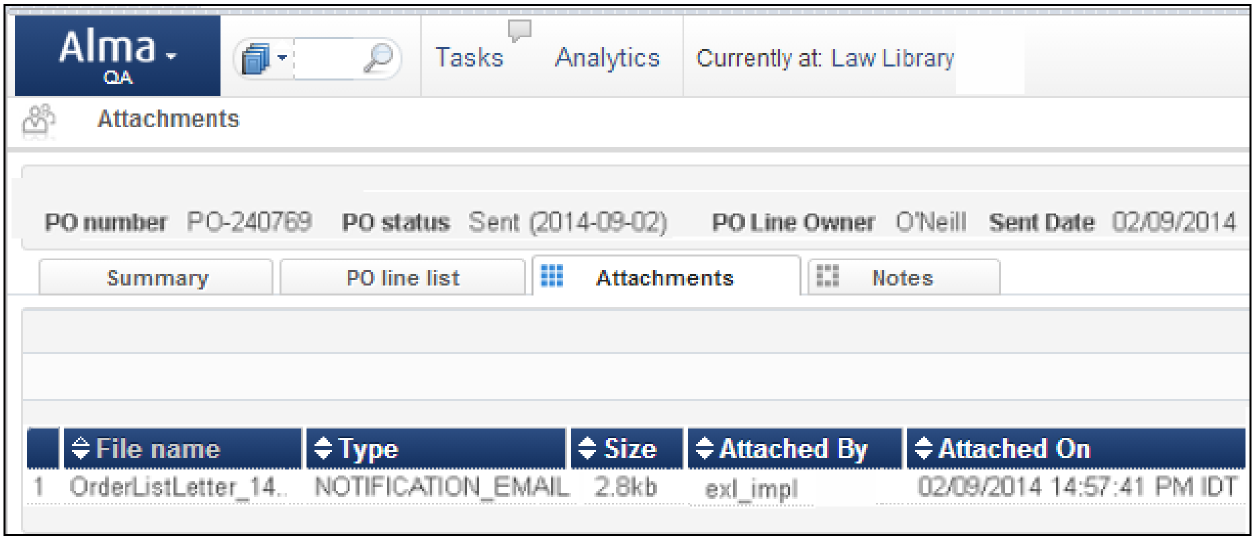


Figure 11 – PO as an Attachment

Support for ONIX-PL-Formatted Licenses

Description

Alma supports the uploading of licenses that conform to the Digital Library Federation (DLF) standards. For the October release, Alma has added the ability to load licenses in the format of ONline Information eXchange (ONIX) for Publication Licenses (PL) and create a DLF license based on the ONIX-PL license loaded. Alma maps fields from the ONIX-PL XML file to fields in the DLF-based license template, as described in the following tables.

If any of the following terms exists in the ONIX file, Alma maps the field with the value **Yes**.

ONIX Field	Alma Field
General Terms Section:	
AllRightsReserved	All rights reserved
DatabaseProtectionOverride	Database protection override clause
StatutoryRightsAffirmation	Fair use clause
ClickThroughOverride	Clickwrap modification clause indicator
ConfidentialityOfUserData	Confidentiality of user information indicator
LicenseeIndemnity	Indemnification by licensee clause

ONIX Field	Alma Field
LicensorIntellectualPropertyWarranty	Intellectual property warranty indicator
UCITAOverride	UCITA Override Clause Indicator
Supply Terms Section:	
ComplianceWithAccessibilityStandards	Accessibility compliance indicator
CompletenessOfContent	Completeness of Content clause indicator
ConcurrencyWithPrintVersion	Concurrency with print version clause indicator

If any of the following terms exists in the ONIX file, Alma maps the text from the `href id` field of the ONIX file to the Alma field.

ONIX Field	Alma Field
General Terms Section:	
ApplicableCopyrightLaw	Applicable Copyright Law
GoverningLaw	Governing law
ActionOnTermination	Termination Requirements
Supply Terms Section:	
ContentWarranty	Content Warranty
ServicePerformanceGuarantee	Performance Warranty Uptime Guarantee

If either of the following terms exists in the ONIX file, Alma maps the field with the relevant ENUM (Permitted/ Prohibited/ Silent/ Un-interpreted/ Not Applicable).

ONIX Field	Alma Field
Usage Terms Section:	
SupplyCopy	Scholarly sharing
PrintCopy	Print copy

Fields that are mapped from ONIX-PL take on the attributes (such as display order) and characteristics (such as whether or not a field appears in the license itself) of the DLF fields, as configured by the Alma Acquisitions Administrator. Thus a field that has been mapped from

ONIX-PL to Alma may not show in the license even though it is in use, depending on the settings of the DLF field to which the ONIX-PL field is mapped.

Fields that exist in the ONIX-PL XML file but not in Alma are stored in the original uploaded XML file from the library.

Technical Instructions

The License Manager role uploads the ONIX-PL XML file and creates a license based on its specifications.

To create an Alma license from an ONIX-PL-formatted license:

1. On the Licenses and Amendments page (**Acquisitions** > **Acquisitions Infrastructure** > **Licenses**), click the **Add License** button.

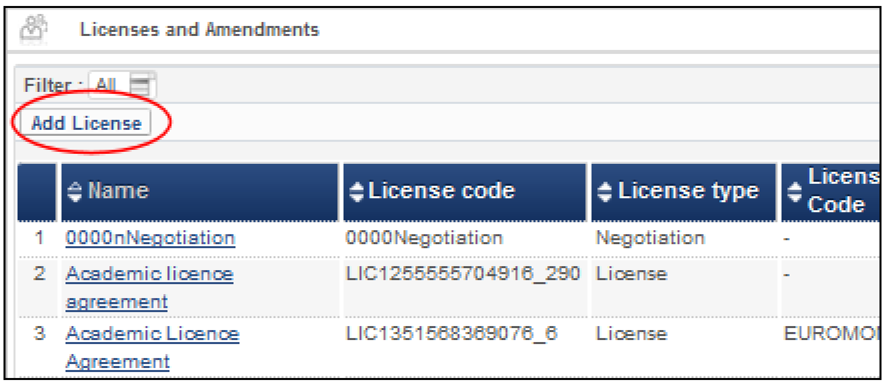


Figure 12 - Add License Button

Step 1 of the Add License wizard opens. Typically, **Manually** is the default selection.

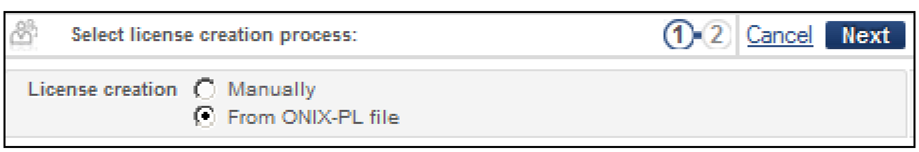


Figure 13 - License Creation - Step 1

2. Select **From ONIX-PL file** and click **Next**.

   Step 2 of the Add License wizard opens.

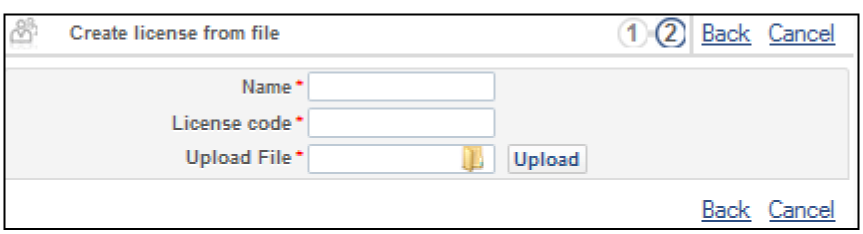


Figure 14 - Create License from File - Step 2

3 Enter a name and code for the license.

4 Click the folder in the **Upload File** field, browse to the ONIX-PL upload file, select it, and click the **Upload** button.

5 Alma uploads the file and takes you to the Summary tab of the License Details page.

For detailed information about creating and working with licenses, see **Managing Licenses and Amendments** in the *Alma Acquisitions Guide* or in the online help.

Other Acquisitions Enhancements

- The following PO line type creation options are now available for local electronic collections:
  - Electronic Collection - One Time
  - Electronic Collection – Subscription
- The **Incident log** field in the Vendor Interface Detail's Administration Information tab (accessible from the Vendor Details page when **Access provider** is selected) has been enlarged to contain up to 2000 characters.

Resource Management

The following sections describe the functions provided for the Resource Management functional area in the October 2014 release of Alma.

Added Information Pop-Up to Electronic Inventory Editors

Description

Alma now allows staff users to view electronic inventory information (such as the creation date, creator, and Alma ID) in the following electronic inventory editors: Electronic Collection Editor, Electronic Service Editor, and Electronic Portfolio Editor.

Technical Instructions

The following roles can configure electronic collections:

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

To view the electronic inventory pop-up window:

1 Perform a repository search to find an electronic collection.

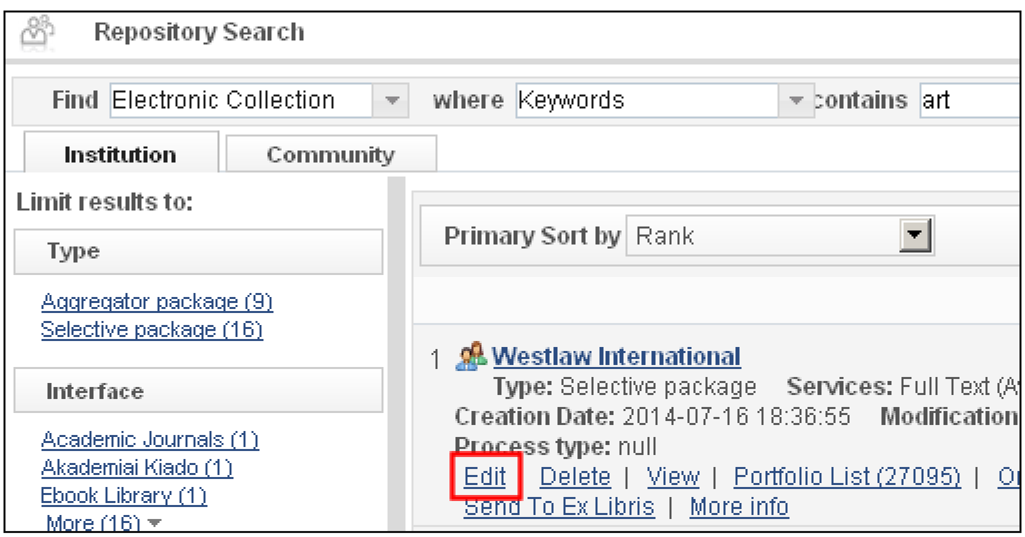


Figure 15 – Results from Electronic Collection Search

2 Click the **Edit** link for the electronic collection to open the Electronic Collection Editor page.

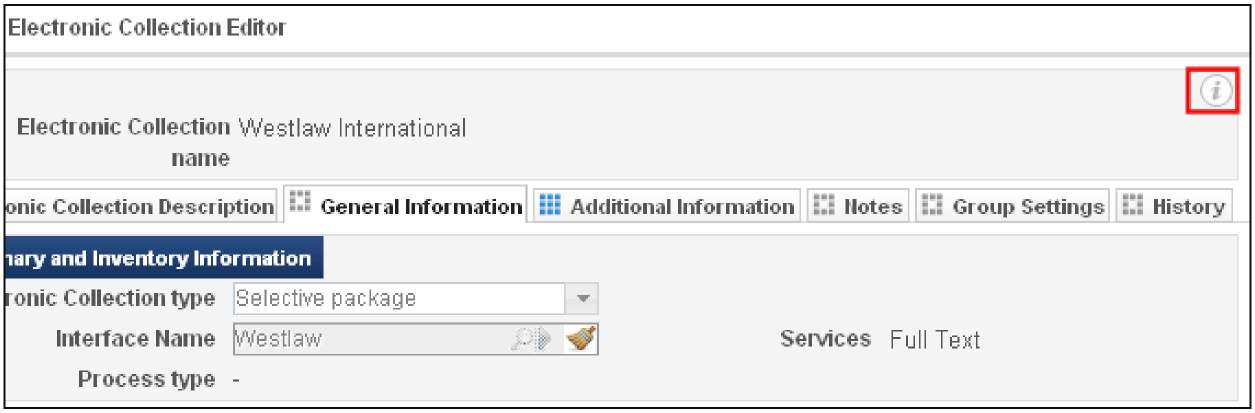


Figure 16 – Electronic Collection Editor

3 Click the information icon to open the pop-up window.

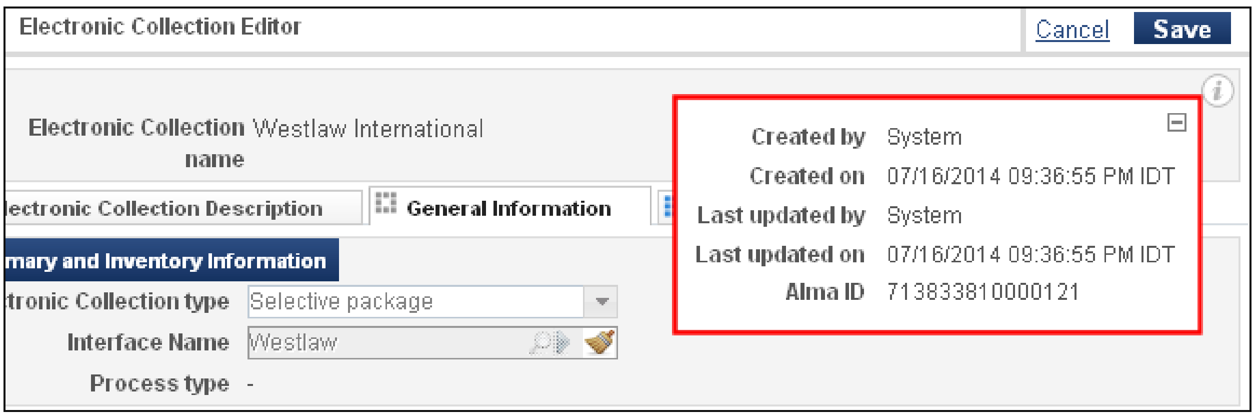


Figure 17 – Information Pop-Up Window

Improved Delete Confirmation for Electronic Collections

Description

Alma has added warning information to the Delete Confirmation dialog box to clarify what will happen when an electronic collection is deleted. The confirmation now includes the following warnings to staff users:

- Associated services, portfolios, and activation tasks will be deleted.
- PO lines will be unlinked from their resources.

In addition, the confirmation message includes the number of portfolios that will be deleted.

Technical Instructions

The following roles are required to delete electronic collections:

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

To access the improved delete confirmation dialog box:

1 Perform a repository search to find the electronic collection that you want to delete.

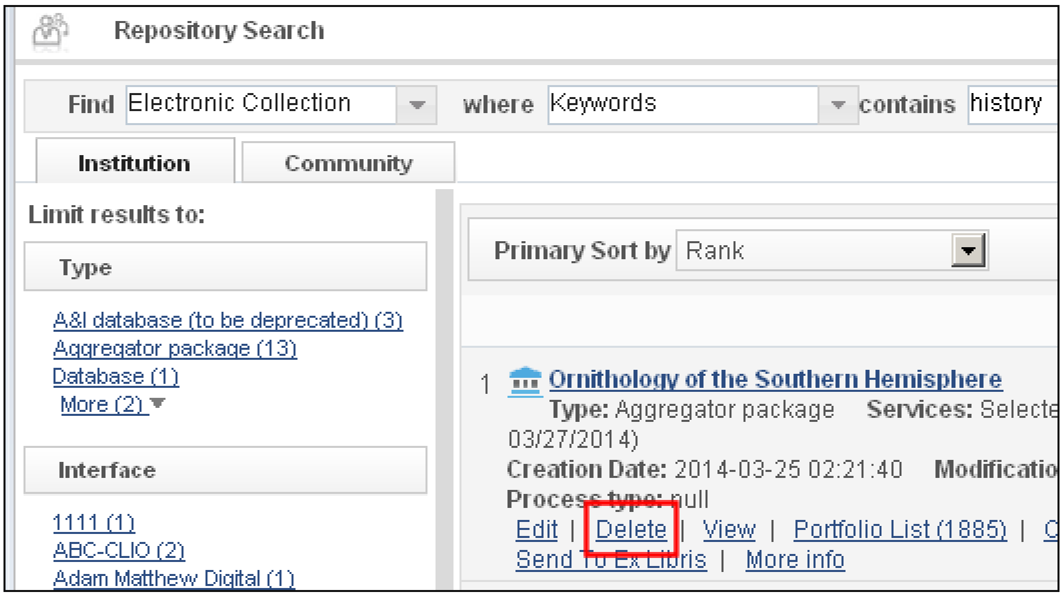


Figure 18 – Repository Search

2 Click the **Delete** link for the electronic collection.

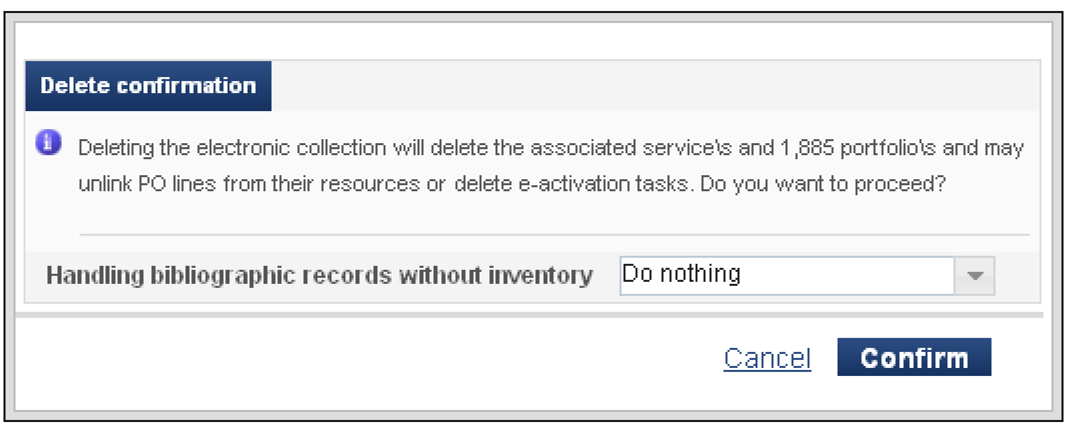


Figure 19 – Delete Confirmation Dialog Box

Enhancements to the Electronic Resource Activation Task List

The following enhancements have been made to the Electronic Resource Activation Task List (**Resource Management** > **Manage Inventory** > **Manage Electronic Resource Activation**):

- The **Expected Activation Date** filter has been added with the following options:
  - **All** – All activation tasks are displayed.
  - **Passed** – Only the activation tasks whose activation date has passed are displayed.
  - **Not Passed** – Only the activation tasks whose activation date has not passed are displayed.
- A view option (**Actions > View**) has been added that allows you to open an activation task in **View** mode.
- Clicking an enabled check mark in the **Notes** column opens the **Notes** tab.
- The **Expected Activation Date** column has been added.
- In the **Assigned to Others** tab, the **Assigned To** column has been added and is sortable.

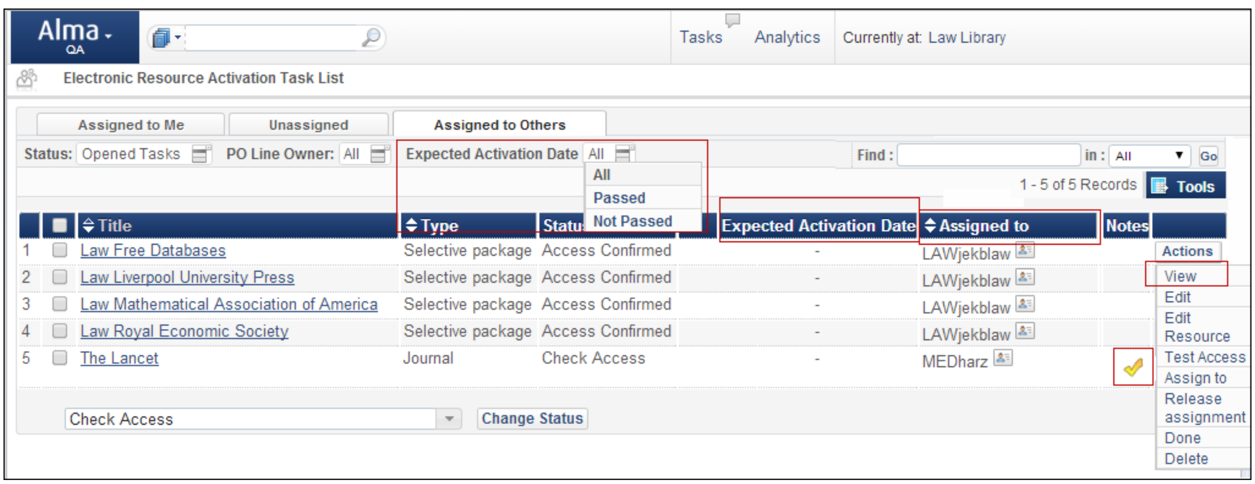


Figure 20 – Electronic Resource Activation Task List

Other Resource Management Enhancements

- The following label changes were made in the Resource Management area:
  - In the MD Editor, Copy to Institution was changed to **Copy to Catalog**.
  - In the Export Electronic Portfolio job, the Alma Link Resolver Basis URL parameter was changed to **Link Resolver Base URL**.

- The **Assign Record to Another Cataloger** option has been restored to the MD Editor (the option had mistakenly been removed with the September release).
- A new out-of-the-box normalization rule, **Fix 245 2nd indicator,** has been added. For detailed information on this normalization rule, refer to the **Normalization Rules – Syntax and Examples** section of the *Alma Resource Management Guide* or Alma online help.
- A **Go to link** pop-up is now available for 856 fields subfield u in the MD Editor and bibliographic record simple view (when you click on a title from the search results). When clicking this link (if the link is a full link, prefaced by http://), the URL is displayed in a new browser tab.

Fulfillment

The following enhancements have been made to the Fulfillment functional area in the October 2014 release of Alma:

- For item-level requests and title-level requests with only one item, Alma can be configured to mark the requested item as not available. The item being requested will be marked as **Item not Available** and will have a **Process** status of **Requested**. In such cases, if you release or cancel the request, the item's **Status** becomes **Item in Place**. To enable this functionality, contact Ex Libris Support.
- Library-level fines are now applied to the library that is the owner of the items as opposed to the library whose circulation desk manages the loan.
- Display logic rules are now applied to related titles in addition to the other titles displayed in the View It/Get It tabs.
- In the lost loan profile, the **Days after status date** field now refers only to a change made to the status selected in the **Loan status** field (and not to any change made to the loan's parameters).
- Lost loan profiles are now called **overdue and lost loan** profiles.
- Loans and requests of all types are now created and displayed with the full **title_abcnph** format (subfields: a, b, c, n, p, h). Note that to display the full title format for notifications, you must customize the recordTitle.xsl to use the field **title_abcnph** instead of **title**.
- A new customer parameter, **check_self_ownership_serial**, is now available (**Fulfillment > Fulfillment Configuration > Configuration Menu > General > Other Settings**). If the parameter is set to **True** (the default value), self-ownership checks are performed for serial titles and the resource sharing link will be hidden in the Get It/View It tabs if the serial is not self-owned. If this parameter is set to **False**, self-ownership checks are not performed for serial titles and the resource sharing link will be exposed regardless of whether the serial is self-owned.

Administration

The following enhancements have been made to the Administration functional area in the October 2014 release of Alma:

- On the General Configuration Menu page (**Administration > General Configuration > Configuration Menu**), the following changes were made:
  - The Back Office link was changed to **Alma Logo and Color Scheme.**
  - The Digital Delivery link was changed to **Delivery System Skins**.

  Note that these links are now accessible in read-only mode to customers during implementation (in their production environments).
- It is now possible to separately define whether the following roles can update user identifiers, in addition to updating other user attributes: Circulation Desk Manager, Circulation Desk Operator, User Manager, User Administrator, and General System Administrator. If you want to disable the ability to edit user identifiers for any of these roles, contact Ex Libris Support.
- In the CRM Contacts mapping table (**Administration > General Configuration > Configuration Menu > General Configuration > CRM Contacts**), the Username field was changed to **Salesforce ID** and the Password field was changed to **Customer Center ID**.

Resource Sharing

The following sections describe the functions provided for Resource Sharing in the October 2014 release of Alma.

Added Location to the Shipping Interface

Description

As of the October release, you can specify the temporary location for a resource sharing lending request item that is being shipped instead of accepting the default lending location for a resource sharing library. This enables the lending libraries to temporarily move shipped items to different locations in the resource sharing library. For example, a library may want to distinguish between items that are shipped for long-term loans and those that are shipped for short-term loans, or to distinguish between items that are shipped to different borrowers.

Technical Instructions

The following roles can specify the temporary location for a resource sharing lending request item that is being shipped:

- Fulfillment Services Operator
- Fulfillment Services Manager

To specify the temporary location for a resource sharing lending request item:

1. On the Resource Sharing Lending Requests Task List page (**Fulfillment > Resource Sharing > Lending Requests**), click **Ship Item** for a request. The Shipping Items page opens.

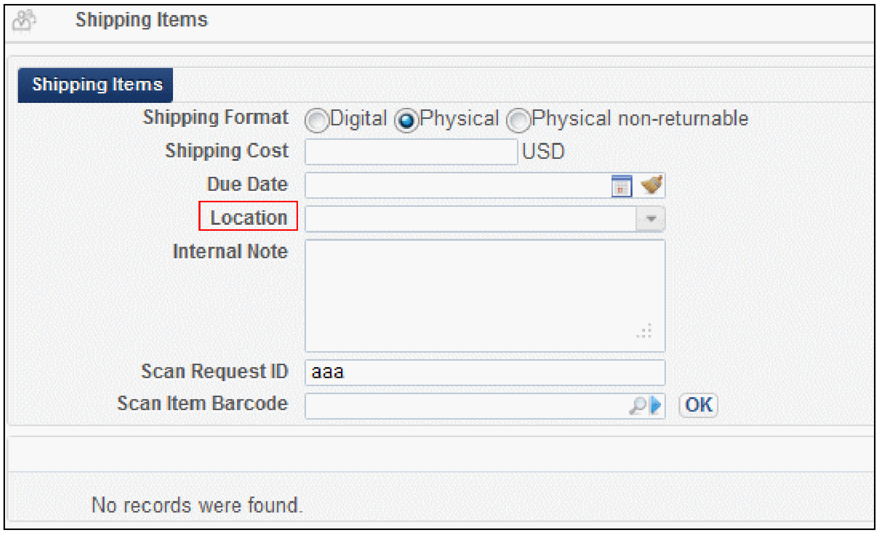


Figure 21 – Shipping Items Page

2 In the **Location** field, specify a temporary location for the item to be shipped. The options displayed in the **Location** field are the locations for the library that is specified in the **Currently at:** field.

3 In the **Scan item barcode** field, scan the item's barcode and click **OK**. The request's status changes to **Shipped Physically**.

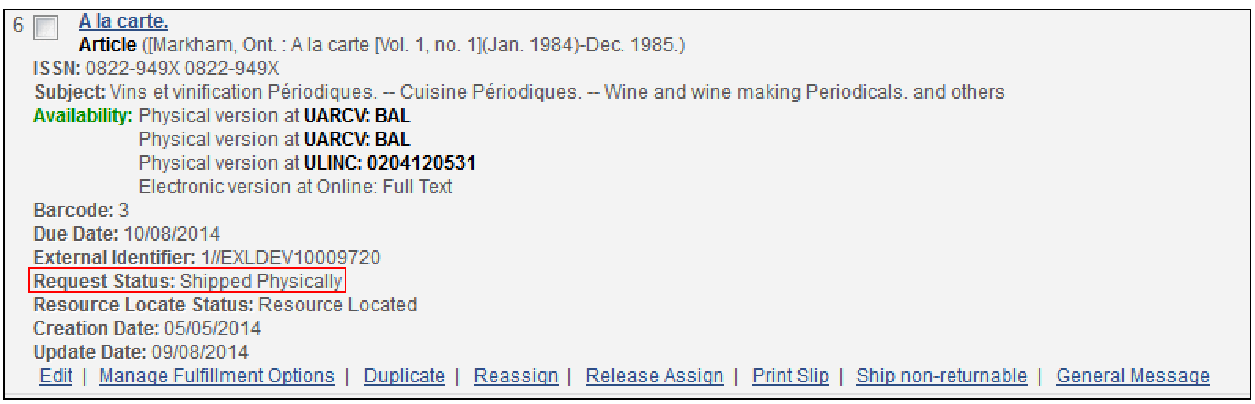


Figure 22 – Request Status for Shipped Item

Adding Availability and "Requestability" Consideration to Alma Borrowing Locate

Description

This feature enables borrowing locate profiles (of type **Alma**) to be used to query the potential suppliers in a rota for titles that are available and requestable. This is in addition to the previous functionality of the locate profiles, which verified only the existence of the title, but not the availability and requestability of its inventory.

An **Available** item has a status of **Item in Place**. A **Requestable** item can be requested for resource sharing.

Note: This feature works only for locate profiles of type **Alma**.

Technical Instructions

The following roles can configure a locate profile to verify availability/requestability:

- Fulfillment Services Operator
- Fulfillment Services Manager

To enable checking availability/requestability for a locate profile:

1. On the Locate Profiles List page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing**), click **Add Locate Profile** under **Locate Profiles**. The first page of the Locate Profile Details wizard opens.

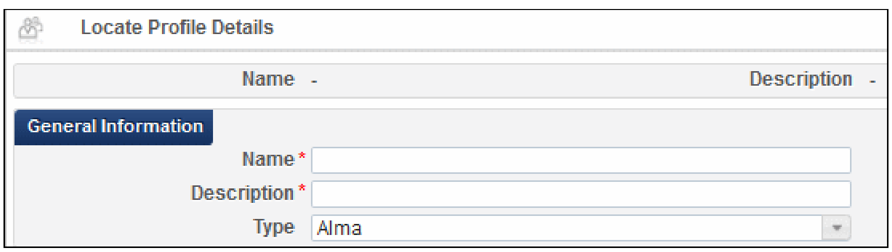


Figure 23 – Locate Profile Details Wizard — Page 1

2. In the **Name** field, enter a name for the locate profile.
3. In the **Description** field, enter a description for the locate profile.
4. In the **Type** field, select **Alma**.
5. Click **Next**. The second page of the Locate Profile Details page opens.

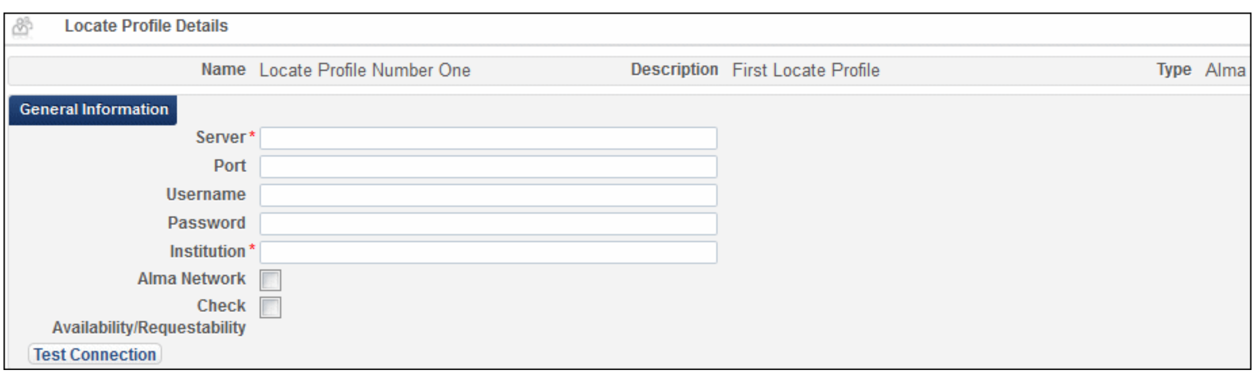


Figure 24 – Locate Profile Details Wizard — Page 2

6 In the **Institution** field, enter a code for the institution.

7 Select the **Check availability/requestability** check box for the profile to check whether an item is available and requestable in the institution.

- **Available** — Indicates that the item's status is **Item in Place**
- **Requestable** — Indicates that the item can be requested as part of a resource sharing request

When selecting this check box, the **Alma network** check box is disabled. When selecting the **Alma network** check box, this check box is disabled.

Note: Availability and Requestability are checked on the institution level only.

8 Configure any other relevant parameters and click **Save**.

Other Resource Sharing Enhancements

- The **Physical Non-Returnable** format has been added to the Primo resource sharing form.
- Automatic requests for resource sharing lending requests are now created even if there is more than one holdings or portfolio for the title. In addition, the following is validated before the automatic request is created:
  - The item is requestable for resource sharing.
  - The item is in a library with which the lending resource sharing library has a Supply From relationship.
  - The lending request has no volume/issue.
  - Digital and physical non-returnable lending requests that are shipped to the borrower can now be marked as completed by selecting the **Complete the request** check box on the Shipping Items page. The request can also be completed by manually changing the request status.

Analytics

The following section describes the functions provided for Analytics in the October 2014 release of Alma.

Item Creation Date and Item Modification Date Enhancements

Description

The following changes have been implemented to the Creation Date and Modification Date dimensions in the Physical Items subject area:

- The dimensions have been renamed **Item Creation Date** and **Item Modification Date**.
- The words **to be deprecated** have been added to fields that will be deprecated in the near future. These columns should not be used.
- The names of all date fields, as displayed in the following table, have been modified to be clearer. (Previously, users needed to rename the fields in order to distinguish between the Create Date and Modification Date values when creating reports, since all date fields were named `date key xxx`. The names are now comprehensible.)

New Name	Previous Name
Item Creation Date	
Item Creation Date	Date key
Item Creation Month Key	Month Key
Item Creation Month	Month Desc
Item Creation Full Month	Full Month Desc
Item Creation Quarter	Quarter Desc
Item Creation Year	Year
Item Creation Fiscal Year	Fiscal Year Desc
Item Modification Date	
Item Modification Date	Date key
Item Modification Month Key	Month Key
Item Modification Month	Month Desc
Item Modification Full Month	Full Month Desc
Item Modification Quarter	Quarter Desc
Item Modification Year	Year
Item Modification Fiscal Year	Fiscal Year Desc

Note:
These changes are planned for all the date fields across all subject areas as part of the Analytics roadmap to create a consistent experience for report creation.

The changes in the names of the fields should have no impact on existing reports that use these fields, unless the fields were used as part of an SQL statement. If you nevertheless experience errors with existing reports, it is recommended that you try to replace the existing fields with the renamed ones.

Technical Details

The Design Analytics role can access this enhancement.

To access the Item Creation Date and Item Modification Date dimensions in Alma Analytics:

Select **Physical Items > Item Creation Date** and **Item Modification Date**.

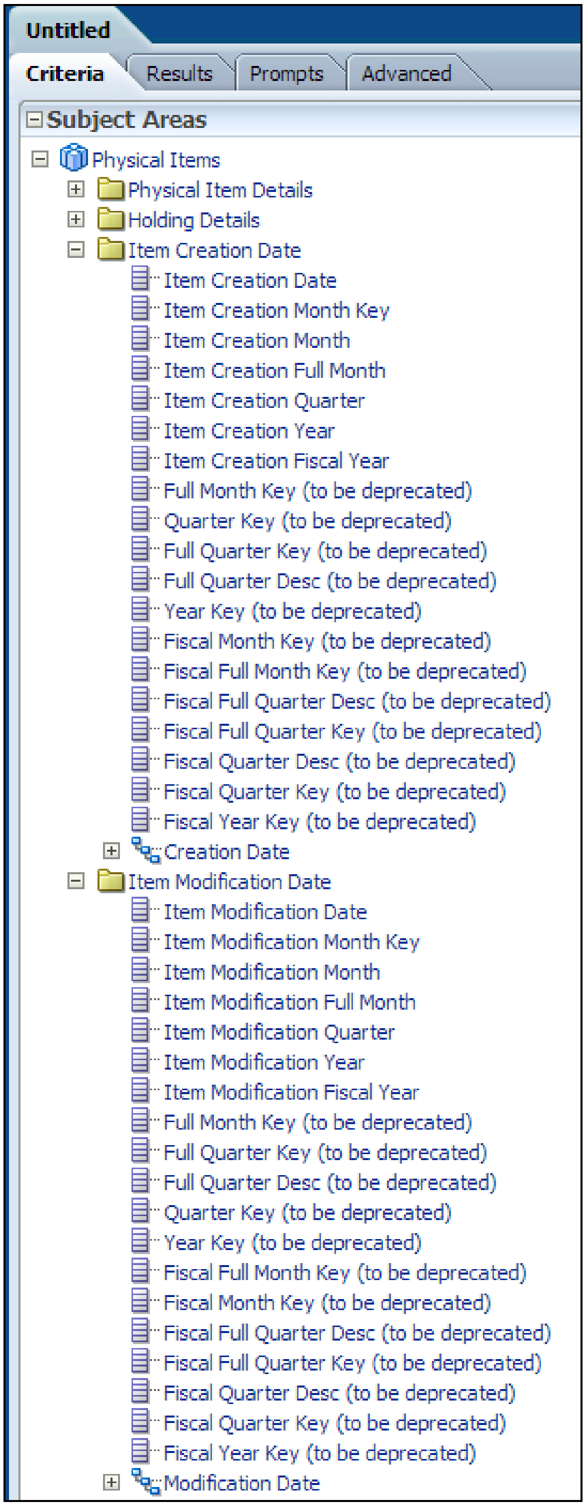


Figure 25 – Item Creation Date and Item Modification Date

Improvements to the Fines and Fees Subject Area

The **Original Amount** field (**Fines and Fees > Transaction Details**) now functions properly and it is no longer necessary to use the **Original Amount - Not Sum** field instead. The **Original Amount field - Not Sum** has been renamed **Original Amount field - Not Sum (to be deprecated**).

Note that these improvements address many customer support issues.

Addition of Records Views and Result Clicks Fields to the Usage Data Details Dimension

Description

The Records Views and Result Clicks fields have been added to the Usage Data Details dimension of the Usage Data subject area. The information for these fields comes from UStat.

- **Records Views** – A successful request for a database record that has originated from a set of search results, from browsing the database, or from clicking another database record.
- **Result Clicks** – A click originating from a set of search results.

Technical Details

The Design Analytics role can access this enhancement.

To access the Records Views and Result Clicks fields in Alma Analytics:

Select **Usage Data > Records Views** and **Result Clicks**.

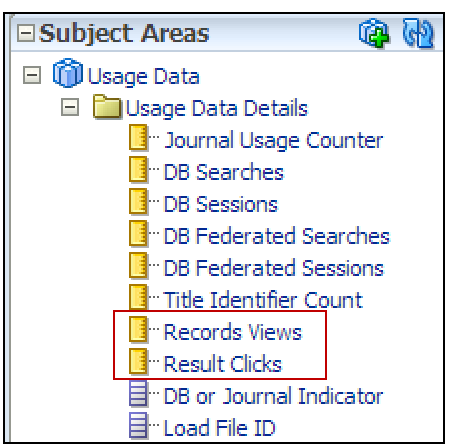


Figure 26 – Records Views and Result Clicks

The following is an example of a report using the Records Views and Result Clicks fields:

Database Usage - Titles

					2014
Title	DB Federated Searches	DB Sessions	Records Views	Result Clicks	DB Searches
Academic Search Complete	20,087		42,162	75,723	103,741
Agricola	10		64	99	6,329
AHFS Consumer Medication Information	8		0	2	3,825
Alt HealthWatch	10		62	141	11,572
Alternative Press Index	8		17	24	3,879
Alternative Press Index Archive	8		12	22	3,903
America: History & Life	20,094		1,076	1,670	15,546
American Film Scripts Online		20			94
Art Abstracts (H.W. Wilson)	8		281	429	5,477
Art Index Retrospective (H.W. Wilson)	8		43	50	5,432
Arte Público Hispanic Historical Collection: Series 1	8		1	1	3,817
Asian American Drama		2			0
Audiobook Collection (EBSCOhost)	1		0	0	2,106
Avery Index to Architectural Periodicals	8		40	76	4,705
Bibliography of Native North Americans	10		0	3	3,877

Figure 27 – Records Views and Result Clicks Report

Alma APIs

The following section describes the Alma API enhancements provided in the October 2014 release.

Alma RESTful APIs

For the October release, the following RESTful APIs were added:

- The Create Order API. For more information, see Real-Time Acquisitions.
- The Get Location API, which retrieves all physical locations for a given library:

  ```
  /conf/libraries/{libraryCode}/locations
  ```

- The Library Request Digitization API. This API uses the existing create item requests and create title requests APIs, with a new request type in `payload` for library digitization. The requester ID is optional for this type.

  ```
  POST /almaws/v1/bibs/mms_id/requests (without user_id)
  POST /almaws/v1/bibs/mms_id/holdings/holding_id/items/item_pid/requests
  (without user_id)
  ```

  The user ID may be sent as a parameter of the URL: `&user_id={User ID}`. If sent without the user_id and type=digitization, a library digitization request is created.

- The Get User Loans Web services were converted to RESTful APIs. For information, see the Retrieve User Loans:

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

Collaborative Networks and Multicampus Institutions

The following sections describe Alma enhancements provided for collaborative networks and multicampus institutions in the October 2014 release.

Overlay Community Zone Records in the Network Zone

Description

For collaborative networks, this enhancement allows Institution Zone (IZ) members to import full bibliographic records and overlay the brief Community Zone (CZ) bibliographic records in the Network Zone (NZ) and also retain which member institutions have activated the resources (which is indicated by the **Held By** field).

Technical Instructions

The following roles can edit and view import profiles:

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

To overlay a CZ record in the NZ:

1. On the Run Import page (**Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles**), scroll to the import profile that you want to edit in the list or locate it using the Find box at the top of the list, and then select **Actions > Edit**.

   The Import Profile Details page opens.

2 Click the **Match Profile** tab to open it.

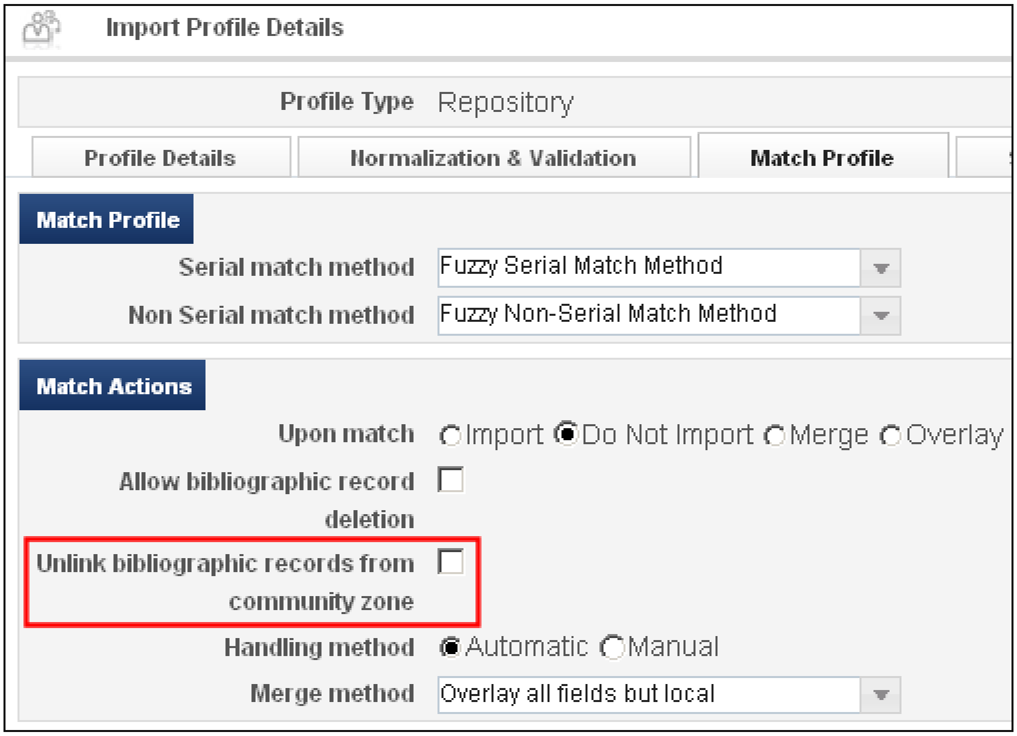


Figure 28 – Import Profile Details Page – Match Profile Tab

3 Select the **Unlink bibliographic records from Community Zone** check box.

Note: This field appears only if the **ignore_cz_records** parameter is set to **false** in the CustomerParameters mapping table (**Resource Management > Resource Configuration > Configuration Menu > Other Settings**).

Configuring a Rota Template from the Network Zone

Description

Rota templates and rota assignment rules can now be centrally configured in the Network Zone and automatically distributed to the network member institutions. Rota templates and rota assignment rules display on their respective pages with a **Scope** value of **Network**.

The Distribute Central Resource Sharing Configuration job distributes the rota templates and rota assignment rules to all network member institutions. The job is monitored in the Network Zone.

Technical Instructions

The following role can define rota templates:

- Resource Sharing Partners Manager (assigned in the Network Zone)

The following role can define rota assignment rules:

- Fulfillment Administrator (assigned in the Network Zone)

To save a rota template located in the NZ to the IZ:

1. On the Rota Templates page (**Fulfillment > Resource Sharing > Rota Templates**), locate a template with a **Scope** value of **Network**.

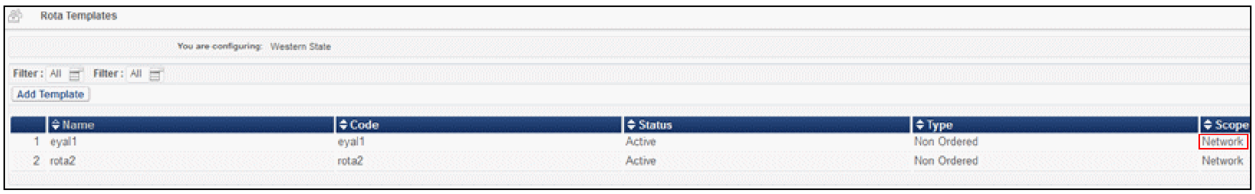


Figure 29 – Rota Templates Page — Network Scope

2. Select **Actions > Duplicate**. The General Information page opens, where you can modify the parameters of the rota template.
3. Click **Save**. The template saves as an institution template (**Scope = Institution**).

Note: The **Network Rules List** section displays only after the Distribute Central Resource Sharing Configuration job runs and copies the rota templates to the NZ's member institutions.

To save a rota assignment rule located in the NZ to the IZ:

1. On the Rota Assignment Rules List page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Rota Assignment Rules**), locate a rule in the **Network Rules List** section.

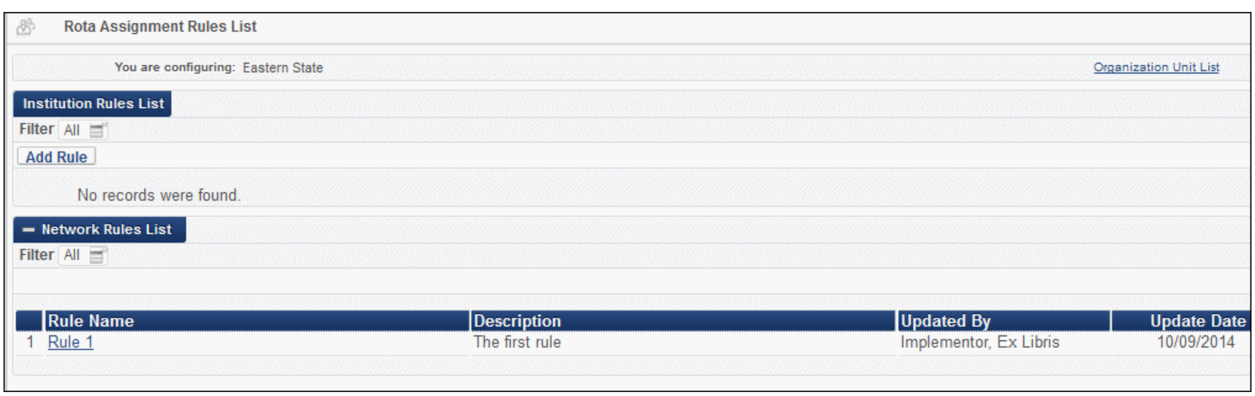


Figure 30 – Rota Assignment Rules List Page — Network Rules List Section

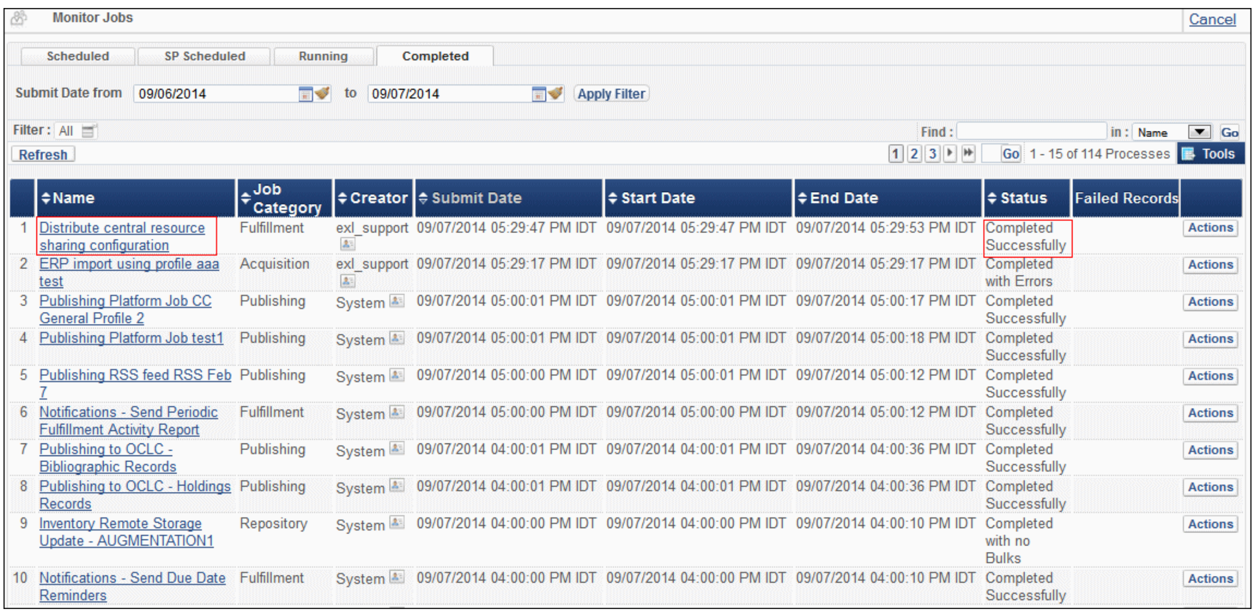
Note: The **Network Rules List** section displays only after the Distribute Central Resource Sharing Configuration job runs and copies the rota templates to the NZ's member institutions.

2 Select **Actions > Duplicate**. The Rota Assignment Rules page opens, where you can modify the parameters of the rota assignment rule.

3 Click **Save**. The rule saves as an institution rule (**Scope = Institution**). The **Update Date** value updates accordingly.

To view output of the Distribute Central Resource Sharing Configuration job for rota templates and rota assignment rules:

1 On the Monitor Jobs page's Completed tab (**Administration > Manage Jobs > Monitor Jobs,** click the **Completed** tab), locate a **Distribute Central Resource Sharing Configuration** job with a status of **Completed Successfully**.



	Name	Job Category	Creator	Submit Date	Start Date	End Date	Status	Failed Records	
1	Distribute central resource sharing configuration	Fulfillment	exl_support	09/07/2014 05:29:47 PM IDT	09/07/2014 05:29:47 PM IDT	09/07/2014 05:29:53 PM IDT	Completed Successfully		Actions
2	ERP import using profile aaa test	Acquisition	exl_support	09/07/2014 05:29:17 PM IDT	09/07/2014 05:29:17 PM IDT	09/07/2014 05:29:17 PM IDT	Completed with Errors		Actions
3	Publishing Platform Job CC General Profile 2	Publishing	System	09/07/2014 05:00:01 PM IDT	09/07/2014 05:00:01 PM IDT	09/07/2014 05:00:17 PM IDT	Completed Successfully		Actions
4	Publishing Platform Job test1	Publishing	System	09/07/2014 05:00:01 PM IDT	09/07/2014 05:00:01 PM IDT	09/07/2014 05:00:18 PM IDT	Completed Successfully		Actions
5	Publishing RSS feed RSS Feb 7	Publishing	System	09/07/2014 05:00:00 PM IDT	09/07/2014 05:00:01 PM IDT	09/07/2014 05:00:12 PM IDT	Completed Successfully		Actions
6	Notifications - Send Periodic Fulfillment Activity Report	Fulfillment	System	09/07/2014 05:00:00 PM IDT	09/07/2014 05:00:00 PM IDT	09/07/2014 05:00:12 PM IDT	Completed Successfully		Actions
7	Publishing to OCLC - Bibliographic Records	Publishing	System	09/07/2014 04:00:01 PM IDT	09/07/2014 04:00:01 PM IDT	09/07/2014 04:00:36 PM IDT	Completed Successfully		Actions
8	Publishing to OCLC - Holdings Records	Publishing	System	09/07/2014 04:00:01 PM IDT	09/07/2014 04:00:01 PM IDT	09/07/2014 04:00:36 PM IDT	Completed Successfully		Actions
9	Inventory Remote Storage Update - AUGMENTATION1	Repository	System	09/07/2014 04:00:00 PM IDT	09/07/2014 04:00:00 PM IDT	09/07/2014 04:00:10 PM IDT	Completed with no Bulks		Actions
10	Notifications - Send Due Date Reminders	Fulfillment	System	09/07/2014 04:00:00 PM IDT	09/07/2014 04:00:00 PM IDT	09/07/2014 04:00:10 PM IDT	Completed Successfully		Actions

Figure 31 – Monitor Jobs Page Completed Tab — Distribute Central Resource Sharing Configuration Job

2 Select **Actions > Report**. The Job Report page opens, displaying information on actions performed on rota templates and rota assignment rules in the NZ.

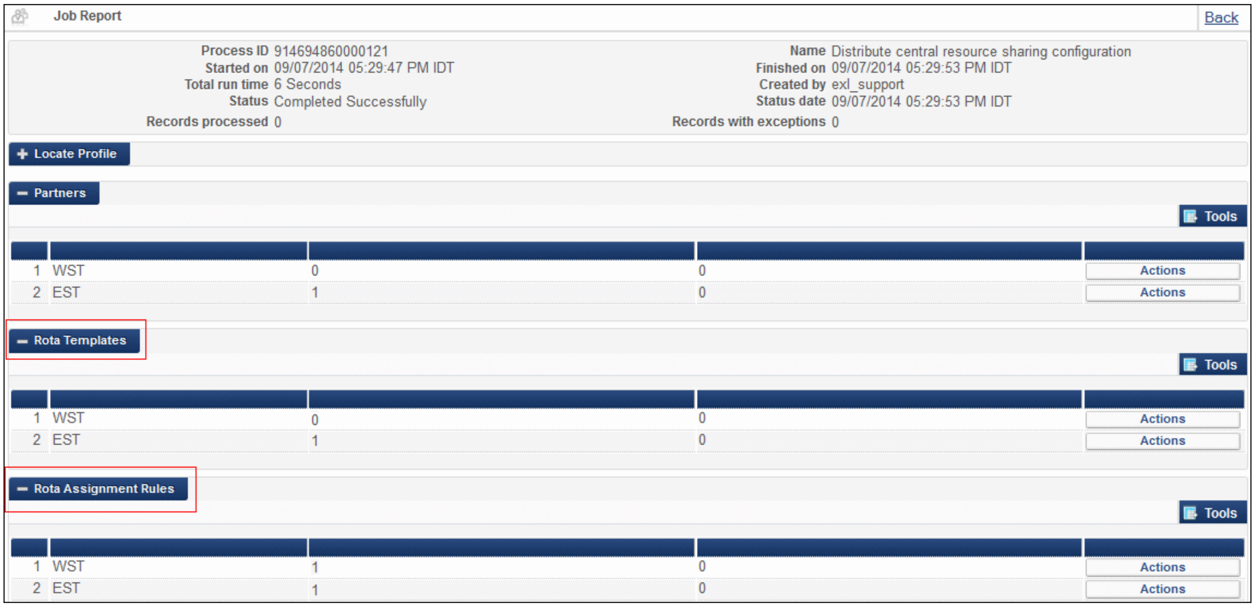


Figure 32 – Job Report Page — Rota Templates and Rota Assignment Rules Sections

3 Select the relevant entry from the **Actions** button to view information on the rota template or rota assignment rule: **View failed records** or **View succeeded records**.

Note: Monitoring the job is done only in the Network Zone by NZ operators.

Other Collaborative Network Enhancements

- When a network member performs a Physical Titles search in the Institution tab, the NZ link icon is now displayed for records that are connected to the Network Zone. When the icon is clicked, the system switches to the Network tab to display the related record and at the same time changes the search type to All Titles.

Alma Interface Updates

The following sections describe Alma interface update enhancements provided in the October 2014 release.

Additional Tabs with Content Indicators

Many tabs on Alma pages allow you to add lists of information. For example, the Notes tab on the Electronic Collection Editor page allows you to create a list of notes. After you add a note, the indicator on the tab will change to let you know that the tab contains notes without opening 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.

As of the October release, the following areas of the UI now have additional content indicators:

- Invoice
- Fund Management
- Vendor Management
- Electronic Collection Editor

For example:

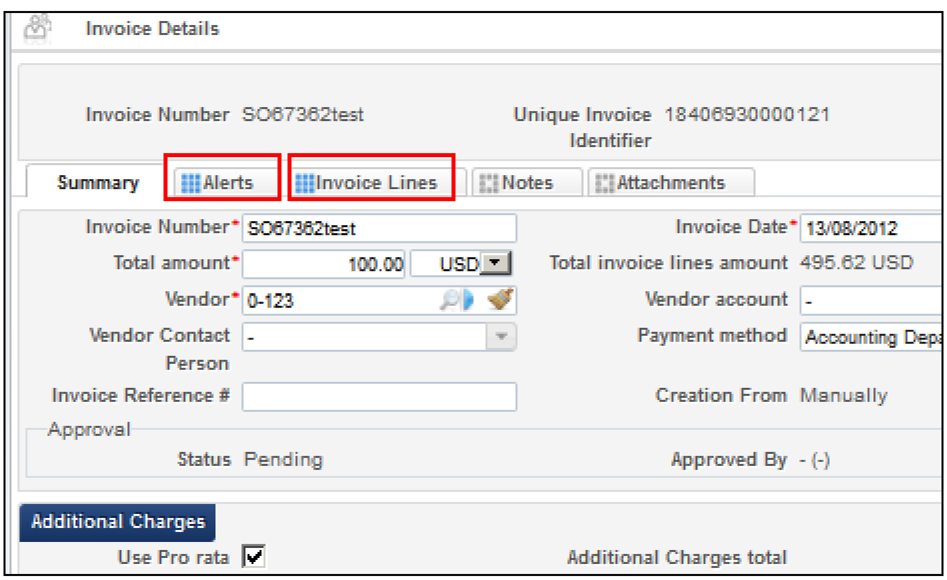


Figure 33 – Invoice Details - Content Indicators on Tabs

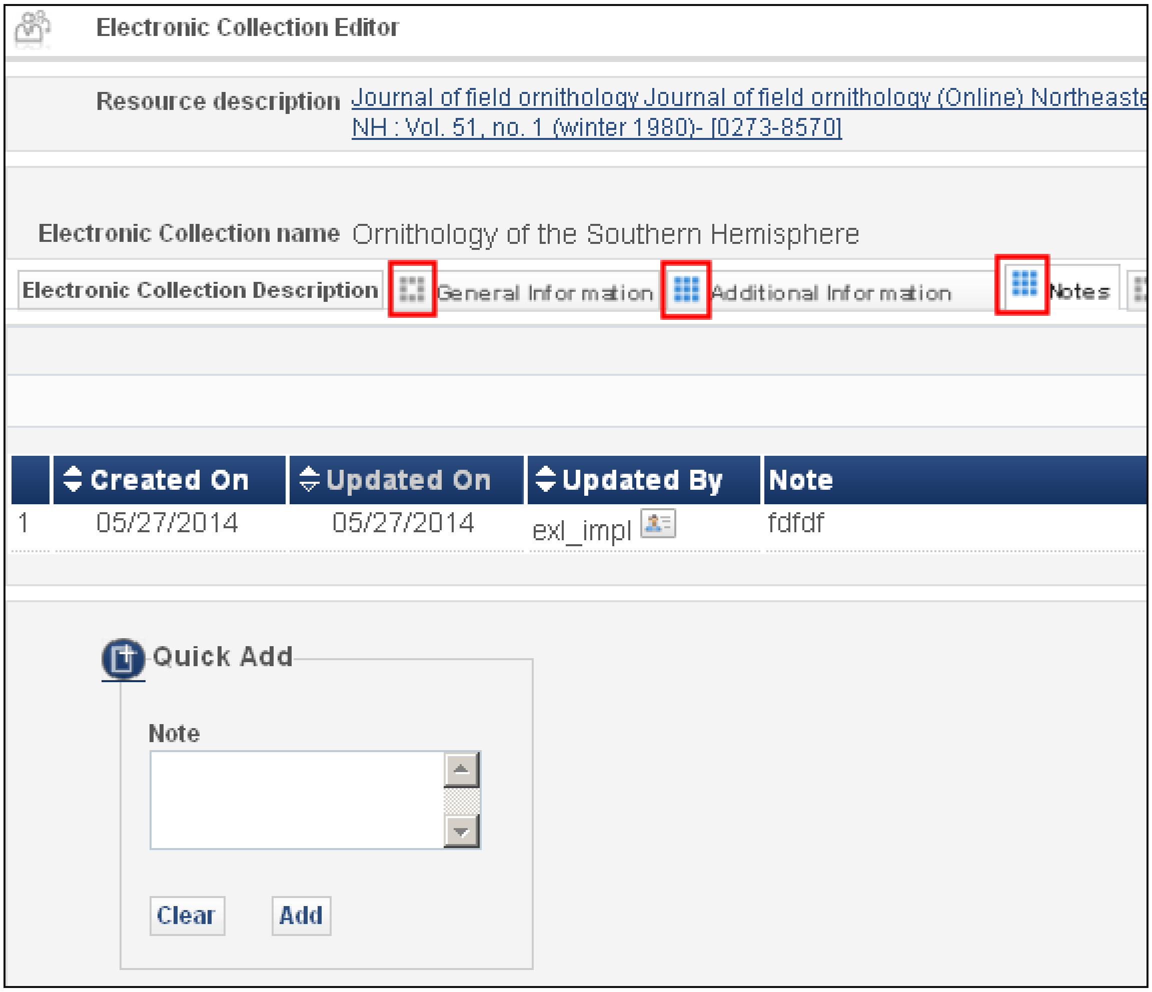


Figure 34 – Electronic Collection Editor - Content Indicators on Tabs

Non-Functional Enabled Column Removed

In all file and several mapping and code tables in Alma, an **Enabled** column was displayed even though it had no functionality in many cases. This column has now been removed from the tables in which it has no functionality.

Known Issues

- When importing an EOD file using the New Order profile, if the location of the item does not have a call number type, the call number type of the institution should be used as the alternative call number type. Currently, however, no alternative call number is used.
- Although the borrower side renewal of loaned items that have been received through a resource sharing request is controlled by the partner's workflow profile, changing the due date using the various Change Due Date options is possible even if the workflow profile does not allow this option.

Fixed Issues

The following previously known issue has been fixed:

- In the repository search, switching between tabs (for example, Institution/ Community) before your search results are completely displayed may cause errors.