



Response to Demo Questions from California Community Colleges

October 2018

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Document released: 2017

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General/Configuration

1. Will all the community colleges have a similar template? It appeared there was a great deal of customization possible. That customization will require staff training.

Ex Libris: Every institution will be configured according to your specifications during implementation, but you will have the option to make changes to configurations.

Some configurations can be set in the network zone and pushed out to member institutions. In this situation, the member institution will have the option to use the central configurations or override them with local configurations.

Staff training is included as part of the Alma implementation, and training materials are available on our Knowledge Center at knowledge.exlibrisgroup.com for ongoing training. The Knowledge Center also includes the Alma Online Help, which includes documentation for all configuration menus, as well as all other parts of Alma.

2. How to set up codes in Alma, such as Loan rules, Location codes and such.

Ex Libris: Terms of Use (TOU) refers to a list of policies that define the institution/library commitment to the patron according to which a service will be provided or terminated. Terms of Use are associated with a specific type of fulfillment activity, such as a loan, a request, or user registration. For details on the policies that can be included in terms of use, see [Configuring Fulfillment Policies](#).

The fulfillment unit rules determine which Terms of Use to employ when delivering a particular service to the patron. For details, see [Configuring Fulfillment Units, Policies, and Terms of Use](#).

If an item belongs to a location that does not have Terms of Use (for example, the location does not belong to any fulfillment unit), the system determines the Terms of Use based on the default policies. An item's Terms of Use is re-calculated each time an activity is performed on a loaned item (such as renewal). Therefore, any change in a policy, fulfillment rule, patron information, or item information has an immediate effect on a loan's or request's Terms of Use.

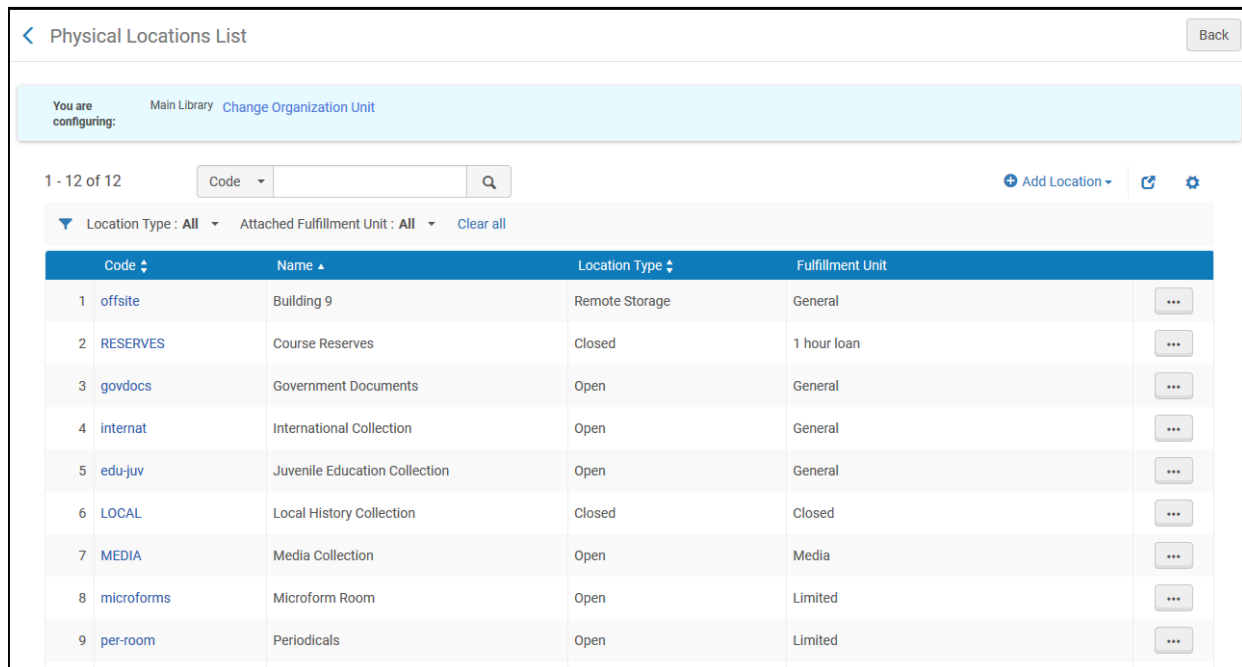
You configure Terms of Use on the Terms of Use Management page (Configuration Menu > Fulfillment > Physical Fulfillment > Terms of Use and Policies).

In a collaborative network, you can create terms of the use in the Network Zone and then distribute them to member institutions. For more information, see [Configuring Fulfillment Information in the Network Zone](#).

The following actions can be performed on this page:

- A physical location (that is, a location, shelving location, or holding) is a physical place where items are stored. A physical location is associated with a library, not the institution. For more information on the relationship between institutions, libraries (organization units), and physical locations, see [Configuring the Institution and Its Libraries](#). Note that physical locations may be located off-site in a remote location. For details, see [Configuring Remote Storage Facilities](#).

You configure physical locations from the Physical Location List page (Configuration Menu > Fulfillment > Locations > Physical Locations) or (General System Administrator only) Configuration Menu > General > Locations > Physical Locations).



Code	Name	Location Type	Fulfillment Unit
1 offsite	Building 9	Remote Storage	General
2 RESERVES	Course Reserves	Closed	1 hour loan
3 govdocs	Government Documents	Open	General
4 internat	International Collection	Open	General
5 edu-juv	Juvenile Education Collection	Open	General
6 LOCAL	Local History Collection	Closed	Closed
7 MEDIA	Media Collection	Open	Media
8 microforms	Microform Room	Open	Limited
9 per-room	Periodicals	Open	Limited

Physical Locations List Page

The following actions can be performed on this page:

- Add a physical location (see [Adding a Physical Location](#))
- Edit a physical location (see [Editing a Physical Location](#))
- Duplicate a physical location (Duplicate in the row actions list and edit the relevant fields)
- Delete a physical location (Delete in the row actions list)

Adding a Physical Location

You can add a physical location.

To add a physical location:

1. On the Physical Locations List page (Configuration Menu > Fulfillment > Locations > Physical Locations), select Add Location. A dialog box appears.

[+ Add Location](#)

Code *
✕

Location Code for RFID

Name *

External Name

Type *

Remote Storage

Fulfillment Unit

Call Number Type

Map

Add Location

Add Location Dialog Box

2. Enter the location code (up to 10 characters, no commas allowed) and name, which are both required fields, as well as the external location name, if applicable.
3. From the Type list, select the type of the location. Distinguishing between different types of locations enables you to filter by location type on the Physical Locations List page. Items in unavailable locations are considered unavailable when calculating display logic rules and the display of services in Primo. Otherwise, this field has no functional significance.
 - Open – A location that can be accessed by patrons, who can remove an item from the location and then check out the item.
 - Closed – A location that is accessible by library personnel only and is not accessible to patrons.

- Remote Storage – A remote storage location, which is similar to a closed location, except that it is located off-site. Retrieving of an item from a remote storage location may take longer than retrieving an item from a regular closed location.
 - Unavailable – A location from which items are considered unavailable for calculating the general electronic services in Primo.
4. If the location has a remote storage facility, from the Remote storage list, select a remote storage option for the location. Note that a location of any type may be associated with a remote storage facility.
 5. From the Fulfillment unit list, select a fulfillment unit for the location. The fulfillment unit defines the policy rule to be applied when circulating items from this location. For details, see [Physical Fulfillment](#).
 6. From the Call number type list, select a call number type for the location. This identifies the type of call number in the holdings record such as Library of Congress classification, Dewey Decimal classification, or National Library of Medicine classification.
 7. Specify the URL of a map that can assist patrons in finding the location.
 8. Select Add Location to add the location.

You can also edit a physical location.

For more information visit the Alma Online Help section:

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma Online Help \(English\)/030Fulfillment/080Configuring_Fulfillment/010Configuring_Fulfillment_Activities_%E2%80%93_Overview](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/030Fulfillment/080Configuring_Fulfillment/010Configuring_Fulfillment_Activities_%E2%80%93_Overview)

3. How to set up users and permissions.

Ex Libris: Alma's user management system supports the definition of:

- Role profiles are bundled together role and role scopes that may be assigned in a single action. When creating a new user in the system, a role profile may be assigned to the user, effectively assigning all of the roles and scopes of that profile to that user
- Role Assignment Rules – Rules may be set up for automatically assigning role profiles to newly created/imported users, based on user record attributes such as job category and job description or user group. Any user imported or manually created in the system will have the role that is bundled in role profiles automatically assigned if the user's attributes match the rule parameters.

Alma handles permissions for all library functions, including circulation, via role-based management. The system includes an out-of-the-box set of roles relevant to library management (e.g. Acquisitions, Fulfillment, Cataloguing, etc.) while also allowing for the definition of role profiles that represent a pre-defined set of roles.

< Profiles List

1 - 19 of 19 Name

▼ Role filter : All ▼

	Name ▲	Included Roles	Created By	Creation Date	Modified By
1	Acquisitions+Cat...	Trial Participant(Alma University),Vendor Manager(Alma University),Acquisitions Administrator(Alma University),Designs Analytics(Alma University),Fund Manager(Alma University),Invoice Manager(Alma University),Invoice Operator(Alma University),Ledger Manager(Alma University),License Manager(Alma University),Purchasing Manager(Alma University),Purchasing Operator(Alma University),Receiving Operator(Main Library),Trial Manager(Alma University),Trial Operator(Alma University),Catalog Administrator(Alma University),Cataloger(Alma University)	admin1	11/06/2011	Jim Benson
2	Acquisitions Managerial Template	Vendor Manager(Alma University),Fund Manager(Alma University),Receiving Operator(Alma University),License Manager(Alma University),Purchasing Operator(Alma University),Purchasing Manager(Alma University),Acquisitions Administrator(Alma University),Ledger Manager(Alma University),Invoice Operator(Alma University)	admin1	03/07/2011	admin1
3	Acquisitions Staff Template	Designs Analytics(Alma University),Fund Manager(Alma University),Invoice Operator(Alma University),License Manager(Alma University),Purchasing Operator(Alma University),Receiving Operator(Alma University),Trial Manager(Alma University),Trial Operator(Alma University),Trial Participant(Alma University),Vendor Manager(Alma University)	admin1	08/14/2011	admin1

The use of profiles decreases the need to re-define the roles and privileges for each new user, and also enables bulk update in case of a change to the profile. While Alma offers quite granular permissions functionality, the interface for configuring permissions is intuitive and easy to use.

Role profiles and role assignment rules can be configured at the network level and shared with member institutions.

You can add new users from any of the tabs on the Find and Manage Users page.

To add a new user:

- On the Find and Manage Users page (Admin > User Management > Manage Users), select Add User.
 - On the All tab, you are prompted to select the record type (Staff, Public, or Contact).
 - On any other tab, the record type is set according to the tab.

The Quick User Management page appears.

Quick User Management

Save and continue
Cancel
Save

User Details

USER INFORMATION

First name *

Middle name

Last name *

Primary identifier *

Title

PIN number

Generate

Job category

Please select a value

Job description

Gender

User group *

Please select a value

Campus

Preferred language

English

Birth date

Expiration date

Purge date

Resource sharing library

Selected Patron Letters

USER MANAGEMENT INFORMATION

Password

Verify password

Force password change on next login

☐

EMAIL ADDRESSES

Email types *

☐ Alternative
☐ Personal
☐ School
☐ Work

Email address

ADDRESSES

Address types

☐ Alternative
☐ Home
☐ School
☐ Work

Address line 1

Address line 2

Address line 3

Address line 4

Address line 5

City

State/Province

Postal code

Country

PHONE NUMBERS

Phone types

☐ Home
☐ Mobile
☐ Office
☐ Office fax

Phone number

Quick User Management Page

- Enter the following information. The fields marked as mandatory in the following table are by default; an administrator can configure which fields are mandatory. See [Mandatory Field Configuration](#).
- Select one of the following options: In either case, continue configuring user details as described in each of the following topics.
 - Select Save or Save and Continue. The new user is saved and you return to the Find and Manage Users page. Continue with editing the user; see [Editing Users](#).

- Select Save and Continue. The user is saved and you continue with editing the user. See [Editing Users](#).

4. How to integrate Alma with student registration system.

Ex Libris: Alma, as the library management system, needs to know the user's information, in order to give them library services. Therefore, the users should exist in Alma: they are copied from the SIS into Alma, and synchronized on a regular basis.

The relation between Alma and the SIS is in a "Parent-Child" module: the SIS is the "Parent" system, which is responsible for the users' information. They are managed and maintained in the SIS. Alma is the "child" – in which the user information is replicated. The users' information in Alma might be edited, but it will be overridden with the SIS information during synchronization. Users that are managed by the SIS are considered as "external" in Alma.

The integration between Alma and SIS is configured in an Integration profile of type "Users" in Alma. If your institution has several SIS systems, a separate profile should be defined for each of them.

There are few usages in which Alma and SIS can be integrated:

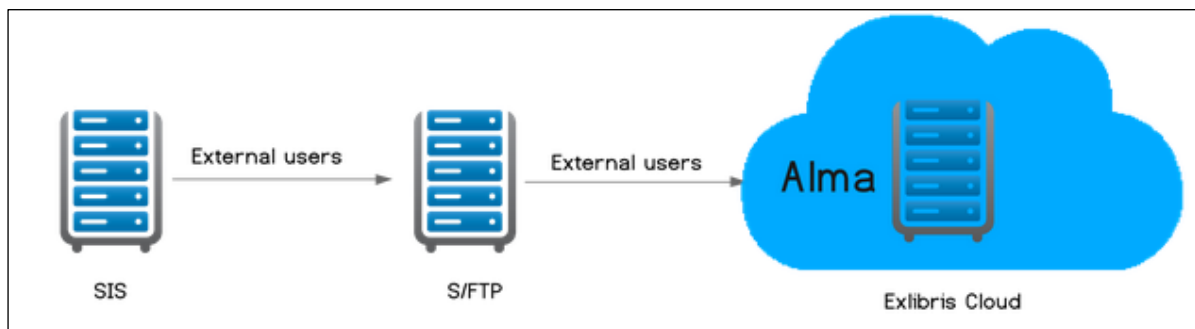
The common usage is

- import and synchronize External users from SIS into Alma

2 additional usages are available, but are not commonly in use:

- Export user blocks
- Export user

The loading from a Student Information System is performed using zipped XML files that are placed at a predefined, secure FTP location. Alma fetches the files, parses them, and updates external users according to the input file and the parameters defined in the integration profile. The following diagram illustrates the communication between the SIS and Alma:



The loading of external users into Alma can be performed in one of two modes:

- Import
- Synchronize

The **import** mode is a one-time load, used to initially create new external users. It is intended to be used only when you have a file of users you know are new, such as during the migration process, when you want to load users from your legacy system into Alma. The **synchronize** mode is an ongoing load, used to update external users and add new ones.

See [Introduction to SIS integration](#) and for more details please see the [Developer Network](#).

5. Do you know which colleges have implemented the online payment system, such as PayPal

Ex Libris: We don't maintain records of which particular colleges use online payment systems, but most of them do. Alma can be integrated with online payment systems including PayPal.

The general flow for integrating with any payment system is the same, so we'll use PayPal in our example but other systems can be integrated as well.

The flow can be summarized as follows:

1. A patron requests to view his fees on a student portal
2. The portal queries Alma and displays a list of fees and the balance. The patron requests to pay his fees via PayPal
3. The portal creates a transaction in PayPal for the relevant amount, then redirects the patron's browser to PayPal for approval
4. The patron logs into PayPal and approves the payment and payment method. PayPal redirects the browser back to the portal application
5. The portal executes the payment in PayPal using the specified transaction code
6. Once confirmation is received from PayPal, the portal posts the payment to Alma to be reflected in the patron's account
7. The portal displays a confirmation message and a zero balance

More information about this integration is available on our Developer Network:

<https://developers.exlibrisgroup.com/blog/Integrating-Alma-and-PayPal-with-the-Alma-REST-APIs>

6. Individual item display (non-editing view) in staff backend

Ex Libris: The view-only display of an item record:


ExLibris Alma University

Alma

★
»
Acquisitions
Resources
Fulfillment
Admin
Analytics

📍
👤
📧
⚙️
?

Physical Item Editor
Relink to another bibliographic record
Cancel



Dimensions, structure and history of Australian unemployment / Borland, Jeff. Australian National University Canberra : 1998 [0731522524]

Holdings

Main Library: General;

Holdings ID

224851890000121

Barcode

117196-000010

Process type

-

Item ID

234851840000121

Status

Item in place

View all holdings

View all items

Browse shelf list...

General

ENUM/CHRON

Notes

History

General Information

Barcode

117196-000010

Material type

Book

Provenance

-

PO Line

-

Receiving date

01/19/2014

Enumeration A

-

Chronology I

-

Description

-

Pages

-

Replacement cost

-

Physical condition

-

Process type

-

Copy ID

-

Item policy

4 Week Loan

Is magnetic

-

Issue date

-

Expected receiving date

-

Enumeration B

-

Chronology J

-

Pieces

-

Receiving operator

-

Inventory Number Information

Inventory number

-

Inventory date

-

Inventory price

-

Location Information

Permanent location

Main Library: General (GEN)

Alternative call number type

-

Source (Subfield 2)

-

Storage location ID

-

Alternative call number

-

Temporary Location Information

Item is in temporary location

No

Temporary location

-

Temporary call number type

-

Source (Subfield 2)

-

Temporary item policy

-

Temporary call number

-

Due back date

-

7. Configuring roles/permissions for a staff user

Ex Libris: See #3 above

8. Batch jobs: e.g. adding a note to all records in a set, changing the shelving location of a group of items

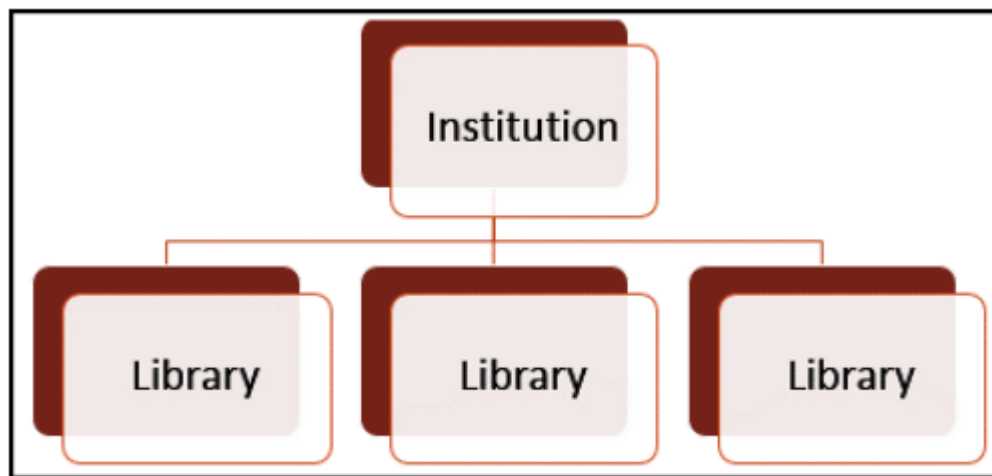
Ex Libris: Batch update actions may be performed using Alma's Process Automation tools. These tools enable:

- Defining a set of records to work on. These records may be of various types:
 - Title records
 - Physical title records
 - Electronic title records
 - Physical item records
 - Digital file metadata records
- Defining a chain of defined tasks to be run on the set. These chains include:
 - Normalization of the set's records
 - Global change of record information

The Metadata Editor enables you to create normalization rules and apply them to MARC 21 records, or apply normalization rules that have already been created to records, so that changes to MARC 21 bibliographic metadata can later be made globally, in bulk. Staff users can utilize the rich search functions within Alma to create sets for batch change.

9. A list of things that, in a multi campus district that shares a catalog, can be customizable at the district level and at the campus level.

Ex Libris: The Alma institution is the basic level of data and workflow management in Alma. The Alma library is comprised of one or more physical locations, each of which is normally housed in a single building or in several buildings in close physical proximity. A library may have several locations within it, such as the circulation desk and digital archiving. Each Alma Institution can have multiple Alma libraries.



Institution/Library Hierarchy

In addition to the institution and library organizational levels, Alma provides two additional optional organizational levels, a campus and a collaborative network.

The Alma Institution

The Alma Institution is the main building block of the organizational structure. It enables consolidated management of key workflows. The institution manages the following data as a single list, accessible to all institution staff with the relevant roles (authorization):

- User management – Alma handles permissions via role-based management. The system includes an out-of-the-box set of roles relevant to library management (for example, Acquisitions, Fulfillment, and so forth) while also allowing for the definition of role profiles that represent a predefined set of roles. The use of profiles decreases the need to redefine the roles and privileges for each new user, and also enables bulk update in case of a change to the profile. While Alma offers granular permissions functionality, the interface for configuring permissions is intuitive and easy to use.
- Vendors – Vendor records hold information about the vendors from which purchasing of physical or electronic resources is handled. This includes attributes such as the vendor's type (material supplier, access provider, or licensor), the used currencies, the libraries that may buy from the vendor, and so forth. The attached vendor accounts include additional account specific information, such as the payment method and delivery and claim information. Vendor records are mandatory in order to be able to complete a purchasing process in Alma.
- Licenses – For licensed material (such as subscriptions to electronic resources), Alma can manage a copy of the license and associate it with the licensed resources. It is possible to associate a specific license with the activated electronic resources.
- Metadata management – The catalog metadata is shared and managed at the institution. All catalogers of the institution have access to the catalog, as per their cataloger role permission and cataloger level. The inventory, regardless of its format (physical, electronic or digital), is manageable at the specific library level.
- Configuration – Various settings such as metadata definitions (e.g. validations), acquisition related definitions (e.g. purchase cancellation reasons) as well as user related definitions (e.g. statistical categories) are managed at the Alma institution level
- Integrations – Alma supports various integration points for interacting with external systems such as: Identity Management, Import/Export to Financial Systems, Import from Student Information Systems. The definitions related to these integrations are managed at the Alma institution level. Please note that in some cases there may be multiple definitions (e.g. Authentication in Alma can accommodate up to 5 different LDAP servers).
- Resource sharing partners – The resource sharing partner records hold attributes of the peer partners with which the resource sharing workflows are managed. Partner records attributes of potential borrowing or lending libraries, such as their communication method and their average time to deliver. The partners are then arranged in partner rota templates which are used to group partner records in functional groups. Although the partners list is managed by the institution, the partner rota templates may be independently managed by each library.

Alma Libraries

Libraries share the management of many data elements and workflows, as listed above. However, there are many options for libraries to separately manage aspects of their workflows, such as:

- Operator/staff roles
- Some staff may be granted roles for working only in the scope of a given library. The roles are listed in Managing User Roles.
- Fulfillment
- Policies - If libraries have unique fulfillment policies that are not shared with other libraries, they may set up library-level policies.
- Resource sharing rota templates and rules - Resource sharing libraries that have unique rota management requirements can set up rota templates that are independent of the rest of the institution

- Acquisitions
- Purchase orders – Libraries can manage their acquisitions separately from one another, with each one managing its own PO lines.
- Fund ownership and availability – Funds may be owned by specific libraries and may be made available for PO lines of specific libraries only.
- Vendor availability – Libraries may be able to contact vendors that are not shared with the rest of the institution.
- Invoices - Invoices record actual purchase payments and are linked to the purchase orders and to funds. Invoices can be electronically updated in the system--for example, via EDI--or internally triggered in the system. Invoices can be owned by libraries. Only users with an Invoice Operator role at the library have access to library-owned invoices.
- Inventory – Physical and electronic inventory can be owned by libraries.

Alma Campuses

Multiple campuses may be implemented when there are geographically dispersed campuses with which patrons are affiliated, and there is need to group fulfillment services for each campus, such as:

Inventory Control:

- Limiting the availability of electronic resources to specific campuses
- Externally exposing the catalog (via Z39.50) sliced by campus level ownership of inventory

Fulfillment:

- Limiting allowed patron pick-up locations for requested resources by campus
- Grouping lists of pick-up locations by campus
- Limiting and controlling the availability of other services based on campus-level considerations

The Alma Collaborative Network

The Alma Collaborative Network is a network of Alma institutions connected together to facilitate collaboration/sharing of data and workflows. In some cases, a collaborative network requires the Alma Network Zone.

An Alma Network Zone may be set up where one of the following is required:

- Shared Catalog – A shared catalog consists of a single metadata catalog that is shared by all libraries. The single catalog source can also easily serve as the source for a shared discovery experience.
- Shared Acquisitions – Shared acquisitions consists of centralized purchasing of e-resources that are available to the member libraries.
- Centrally managed configurations – Additional functionality can be implemented on top of the Network Zone to facilitate centrally managed configurations for the following:
 - Shared fulfillment – The Network Zone can be used to centrally manage fulfillment policies and terms of use. The centrally managed policies and terms of use are then dispatched to all members of the network, where they are used in the local members' fulfillment rules. This achieves a high level of consolidation in the fulfillment area, with agreed upon policies and terms of use being used by all members of the network.
 - Resource sharing – The basic configurations of the resource sharing component may be centrally managed at the Network Zone and shared by all members of the network. This includes a shared list of: Using a consolidated configuration set achieves the goal of unifying the user experience and library back office processing across all disparate libraries.

- Resource sharing partners
- Resource sharing rota templates and assignment rules
- Workflow profiles
- Locate profiles
- Vendors – Vendor records can be centrally managed at the Network Zone. Routine and automatic dispatching of the vendor records to all network members achieves the goal of having a single list of vendors that is used throughout all members of the network but is managed centrally by a single office.
- Mapping tables – Mapping tables govern a variety of system behaviors across all functional elements of the system. Maintaining a centrally managed mapping tables set is key to creating unified and consolidated workflows at the network members across the system.

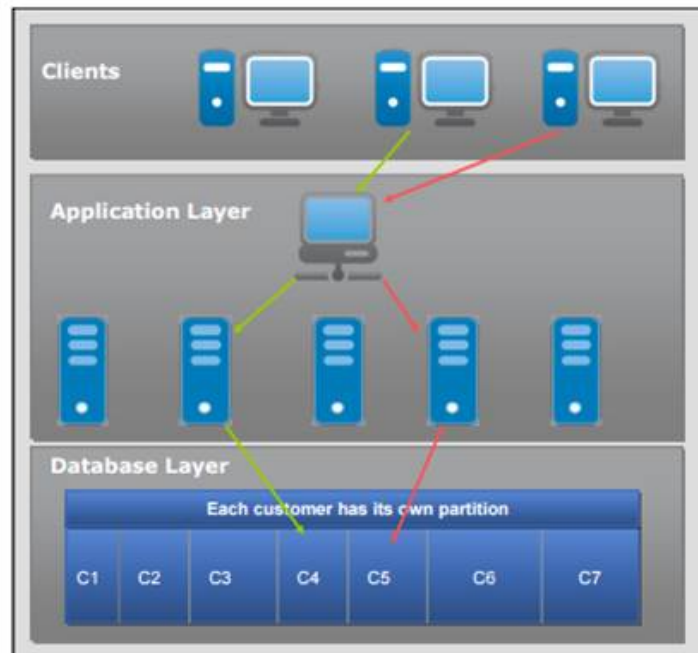
There is a diagram on our Knowledge Center that shows the entities that can be managed on each level: [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/010Getting_Started/030Alma_Topologies#The_Alma_Collaborative_Network](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/010Getting_Started/030Alma_Topologies#The_Alma_Collaborative_Network)

10. How many data centers across the state? Any data replication throughout the state in case for disaster recovery? We had experienced a couple of extensive downtime from OCLC WMS.

Ex Libris: Alma is deployed in Ex Libris' private cloud, based on a SaaS, multi-tenancy architecture in which one instance of Alma supports multiple customers. Ex Libris maintains a North American data center in the Chicago, Illinois area, as well as data centers in Amsterdam and Singapore. Additionally, in 2016 we added data centers in China and Canada.

The Ex Libris data center utilizes 1G bandwidth as its backbone and works with multiple ISP vendors (up to 8) at every point in time. As with every SaaS vendor, we measure the performance of our servers; we do not, however, have control of the 'last mile' at the institution level. We can report that, so far, our customers report a high performance level for all operations that met web application expectations. We also monitor our application and server throughput 24/7 in order to make sure that transactions are handled and sent to the user browser as expected.

Alma is designed in accordance with the SaaS model. The system is based on multitenant architecture, in which all the resources are shared (see diagram below). This model enables Ex Libris to provide its customers with a fault-tolerant computing environment that includes dynamic resource allocation.



Backup, Recovery

Ex Libris has a well-developed backup plan consisting of multiple daily snapshots including a full daily backup. The backups are made to a separate set of disks which offers a much more reliable fast retrieve backup media and is stored at the data center site and in a remote secured location over a private dedicated fast secured line. This guarantees that at any point in time, in case of a disaster, Ex Libris holds copies of the data onsite and in a remote and secured disk backup. On a regular basis, Ex Libris performs a system backup to back up application files, database files, and storage files. The privacy controls in practice at the company apply as well to all backup files. All backup files are subject to the privacy controls in practice at Ex Libris. Ex Libris has a 10-week retention policy. The restore procedures are tested on an ongoing basis to ensure rapid restoration in case of data loss.

Ex Libris maintains both onsite and offsite data backups of all customer Data for disaster recovery purposes, and such backups are regularly monitored and checked for errors.

On-site backup - Incremental and full daily backups of the customer data maintained at Ex Libris' data center facility. Backups are based on multiple snapshots during the day using storage snapshot technology. The backups are kept for one week on-site at a separated set of disks.

The snapshots are automatically mounted with specific access restriction values seen by the operating system in a special set of directories allowing for an easy and immediate restore at any time by Ex Libris authorized personnel.

Off-site backup – Full daily backups of customer data that are maintained at a secure offsite location for a period of 10 (ten) weeks. Backups are performed daily using snap mirror technology over a private dedicated fast secured network connection from the primary data center to an off-site backup location using the same storage technology as the storage at the primary location.

Disaster Management

Ex Libris is responsible for recovery and also maintains a business continuity plan which is implemented following a disruption to service. The Ex Libris cloud services group has classified disasters and emergencies into the following three levels – minor, major and catastrophic:

Minor Disaster - A minor disaster is characterized by an expected downtime of no more than 48 hours. Damage can be to hardware, software, and/or operating environment.

Ex Libris cloud services could be restored to normal operations at the primary site and repairs can be started as soon as possible:

Major Disaster - A major disaster is characterized by an expected downtime of more than 48 hours but less than 7 days. A major disaster will normally have extensive damage to system hardware, software, networks, and/or operating environment. Ex Libris cloud services could be restored to normal operation with the assistance of certain recovery teams who will be called to direct restoration of normal operations at the primary site.

Catastrophic Disaster - A catastrophic disaster is characterized by expected downtime of greater than 7 days. The facility is destroyed to the extent that an alternate facility must be used.

Damage to the system hardware, software, and/or operating environment requires total replacement / renovation of all impacted systems. The implementation of the Disaster Recovery Plan in a remote recovery site is required to restore Ex Libris cloud services to normal operation. In the event of a major or catastrophic event, data recovery is performed using backups retrieved from the disaster site from the offsite backup locations. After identifying salvageable equipment, early data recovery efforts first focus on restoring the operating system(s) for each system. Next, mission critical system data is restored. After system data is restored, individual customer data is restored.

11. Extraction of data, MARC and otherwise (could be for projects, or for the next great migration in the future)

Ex Libris: Alma supports the ability to export bibliographic, inventory, and authority records in their native formats, including MARC 21 XML or binary and Dublin Core XML. The export of bibliographic records makes use of Publication Profiles. These profiles are defined to determine which records to export, on what schedule to export them, and additional services to run at export (which may include enhancing or cleaning up the outgoing records). This publication approach is the same infrastructure used for synchronizing holdings with WorldCat.

Additionally, Alma supports the ability to perform ad-hoc exports on demand. This can be used for external record processing, updating for a shared repository, loading into an institutional data warehouse, or any other purpose. The most versatile and ubiquitous type of data extract is the Tools button that is found on most list screens generated in Alma. This Tools button permits the user to save whatever list is present to an Excel spreadsheet for further work outside of Alma.

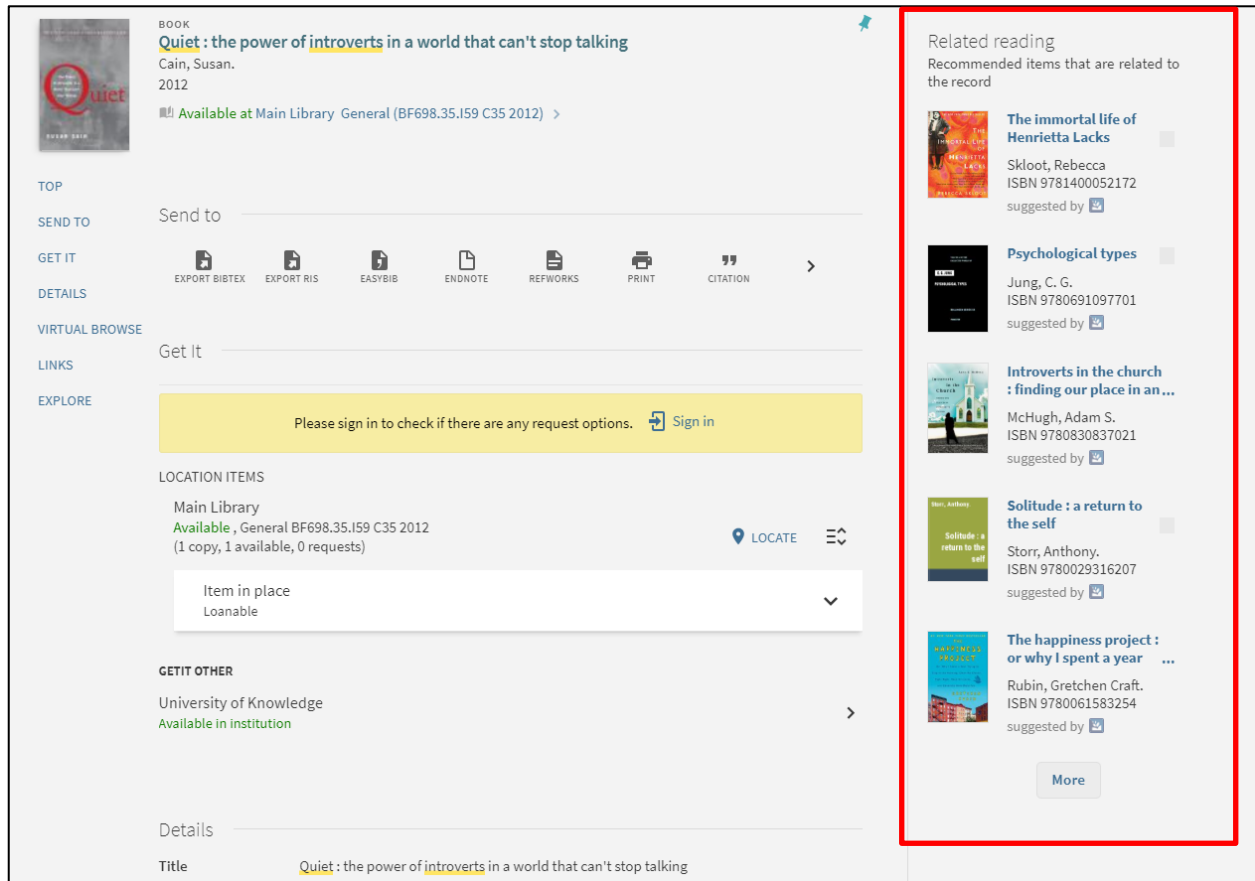
The Ex Libris contract specifies that customer data will be available in industry-standard format for download upon termination or completion of the service (free of charge). The customer will have 30 days to download the data before Ex Libris will delete it.

Discovery (Primo)

12. Is it possible to purchase a Syndetics subscription to interface with Primo? Our students really appreciate the "Look Inside" option. It isn't included, but can it be integrated?

Ex Libris: Yes, it is possible to purchase a Syndetics subscription. Let us know if you would like a quote.

Syndetics Unbound can be integrated into the Primo full details page. Recommendations for additional content from Syndetics Unbound appear in the right pane in Primo:



BOOK
Quiet : the power of introverts in a world that can't stop talking
Cain, Susan.
2012
Available at Main Library General (BF698.35.I59 C35 2012) >

TOP
SEND TO
GET IT
DETAILS
VIRTUAL BROWSE
LINKS
EXPLORE

Send to

EXPORT BIBTEX EXPORT RIS EASYBIB ENDNOTE REFWORKS PRINT CITATION >

Get It

Please sign in to check if there are any request options. [Sign in](#)

LOCATION ITEMS
Main Library
Available, General BF698.35.I59 C35 2012
(1 copy, 1 available, 0 requests) [LOCATE](#)

Item in place
Loanable

GET IT OTHER
University of Knowledge
Available in institution >

Details

Title **Quiet : the power of introverts in a world that can't stop talking**

Related reading
Recommended items that are related to the record

The immortal life of Henrietta Lacks
Skloot, Rebecca
ISBN 9781400052172
suggested by [\[icon\]](#)

Psychological types
Jung, C. G.
ISBN 9780691097701
suggested by [\[icon\]](#)

Introverts in the church : finding our place in an ...
McHugh, Adam S.
ISBN 9780830837021
suggested by [\[icon\]](#)

Solitude : a return to the self
Storr, Anthony.
ISBN 9780029316207
suggested by [\[icon\]](#)

The happiness project : or why I spent a year ...
Rubin, Gretchen Craft.
ISBN 9780061583254
suggested by [\[icon\]](#)

[More](#)

Additionally, the “Explore” section at the bottom of the page includes Syndetics Unbound content, including:

- Premium Cover Service — Syndetics Unbound offers the most comprehensive cover database in existence for libraries — over 25 million full-color cover images for books, videos, DVDs, and CDs, with thousands of new covers added every week. If a cover is missing for an item, Syndetics Unbound automatically generates a cover using the title, author, and media type.
- Summary — Over 18 million summaries and annotations covering fiction, non-fiction, and both trade and scholarly titles. Thousands of summaries are added each week.
- About the Author — This section includes the author biography and a shelf of other items by the author. The section is also adorned by a small author photo.
- Look Inside — Includes first chapters, book excerpts, and table of contents for millions of titles, enabling patrons to take a peek inside a book.
- Series — Shows a book's series, including the reading order. If the library is missing part of the series, those covers are shown, but grayed out.
- You May Also Like — Provides sharp, on-the-spot readers' advisory in your catalog, with the option to browse a larger world of suggestions, drawn from LibraryThing members and big-data algorithms. As with other enrichments, Syndetics Unbound only recommends items that your library owns.

- Professional Reviews — More than 5.4 million reviews are available from:
 - Library Journal
 - School Library Journal
 - New York Times
 - The Guardian
 - The Horn Book
 - BookList
 - BookSeller + Publisher Magazine
 - Choice
 - Publishers Weekly
 - Kirkus
- A la carte professional review options also include:
 - Voice of Youth Advocates: VOYA
 - Doody's Medical Reviews
 - Quill and Quire
- Reader Reviews and Ratings — Includes more than 1.7 million vetted reader reviews from LibraryThing members. It also allows patrons and librarians to add their own ratings and reviews, right in their library's catalog, and then showcase them on a library's home page and social media.
- Also Available As — Help patrons find other available formats and versions of a title in your collection, including paper, audio, ebook, and translations.
- Tags — The Tags element updates LibraryThing's celebrated tag clouds — redesigning them toward simplicity and consistency. Based on over 141 million tags created by LibraryThing members, tags are hand-vetted by our staff librarians for quality. A new exploration interface allows patrons to combine and filter tags, to focus in on the genres, subjects, and other categories they want most.
- Book Profile — A newly dynamic version of what Bowker has done for years — analyzing thousands of new works of fiction, short story collections, biographies, autobiographies, and memoirs annually. With Syndetics Unbound every term is clickable, and patrons can search and browse over one million profiles.
- Reading Level — See and explore other books in the same age and grade range. Reading Level also includes Metametrics Lexile® Framework for Reading.
- Awards — Highlights the awards a title has won, and helps patrons find highly-awarded books in your collection. Includes well-known awards, like the National Book Award and the Booker Prize, but also smaller awards like the Bram Stoker Award and Oklahoma's Sequoyah Book Award.
- Browse Shelf — Gives your patrons the context and serendipity of browsing a physical shelf, using your call numbers. Includes a mini shelf-browser that sits on your detail pages, and a full-screen version, launched from the detail page.
- Video and Music — Syndetics Unbound offers a wealth of descriptive information for more than 4 million video and music titles including annotations, performers, track listings, release dates, genres, keywords, and themes.
- Video Games — The video game element enriches your catalog with game covers, ESRB Rating, Star Rating, Game Information, System Requirements, Game Features, Game Description, Game Reviews, and Screenshots.

EXPLORE
<
Charisma : the gift of grace, and how it has been taken away from us ... c2007
The enneagram intelligences : understanding personality for ... 1999
Rejuvenile : kickball, cartoons, cupcakes, and the ... c2006
Quiet : the power of introverts in a world that can't stop ... c2012
BRIGHT-SIDED : how the relentless promotion of positive ... 2009
Optimism & pessimism : implications for theory, research, and ... c2001
>

More From Syndetics Unbound
Summary
Professional Reviews
About The Author
Book Profile
Look Inside
Awards
You May Also Like

SUMMARY

At least one-third of the people we know are introverts. They are the ones who prefer listening to speaking, reading to partying; who innovate and create but dislike self-promotion; who favor working on their own over brainstorming in teams. Although they are often labeled "quiet," it is to introverts that we owe many of the great contributions to society--from van Gogh's sunflowers to [\(read more\)](#)

ABOUT THE AUTHOR




Image courtesy LibraryThing

Susan Cain

Susan Cain graduated from Princeton University and Harvard Law School. She worked as a corporate lawyer before deciding to write *Quiet* and devote herself to the cause of empowering introverts. She is also the author of the children's book *Quiet Power: The Secret Strengths of Introverts*.

(Bowker Author Biography)

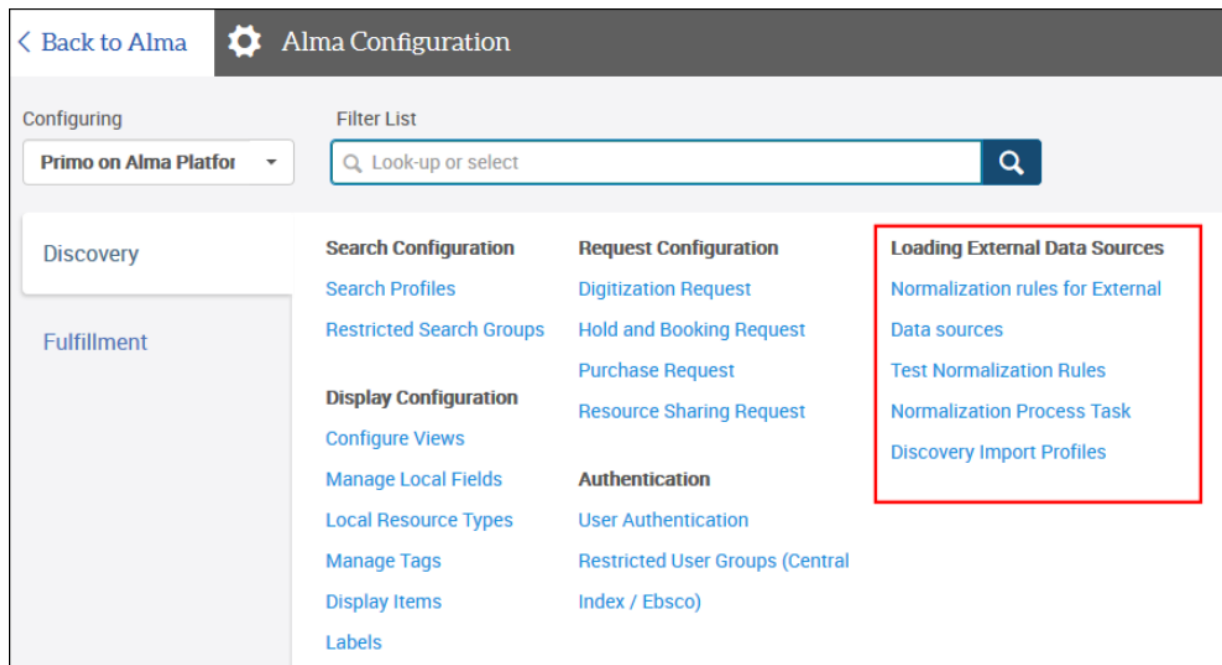
LOOK INSIDE

Today we make room for a remarkably narrow range of personality styles. We're told that to be great is to be bold, to be happy is to be sociable. We see ourselves as a nation of extroverts-which means that we've lost sight of who we really are. Depending on which study you consult, one third to one half of Americans are introverts-in other words, one out of every two or three people you know. (Given that the United States is among the most extroverted of nations, the number must be at least as high in other parts of the world.) If you're not an introvert yourself, you are surely raising...

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[SEE FULL TABLE OF CONTENTS](#)
[COVER](#)

13. Primo back end. How to set up pipes and normalization rules. Please give an idea of what will be done at the consortial level and Ex Libris level in setting up normalization rules.

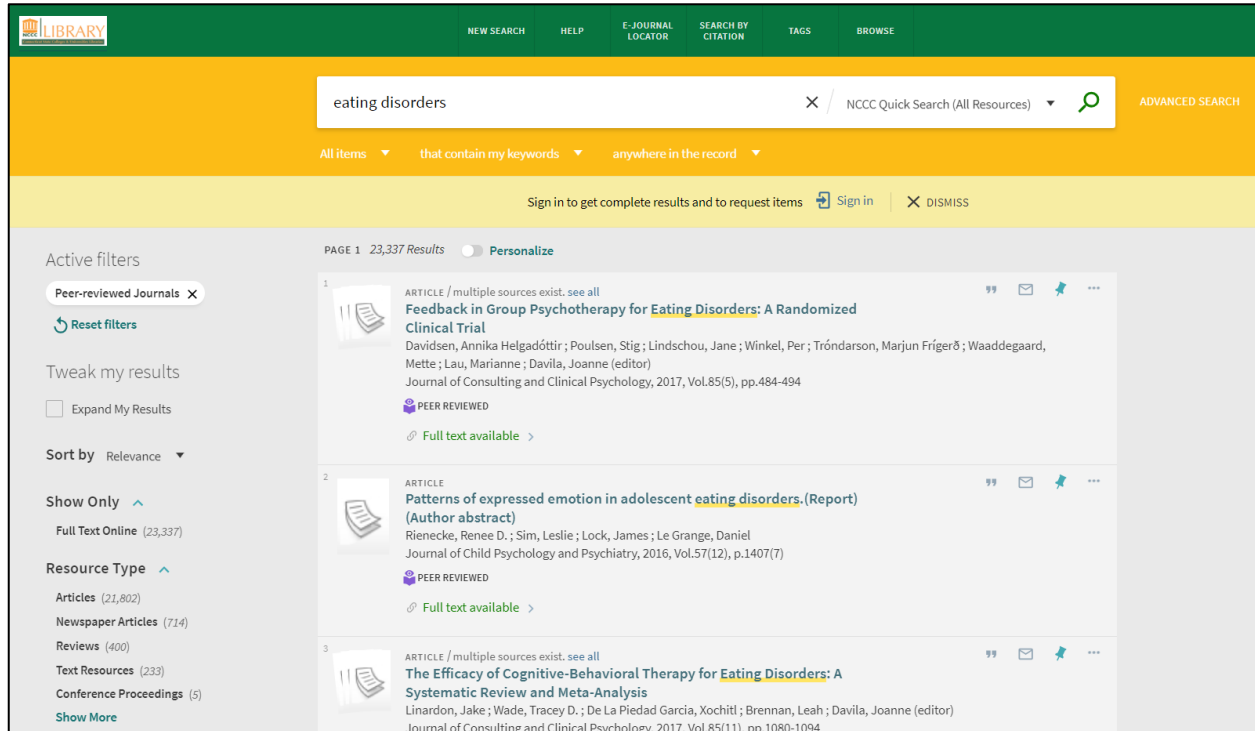
Ex Libris: Primo VE does not include pipes and normalization rules in the same way these tools are used in classic Primo. Instead, with Primo VE, records managed in Alma are simply visible in Primo with no need to publish the data. Each institution can add local fields to be used for search and/or display, as well as local facets. These are configured using the Discovery configuration menus in Alma. It is possible to add external data, such as from a digital repository. This is done using the Discovery configuration menus in Alma:



In this case, normalization rules are used to determine how the source data elements will map to the Primo data. These normalization rules can be shared with the network or with the Alma community. Once normalization rules have been configured, Discovery import profiles are used to load the external data into Alma for discovery. Import profiles can be shared with the network or with the Alma community.

14. Could you show how EBSCO database articles appear in Primo? What are workarounds that can be done through Alma if metadata isn't being shared directly by EBSCO? How does that expand to JSTOR and other non-ProQuest products?

Ex Libris: EBSCO database articles appear in the Primo results alongside all other resources:

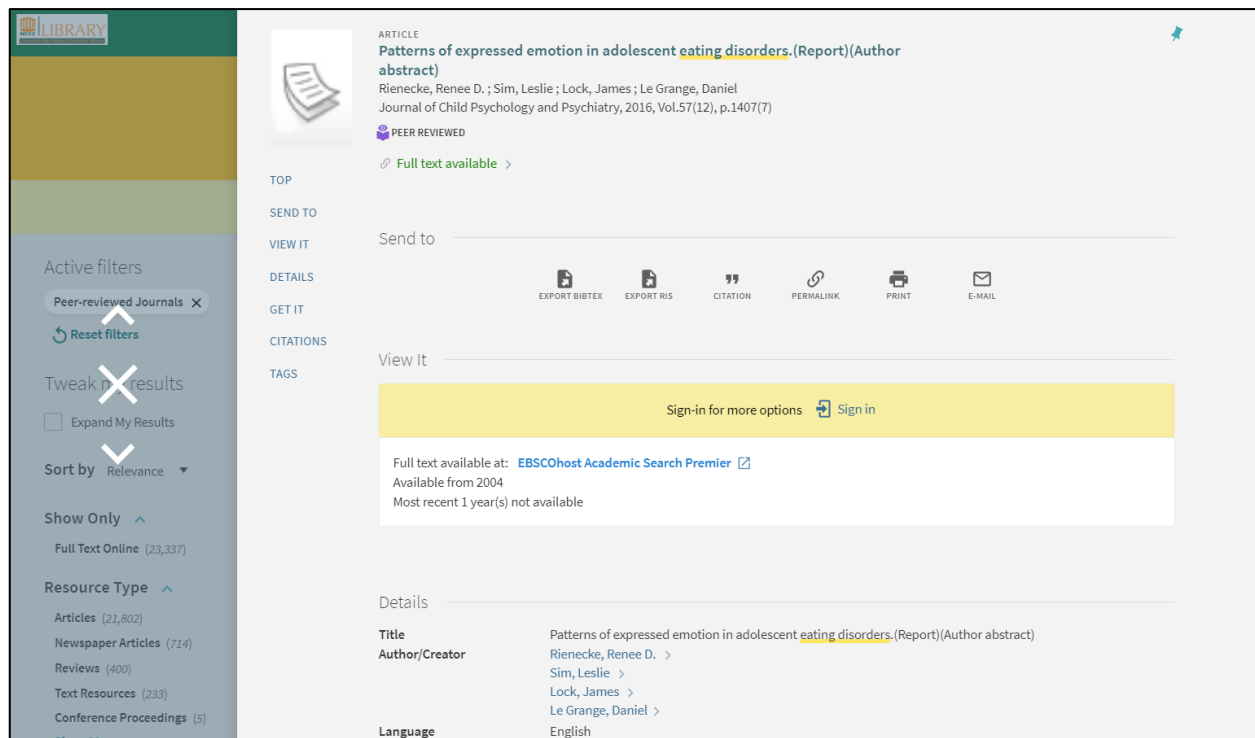


The screenshot shows the ExLibris search results page for the query "eating disorders". The page features a green header with navigation links: NEW SEARCH, HELP, E-JOURNAL LOCATOR, SEARCH BY CITATION, TAGS, and BROWSE. Below the header is a search bar with the query "eating disorders" and a dropdown menu for "NCCC Quick Search (All Resources)". To the right of the search bar is a link to "ADVANCED SEARCH". Below the search bar is a yellow banner with the text "Sign in to get complete results and to request items" and buttons for "Sign in" and "DISMISS".

On the left side of the page, there is a sidebar with "Active filters" showing "Peer-reviewed Journals" and a "Reset filters" button. Below this is a "Tweak my results" section with a checkbox for "Expand My Results". The "Sort by" section is set to "Relevance". The "Show Only" section shows "Full Text Online (23,337)". The "Resource Type" section lists various resource types with counts: Articles (21,802), Newspaper Articles (714), Reviews (400), Text Resources (233), and Conference Proceedings (5). A "Show More" link is at the bottom of the sidebar.

The main content area displays a list of search results. The first result is an article titled "Feedback in Group Psychotherapy for Eating Disorders: A Randomized Clinical Trial" by Davidsen, Annika Helgadóttir; Poulsen, Stig; Lindschou, Jane; Winkel, Per; Tróndarson, Marjun Frígerð; Waadegaard, Mette; Lau, Marianne; Davila, Joanne (editor). The second result is an article titled "Patterns of expressed emotion in adolescent eating disorders.(Report)(Author abstract)" by Rienecke, Renee D.; Sim, Leslie; Lock, James; Le Grange, Daniel. The third result is an article titled "The Efficacy of Cognitive-Behavioral Therapy for Eating Disorders: A Systematic Review and Meta-Analysis" by Linardon, Jake; Wade, Tracey D.; De La Piedad Garcia, Xochitl; Brennan, Leah; Davila, Joanne (editor). Each result includes a "Full text available" link.

The full details page shows the linking information for any resource, in this case, via Academic Search Premier:



The screenshot shows the full details page for the article "Patterns of expressed emotion in adolescent eating disorders.(Report)(Author abstract)" by Rienecke, Renee D.; Sim, Leslie; Lock, James; Le Grange, Daniel. The page features a green header with the ExLibris logo. Below the header is a sidebar with "Active filters" showing "Peer-reviewed Journals" and a "Reset filters" button. Below this is a "Tweak my results" section with a checkbox for "Expand My Results". The "Sort by" section is set to "Relevance". The "Show Only" section shows "Full Text Online (23,337)". The "Resource Type" section lists various resource types with counts: Articles (21,802), Newspaper Articles (714), Reviews (400), Text Resources (233), and Conference Proceedings (5). A "Show More" link is at the bottom of the sidebar.

The main content area displays the article details. The title is "Patterns of expressed emotion in adolescent eating disorders.(Report)(Author abstract)". The authors are Rienecke, Renee D.; Sim, Leslie; Lock, James; Le Grange, Daniel. The journal is "Journal of Child Psychology and Psychiatry, 2016, Vol.57(12), p.1407(7)". The page includes a "Full text available" link. Below the article details is a section for "Send to" with options: EXPORT BIBTEX, EXPORT RIS, CITATION, PERMALINK, PRINT, and E-MAIL. There is also a "View it" section with a "Sign-in for more options" button and a "Sign in" button. Below this is a section for "Full text available at: EBSCOhost Academic Search Premier" with a link to the full text. The "Details" section shows the title, author/creator, and language (English).

EBSCO content can be made accessible to Primo users in the following two ways:

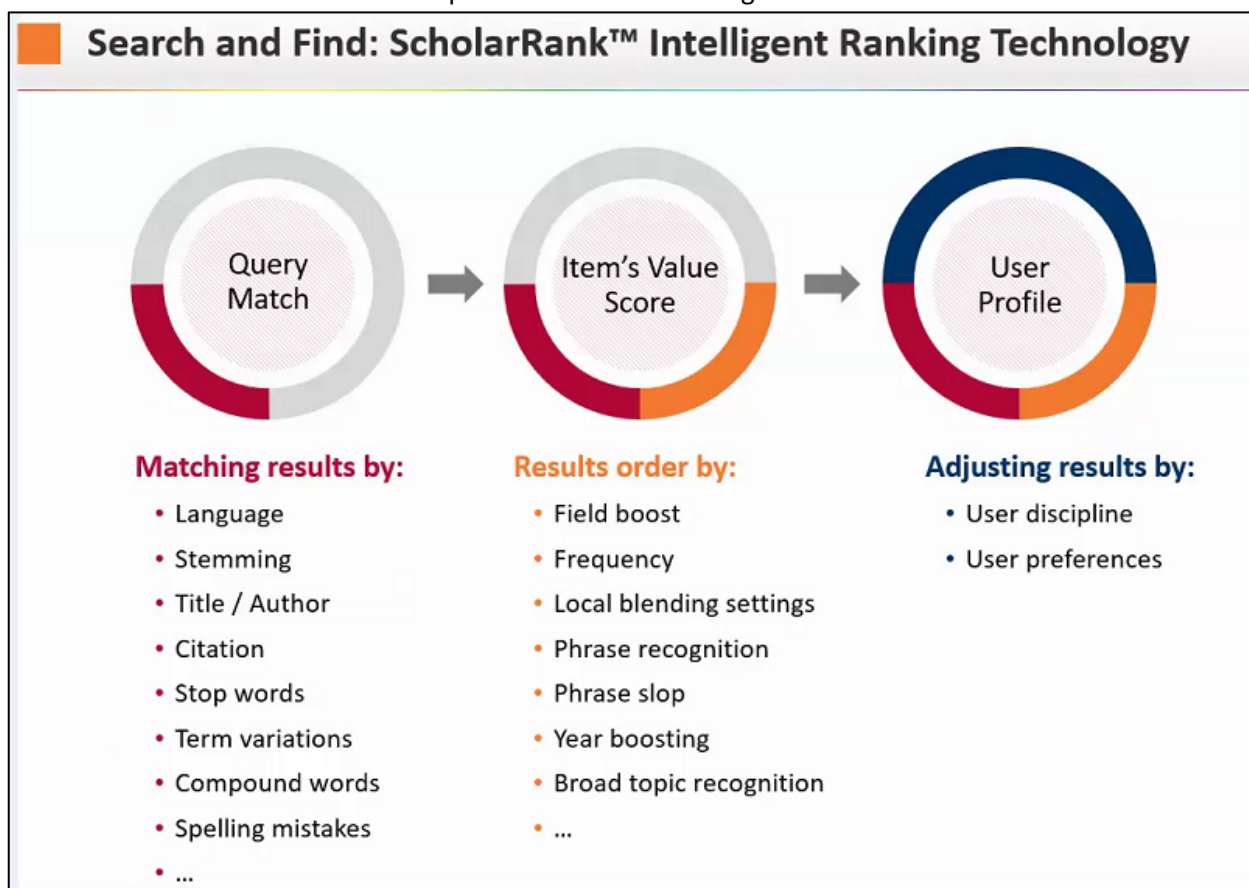
- Primo Central Index - EBSCO has chosen not to contribute content to the Primo Central Index (PCI). However, most article and some e-book content indexed by EBSCO is also indexed by other providers, many of whom do cooperate with Ex Libris and our mutual customers by contributing content to the PCI. We refer to this as "alternative coverage". Access to this EBSCO content can be achieved by activating the alternative coverage collections for searching in Primo. Delivery of the full text content is handled by the Alma link resolver, which can link the Primo user directly to EBSCO.
- EBSCO search plug-in - The EBSCO search plug-in enables Primo to query and receive results from the EBSCOhost API. End users that are either logged on to Primo or using an on-campus terminal do not need to log on to EBSCO to search for EBSCO content.

The first method mentioned above, alternative coverage, is used for any content provider where we don't receive the discovery records directly from the provider.

JSTOR collections and Gale Virtual Reference Library resources are included in the Primo Central index. Primo does not prefer results from one vendor or another. Additionally, libraries may have access to articles through different providers and this will not affect their relevancy ranking in search results.

15. Demo the Discovery service within Primo, how is the ranking of resources determined and can the link resolver be demonstrated using Academic Search Complete using the Discovery product within Primo

Ex Libris: For a full demo of Primo please view the recording of the Primo demo.



Ranking of resources utilized our ScholarRank technology, which first determines the full set of applicable search results, then determine the relevancy ranking. Relevancy is based on many factors,

including which field the search terms appear in, how frequently the search terms appear, how close search terms are to each other, and other factors. In addition, the library can add additional blending settings. For example, the library can boost local materials higher in the results set or boost a particular unique collection. Finally, ranking can also account for additional factors set by the user, including preferred disciplines and a preference for newer material.

As mentioned above, relevancy ranking is not affected by the vendor. Resources available through Academic Search Complete will be included in results based on how well they match the patron query.

16. When using Primo, can we set up to search our local holding, including our course reserves, ebooks, eresources as the initial search

Ex Libris: Complies with all. Primo enables the institution to define one or more scopes to provide access to all or a discrete subset of its collection—whether local or remote resources. A scope determines the domain of the search. For example, a scope might restrict the search by location, area of interest, or other parameters determined by the institution. An institution may define multiple scopes and enable them for use by all users or by specific user groups. Each institution can determine the default search scope.

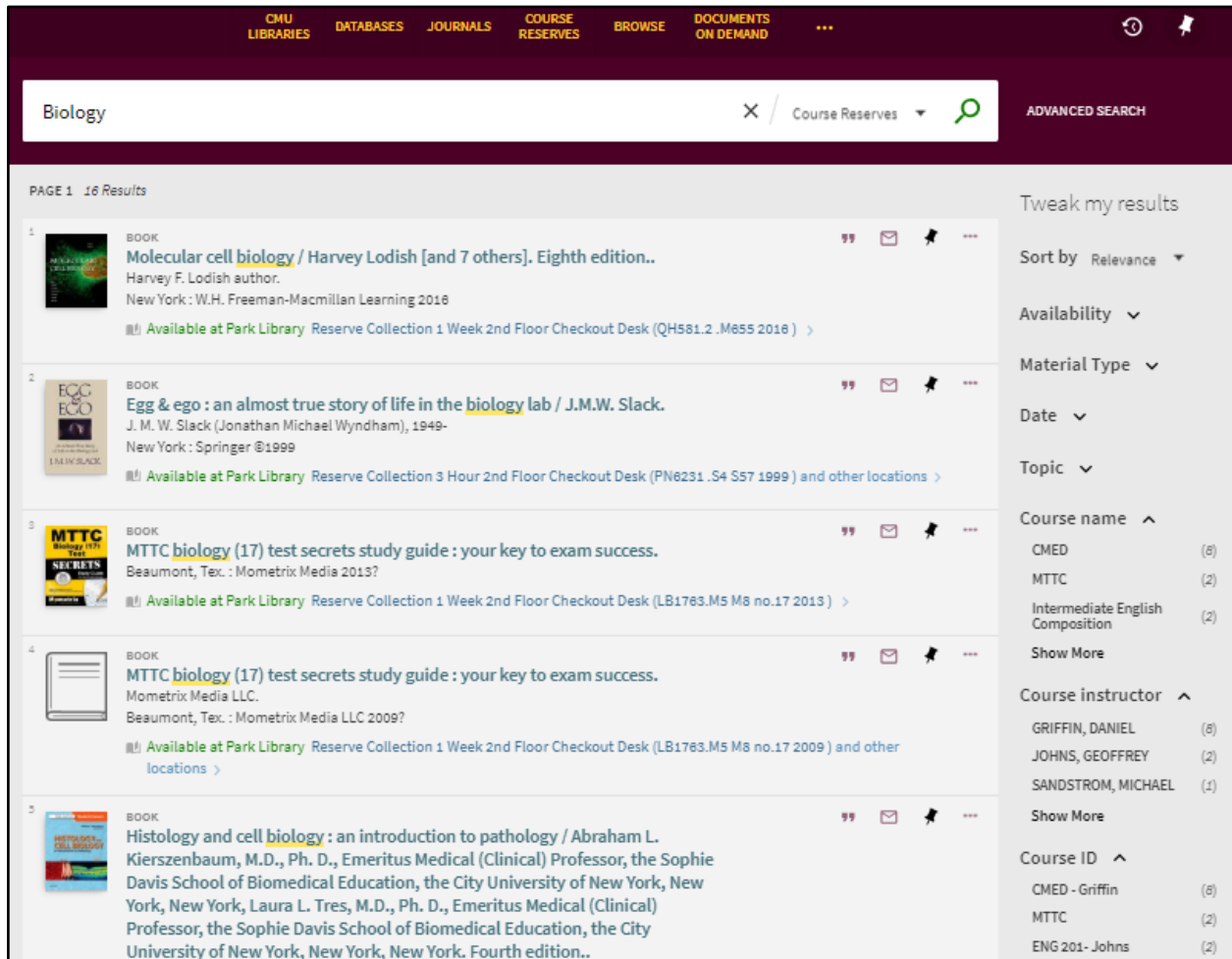
Additionally, Primo’s relevancy ranking configuration (“boosting”) allows the library to boost some items ahead of others, on a per-field basis, increasing the likelihood that a search for a specific title or author will be close to the top of the result set. Ranking is based on the metadata and full-text, and Primo provides the ability to manipulate the relevancy ranking algorithm by defining field-level boosting factors, as follows:

- Setting the importance of specific fields for boosting purposes;
- Boosting documents in publishing by use of normalization rules. A number is placed in the boost field in the Primo Normalized XML record, and the ranking algorithm relates to this number when defining the item’s rank. The boost field may push the item up or down in the ranking in varying degrees, depending on the value that populates it;
- Boosting by synonyms—typically, a record that contains a synonym to the searched term should be ranked below a similar record that contains the searched term. The degree to which the record that contains the synonym should be pushed down is configurable; and,
- Boosting local collections vs. Primo Central content.

An additional feature available in Primo that allows the library to promote special scopes that might be relevant for specific search scopes is the Featured Results Bar – this feature can be configured by the library to add to specific tabs/search scopes to search in parallel with additional scopes (that might include any collection) and highlight the results in a thumbnails display bar.

17. What course reserves searching is like in Primo. Is there a way for students to see a list of all items on reserve for a course? Or are they limited to searching by instructor and item title?

Ex Libris: Patrons access Course Reserves material through Primo. Many libraries include Course Reserves as a separate scope in the discovery layer. Below is a screenshot from Central Michigan University:



The screenshot displays the ExLibris library catalog interface. At the top, a navigation bar includes links for CMU LIBRARIES, DATABASES, JOURNALS, COURSE RESERVES, BROWSE, DOCUMENTS ON DEMAND, and a search icon. Below this, a search bar contains the term 'Biology' and a dropdown menu for 'Course Reserves'. The main content area shows search results for 'Biology' on page 1 of 16 results. The results list five books, each with a thumbnail, title, author, and availability information. The books are:

- Molecular cell biology** / Harvey Lodish [and 7 others]. Eighth edition.. Harvey F. Lodish author. New York : W.H. Freeman-Macmillan Learning 2016. Available at Park Library Reserve Collection 1 Week 2nd Floor Checkout Desk (QH581.2 .M655 2016) >
- Egg & ego : an almost true story of life in the biology lab** / J.M.W. Slack. J. M. W. Slack (Jonathan Michael Wyndham), 1949- New York : Springer ©1999. Available at Park Library Reserve Collection 3 Hour 2nd Floor Checkout Desk (PN6231 .S4 S57 1999) and other locations >
- MTTC biology (17) test secrets study guide : your key to exam success.** Beaumont, Tex. : Mometrix Media 2013?. Available at Park Library Reserve Collection 1 Week 2nd Floor Checkout Desk (LB1783.M5 M8 no.17 2013) >
- MTTC biology (17) test secrets study guide : your key to exam success.** Mometrix Media LLC. Beaumont, Tex. : Mometrix Media LLC 2009?. Available at Park Library Reserve Collection 1 Week 2nd Floor Checkout Desk (LB1783.M5 M8 no.17 2009) and other locations >
- Histology and cell biology : an introduction to pathology** / Abraham L. Kierszenbaum, M.D., Ph. D., Emeritus Medical (Clinical) Professor, the Sophie Davis School of Biomedical Education, the City University of New York, New York, New York, Laura L. Tres, M.D., Ph. D., Emeritus Medical (Clinical) Professor, the Sophie Davis School of Biomedical Education, the City University of New York, New York, New York. Fourth edition..

On the right side of the results, there is a sidebar titled 'Tweak my results' with filters for Sort by (Relevance), Availability, Material Type, Date, Topic, Course name (CMED (8), MTTC (2), Intermediate English Composition (2)), Course instructor (GRIFFIN, DANIEL (8), JOHNS, GEOFFREY (2), SANDSTROM, MICHAEL (1)), and Course ID (CMED - Griffin (8), MTTC (2), ENG 201- Johns (2)).

Links to electronic materials and information about print materials are visible in the same way as regular, non-course reserve materials.

A course reserves record can either be suppressed from the discovery interface completely or published in a manner that makes it discoverable only in the context of a courses related search. This type of cataloging may be preferable if the resource is expected to be re-used for subsequent courses but is not otherwise a part of the library inventory.

Citations that are linked to active courses are published to Primo with course information included. The following fields are indexed and can be retrieved by a Primo search: course IDs, course names, and instructor names. These fields can additionally be used as facets. This allows students to search for course materials with great flexibility. Additionally, Course reserves records include a Note field that can be used, for example, for recording information from the instructor about when the article/chapter etc. should be read. This note may be exposed in the Discovery Interface.

18. Discovery: How granular does the Discovery usage data go? It would be powerful to be able to generate a report that could be exported and provided to a campus' Institutional Research

dept to make connections between library users and larger datasets that the institution has to measure value and trends.

Ex Libris: There is a Primo analytics and reporting service for Primo cloud customers. The service is based on the Oracle Business Intelligence (OBI) platform, which is a leading platform for managing and delivering interactive reports and dashboards. OBI reports are easy to customize. Staff users can create their own reports and share report templates with other institutions. Ex Libris also provides a number of reports out of the box—for example, user actions, facet usage, and popular searches.

Note that Primo analytics and Alma analytics share a single interface. Primo analytics is accessible via a link from the Primo administration module.

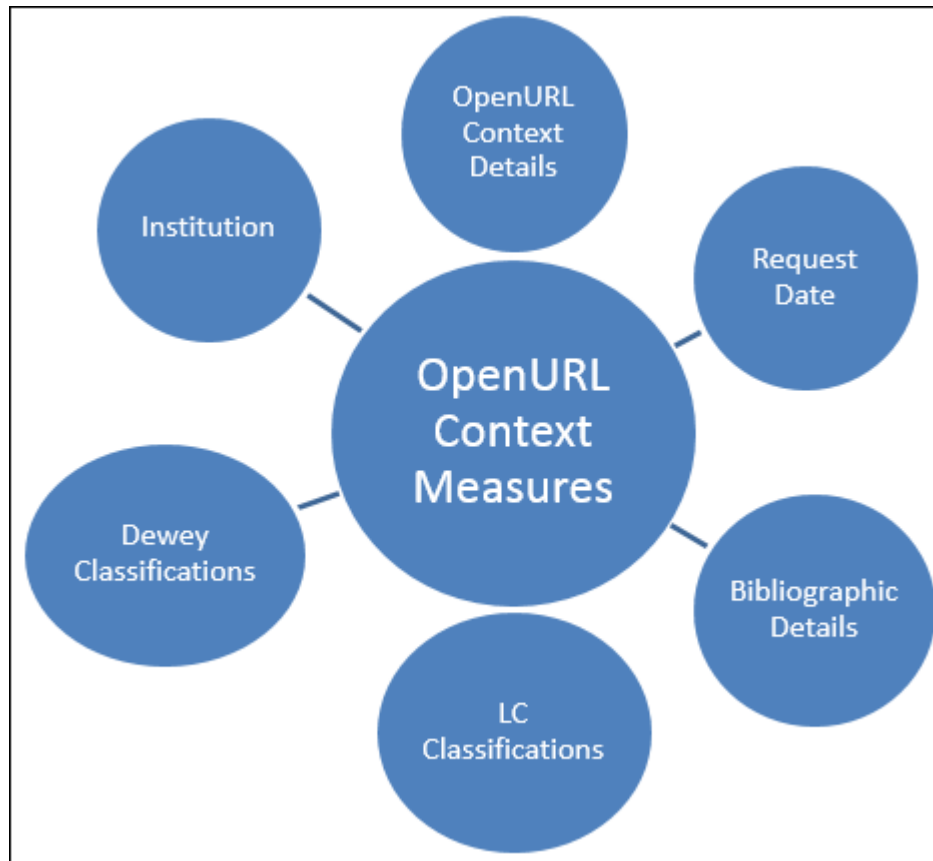
Alma also collects data on the usage of electronic resources via the Alma link resolver. These include OpenURL requests, services offered to the patrons and services which the patron chooses to use. Usage of electronic resources tracked via the link resolver can also be used for reporting using Alma Analytics. Reports can be created of usage statistics by journal, database, publisher, platform, and subscriber. The reports enable the library to drill down on data elements included in the report such as year range, titles, and so on.

Please note that usage statistics are only available at the institution level.

The fields of the Link Resolver Usage 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. This subject area supplements the Usage Data subject area, which includes data from vendors, while the Link Resolver Usage subject area takes data directly from the Alma link resolver.

Using the Link Resolver Usage area, the Design Analytics you can create reports/dashboards for the Link Resolver Usage area and are able to answer the following types of business questions:

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



Star Diagram – Link Resolver Usage

19. Discovery Question: How are collections (3rd party vendors for periodicals, eBooks, Open Access collections, and other multimedia collections) managed? Can custom collections be created? If a collection is purchased by a consortium and it is from vendor X -- and it is a shared collection how is that managed? AND if the members of the same consortium also purchase unique titles from vendor X on top of the consortium purchased collection how would those unique titles be managed.

Ex Libris: With regards to the end user display, Primo, by default, will display resources that are available to the patron. This can include resources that are only available at the individual institution and also resources available through consortial purchasing. Each Alma institution will have a dedicated Primo which can be used to search that institution's holdings as managed in Alma.

Alma includes a Central KnowledgeBase. The Central KnowledgeBase (CKB) describes vendor offerings for electronic resources and is maintained by Ex Libris. By integrating the CKB into the data services environment (the Community Zone), Alma allows libraries to eliminate the need to manually synchronize records for electronic resources into the local catalog. When a complete or partial package is activated in the CKB, the individual titles in that package are immediately available in the library's inventory. The CKB is tightly integrated with Alma acquisitions workflows and electronic management workflows:

- The institution can search the CKB for electronic resources of different types, choosing resources as part of the selection workflow, and/or initiating a purchasing workflow for the selected resources.
- An institution can also activate CKB electronic resources using an activation wizard. The Central Knowledge Base electronic resources details can be overwritten with an institution's local information.
- Since the CKB is maintained by Ex Libris, any CKB change related to the electronic resources used by the institution will be reflected in the institutional inventory, keeping the institution's electronic resources up to date, and also taking into account any localization of the electronic resource.
- The information in Alma's CKB also provides the data needed for Alma's link resolution functionality. Electronic resources linked to the CKB electronic resources can be resolved just as any other electronic resource, using the embedded OpenURL link resolver.

The Central KnowledgeBase is updated on a weekly basis by a dedicated team at Ex Libris. High quality data is loaded regularly and updated frequently from all major vendors, platforms, and publishers. The Community Zone Updates Task List page in Alma displays these updates that were made to the Institution Zone (IZ) during updates from the Community Zone (CZ). These changes are specific to the institution and may include modifications to bibliographic records as well as changes to holdings, availability, security requirements, and parser parameters.

Users can search their own institution, the consortium (the Network Zone) and the Community Zone shared catalog (the Alma Community Zone incorporates the KnowledgeBase, a Community Bibliographic Catalog and Global Authority Files).

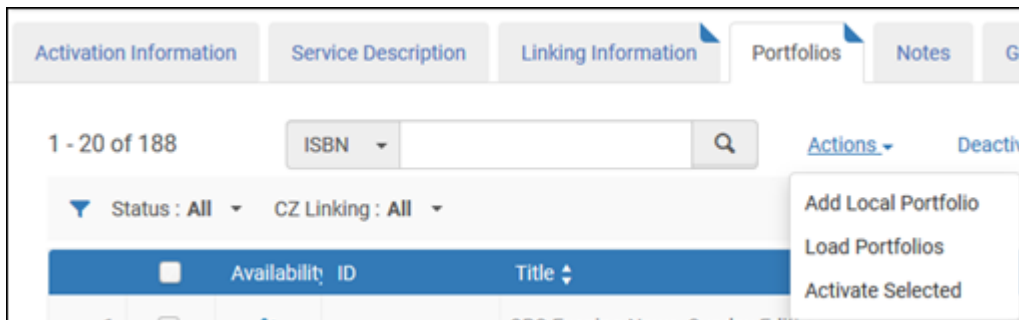
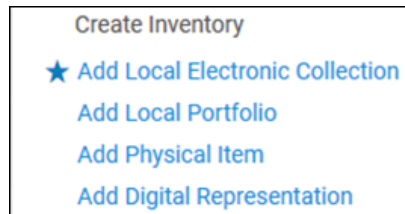
Because Alma was planned as a unified system, thereby integrating Electronic Resource Management, Acquisitions and Link Resolution, there is no need to load additional descriptive records when acquiring electronic resources based on the CKB. In other words, all electronic resources managed in the CKB will contain a descriptive record linked to locally activated resources. As policy, Ex Libris attempts to provide as full a description as possible for the CKB resources; for example, by enriching the records based on CONSER information (for e-journals). This makes any additional loading of full descriptive records into the local catalog unnecessary.

The Alma CKB describes collections of electronic resources offered by a wide variety of vendors, including the titles that are part of that package and linking information for individual titles and articles in those packages. The sources of the metadata come from the vendors providing the electronic resources. Ex Libris continually works to improve and add content to the Knowledge Base. Customers may request that resources be added to the Knowledge Base, and we endeavor to add them as quickly as possible. Customers request new resources to be added to the KnowledgeBase via Salesforce. In Salesforce, they can also view existing requests from other customers, and promote them.

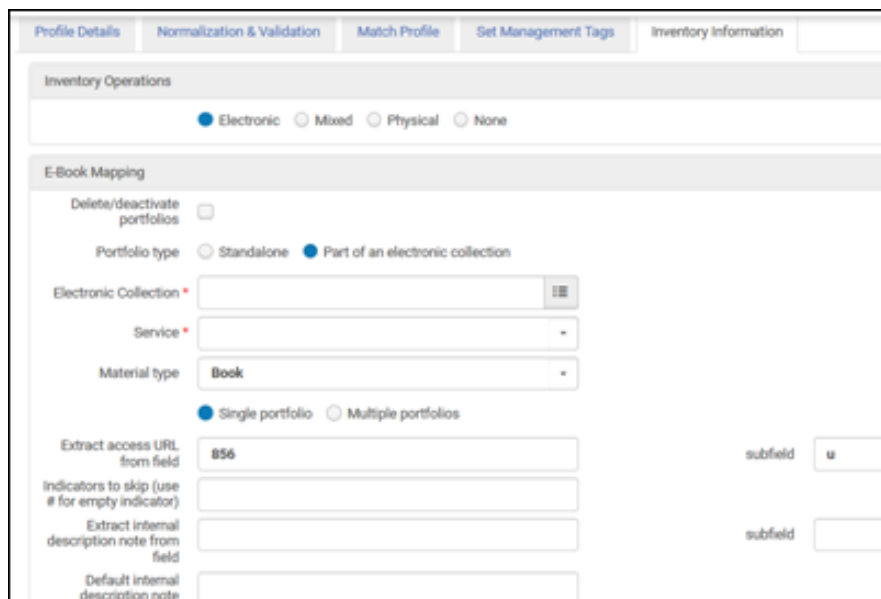
Custom Collections

Electronic resources of any type (Database, Interface, Collection, Titles) can be locally created in the institution.

From the Alma Menu staff users can chose from different options to create local inventory:



Alma supports enriching the title information with complete descriptive records using MARC based imports as illustrated below:

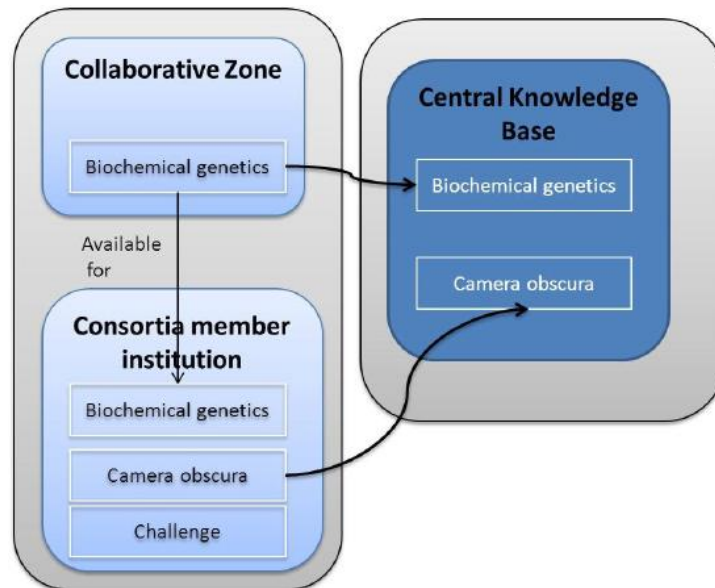


Once the collection has been created, functionality to share with the rest of the consortium can be used. The CKB itself is maintained and updated by Ex Libris staff.

Consortial Collection Development

Designed to support consortia, Alma supports consortial purchasing and management of electronic resources. Electronic resource purchasing, negotiated by the consortium, will be managed in the Network Zone, and electronic resources can be owned by all consortium members, a group of members, or an individual member. Consortium members can benefit from electronic resources managed in the shared institution but also retain independence by purchasing and managing electronic resources that are not negotiated by the consortium.

The diagram below illustrates the relationships among consortium members in relation to electronic resource management:



In the example above:

- The consortium negotiated a purchase of the electronic journal title 'Biochemical genetics' for a member institution and the electronic journal title is available via the CKB.
- The consortium member independently purchased an electronic journal title, 'Camera obscura', which is available via the CKB.
- The consortium member independently purchased the electronic journal, 'Challenge', which is not part of the CKB.

The CKB is tightly integrated with Alma acquisition workflows and electronic management workflows:

- Every institution in the consortium can search the CKB for electronic resources of different types, choosing resources as part of the selection workflow, or/and initiating a purchasing workflow for the selected resources.
- An institution can also activate CKB electronic resources using an activation wizard. The Central Knowledge Base electronic resources details can be overwritten with an institution's local information.

Acquisitions

20. Demonstrate how funds are managed such as creating specific vendor funds, encumbering ordered materials and invoicing received materials.

Ex Libris: Alma provides a flexible, hierarchical fund structure that the library can customize to meet its needs. The fund hierarchy:

1. Ledger
2. Summary
3. Allocated

A ledger must be defined, but not all the levels need to be utilized (e.g. it is possible to define a ledger, and an allocated fund, but not have a summary fund.) An institution may create many ledgers. A ledger generally contains one or more summary funds, and allocated funds under each summary fund. The allocated accounts contain actual monetary balances used to pay for library resources. There is no limit to the number of funds that can be created, and no limits to the number of funds that can be used for payments.

An example of a ledger record with its associated funds:

Status

Active (141)

Type

Allocated fund (82)
Ledger (18)
Summary fund (41)

Fiscal Period

01/01/2017 - 12/31/2017 (141)

Ledger

Art and Design (15)
Arts (13)
Business and Economics (14)
Classical Painting (2)
More (14) +

Library

Alma University (141)

Funds

Name

Q

<

Funds and Ledgers (1 - 20 of 141)

Add Ledger

Status : Active

Fiscal Period : 01/01/2017 - 12/31/2017

Clear all

1

API Division

Code: API Division

Type: Allocated fund

Status: Active

Fiscal Period: 01/01/2017 - 12/31/2017

Path: Engineering>Civil Engineering

Available Balance: 40.00 USD

Cash Balance: 340.00 USD

Encumbered Balance: 300.00 USD

Expenditure Balance: 0.00 USD

Allocated Balance: 340.00 USD

Edit

Duplicate

...

2

Accounting Serials

Code: ACC-SER

Type: Allocated fund

Status: Active

Fiscal Period: 01/01/2017 - 12/31/2017

Path: Business and Economics>Accounting and Finance

Available Balance: 851.14 USD

Cash Balance: 4,700.00 USD

Encumbered Balance: 3,848.86 USD

Expenditure Balance: 0.00 USD

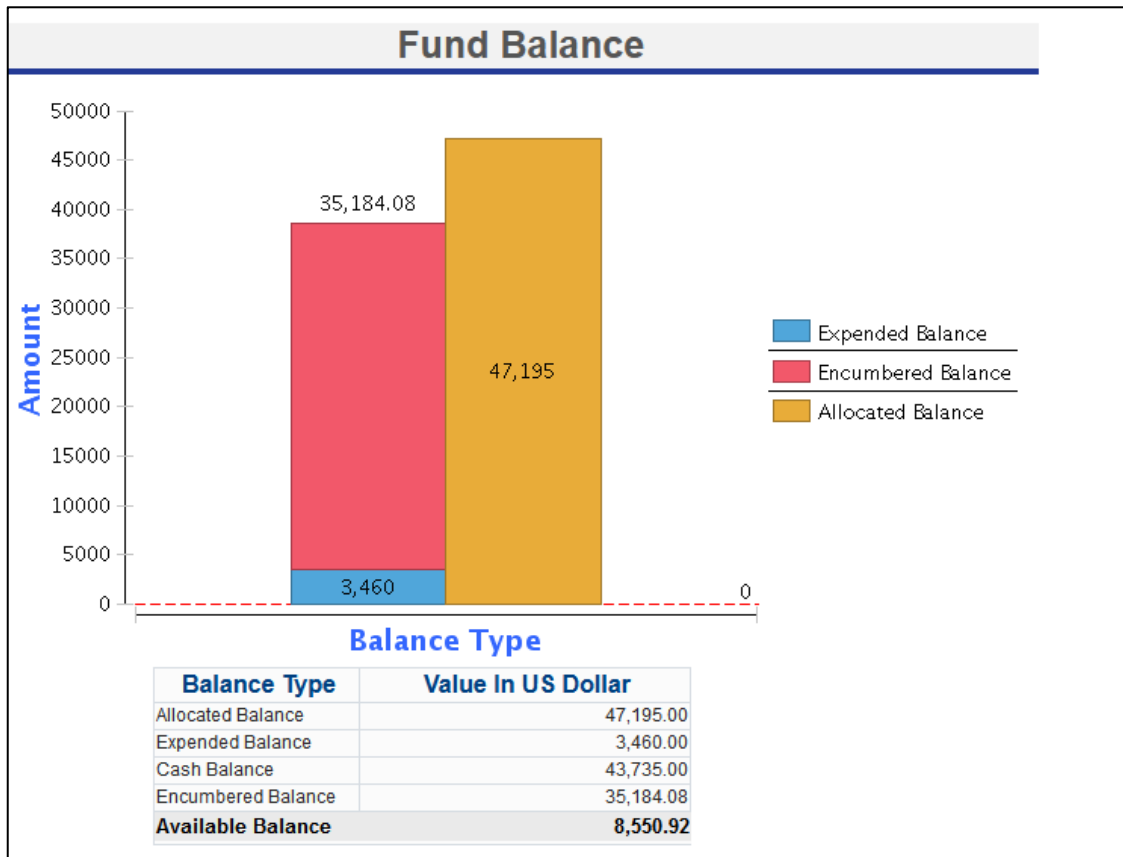
Allocated Balance: 4,700.00 USD

Edit

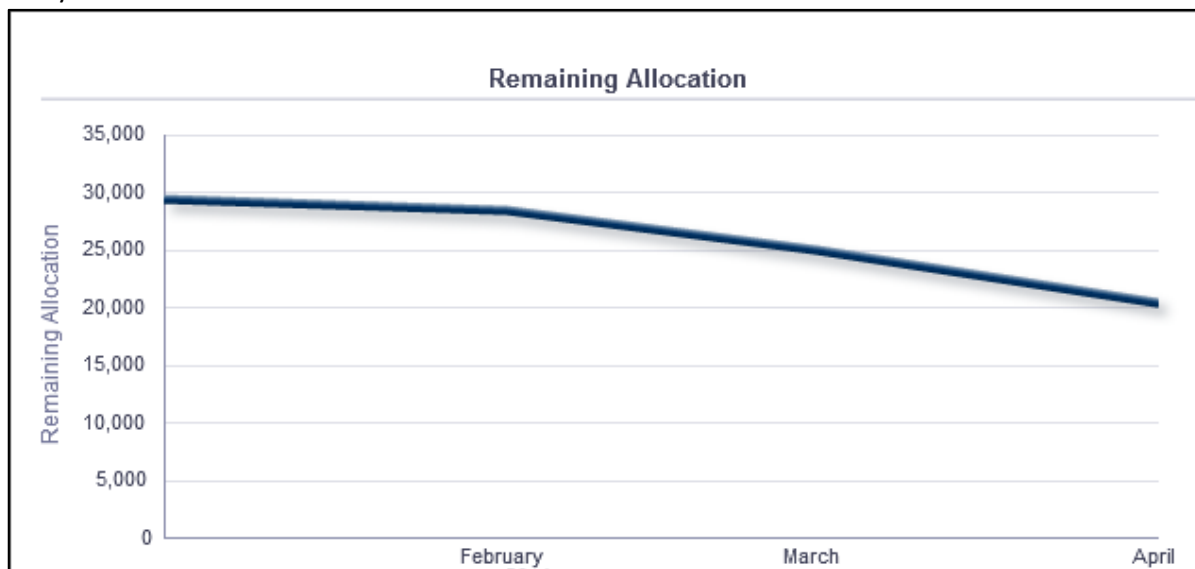
Duplicate

...

Alma supports real-time fund balances, including a graphical display of the fund balance showing encumbrances and expenditures, based on the real-time balance of the account at any given moment.



Users can also see a graphic display of the fund burn down – generated from a standard report in Alma Analytics:



Additionally, each fund displays a history of transactions (including positive and negative transactions) and the balance in the fund at the point of each transaction. The following screen capture shows transaction details of a fund:

Transactions

Deactivate

Cancel

Fiscal period

01/01/2017 - 12/31/2...

Code

LEDGER100...

Available Balance

2,769.17 USD

Cash Balance

81,900.00 USD

Encumbered Balance

79,130.83 U...

Expenditure Balance

50.00 USD

Summary

Transactions

Notes

Attachments

1 - 20 of 365

PO Line

Q

Transfer Funds

Allocate Funds

Filter : All

Time	Type	Related record	Amount	Payment date	Reporting code	Transaction reference	Notes
1 06/13/2017 23:59	Encumbrance	PO Line:POL-45862	300.00 USD	-	Electronic Resource	-	
2 06/13/2017 18:20	Encumbrance	PO Line:POL-45860	100.00 USD	-	-	-	
3 06/13/2017 18:13	Encumbrance	PO Line:POL-45859	100.00 USD	-	Electronic Resource	-	
4 06/07/2017 16:39	Encumbrance	PO Line:POL-45847	100.00 USD	-	Electronic Resource	-	

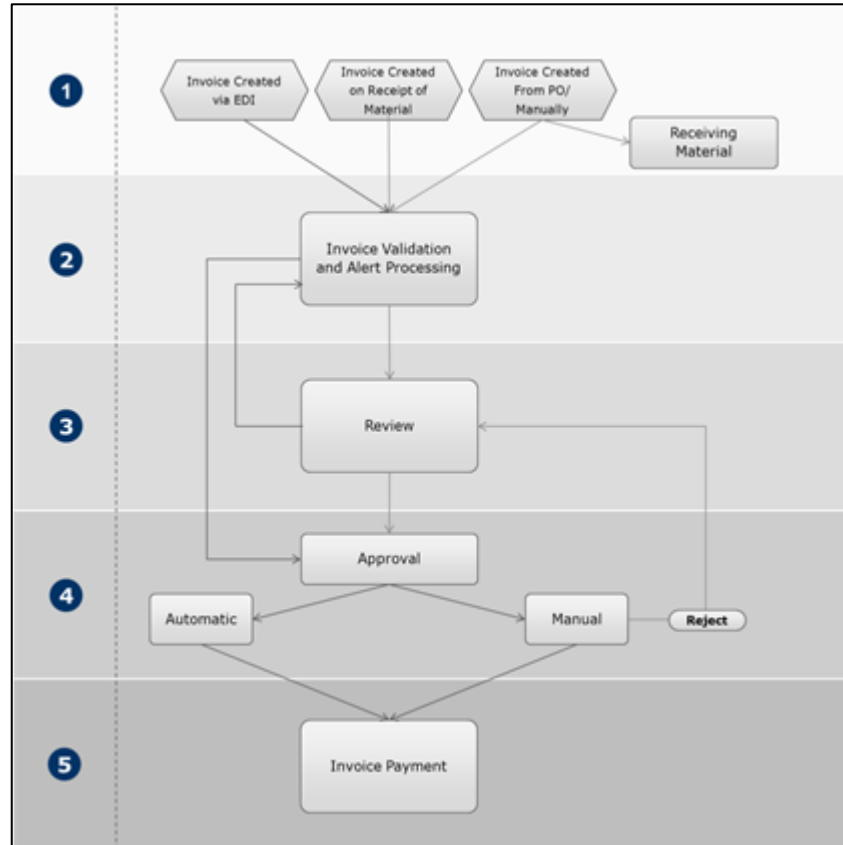
In Alma, an invoice can be created in several ways:

1. Electronic data interchange (EDI) with a vendor
2. Creating an invoice from the PO
3. Creating an invoice manually or
4. Loading invoices from an Excel file.

The invoice workflow in Alma

Receiving and invoicing can be done together or separately, depending on the library's workflows. Alma uses library-defined rules to automatically process an invoice to determine whether there are elements that require special attention. If there are issues that require attention, the invoice is surfaced via the task list for review by a staff user.

The diagram below illustrates a typical workflow for invoicing materials.



EDI Invoices:

When invoices are placed at an FTP location by an EDI-enabled vendor, Alma will automatically load and parse the invoices.

Creating an invoice from the PO (Purchase Order):

Alma supports the creation of an invoice automatically from a PO. Once the PO is selected Alma will automatically create invoice lines based on the PO details; the invoice line fields are automatically populated and are displayed in the Summary tab, where they can be edited as needed:

Invoice Details										
<div> Summary Alerts Invoice Lines History Notes Attachments </div>										
<div> 1 - 5 of 5 <div> Add Invoice Line </div> </div>										
<div> Status: All Type: All </div>										
Line #	Type	Price	Total Price	VAT Note	Status	Description	Funds	Note	PO Line #	
1	1	Regular	20.00 USD	20.00 USD	-	Ready	1001 math problems.	Accounting and Finance Monographs (100.0%) (01/01/2017 - 12/31/2017)	-	POL-43969 (Waiting for Invoice)/
2	999991	Shipm...	0.00 USD	0.00 USD	-	In-Rev...	-	-	-	...
3	999992	Discou...	0.00 USD	0.00 USD	-	In-Rev...	-	-	-	...
4	999993	Overhe...	0.00 USD	0.00 USD	-	In-Rev...	-	-	-	...
5	999994	Insura...	0.00 USD	0.00 USD	-	In-Rev...	-	-	-	...

Manual creation of an invoice:

Alma also supports the completely manual creation of an invoice using the following form:

Invoice Details

1
2
Cancel
Back
Save and Create Invoice Lines

Invoice number *

Vendor *

Total invoice lines amount

Payment method
Accounting Department

Creation from
Manually

Invoice date *

Vendor account

Total amount *
USD

Vendor contact person

Invoice reference #

Owner *
Alma University

Additional Charges

Use pro rata

VAT

Report tax

VAT per invoice line

VAT code
Update Amount

When saving an invoice Alma checks whether the invoice foreign currency is different than the invoice line fund. If there is a difference, Alma calculates the expenditure price based on the foreign currency, according to the currency repository for the invoice date.

Alma also supports defining an explicit ratio per invoice. In this case, Alma calculates the expenditure based on the explicit ratio and does not consult the currency repository.

21. Ordering, invoicing, receiving/cataloging a single-piece and multi-piece monographs (all pieces available at time of purchase and in hand)

Ex Libris: Alma supports a variety of order types covering all options of material that might be ordered by a library. The list is supplied out of the box by Ex Libris, and can be customized by the library. For example, a library might choose to de-activate some of the order types because they are not relevant for their library. An example of the list of order types – including continuous order types (that are active – with a yellow check mark, or not-active without the yellow check mark) can be seen in the following screen capture:

	Enabled	ID	Description	Continuity	Inventory Format	Acquisition Material Type	Context
1		ACCESS_SERVIC	Access Ser	Continuous	Generic	Service	LOCALMM!
2		DB_CO	Database -	Continuous	Electronic	Package	LOCALDB,L
3		DB_OT	Database -	One-Time	Electronic	Package	LOCALDB,L
4		DB_SERVICE_OT	Database S	One-Time	Generic	Service	LOCALMM!
5		DIGITAL_NONAR	Digital - No	One-Time	Generic	Service	LOCALMM!
6		E_BOOK_CO	Electronic E	Continuous	Electronic	Book	LOCALMM!
7		E_BOOK_OT	Electronic E	One-Time	Electronic	Book	LOCALMM!
8		E_BOOK_PKG_CC	Electronic E	Continuous	Electronic	Package	GLOBALPA
9		E_BOOK_PKG_OT	Electronic E	One-Time	Electronic	Package	GLOBALPA
10		E_BOOK_SO	Electronic E	Standing Or	Electronic	Book	LOCALMM!
11		E_JOURNAL_CO	Electronic J	Continuous	Electronic	Journal	LOCALMM!

The Order Workflow

When initiating an order, Alma will offer the staff user the option of choosing a Purchase Type – based on the type of media being ordered. (The list can be customized by the library.)

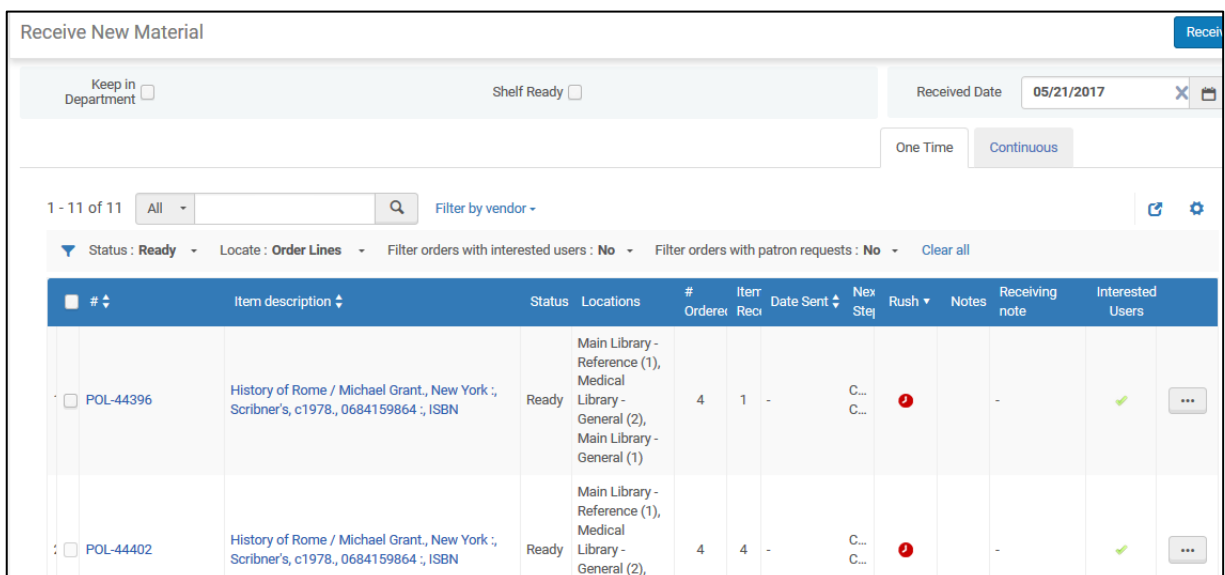
Purchase type *
PO line owner *
Load from template

Recommended
Physical - One Time
Physical - Standing Order Monograph
Electronic Title - One Time
Electronic Title - Subscription
Other

Based on this information, the PO Line that is created will be tailored to the type of material being order. For example, a monograph will have fields to define library and location; journals (print and electronic) will have subscription date fields.

Staff members receive new print material into the system using a dedicated receiving “workbench”. They locate the relevant purchase order lines with the material received, and then receive the items. Additionally, at this stage staff can add barcode information, perform copy cataloguing, etc. When relevant, they can also indicate whether further work must be performed (i.e., it needs to remain in Technical Service) before the material is available to the library for which it was ordered.

For single-title monographs, checking-in an item triggers marking the PO line as received, as well as routing the item to the appropriate next step (cataloging, physical processing, shelves, or patron pickup if a request has been placed). For standing orders (serials and serial monographs), the same actions will be triggered, but the PO line will remain open.



#	Item description	Status	Locations	# Orders	Item Recd	Date Sent	Nex Ste	Rush	Notes	Receiving note	Interested Users
POL-44396	History of Rome / Michael Grant, New York ; Scribner's, c1978, 0684159864 ; ISBN	Ready	Main Library - Reference (1), Medical Library - General (2), Main Library - General (1)	4	1	-	C...	2	-	-	✓
POL-44402	History of Rome / Michael Grant, New York ; Scribner's, c1978, 0684159864 ; ISBN	Ready	Main Library - Reference (1), Medical Library - General (2)	4	4	-	C...	2	-	-	✓

Alma streamlines the process of receiving items and allows for shelf-ready materials to be processed simply by scanning their barcode, saving staff time and effort.

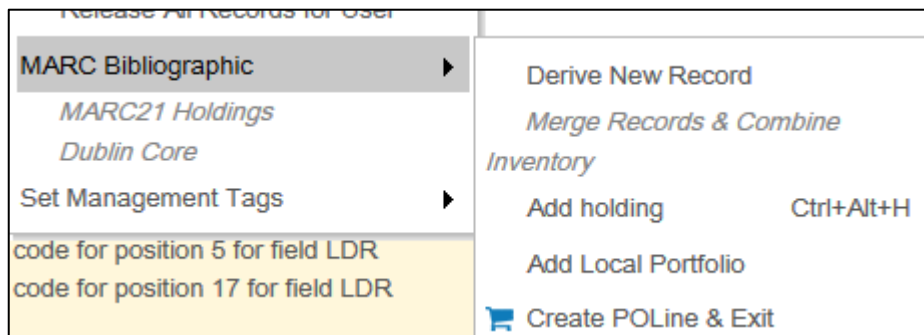
Alma provides a task list to manage material that needs to be further processed before being shelved. Items in this process have distinct statuses assigned to them so they can be tracked and moved among the relevant units for physical processing, cataloging, and temporary storage.

Invoicing in Alma is described in a previous response.

22. Ordering, invoicing, receiving a multipiece monograph where all pieces are not available/not in hand, such as when all volumes are not yet published, and we would order them one by one as they became available, or a set is purchased together but one volume is on backorder and received at a later time

Ex Libris: Please see the response directly above. Alma’s streamlined acquisition processes allow for ordering new materials for which bibliographic data does not already exist; there is no dependency on

having complete bibliographic record information to initiate an acquisition process. The library staff member simply enters brief bibliographic information into a template and generates a purchase order line based on the brief record.



For brief records, the library determines which fields are mandatory before the record can be saved. The bib record can be completed at a later stage, once the item has arrived, or at any point in the process when more complete metadata becomes available.

23. Ordering, invoicing, receiving non-magazine serial titles whether annual or irregular. (Things like Nolo, college profile directories, Westlaw, Best American Short Stories.) Both when there is a standing order to receive each volume when it is published and one-off orders (such as replacements or gifts of a single volume).

Ex Libris: Alma supports purchasing workflows of all types.

- Approval orders are managed as standing orders, where the specific titles are loaded via MARC embedded order data/embedded order confirmation records. The system will check for approval titles that are already owned and flag them for staff review.
- Firm orders for print or electronic resources are managed by creating order lines attached to either a brief bibliographic record or a complete record from the Alma Community Catalog. Once the order has been processed, it may be sent via EDI, email, or print. The library may attach complete bibliographic records either from the Community Catalog or an external source. Print titles await receiving from the vendor, and electronic titles are activated as per agreement with the vendor. At that point, these resources are added to the permanent collection.
- Print continuations (print subscriptions and standing orders) and electronic subscriptions are both managed by Alma through ongoing open orders. The library establishes a purchase for the subscription, including a start and end date (the latter is optional). As new issues of print resources are received, inventory is created automatically. Electronic subscriptions may be activated and are subject to evaluation and renewal workflows.
- Alma also supports acquisition workflows for non-purchased materials, such as gifts, and legal deposit, without requiring that the items follow the traditional workflow of order, receipt, invoice, payment.
- Alma supports the ability to derive purchase orders based on EOD/EOCR records. The approach is flexible enough to accommodate mapping PO data from an array of different MARC fields and subfields, and can be customized based on different vendor requirements. Default profiles are included for common vendor mappings.
- Alma maintains a lifecycle of purchasing that allows orders to be processed automatically with no staff intervention. The library can set up rules that will flag an order for review or for automatic processing based on flags, e.g.:

- By vendor (so that some vendor orders can pass through automatically)
- By acquisition method (e.g., so that approval orders will pass fewer checks)
- By type of material or source of PO information
- By additional exceptions (duplicate active order, item already exists in inventory, price exceeds limits, fund nearing limit, etc.)

In this way, acquisitions staff will have one task list in which to review orders that require decisions, while other orders will be automated. The following screen capture shows an example of a staff user's task list – with a hypertext link to order lines that require review:

Tasks	
31	Purchase Requests
388	Order Lines
6	Review - assigned to you
2	Review - unassigned
216	Review
153	Order Lines with claims
11	Waiting for renewal
22	Invoices
24	Items
6	Electronic Resources
10	Trials

24. Ordering, invoicing, and receiving an item that was ordered as a single piece with a single price, but needs to be split apart into multiple titles for cataloging and receiving (such as a boxed set)

Ex Libris: This scenario would probably best be handled as a standing order. There are ten steps involved in creating and processing a standing order. (Note that this is a recommended workflow, but it is possible to deviate from these steps based on local customs and needs, for example, #8 in the list below may not be relevant.)

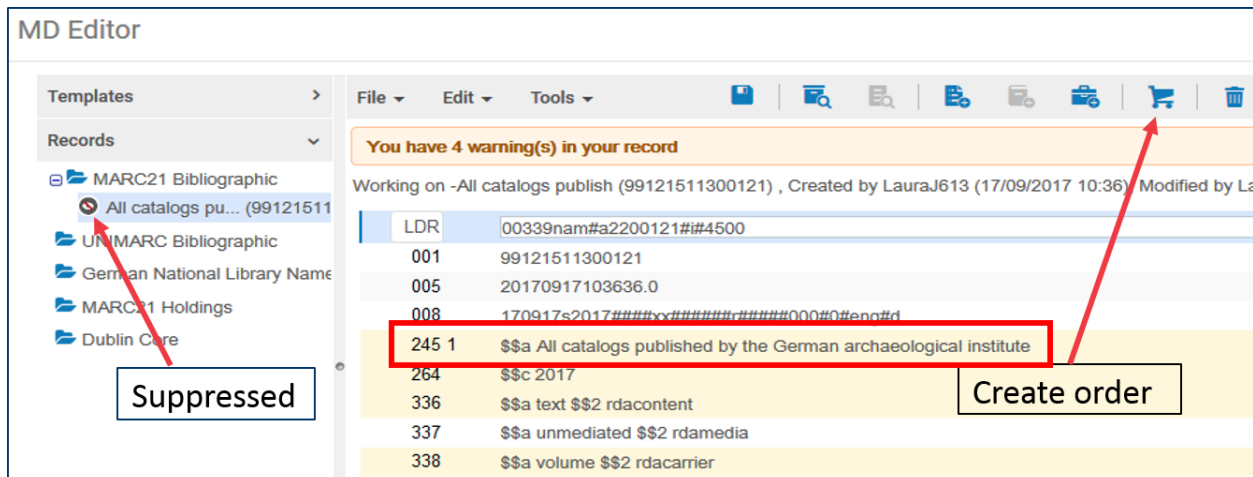
1. Create a bibliographic record that will be used to create the order.
2. Suppress the bibliographic record because it is not a real record, but rather, a description of the standing order.
3. Create an order for the record and choose purchase type 'Physical – Standing Order ...'

4. In the order price, enter the amount which you want to be encumbered on the budget(s) used for this order.
5. Send the order.
6. Whenever an item arrives for the standing order catalog it as a separate bibliographic record and add holding record and item. This can be done in one of two ways:
 1. Via the metadata editor
 2. Via menu 'Resource management > Create Inventory > Add Physical Item'
7. In the item record enter the receiving date and link it to the POL.
8. When invoice arrives pay for each item that arrived as part of the standing order using a separate invoice line for each item.
9. Pay the invoice as you would pay any invoice.
10. When the vendor will no longer be sending items for the standing order, it should be manually closed.

Here is an example of the workflow. In this example, we will make a standing order for "All catalogs published by the German archaeological institute". These are catalogs that are printed on an irregular, random basis. The vendor receives the order and knows that any time another catalog is published it should be sent to the library.

The example used here can be used for any type of physical material that is supplied from the same vendor in an irregular and unpredictable frequency, (or, as in your example, a box set which will be cataloged separately).

Create order for the suppressed record with title "All catalogs published by the German archaeological institute":



The screenshot shows the MD Editor interface. On the left, a sidebar lists templates and records. The 'Records' section shows a list of records, with 'All catalogs pu... (99121511)' selected and marked as 'Suppressed'. The main area displays the record details for 'All catalogs published by the German archaeological institute'. A red box highlights the record title, and a red arrow points from the 'Create order' button to the record title. The record details include fields for LDR, 001, 005, 008, 245 1, 264, 336, 337, and 338.

Field	Value
LDR	00339nam#a2200121#i#4500
001	99121511300121
005	20170917103636.0
008	170917s2017####xxt#####d####000#0#eng#d
245 1	\$a All catalogs published by the German archaeological institute
264	\$c 2017
336	\$a text \$2 rdacontent
337	\$a unmediated \$2 rdamedia
338	\$a volume \$2 rdacarrier

Here we create the order (POL-44573) and choose Purchase Type "Physical – Standing Order Monograph":

< PO Line Owner and Type

Description * All catalogs published by the German archaeological institute

Purchase type * Physical - Standing Order Monograph

PO line owner * Main Library

Load from template

In the order price, enter the amount that you want to be encumbered on the budget(s) used for this order. This will likely be the amount, which you think the series of items will eventually cost.

Vendor information

Material supplier * GAI/GAI_Main_Account X View vendor

Expected receipt after ordering (days) 10

Claiming grace period (days) 30

Or expected receipt date

Pricing

List price * 1000.00 EUR

Net price 1,000.00 EUR

Quantity for pricing * 1

Discount (%) 0.0

Funding

Add Fund +

Redistribute Lines

#	Fund Name ▲	Percent	Amount ⇅
1	1 Library and Information Science (01/01/2017 - 31/12/2017) (4,950.69 USD)	100.0%	1000.00 EUR
2	Total	100.0%	1,000.00 EUR

The order is sent to the vendor:

German Archeological Institute 21 Archeology Strauss Cologne DEU	Main Library Primary Dept. 237 Center Street Main Library 237 Center Street Main Library 2nd Floor Centreville
--	---

Dear German Archeological Institute

We would like to place an order for the following items:

Order Date: 17/09/2017
 Vendor Account: GAI Main Account
 Shipping Address: Shipping Dept. 237 Center Street Main Library 237 Center Street Main Library 2nd Floor Centreville
 Shipping Method:
 Billing Address: Billing Dept. 237 Center Street Main Library 237 Center Street Main Library 2nd Floor Centreville

PO Line Number	Date	ISSN/ISBN	Title	Quantity	Price	Note
POL-44573	17/09/2017		All catalogs published by the German archaeological institute	1	EUR 1000.00	


The first pamphlet arrives for the standing order. It is "A report on the archaeological findings in and under the Town Hall Square in Cologne, Germany". The bibliographic record, holding record and item are added. In the item record enter the receiving date and link it to the POL.

Here we add the Bibliographic record:

005	20170917110945.0
008	170917s2017####xx#####r#####000#0#eng#d
110	\$\$a Deutsches Archäologisches Institut
245 1 2	\$\$a A report on the archaeological findings in and under the Town Hall Square in Cologne, Germany
264	\$\$a Cologne : \$\$b German Archaeological Institute \$\$c 2017
336	\$\$a text \$\$2 rdacontent
337	\$\$a unmediated \$\$2 rdamedia

Here we add the item and then link the item to the PO Line of the standing order and add the Receiving Date:

< Physical Item Editor



**A report on the archaeological findings in and under the Town
Institut German Archaeological Institute Cologne : 2017**

Holding	Main Library: General; BL1109.2	Holdings ID	-
Barcode	AU43513		
Process type	-		

Barcode **AU43513** Generate

Material type **Pamphlet**

Provenance

PO Line **POL-44573** X ⋮ 🔄


Receiving date **17/09/2017** X 📅

POL of the standing order

At some later point, another record arrives for the standard order. As was done for the first order we catalog it, add a holding record and an item. We link the item to the same standing order POL.

The pamphlet that arrives now is “Archaeological discoveries of the Ubii village on the Rhine”. As with the previous item that already arrived for the standing order, we link this item to the standing order and add the receiving date:

< Physical Item Editor



**Archaeological discoveries of the Ubii village on the Rhine Deut
Cologne : 2017**

Holding	Main Library: General; BL1109.3	Holdings ID	-
Barcode	AU43514	Item ID	
Process type	-		

Barcode

Material type

Provenance

PO Line

Receiving date

POL of the
standing order

When invoice arrives pay for each item that arrived as part of the standing order using a separate invoice line for each item:

< Invoice Details

PO-68813

Unique invoice identifier	3835473370000121	Owner	-	Vendor	GAI
Approved by	- (-)	Status	Pending	Total amount	1,000.00 EUR
Total invoice lines amount	-				

Summary Alerts Invoice Lines History Notes Attachments

Status: All Type: All

The first item of the standing order in first invoice line:

Add Invoice Line

Type: Regular

PO line: **POL-44573** ✕ [More Information](#)

Title: All catalogs published by the German archaeological institute

PO line price: 1,000.00 EUR

Check subscription date overlap: ☐

Poline subscription dates range: -

Subscription dates range:

Additional information: A report on the archaeological findings

No records were found.

Price: 61.30 EUR

Total price: 61.30 EUR

Release remaining encumbrance: ☐

The second item of the standing order in second invoice line:

Add Invoice Line

Type: Regular

Line number: 2

PO line: **POL-44573** ✕ [More Information](#)

Title: All catalogs published by the German archaeological institute

PO line price: 1,000.00 EUR

Check subscription date overlap: ☐

Poline subscription dates range: -

Subscription dates range:

Additional information: Archaeological discoveries of the Ubi

Invoice / Invoice line number	Invoice Status	From Date	To Date	Additional Information
PO-68813 (1)	ACTIVE	-	-	A report on the archaeological findings in and under the Town Hall Square in Cologne, Germany

Price: 24.80 EUR

Total price: 24.80 EUR

Release remaining encumbrance: ☐

Here are both invoice lines:

Summary Alerts Invoice Lines History Notes Attachments									
1 - 2 of 2									
Status: All Type: All									
Line #	Type	Price	Total Price	VAT Note	Status	Description	Funds	Note	PO Line #
1 1	Regular	61.30 EUR	61.30 EUR	-	Ready	All catalogs published by the German archaeological institute	Library and Information Science (100.0%) (01/01/2017 - 31/12/2017)	-	POL-44573 (Waiting for Renewal)/
2 2	Regular	24.80 EUR	24.80 EUR	-	Ready	All catalogs published by the German archaeological institute	Library and Information Science (100.0%) (01/01/2017 - 31/12/2017)	-	POL-44573 (Waiting for Renewal)/

Pay the invoice in whatever manner you would normally pay an invoice.

Payment Information

Prepaid ☒

Internal copy ☐

Payment status **Paid**

Payment date 17/09/2017

Sum of all invoice lines

Payment identifier

Payment amount * 86.10

Invoice #	Status	Vendor	Owner	Creation from	Creation Date	Last Updated Date	# of Lines	Total Price
1 PO-68813	Closed	German Archeological Institute	Main Libr...	From PO	17/09/20...	17/09/2017	2	86.10 EUR

When the vendor will no longer be sending items for the standing order it should be manually closed.

1  All catalogs published by the German archaeological institute, 2017, Edit Change Bib Reference ...

MMS ID: 99121511300121

Assigned to: -

Type: Physical - Standing Order Monograph

PO line owner: Main Library

Standard number: -

Order: PO-68813 / (Sent)

Order Line: POL-44573 / (Waiting for Renewal)

Copies: -

Total price: 1000.00 EUR

Funds: Library and Information Science (100.0%) (01/01/2017 - 31/12/2017)

Vendor/Account: German Archeological Institute / GAI Main Account GAI_Main_Account

Vendor reference ID: -

Expected delivery: 27/09/2017

Renewal date: 31/12/2019

Receiving note: -

Sent date: 17/09/2017

The bib record is brief, Price limit reached, At least one of the reporting codes is missing

Close

Cancel

1


All catalogs published by the German archaeological institute, 2017,
[Edit](#)
[Change Bib Reference](#)
[...](#)

MMS ID: 99121511300121 Assigned to: - Type: Physical - Standing Order Monograph PO line owner: Main Library Standard number: - Order: PO-68813 / (Closed) Order Line: PO1-44573 / (Closed)	Copies: - Total price: 1000.00 EUR Funds: Library and Information Science (100.0%) (01/01/2017 - 31/12/2017) Vendor/Account: German Archeological Institute / GAI Main Account GAI_Main_Account Vendor reference ID: - Expected delivery: 27/09/2017	Renewal date: 31/12/2019 Receiving note: - Sent date: 17/09/2017 The bib record is brief, Price limit reached, At least one of the reporting codes is missing
---	---	---

25. Alma/Acquisitions: Example of how a basic setup of the Acquisitions portion of Alma for electronic resources, and for book/eBook purchases with Gobi.

Ex Libris: Alma is a unified platform and handles resources of all types, regardless of format. This means that much of the functionality for e-resource management uses the same workflows as with physical resource management, allowing for consistent training, reporting, and a platform for workflow enhancements that applies to resources of any type.

Alma's workflows support streamlining a variety of purchasing models for electronic journals and electronic books, including:

- Individual title subscriptions;
- Individual title purchases;
- Full collection subscriptions;
- "Selective" (partial) collection subscriptions; and
- Patron-driven acquisition of e-books.

A Central KnowledgeBase (CKB) managed, maintained and updated by Ex Libris, tracks the most up-to-date vendor offerings in the shared data services environment. When acquiring a new collection, libraries may search the CKB and, when they find the collection they wish to acquire, initiate an acquisition workflow based on either the full collection or a selective subset of titles they've licensed from the vendor. The workflow may begin with a trial, pass through purchasing, and ultimately end up in the activation of that resource for all users.

Search for and Order an Electronic Resource:

1


Barriers to Riches [electronic resource]
[Order](#)
[Portfolio List](#)
[...](#)

Identifier: 0-262-16193-1 Imprint: Cambridge, MA, USA, MIT Press, 20000701	Medium Type: [electronic resource] Type: Book Language: English Record number: (PQKB)10181760
---	--

● Electronic (1)
[Other details](#)

Based on agreements with the vendor, once the order has been sent, the library will be able to activate the e-resource. Staff members activate new electronic resource material in the system using a wizard from the Activation Task List.

Here, a staff member performs various activities related to activating the resource, including verification that the resource is available (using Alma's embedded link resolver functionality), determination of the specific contents and coverage of the resource, and then making it available for discovery by the end user.

<input type="checkbox"/>	MMS ID	Title ▲	Type ▾	Status	Status Date ▾	Modified By	Identifier ▾	Due Date ▾	Expected Activation Date	PO Line Owner	Order Line
1 <input type="checkbox"/>	99152210500121	Gale Cengage Nursing Resource Center	Aggreg... package	Check Access	06/06/2017	System	-	07/25/2017	06/2...	Main Library	POL-45842
2 <input type="checkbox"/>	-	War history of American railroads,	Portfolio	Check Access	09/29/2013	System	-	-	-	Main Library	POL-29510

Electronic Collection Description

General Information

Additional Information

Notes

Group Settings

History

Summary and Inventory Information

Electronic Collection type

Aggregator package

Interface Name

Galegroup

Interface Description

Services

-

Process type

Acquisition

Access type

☒ Current ☐ Perpetual

Acquisitions and License Information

PO Line

POL-45848

PO Line details

POL-45848

Activation date

-

Expected activation date

License

Gale

View license details

Gale

Once activated, descriptive metadata (bibliographic records) for the titles will automatically be added to the local catalog. Additionally, link resolution is built in; Alma will respond to any requests from discovery environments, with a menu with links to full text for all resources-types: print, electronic and digital.

When a subscription is nearing conclusion, Alma will prompt staff to initiate an evaluation process for the collection. In the evaluation function, staff may view information about usage, cost, and how the collection has changed, in order to decide whether to renew or cancel the subscription. Cancellation will automatically remove the descriptive records from the catalog.

GOBI

Alma integrates with commonly-used external selection portals such as YBP's GOBI platform with automated import capabilities through extensive support for vendor-specific import profiles and embedded order data (EOD) records.

Real-time acquisition is an integration between Alma and 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.

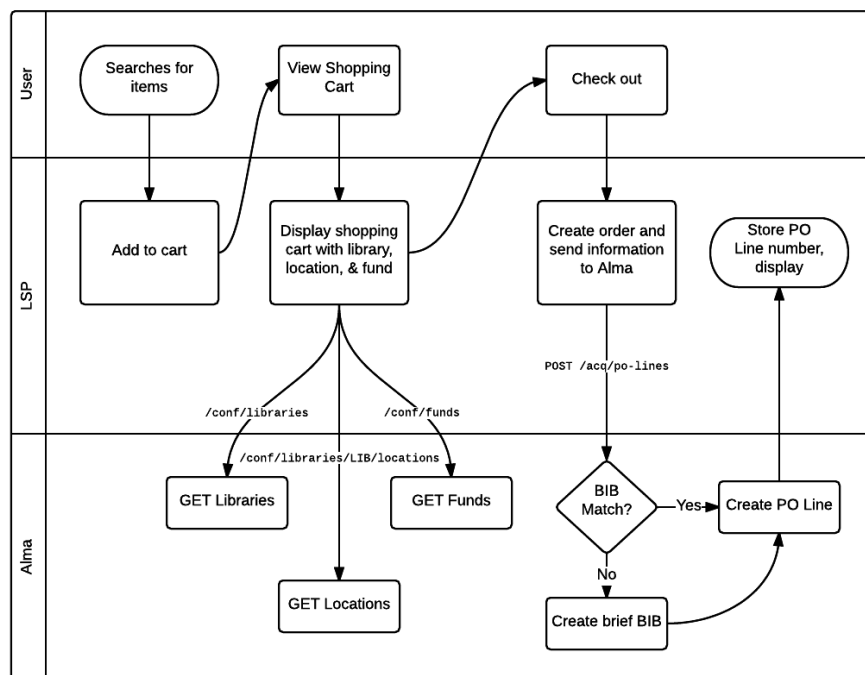
Workflow

- The user searches for items in the vendor's system, and places them in the shopping cart (or equivalent).
- The user verifies owning library, fund codes and other relevant information.
- At checkout, the vendor sends the shopping cart data to Alma using the [Create PO line API](#).
- Alma validates the received PO line information (see [PO line object](#))
- Alma [attempts to match](#) the bibliographic data using standard identifiers. If no match is found, Alma creates a brief bibliographic record for the order.
- Alma responds with the newly created PO line number to the vendor.
- 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 **vendor reference number** is kept as part of the Alma PO line. **Alma PO line number** is kept as part of the vendor order details.

The following flow chart represents the workflow.

Real Time Acquisitions Integration Alma & Library Service Providers (LSP's)



The following vendors currently support this integration:

- [GOBI](#)
- [Harrassowitz](#)

- [OASIS](#)

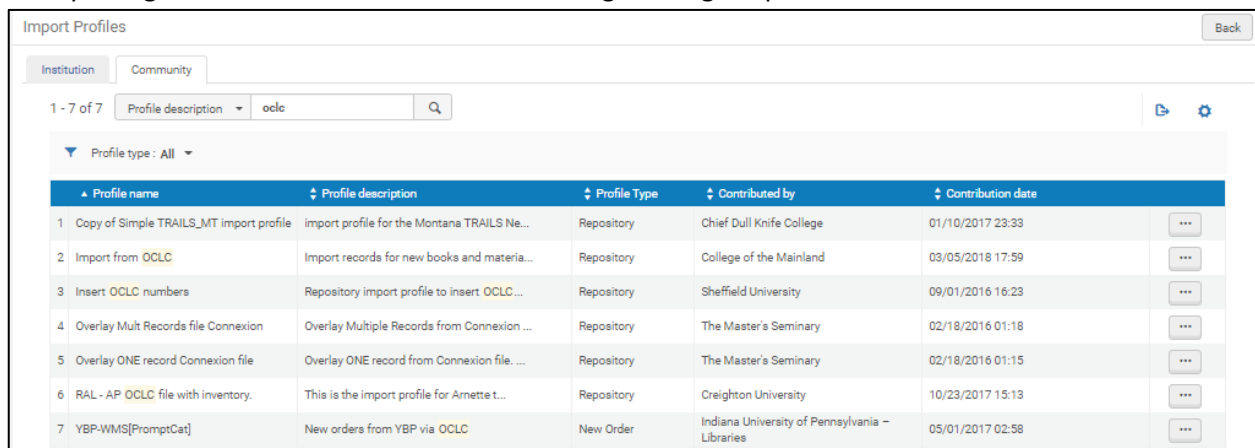
The required steps for institutions to set up a real-time acquisitions workflow with participating vendors are available in this article: <https://developers.exlibrisgroup.com/blog/Real-time-Acquisitions-setup-for-institutions>.

Cataloging

26. How to setup Alma to import records from OCLC Connexion

Ex Libris: Record import and publication is considered a core function, and it may be set up and run as a frequent process in Alma without intervention from Ex Libris. Libraries will set up one or more import and publication profiles, which can then be used to automatically import and export records on an ongoing basis. These processes may also be run on demand by the library.

All importing of metadata records in Alma is managed using “Import Profiles”:

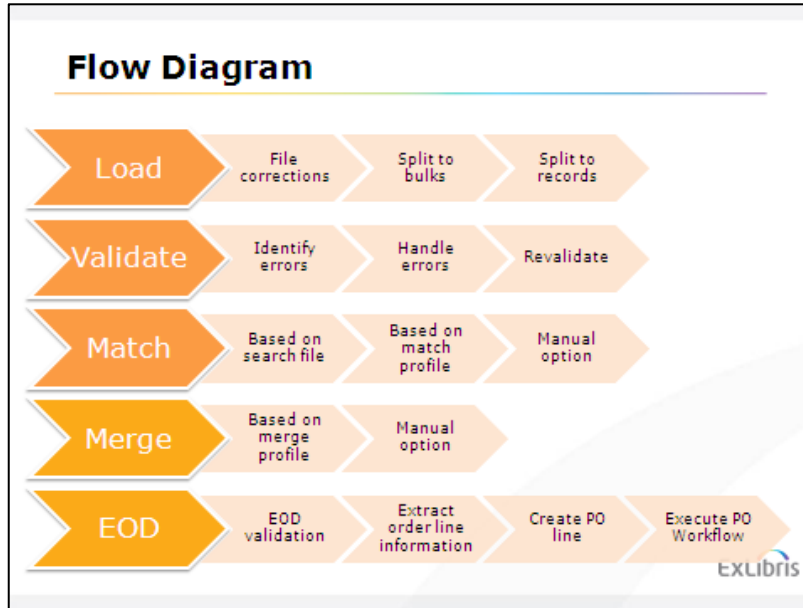


Profile name	Profile description	Profile Type	Contributed by	Contribution date
1 Copy of Simple TRAILS_MT import profile	Import profile for the Montana TRAILS Ne...	Repository	Chief Dull Knife College	01/10/2017 23:33
2 Import from OCLC	Import records for new books and materia...	Repository	College of the Mainland	03/05/2018 17:59
3 Insert OCLC numbers	Repository import profile to insert OCLC...	Repository	Sheffield University	09/01/2016 16:23
4 Overlay Mult Records file Connexion	Overlay Multiple Records from Connexion ...	Repository	The Master's Seminary	02/18/2016 01:18
5 Overlay ONE record Connexion file	Overlay ONE record from Connexion file. ...	Repository	The Master's Seminary	02/18/2016 01:15
6 RAL - AP OCLC file with inventory.	This is the import profile for Arnette t...	Repository	Creighton University	10/23/2017 15:13
7 YBP-WMS[PromptCat]	New orders from YBP via OCLC	New Order	Indiana University of Pennsylvania – Libraries	05/01/2017 02:58

As shown above, Import Profiles can be shared in the Community Zone for use by any Alma Institution. These profiles define all aspects of the loading process. This process is split into a sequence of steps:

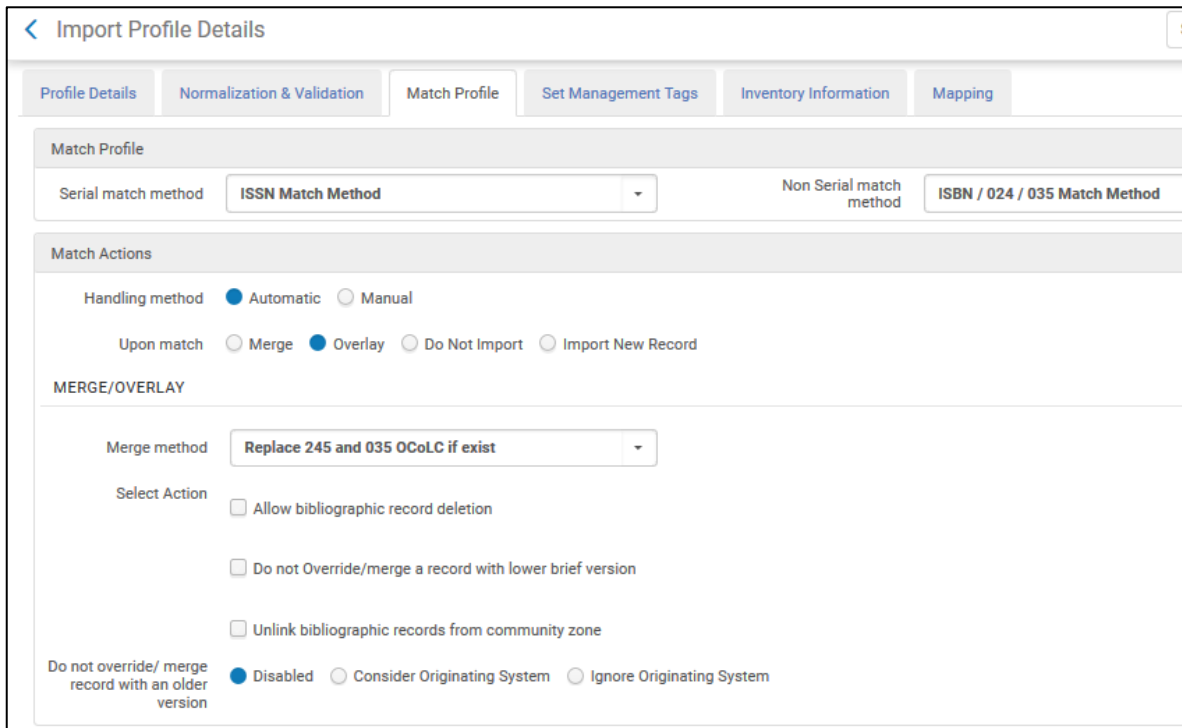
- Loading the file
- Normalizing and validating the records in the file
- Finding an existing match in the catalog
- Merging into the existing record (when relevant)
- EOD (Embedded Order Data) files – creation of order line records (when relevant)

This can be summarized as follows:



The import process supports the maximum possible automation. For example, the import can be defined to merge an imported record into the catalog automatically in cases where the system finds a single match.

When importing any record, Alma goes through specific steps according to the rule of the appropriate import profile. It validates each record for encoding and content. It checks for matching records that already exist in the catalog, then can be set up to either merge, overlay, ignore (importing anyway), or flag matched records for review.



The screenshot shows the 'Import Profile Details' interface with the following sections:

- Match Profile:**
 - Serial match method: **ISSN Match Method** (dropdown)
 - Non Serial match method: **ISBN / 024 / 035 Match Method** (dropdown)
- Match Actions:**
 - Handling method: ☒ Automatic, ☐ Manual
 - Upon match: ☐ Merge, ☒ Overlay, ☐ Do Not Import, ☐ Import New Record
 - MERGE/OVERLAY:**
 - Merge method: **Replace 245 and 035 OCoLC if exist** (dropdown)
 - Select Action:
 - ☐ Allow bibliographic record deletion
 - ☐ Do not Override/merge a record with lower brief version
 - ☐ Unlink bibliographic records from community zone
 - Do not override/ merge record with an older version: ☒ Disabled, ☐ Consider Originating System, ☐ Ignore Originating System

If at any stage during the import process, either because of errors, or because the import profile definition requires mediated intervention, the staff user will be able to review issues using a dedicated task list. This task list will provide the staff user with information on what the issue is as well as the relevant actions the user can perform.

Alma also allows for catalogers to use merge, match and overwrite options for individual bibliographic records as they are imported from another library system that is being used as an external resource. In this way it is possible for the Library to prevent duplication of records in the catalog.

27. Interface(s) for bib/MARC editing and individual item editing

Ex Libris: Alma's cataloging workbench, the Metadata Editor, supports editing any MARC tag, subfield, and indicator. Catalogers can use the Metadata Editor for day-to-day cataloging activities. Alternatively, Alma can be integrated with Connexion if staff prefer to do cataloging work there. An example of the Metadata Editor interface is shown below:

MD Editor

Templates ▾
Records ▾

- MARC21 Bibliographic
 - (99161510800121)
 - (99158410900121)
 - Chemistry / Kel... (99474919000)
 - Emma : a modern... (991584113)
 - Forensic Chemistry (991381219)
 - Nickel and dime... (99215916000)
 - The yellow wind... (99516098001)
- MARC21 Holdings
 - Emma : a modern... (223779994)
 - Forensic Chemis... (2237799970)
 - The yellow wind... (2237799840C)
- Dublin Core

File Edit Tools

You have 18 warning(s) in your record

Working on -Nickel and dime... : o (992159160000121) , Created by cat (06/03/2012 10:33)

LDR	05095cam^^22008054a^4500
001	992159160000121
005	20130329210744.0
008	120603s2001^nyu^000^0^eng^
010	\$\$a ^00052514^
020	\$\$a 0805063889 (hc.)
020	\$\$a 9780805063882 (hc.)
035	\$\$a (OCoLC)45243324
035	\$\$a (OCoLC)ocm45243324^
040	\$\$a DLC \$\$c DLC \$\$d C#P \$\$d QP9 \$\$d LVB \$\$d ZQP \$\$d WSL \$\$d NLGGC \$\$d BAKER \$\$d GZM \$\$d UBY
042	\$\$a pcc
043	\$\$a n-us---

Staff will benefit from an intuitive, feature-rich user interface designed to save time and effort. As an example, fixed fields can either be edited inline, or in a form that presents all values for the relevant position in the field:

Working on -Nickel and dime... : o (992159160000121) , Created by cat (06/03/2012 10:33)

LDR	05095cam^^22008054a^4500
001	992159160000121
005	20130329210744.0
008	Date entered on file (0-5)
	Date 2 (11-14)
	Illustrations(19)
	Target audience(22)
	Nature of contents(25)

- Unknown or not specified
a - Preschool
b - Primary
c - Pre-adolescent
d - Adolescent
e - Adult
f - Specialized
g - General
j - Juvenile
k - No attempt to code

s - Single known date/pr
Date 1 (7-10)

nyu - New York (State)
Illustrations(18)

h - Facsimiles
Illustrations(21)

g - General
Form of item(23)

Nature of contents(26)

Nature of contents(27)

Alma offers a series of default templates for each media type, a great time saving feature. Staff can also create their own templates, which can be private or shared.

Templates

- + Dublin Core
- MARC21 Bibliographic
 - + Private
 - + Shared

An example of a default template with RDA populated fields:

041 0	\$\$a
050 0 0	\$\$a
100 1	\$\$a \$\$b \$\$c \$\$d
240 1	\$\$a
245 1	\$\$a \$\$b \$\$c \$\$h
246 1 1	\$\$a \$\$b
250	\$\$a \$\$b
264	\$\$a \$\$b \$\$c 2015
300	\$\$a p. \$\$c cm
336	\$\$a text \$\$2 rdacontent
337	\$\$a unmediated \$\$2 rdamedia
338	\$\$a volume \$\$2 rdacarrier

In addition, catalogers can copy catalog or download records from shared catalogs into the local Institution Zone catalog. The metadata management environment provides an External Search function, streamlining the process of sourcing records for copy cataloging. Alma supports searching an external bibliographic database in the Metadata Editor based on content of the bibliographic record or by populating fields in the External Search window seen below:

You have 16 warning(s) in your record

Working on -Nickel and dined : o (992159160000121) , Created by cat (06/03/2012 10:33)

LDR	05095cam^^22008054a^4500
001	992159160000121
005	20130329210744.0
008	120603s2001^nyu^h^g^000^0^eng^^
010	\$\$a ^00052514^
020	\$\$a 0805063889 (hc.)
020	\$\$a 9780805063882 (hc.)
035	\$\$a (OCoLC)45243324
035	\$\$a (OCoLC)ocm45243324^
040	\$\$a DLC \$\$c DLC \$\$d C#P \$\$d QP9 \$\$d LVB \$\$d ZQP \$\$d WSL \$\$d NLGGC \$\$d BAKER \$\$d BTCTA \$\$d YDXCP \$\$d BUR \$\$d F4B \$\$d GZM \$\$d UBY

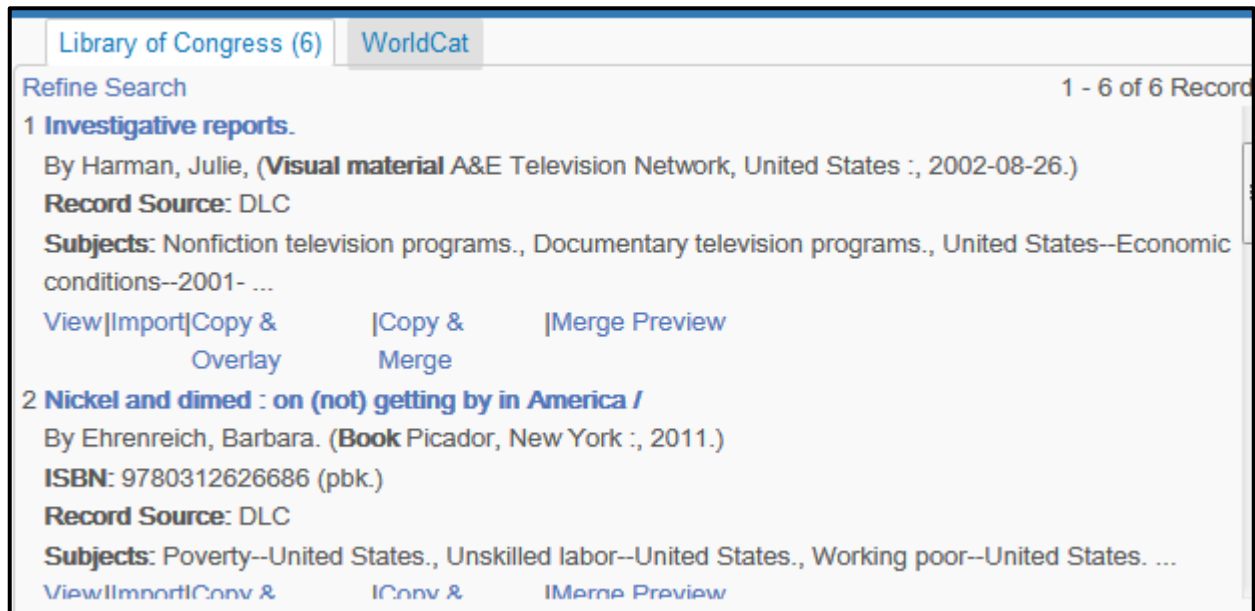
Current cataloger level [00] Default Level, change to [00] Default Level

Search Cataloging Profile WorldCat

Find: Any Field

AND	Title	Contains Phrase	
AND	Creator	Contains Phrase	Nickel and dined :
AND	Subjects	Contains Phrase	Ehrenreich, Barbara
AND	ISBN	Contains Phrase	9780805063882 (hc.)
AND	ISSN	Contains Phrase	
AND	System Number	Contains Phrase	45243324
AND	Year of Publication	Equals	2001

Cancel Clear Search



External Search results screen

The knowledge base of external bibliographic databases that can be configured includes more than 80 external bibliographic databases such as:

- Library of Congress (United States Library of Congress (LOC))
- WorldCat (OCLC)
- German National Library
- British Library
- National Library of Australia

In the following image, an external catalog has been searched, and staff can choose how to import a matching record—whether to bring in a new copy, overlay the record being edited, or merge the edited record with the external record.

You have 16 warning(s) in your record

Working on -Nickel and dined : o (992159160000121) , Created by cat (06/03/2012 10:33)

Field	Value
LDR	05095cam^^22008054a^4500
001	992159160000121
005	20130329210744.0
008	120603s2001^^^nyu^^h^g^^^^000^0^eng^^
010	\$\$a ^^00052514^
020	\$\$a 0805063889 (hc.)
020	\$\$a 9780805063882 (hc.)
035	\$\$a (OCoLC)45243324
035	\$\$a (OCoLC)ocm45243324^
040	\$\$a DLC \$\$c DLC \$\$d C#P \$\$d QP9 \$\$d LVB \$\$d ZQP \$\$d WSL \$\$d NLGGC \$\$d BAKER \$\$d BTCTA \$\$d YDXCP \$\$d BUR \$\$d F4B \$\$d GZM \$\$d UBY

Current cataloger level [00] Default Level, change to [00] Default Level

Info Alerts Linked Data

Back to results Import

Import
Copy & Overlay
Copy & Merge
Merge Preview

The Alma item record consists of a great number of fields including item barcode, temporary and permanent locations, material type, fulfillment (circulation) policy, enumeration and chronology fields for serials, and numerous fields for registering note information – e.g. internal note, fulfillment note etc. In addition, staff will always have an indication of the item’s availability. Some of this detailed information can be seen in the following screen capture:

General Information ENUM/CHRON Information Notes History

Barcode	AU36571	Generate	Copy ID	
Material type	Book		Item policy	4 Week Loan
Provenance			Is magnetic	
PO Line	Select from a list		Issue date	
Receiving date			Expected receiving date	
Enumeration A			Enumeration B	
Chronology I			Chronology J	
Description		Generate	Pieces	
Pages			Receiving operator	admin1
Replacement cost				






The item record in Alma supports fields for defining temporary locations. When moving items from one location to another staff have the option of inputting an end date for the temporary location. On this date a regular job process will warn staff to return these items to their regular location.

Requests - Restore Temporarily Shelved Items	
Status <input checked="" type="radio"/> Active <input type="radio"/> Inactive	Schedule <div>Every day at 11:00 ▾</div>

On the item level, Alma allows you to add a public note and a fulfillment note. Furthermore, several internal notes and statistical notes can be added:

General Information	ENUM/CHRON Information	Notes	History
<div>Public note</div> <div>Includes 3 CD-ROMs in back pocket</div>			
<div>Fulfillment note</div> <div>Item has CD in the back of the book. Please check that CD is in place before loaning/returning.</div>			
Internal Notes			
Internal note 1			
Internal note 2			
Internal note 3			
Statistics Notes			
Statistics note 1		Course	
Statistics note 2			
Statistics note 3			

The history tab of each item record provides a history of all fulfillment activities. Users can also view the history of item changes and holding record changes:

General Information				
ENUM/CHRON Information				
Notes				
History				
Report type <input type="radio"/> Item changes <input type="radio"/> Holdings changes <input checked="" type="radio"/> Fulfillment activities				
Circulation desk name <input type="text"/> <input type="button" value="Q"/>				
Action type	Desk name	Operator	Date	
1 Return	Main Circulation Desk	admin1 	11/20/2016 12:11	
2 Loan	Main Circulation Desk	dawnb 	10/30/2016 09:53	
3 Return	Main Circulation Desk	dawnb 	10/30/2016 09:53	
4 Loan	Main Circulation Desk	dawnb 	08/30/2016 12:38	
5 In house loan	Main Circulation Desk	dawnb 	06/29/2016 10:54	

28. Merced College has a custom index to our local newspaper using unique Newspaper fields. Can unique databases such as this be integrated in Alma? SIRSI DYNIX created the files for us.

Ex Libris: If the newspaper records include fields that are relevant for end users, the library can configure local fields to be used for search, display, and/or faceting in Primo. Primo VE allows you to map information from the following MARC21 fields in the source records to local fields in Primo VE, where these fields can then be used to extend search queries, to filter search results with facets, and to display additional information in the record's brief and full displays:

MARC21: 009, 09X, 490, 5XX, 69X, and 9XX

Generally speaking, MARC records will migrate as they exist in the source system. Our goal is to make the migration process as smooth as possible and so we do not perform extensive record validation or manipulation during the migration process. Alma will preserve unique fields and lowered encoding levels, though each condition may be logged when the incoming records are validated. We provide record cleanup tools in Alma that allow you to resolve any record issues post migration. Therefore, all records in your source ILS files will migrate to Alma in their current form unless they are missing a MARC 245 tag with a subfield a. No further validation is performed on bibliographic records meaning that invalid MARC records will load to Alma as is. Also, records marked as suppressed in your ILS will load to Alma as suppressed. For administrative data (patrons, items, Orders, Invoices, holds, etc.), our migration specifications indicate that this data will be provided to us in .csv format which will be validated against a field mapping form that you will complete as part of your migration form for your ILS.

In cases of duplicate barcodes being encountered during the migration process, an additional value will be appended to the subsequent instances of the barcode to ensure uniqueness. At the end of each

migration process a report will be shared with you listing the records that failed the migration process along with the reason. After the test load you will be able to review the list of failed records and resolve any issues in your ILS prior to the cutover load.

Customized Indexing








In a cloud-based multi-tenant solution, the fields that are indexed are set by the system, and libraries can define from the indexed fields which are to be used for searching and sorting. Local 99X fields are indexed in Alma and available for staff to define for search criteria. With many hundreds of institutions live, we cover an extensive number of indexed fields that meet our customers' needs.

The Alma architecture is designed to allow for the immediate indexing of new data upon saving. That is, for the fields defined in the system as indexed, when new data is entered by the user for that field, it will be saved when indexing occurs. This type of system architecture and operation does not impact or limit the user experience or performance.

There are options to:

- Define whether an index should be enabled or not
- If the index should be available for Simple and/or Advanced Search

The display order of the index:

	Enabled	Index Code	Object Type	Simple Search?	Adv. Search?	Index Label Table
43		available_for	PORTFOLIO	false	true	UILABELS
44		available_for_group	PORTFOLIO	false	true	UILABELS
45		available_only_for	PORTFOLIO	false	true	UILABELS
46		available_only_for_group	PORTFOLIO	false	true	UILABELS
47		barcode	ITEM	true	true	UILABELS
48		baseStatus	ITEM	false	true	UILABELS
49		bib_level	BIB_MMS	false	true	UILABELS

All local (9XX) fields can be renamed and activated:

327	✓	local_field_913	BIB_MMS	false	true	CustomizeSea
328	✓	local_field_914	BIB_MMS	false	true	CustomizeSea
329	✓	local_field_915	BIB_MMS	false	true	CustomizeSea
330	✓	local_field_916	BIB_MMS	false	true	CustomizeSea
331	✓	local_field_917	BIB_MMS	false	true	CustomizeSea
332	✓	local_field_918	BIB_MMS	false	true	CustomizeSea
333	✓	local_field_919	BIB_MMS	false	true	CustomizeSea
334	✓	local_field_920	BIB_MMS	false	true	CustomizeSea

E-Resource Management

29. Link Resolver For Databases Suite or "Add-On"? (Link from an Individual Database to content in another individual different vendor database--not from Primo. Currently a Link Resolver such as this are included via another Discovery service)

Ex Libris: Alma includes an embedded Link Resolver which provides patrons with context-sensitive electronic, digital and print services. The embedded link resolver is a standard functionality in Alma (no additional subscription fee is required) and is based on Ex Libris' experience delivering the SFX link resolver to over 2500 institutions worldwide.


The Alma link resolver offers services via a menu that can be customized by the institution, defining the labels of the services and the order which they appear.

The link resolver will link to all available options. An example can be seen following (in Primo) of a record with print and electronic versions of a record. Users can check the availability for the electronic version via the View It and the print version from the Get It window in Primo:




Patrons have access to the full text versions (View it):




View It

Full text available at: [EBSCOhost Academic Search Complete](#) 
Show license ▼


Available from 1999
Most recent 3 year(s) not available

Full text available at: [Ebrary Local](#) 

Get It

REQUEST OPTIONS: [Illiad\(1 month\)](#)  / [OCLC Navigator\(1 month\)](#)  / [Relais D2D](#)  / [Resource sharing request](#) / [Purchase request](#)

Year All ▼ Volume All ▼ Description All ▼

Main Library General QL435.A1 C75  [Locate](#)
[Hide Details](#)
from:1 2013 until:87 2016
, Copy: 1

1 - 10 of 23 Records | [1](#) [2](#) [3](#) [NEXT](#) [LAST](#)

BARCODE	TYPE	POLICY	DESCRIPTION	STATUS	OPTIONS

And can view the items in the library's repository (Get It):

Get It

REQUEST OPTIONS: [Illiad\(1 month\)](#) / [OCLC Navigator\(1 month\)](#) / [Relais D2D](#) / [Resource sharing request](#) / [Purchase request](#)

Year All ▾ Volume All ▾ Description All ▾

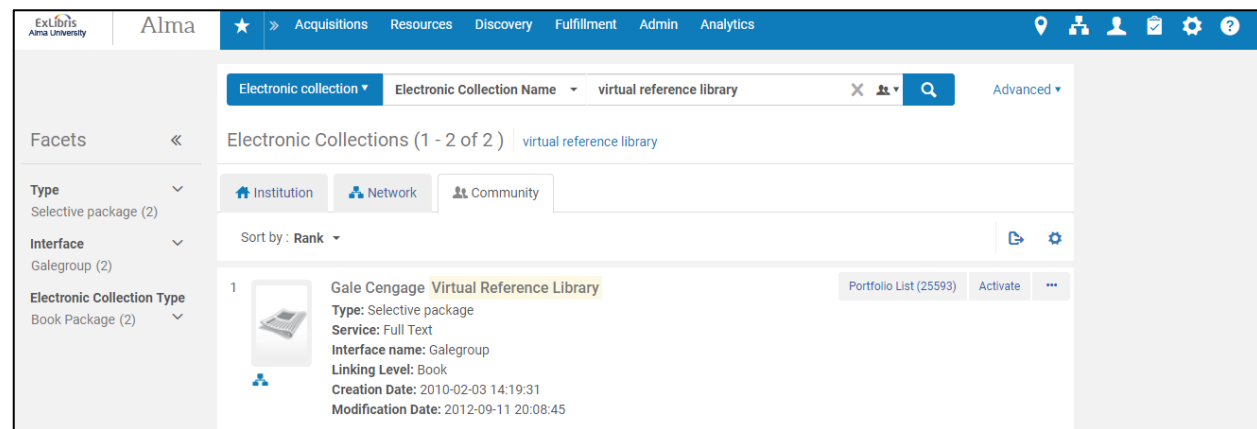
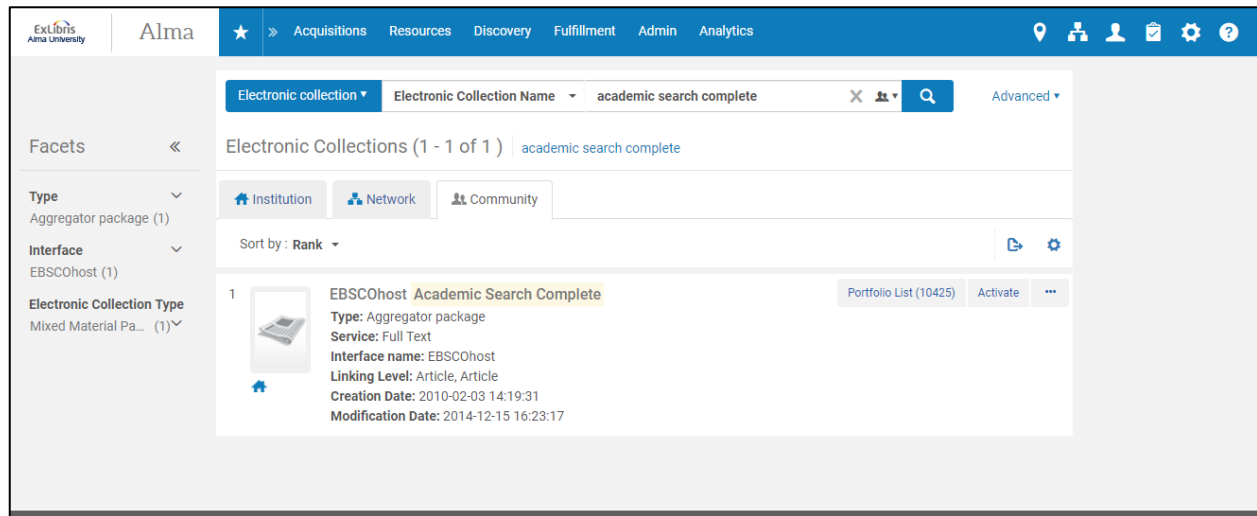
Main Library General QL435.A1 C75 [Locate](#)
[Hide Details](#)
from:1 2013 until:87 2016
, Copy: 1

1 - 10 of 23 Records | [1](#) [2](#) [3](#) [NEXT](#) [LAST](#)

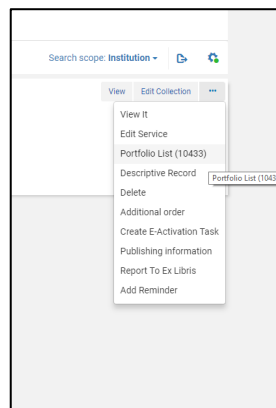
BARCODE	TYPE	POLICY	DESCRIPTION	STATUS	OPTIONS
AU37603	Issue	One Week Loan	Vol. 87 no. 9 (2014 Nov.)	Missing (0 requests)	
AU40642	Bound Issue	One Week Loan	Vol. 87 No. 5-8 (2014)	Item in place (0 requests)	Request Digitization
AU40645	Bound Issue	One Week Loan	Vol. 87 No. 1, 2, 4 (2014)	In transit until 04/19/2016 (0 requests)	Request Digitization
AU37706	Bound Issue	One Week Loan	Vol. 86 nos. 5-6	Item in place (0 requests)	Request Digitization

30. Direct example/connection of loading database content into KnowledgeBase and then testing it on Primo (Please include Academic Search Complete as an example). Another example should include GVRL--an example of individual Library owns certain titles/new titles to add.

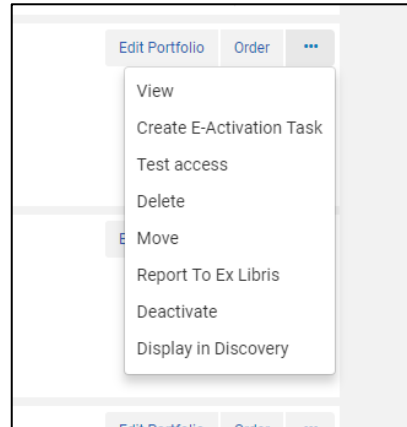
Ex Libris: Academic Search Complete and Gale Virtual Reference library are included in the Alma Central Knowledgebase. The library only needs to activate these resources in Alma. There is no need to load additional content into Alma, unless your negotiated subscription includes additional content.




Once activated, all titles within the collection as well as the collection itself are immediately indexed for search within Alma. New records will be visible in Primo within 15 minutes.



A staff operator can click on the “Portfolio List” for a collection to see all of the titles that are part of that collection. From the portfolio list, it is possible to test access for any title or to view in discovery to see how it displays within Primo:





JOURNAL

Revista română de cardiologie = Romanian heart journal.

Societatea Română de Cardiologie.

1991

[Available Online >](#)

TOP

SEND TO









SEARCH INSIDE

VIEW ONLINE

DETAILS


LINKS

Send to

 EXPORT BIBTEX
  EXPORT RIS
  EASYBIB
  ENDNOTE
  REFWORKS
  PRINT
  CITATIC
 

Search inside

Search for articles within this journal




View Online

Full text availability


[EBSCOhost Academic Search Complete](#)

Available from 2009

[SHOW LICENSE](#) 

Details

Title	Revista română de cardiologie = Romanian heart journal.
Creator	Societatea Română de Cardiologie. >
Subject	Heart -- Diseases > Periodicals >
MESH subjects	Heart Diseases > Periodicals >
Genre	Periodicals.
Other title	Romanian heart journal Romanian journal of cardiology



BOOK

Back Roads of Northern Italy

Dorling Kindersley Publishing Staff Corporate Author

2012

[Available Online >](#)

TOP









SEND TO

VIEW ONLINE

DETAILS


LINKS

Send to

 EXPORT BIBTEX
  EXPORT RIS
  EASYBIB
  ENDNOTE
  REFWORKS
  PRINT
  CITATIC
 

View Online


Full text availability


[Gale Cengage Virtual Reference Library](#)


Details

Title	Back Roads of Northern Italy
Creator	Dorling Kindersley Publishing Staff Corporate Author >
Other title	Eyewitness Travel Back Roads
Publisher	Place of publication not identified Dorling Kindersley Publishing Incorporated
Creation Date	2012
Source	Library Catalog

Links

[Request this via Get It Now](#)  >

[Search in Google by ISBN](#)  >

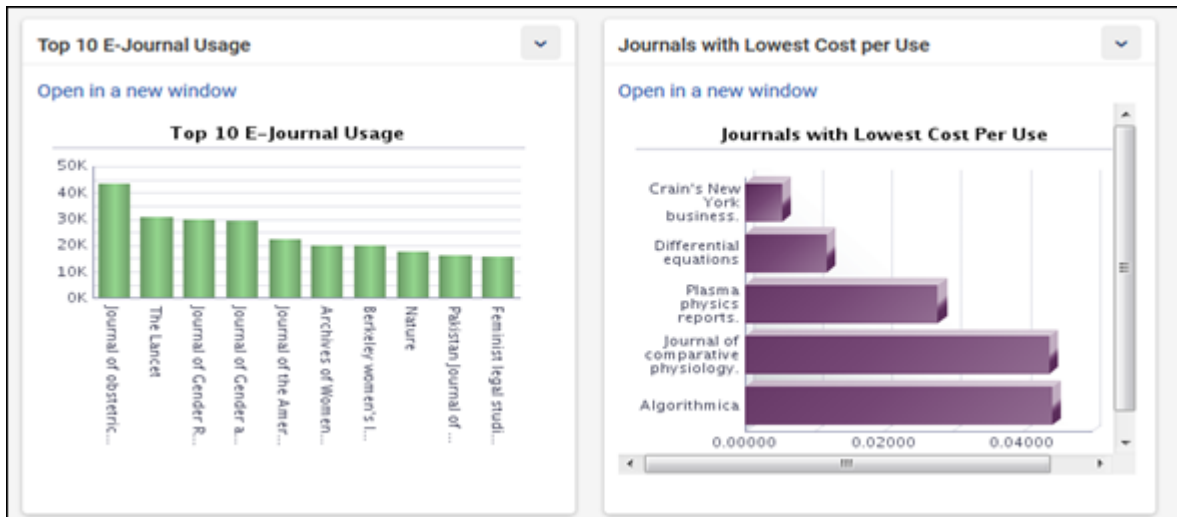
[Display Source Record](#) >

31. Please show us the COUNTER reports

Ex Libris: Alma facilitates the collection and reporting of usage statistics information supplied by vendors (content providers) in COUNTER 4 format.

Alma Analytics provides usage statistics reporting capabilities that enable the creation of reports such as usage statistics by journal, database, publisher, platform, and subscriber. The reports enable the library to drill down on data elements included in the report such as year range, titles, etc.

Alma includes cost per use data elements and reports out of the box, and reports can be done on both the level of institution and the Network level.



Support for COUNTER 5 and SUSHI lite is on the Alma Roadmap. Ex Libris is closely following developments in the industry regarding these protocols and will incorporate them into Alma in a timely manner, as the industry develops. We are aware that COUNTER has stated that “In January 2019, all publishers and vendors are required to comply with the new Release of the Code of Practice” and Ex Libris product management is therefore closely following all developments.

Below is a list of out-of-the-box COUNTER reports in Alma Analytics. More information may be found at [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/080Analytics/060Out-of-the-Box-Reports](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/060Out-of-the-Box-Reports)

Usage via COUNTER Reports	
Top ten title accesses via OpenURL requests in the previous year	Displays which titles are being most searched for via the Alma link resolver to know what areas should be stressed in collection development.
Top ten Title accesses via OpenURL requests without services in the previous year	Displays which titles are being most searched for via the Alma link resolver, but do not have services. This may indicate areas where collection development should be increased so that end users will have less results with no services. This will typically not happen when coming from Primo because the search was already made on a record with inventory holdings, but it may happen when coming from an external native interface or database such as PubMed.
Top ten LC Subject categories accesses via	Displays which subjects are being most searched for via the Alma link resolver to know what areas should be stressed in collection development.

OpenURL in the previous year	Bibliographic records with subjects are matched from the Open URL via ISBN, ISSN, DOI or IE ID to the local repository.
Top ten LC Subject categories accesses via OpenURL in the previous year	Displays which subjects are being most searched for via the Alma link resolver to know what areas should be stressed in collection development. Bibliographic records with subjects are matched from the Open URL via ISBN, ISSN, DOI or IE ID to the local repository.
Top ten article title accesses via OpenURL in the previous year	Displays which article titles are being most searched for via the Alma link resolver to know what areas should be stressed in collection development.
Top ten article title accesses via OpenURL requests without services in the previous year	Displays which article titles are being most searched for via the Alma link resolver but do not have services. This may indicate areas where collection development should be increased so that end users will have less results with no services.
Resolver Statistics by Source	Displays resolver statistics according to source.
Top Ten Requests	Displays the top ten rested items
Requests by Source	Displays requests according to source.
Resolver Statistics by Journal	Displays resolver statistics according to journal.
Top Ten journals by requests	Displays the top ten journal requests.

Fulfillment

32. I would like to see a much more detailed look at Course Reserves.

33. It would be very helpful to see how class records can be built & searched using the course reserve module and also how to link the item records to the course reserve module.

34. Creating courses/instructors for Reserves and putting items on Reserve

Ex Libris: In response to #32-34: Courses may be imported into Alma in batch, by a course loader that accepts a file of courses. The loader may be used to update certain elements of the course information such as number of participants. The loader may also be used to create new courses based on older ones' description.

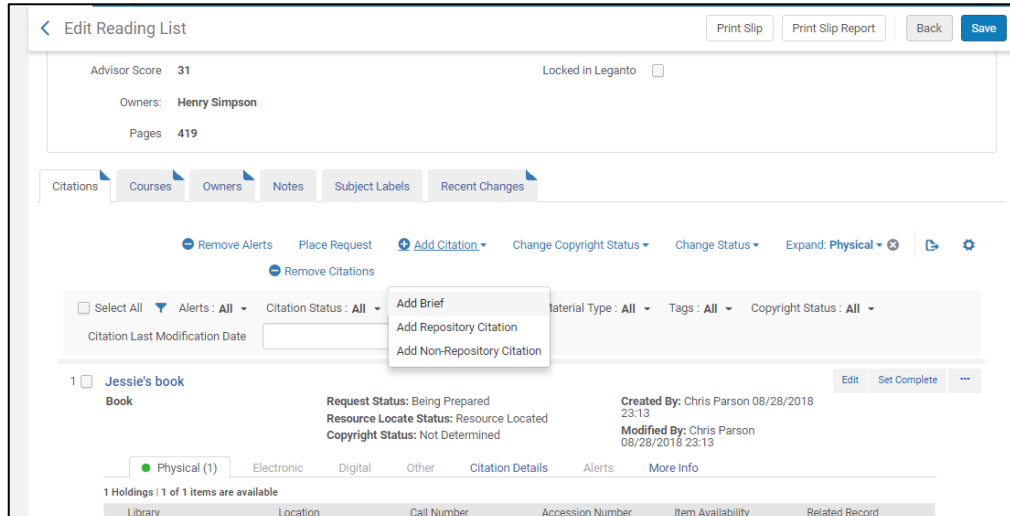
Course information includes instructor, start and end dates, number of participants, and weekly hours. The staff operator may add, delete, or edit courses in a department. Creating a course is a prerequisite to enable access to reading lists.

Alma-Primo integration means that Course reserves are automatically published to Primo for discovery once the course is active in Alma, and then removed from discovery when the course is over. Citations that are linked to active courses are published to Primo with course information included. The following fields are indexed and can be retrieved by a Primo search: course IDs, course names, and instructor names. These fields can additionally be used as facets. This allows students to search for course materials with great flexibility. Additionally, Course reserves records include a Note field that can be used, for example, for recording information from the instructor about when the article/chapter etc. should be read. This note may be exposed in the Discovery Interface. Primo may be configured to include a specific Course Reserves search scope.

Alma's course reserve functionality is fully integrated and uses the same user and bibliographic databases as the rest of the system. Additionally, Alma provides searching of both bibliographic records and course reserve information in a single interface for library staff, and through a common discovery interface, such as Primo, for end users.

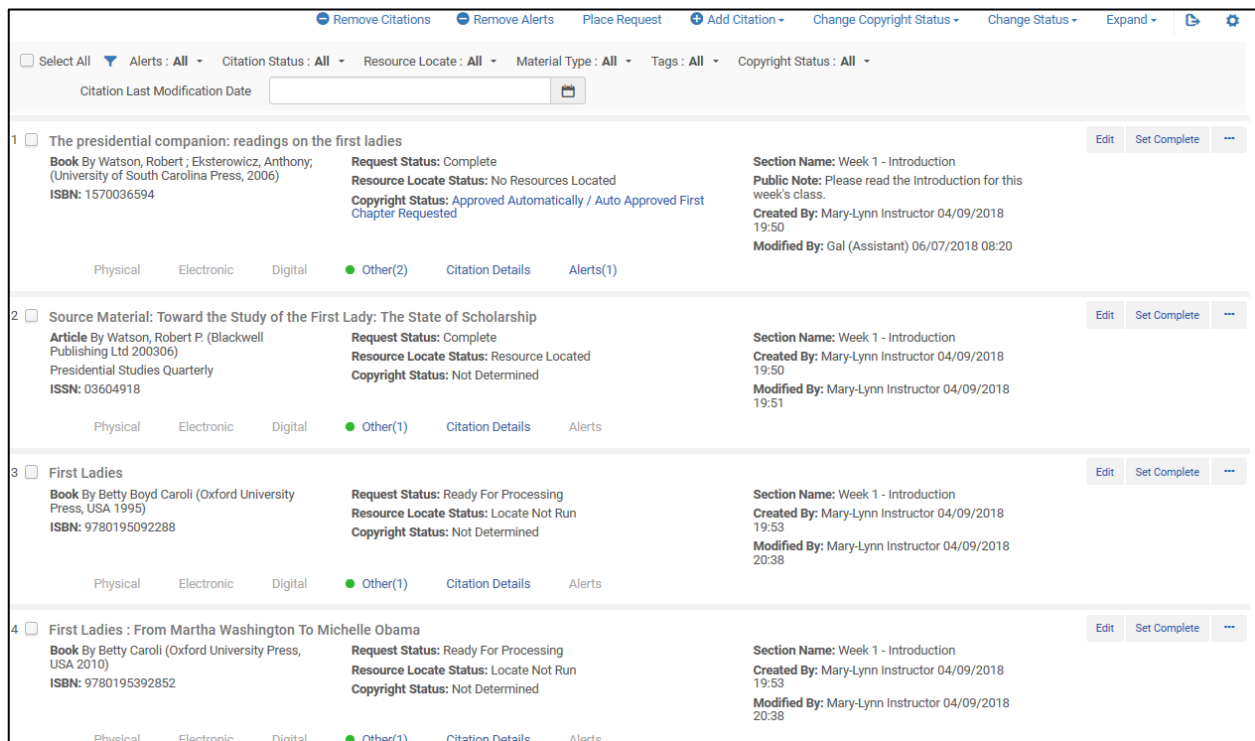
Dedicated workflows facilitate the temporary change of item information for physical copies that have been moved to a reserved area. For example, changing their temporary location or the terms of use by which they are circulated, and setting the date on which the item is expected to be moved back to its permanent location. This date may be automatically calculated based on the length of course for which the item is moved.

Automatic processes trigger the moving of these items back to their permanent shelving locations. For titles that have been made part of the reading list, the system will display the available inventory, be it physical, digital or electronic, and supply management tools to the operator, for example for requesting the transfer of physical items to a reserved area, or for requesting the digitization of physical copies.



Adding a new item record from within a course reserves reading list.

Course Reserve information can be found in the Fulfillment menu under courses, reading lists, and citations. Citations refer to items that students must view or read for a course.



	Title	Author	Request Status	Resource Locate Status	Copyright Status	Section Name	Public Note	Created By	Modified By
1	The presidential companion: readings on the first ladies	Book By Watson, Robert ; Eksterowicz, Anthony; (University of South Carolina Press, 2006) ISBN: 1570036594	Complete	No Resources Located	Approved Automatically / Auto Approved First Chapter Requested	Week 1 - Introduction	Please read the Introduction for this week's class.	Mary-Lynn Instructor 04/09/2018 19:50	Gal (Assistant) 06/07/2018 08:20
2	Source Material: Toward the Study of the First Lady: The State of Scholarship	Article By Watson, Robert P. (Blackwell Publishing Ltd 200306) Presidential Studies Quarterly ISBN: 03604918	Complete	Resource Located	Not Determined	Week 1 - Introduction		Mary-Lynn Instructor 04/09/2018 19:50	Mary-Lynn Instructor 04/09/2018 19:51
3	First Ladies	Book By Betty Boyd Caroli (Oxford University Press, USA 1995) ISBN: 9780195092288	Ready For Processing	Locate Not Run	Not Determined	Week 1 - Introduction		Mary-Lynn Instructor 04/09/2018 19:53	Mary-Lynn Instructor 04/09/2018 20:38
4	First Ladies : From Martha Washington To Michelle Obama	Book By Betty Caroli (Oxford University Press, USA 2010) ISBN: 9780195392852	Ready For Processing	Locate Not Run	Not Determined	Week 1 - Introduction		Mary-Lynn Instructor 04/09/2018 19:53	Mary-Lynn Instructor 04/09/2018 20:38

Reading lists are comprised of citations

Edit Reading List Print Slip Print Slip Report Back Save

America's First Ladies i ▼

Course Code: AMS301 Processing Department: Main Library Campus: - View in Leganto
 Course Name: America's First Ladies Instructors: Mary-Lynn Instructor
 Section: - Number of participants: 0

Reading List Information ▼

Code: * 0.26093358005767 Status: Complete
 Name: * America's First Ladies
 Publication Status: Course Students Due Back Date: 📅
 Reading List Visible Start Date: 📅 Requested for Review On: 04/09/2018
 End Date: 📅 Creative Commons License: ▼
 Advisor Score: 77 Locked in Leganto: ☐
 Owners: Mary-Lynn Bragg ; Mary-Lynn Instructor
 Pages: 1637

Citations Courses Owners Notes Subject Labels Recent Changes

Remove Citations Remove Alerts Place Request Add Citation Change Copyright Status Change Status Expand 📄 ⚙️

☐ Select All Alerts: All Citation Status: All Resource Locate: All Material Type: All Tags: All Copyright Status: All

Citation Last Modification Date: 📅

1 ☐ The presidential companion: readings on the first ladies Edit Set Complete ...

Book By Watson, Robert ; Eksterowicz, Anthony; (University of South Carolina Press, 2006)
 ISBN: 1570036594
 Request Status: Complete
 Resource Locate Status: No Resources Located
 Copyright Status: Approved Automatically / Auto Approved First Chapter Requested
 Section Name: Week 1 - Introduction
 Public Note: Please read the Introduction for this week's class.
 Created By: Mary-Lynn Instructor 04/09/2018 19:50

and courses may have multiple reading lists.

Manage Course Information Cancel Save

America's First Ladies i ▼

Course Code: AMS301 Processing Department: Main Library Campus: -
 Course Name: America's First Ladies Instructors: Mary-Lynn Instructor;
 Section: - Number of participants: 0

Course Information Instructors Notes Campus

Code: * AMS301 Section: 📅
 Name: * America's First Ladies
 Academic Department: ▼ Processing Department: * Main Library ✕ 📄
 Terms list: Early Autumn 📅 Submit Lists By: 📅
 Status: ☒ Active ☐ Inactive
 Start date: 04/06/2018 ✕ 📅 End date: 04/01/2019 ✕ 📅
 Number of participants: 0 Weekly hours: 0
 Year: 📅
 Searchable IDs: 📅

35. Please show us the offline circulation module

Ex Libris: Alma includes an offline circulation tool that will allow for the continuation of check-in and check-out activities when the system is available. The offline circulation tool can be installed locally and allows the data to be synced back to Alma when the network connection is back following a network

failure. In addition, as Alma is hosted in the cloud, in case of local network outage there is also the option of using 3G or 4G mobile networks to access the system, enabling normal operations.

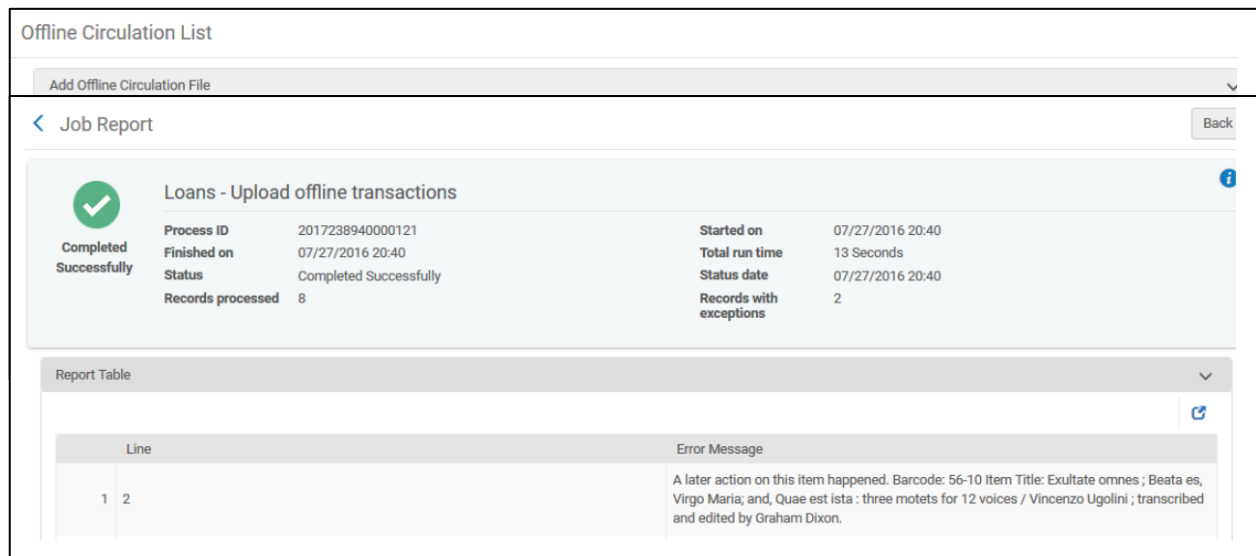
The offline circulation utility can be downloaded from the Developers Network.

The offline circulation client stores patron barcodes and item barcodes. Loans are generated when the offline circulation files are uploaded to Alma.

To upload offline loans and returns, on the Offline Circulation List page click in the File Name field and select the .dat file containing the list of loans and returns performed during connection downtime.

Click Upload and Validate File Content.

The job is displayed in the table at the bottom of the page. Its status is displayed in the Status column.



The screenshot shows the 'Offline Circulation List' page. At the top, there is a button 'Add Offline Circulation File'. Below it, a 'Job Report' section shows a green checkmark and the text 'Completed Successfully'. The job details are as follows:

Loans - Upload offline transactions	
Process ID	2017238940000121
Finished on	07/27/2016 20:40
Status	Completed Successfully
Records processed	8
Started on	07/27/2016 20:40
Total run time	13 Seconds
Status date	07/27/2016 20:40
Records with exceptions	2

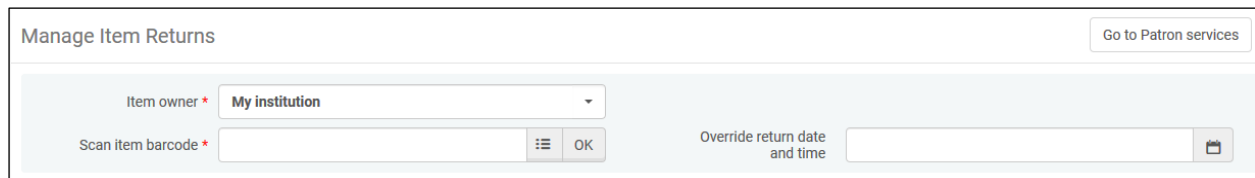
Below the job details is a 'Report Table' with the following content:

Line	Error Message
1 2	A later action on this item happened. Barcode: 56-10 Item Title: Exultate omnes ; Beata es, Virgo Maria; and, Quae est ista : three motets for 12 voices / Vincenzo Ugolini ; transcribed and edited by Graham Dixon.

To view details of a job, click View for the relevant job. The Job Report page opens, detailing the number of items processed successfully and unsuccessfully.

36. Please show us the item check-in screen, I would like to know if which fields are being displayed, especially for an item with overdue fees. Does it display the original due date besides the new due date (if the item was renewed after the original due date), checked our date, etc.

Ex Libris: Below is the check-in screen.



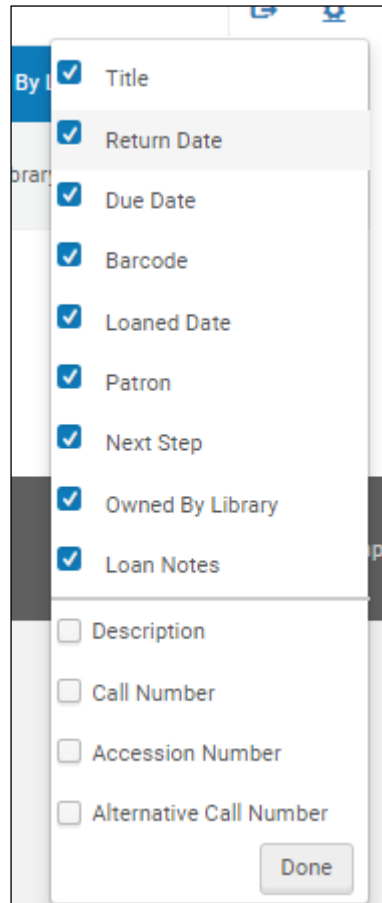
The screenshot shows the 'Manage Item Returns' screen. It includes a 'Go to Patron services' button in the top right corner. The main form has the following fields:

- Item owner ***: A dropdown menu with 'My institution' selected.
- Scan item barcode ***: A text input field with a barcode icon and an 'OK' button.
- Override return date and time**: A date and time picker.

When an item is returned in Alma, the staff user is advised of the next step for this item, such as item has to be re-shelved to a certain location or placed on the hold shelf if it has been requested by another patron:


Title	Return Date	Due Date	Barcode	Loaned Date	Patron	Next Step	Owned By Library
1 10 minute guide to Effective leadership / by Andrew J. DuBrin.	06/13/2017	06/16/2017 21:00	AU41400	04/28/2017	Sara Carr	Reshelve to General	Main Library

Each individual user can customize which columns display in the check in screen, the width of each column, and the order in which they appear:



The Due Date can display on the main check in history. It is possible to click on the patron name in order to navigate to the patron circulation account and view the loan history:

Loan Audit Trail
Back



Feminism / edited by Susan Moller Okin and Jane Mansbridge.

Description
Borrower
Loan date
Due date
Loaned at library
Loaned at desk
Loan status
Process ID
Return date
Booking loan?

-
Sara Carr
07/09/2018 17:20
08/24/2018 21:00
Main Library
Main Circulation Desk
Renewed
3886748300000121
10/04/2018 17:25
No

37. When items are checked in, what happens to the patron data linked to that circulation - can we retrieve patron data for prior checkouts, or is it wiped for security? Will libraries be able to set that parameter individually or is it set at the system level?

Ex Libris: The only configuration that is required for anonymization is whether to activate it or not. Alma automatically anonymizes all complete hold requests. Other elements related to anonymization may be switched on or off:

Anonymization Job

Status
☒ Active
☐ Inactive

☐ Anonymize item loans
[Loan Anonymization Rules](#)

☐ Anonymize fines and fees

☐ Anonymize resource sharing requests

Schedule

Loans

Anonymizing loans will cause every complete loan (i.e. loan that has been returned) to have its link to the borrower removed from the system. This is a database removal action that is not revertible. Loans will not be anonymized if:

- Are marked Lost but not checked in\deleted
- Are marked Claimed Returned but not checked in\deleted
- Are linked to still in process fees. The loan will be anonymized only after all attached fees are closed

Anonymized loans are reportable by statistic dimensions such as user statistical categories and user group.

Fines and Fees

Fines and Fees are anonymized only after they are fully closed, i.e. fully paid, waived or extracted to the bursar. The link to the patron is removed from the Fine/Fee. This is a database removal action that is not reversible. Anonymized fines/fees are reportable by statistic dimensions such as user statistical categories and user group.

Borrowing and Lending Resource Sharing Request

Resource Sharing Requests are anonymized only after their lifecycle is complete, for example when the item has been checked back in. Link to the patron is removed from the request. This is a database removal action that is not revertible. Anonymized Resource Sharing Requests are reportable by statistic dimensions such as user statistical categories and user group. Cancelled/Rejected resource sharing requests are also anonymized. No anonymization takes place if the request status is not updated to one of these statuses.

Impact of anonymization on reporting

The anonymization process strips relevant fulfillment records of their patron personal information where that information is not required for a current patron service (i.e. the record is a historical record), while retaining enough information to be able to meet the auditing and reporting requirements of the libraries. The relevant entities (loans, fees, requests and resource sharing requests) remain fully reportable, but without any information on the linked patron, other than statistical information based on the user's user group and statistical categories.

Anonymized records have no link to any details of the patron, but they remain reportable by statistic dimensions such as user statistical categories and user group.

Configurability of anonymization jobs

Loan anonymization is configured in the Fulfillment Configuration > Fulfillment Jobs Configuration menu.

Anonymization Job

Status

☒ Active
 ☐ Inactive

☐ Anonymize item loans
 [Loan Anonymization Rules](#)

☐ Anonymize fines and fees
 ☐ Anonymize resource sharing requests

Schedule

Every day at 02:00

As is evident from this screen, the library may decide which element to anonymize, independently of any other element that may be anonymized.

Unlike loans, fees and resource requests, which a library may decide not to anonymize, requests are always anonymized.

Anonymizing fulfilment elements is a configurable option. The library may turn it on or off at any point during an implementation phase or after the library is already using Alma in production. Anonymization jobs are configured at the level of the institution, however, the loan anonymization rules can be set to anonymize loans from different libraries separately.

Options for Anonymization include:

- Days since loan ended
- Days since user expiry
- Library
- Location
- Number of loans to retain. For example, if a rule is set with Number of loans to retain = 3 and there are three loan history records for an item, they are not anonymized. If there are four loan history records for the item, then only the oldest one is anonymized.
- User group

These options can be combined. As an example, it can be configured that course reserves loans for undergraduates are anonymized after 3-month but course reserves loans for instructors are anonymized immediately.

Loans with unpaid fees are not anonymized because they still await processing (paying the fines). Keeping them linked to the patron is necessary for functional reasons, for example for dispute handling. All Alma libraries are currently using the loans anonymization in this manner.

38. Inventory management overview and demo

Ex Libris: Alma includes inventory management functionality. Using a hand-held scanning device, you can scan items on your shelves and receive a beep when the scanned barcode has some condition, for

example: is marked missing, is marked on loan, and so forth. To do this, you must upload a file generated by Alma to your scanning device. The generated file is not designed for a specific device and can be used by any such scanning device.

You generate and export these files on the Items Requiring Action page (Fulfillment > Advanced Tools > Items Requiring Action). The file is created according to criteria you define and is uploaded to an FTP site using the FTP connection that you specify. A separate file is created for each library and type of criteria. The code of the library and criteria are included in the file name. After exporting the file from Alma, you must import the files to your device (which is not covered in this documentation).

To create a file of items requiring action:

1. On the Items Requiring Action page, enter the following information.
 - S/FTP connection type – Select a connection type from a predefined list (see [Configuring S/FTP Connections](#)). Note that the connection type selected must have a subdirectory defined.
 - Items that do not belong to the current library – When selecting this option, the Library field appears, enabling you to select a library. Items that belong to the selected library are included in the file.
Select the required criteria that will cause the scanner to beep.
 - Items that are marked as missing
 - Items that have requests waiting for them
 - Items that are on loan
 - Items that are claimed to be returned
 - Loaned items that are lost
2. Select OK to create a job that exports the files. The job appears in the table at the bottom of the page.

Items Requiring Action

Cancel

Run Items Requiring Action Job

S/FTP Connection Type *

AlmaFTP sample

Items to include: *

Items that do not belong to the current library

☒

Items that are marked as missing

☒

Items that have requests waiting for them

☒

Items that are on loan

☐

Items that are claimed to be returned

☒

Loaned items that are lost

☐

Library

Graduate Library

OK

1 - 10 of 10

Job Id	Status	Creator	Time Started	Time Ended	Entities Finished	Entities Failed	
1 1294124480000521	Pending	Docteam	-	-	-	-	...
2 73844720000521	Completed Successfully	exl_impl	2013/08/12 09:00:58 CDT	2013/08/12 09:01:43 CDT	78161	0	...
3 73844570000521	Completed Successfully	exl_impl	2013/08/12 08:58:56 CDT	2013/08/12 08:59:44 CDT	78163	0	...
4 63667360000521	Completed Successfully	exl_impl	2013/08/12 08:55:56 CDT	2013/08/12 08:56:40 CDT	78165	0	...
5 63666760000521	Completed Successfully	exl_impl	2013/08/12 08:53:24 CDT	2013/08/12 08:54:12 CDT	78170	0	...
6 63666090000521	Completed Successfully	exl_impl	2013/08/12 08:49:07 CDT	2013/08/12 08:49:51 CDT	78173	0	...
7 63664920000521	Completed with Errors	exl_impl	2013/08/12 08:43:45 CDT	-	74507	0	...
8 63663700000521	Completed with Errors	exl_impl	2013/08/12 08:38:26 CDT	-	78173	0	...
9 63663390000521	Completed with Errors	exl_impl	2013/08/12 08:43:45 CDT	-	74507	0	...
10 63663360000521	Completed with Errors	exl_impl	2013/08/12 08:38:26 CDT	-	78173	0	...

Items Requiring Action Page

The files created by the job are uploaded to the FTP server.

39. If you could demonstrate how hourly items can be given overnight or no overnight circulation rules, that would be useful.

Ex Libris: See #41 below.

40. Demonstrate how resource sharing works and if/how we can prioritize searches of local resources

Ex Libris: California Community Colleges Libraries will be members of a Fulfillment network in Alma that work together by allowing their patrons to interact directly with other institutions in that network. Additionally, these members may be willing to accept and process items from other institutions and ship them back. Two primary use cases are currently supported:

- Walk-in Registration
- Direct requesting
- Return Anywhere
- Pickup Anywhere
- A network patron card in Primo

In a Fulfillment Network process, Alma's standard loan and item transit processes are used. In other words, as long as the item is held by the borrower, the standard loan control mechanisms for tracking overdue loans is used. After the item is checked in, standard transit routines are used to track where the item has been put in transit, where the item has been put in transit to, and when it is expected to arrive at its target destination.

A single institution may participate in multiple fulfillment networks.

It is possible to block requesting of on shelf items. All of the items from a location (fulfillment unit) that has been defined as 'requesting available items is not allowed' will not be requestable if some of the items are available. Managing the potential suppliers for a resource sharing request is done in three tiers:

1. Each institution defines profiles of target institution rotas*. Each rota is an ordered or non-ordered list of potential suppliers. The rota will be used as a list of targets to request from, one at a time. Different rotas may be used for different purposes. For example, an institution may set up a 'quick to respond' rota, an 'expensive but likely to fulfill' rota or an 'e-material experts' rota. Institutional rules as well as manual operations may be used to attach a specific rota to a specific request.
2. The suppliers on a rota are checked to see whether they own relevant holdings. Potential suppliers will be contacted only if they appear to own relevant holdings.
3. Within the consortium, a supplier that is an Alma institution will be ranked lower in the rota if the number of requests from the consortium partners has exceeded a defined threshold. This way, an overloaded partner will get fewer new requests directed at it. Calculating an overloaded target is based on Alma being able to collect information from each consortium member with regard to how many requests that institution has open with any target supplier.

In addition, each consortium campus and resource sharing partner using Alma can automatically reject new incoming requests based on how many open incoming requests are currently managed at that institution. If the number is past a defined threshold, requests may be automatically turned down.

* Rota - An ordered list of potential suppliers that are assigned by Alma to a resource sharing request. The rota, sometimes termed also "roster" or "lending string", is used by Alma to attempt to fulfill a resource sharing request. Alma assigns the request to the first potential supplier on the rota, and then to the next potential supplier on the list whenever the active supplier fails to supply the requested material.

Alma Analytics will allow the institution and the consortium to create decision-making reports such as borrowing request fill time. An example of this is displayed directly below:

Borrowing Creation Month	Num of Requests	Filled (Request Status)	Filled (Arrival Date)	Unfilled (Request Status)	Unfilled (No Arrival Date)	Average Turnaround Time (Created to Received)	Fill Rate	Fill Rate (Arrival Date)
2016 - 12	7	3	3	4	4	0.00	42%	42%
2017 - 01	11	7	5	4	6	0.00	63%	45%
2017 - 02	17	12	4	5	13	0.08	70%	23%
2017 - 03	6	4	4	2	2	0.00	66%	66%
2017 - 04	18	6	1	12	17	0.00	33%	5%
2017 - 05	17	14	10	3	7	2.00	82%	58%
2017 - 06	16	11	7	5	9	3.64	68%	43%
2017 - 07	1	1	1	0	0	0.00	100%	100%
2017 - 08	4	1	2	3	2	0.00	25%	50%
2017 - 09	2	0	0	2	2		0%	0%
2017 - 10	4	1	1	3	3	0.00	25%	25%
Grand Total	103	60	38	43	65	1.15	58%	36%

41. What level of complexity in circ rules is supported for items with loan periods in hours (For example, is it possible to have some items' due time cut off at library closing time, and others to automatically advance to [x] hours after opening on the next available day)

Ex Libris: Alma offers the option of defining a calendar of open and closed hours. Definitions can be on the level of the Institution, or on the level of the library. In addition, it is possible to define:

- Events – special dates, such as the end of the year or the end of the semester
- Exceptions – exceptions for open/closed dates and times, such as holidays

An event or an exception is defined on the Institution level.

In addition, the Terms of Use Policy includes a parameter for defining the behavior of due dates related to library hours and closures. For example, if an item is due when the library is closed, Alma can automatically change the due time to the upcoming closing time, the next open time, or leave the time as is. Similarly, booking requests are automatically adjusted by the system so that their start and end time be on library open time slots. This is set at the level of the policy, so it would be possible to have different policies assigned to different items.

Closed Library Due Date Management

How to manage fulfillment activities when the library is closed. The available options, displayed in the **Value** field of the Policy Details page when this policy type is chosen, are:

- **Keep** – Keep the current due date
- **Move backward** – Move to the end of the previous open day
- **Move forward** – Move to the beginning of the next open day
- **Move to the end of the next open day** (affects due dates that would otherwise fall on a day that the library is closed)

Due Date

The institution can set up due date policies regarding the length of time an item may be borrowed. You can specify the following period types for due date policies:

- **Fixed** – Based on your institution's calendar, such as the **End of Term**.

- **Non Fixed** – Based on the date the item was borrowed. The following values are valid: **Days, Exact Days, Hours, Minute, Month, and Week.**

If you set the **Unit of Measurement** field to **Days, Month, or Week**, you can also specify a specific time. If you don't specify a time, the default is your institution's closing time.

Hold Shelf Period

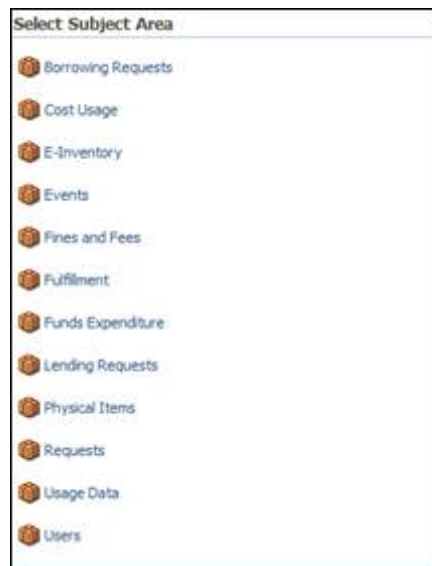
The Hold Shelf Period value does not include days that the library is closed. For example, if the Hold Shelf Period value is 5 days and the library is closed for 2 days during that period, the 2 days are not calculated as part of the Hold Shelf Period

Analytics

42. Database schema and an overview of writing/running reports

Ex Libris: Alma includes advanced data analytics, Alma Analytics, based on a worldwide leading Business Intelligence platform: Oracle Business Intelligence Enterprise Edition (OBIEE). Alma Analytics is fully integrated into Alma and transparent to the end user.

The data warehouse is organized into subject areas which are designed as a star schema and which classifies the attributes of an event into facts (measures) and descriptive dimensions.



The benefits of a star schema are:

- Simpler queries - star schema joined logic is generally simpler
- Simplified business reporting logic
- Query performance gains - star schemas can provide performance enhancements for read-only reporting applications
- Fast aggregations - the simpler queries against a star schema can result in improved performance for aggregation operations

- Reports which cross subject areas are possible through dimensions, which are shared by multiple subject areas. For example, Classification is a joint dimension of Expenditure and Circulation subject areas, so it is possible to create reports that match expenditure and usage of a specific location.

Alma contains numerous operational, analytical, and assessment data points to enable staff to create traditional and advanced library reports. The data points are organized into Subject Areas within Analytics, so users can easily drag and drop elements to build reports. The relevant data points necessary to create reports across Subject Areas are shared within folders.

Alma Analytics uses a drag and drop query method to build powerful reports; it is easy to learn and fully documented in Alma's Help Documentation. For all of the reports contained within this section, all that is required to build the report is the application of the Design Analytics role to the library user account.

All reports in Analytics are customizable to enable staff to add, remove, filter, and rearrange fields to meet library requirements.

You can create new reports to provide you with information on library activities. The simplest way to create a report is based on one subject area. You can combine data from more than one subject area to create an advanced report; this is a more complex process that requires understanding of the data dependencies.

43. Please show sample reports and review any procedural differences as it relates to barcode vs rfid users

Ex Libris: Every patron must have one unique identifier assigned to their account, but it is possible to have multiple identifiers, such as barcode and student ID number. For reporting purposes, this is the same patron. The various identifiers are available in analytics:

Last Name	First Name	Primary Identifier	User Id	Identifier Type	Identifier Value
Aaberg	Oscar	252571	3948404530000121	Barcode	000000004931
			3948404530000121	System number	252571
Aagaard	Krista	2525347058	4025425490000121	Barcode	000000000809
			4025425490000121	System number	2525347058
Aakre	Krissy	252518	15862130000121	Barcode	000000001075
			15862130000121	FEIDE	9283761253
			15862130000121	System number	252518
Aalbers	Sol	2525104544	15850860000121	Barcode	000000005009
			15850860000121	System number	2525104544
Aamodt	Domenica	252504	15785280000121	Barcode	000000000120
			15785280000121	System number	252504
Aamot	Albert	2525364337	15969250000121	Barcode	000000002429
			15969250000121	System number	2525364337
Aanerud	Krishna	252534	15958780000121	Barcode	000000004696
			15958780000121	System number	252534
Aaron	Daren	252541	16024310000121	Barcode	000000004447
			16024310000121	System number	252541
Aaronson	Brice	2525411197	16030170000121	Barcode	000000002506

Alma does not support RFID for user records, only for physical resources. The supported RFID actions include:

- Read barcode from item on pad
- Update security tag on loan and return
- Update item information (for single piece item and multi pieces item)

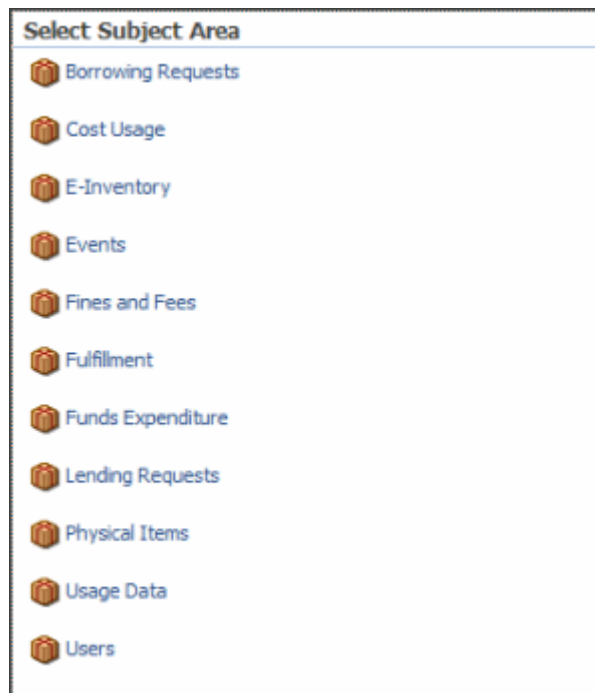
44. Creating reports and any statistical information that might be needed

Ex Libris: The simple way to create a report is using one specific subject area. Creating reports using one subject area does not require any deep knowledge of the data structure and relationship of the star scheme.

The following is a basic example of how to create a report. The example is performed in Alma Analytics using an Alma subject area, but the same exact steps apply to any Ex Libris Analytics product (Summon, campusM, Primo, and so forth).

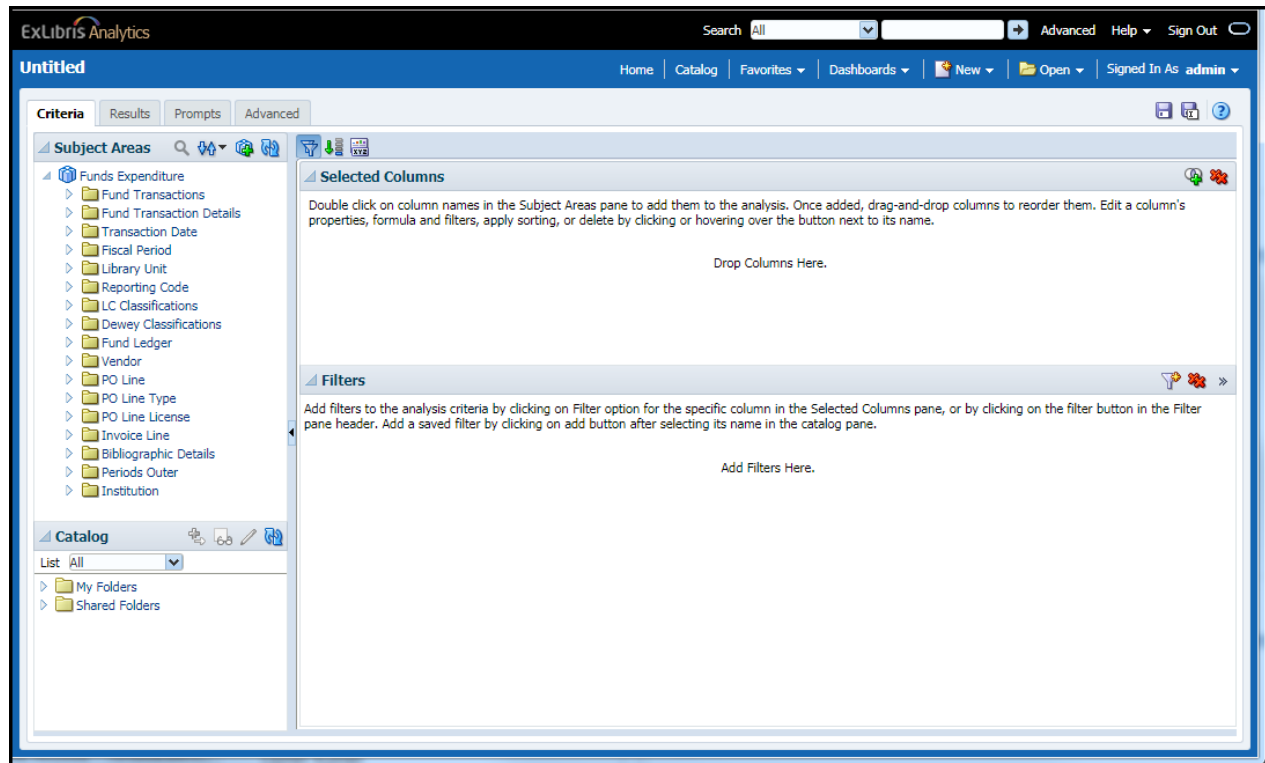
To create a report:

1. Select New > Analysis. The Select Subject Area menu appears. For the list of subject areas, see [Alma Analytics Subject Areas](#), [campusM Analytics Subject Areas](#), or [Primo Subject Areas](#).
- 2.



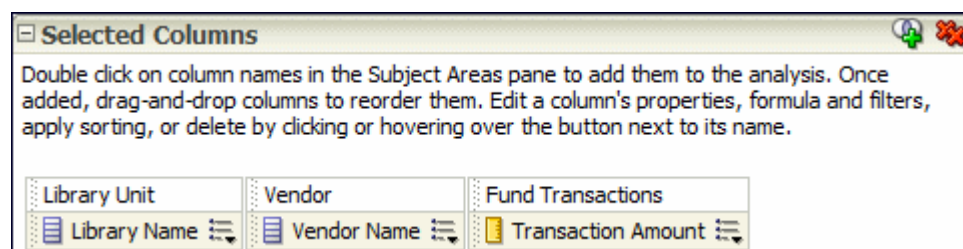
Select Subject Area Menu (Alma)

3. Select a subject area, for example Funds Expenditure, to open the Analysis Editor.





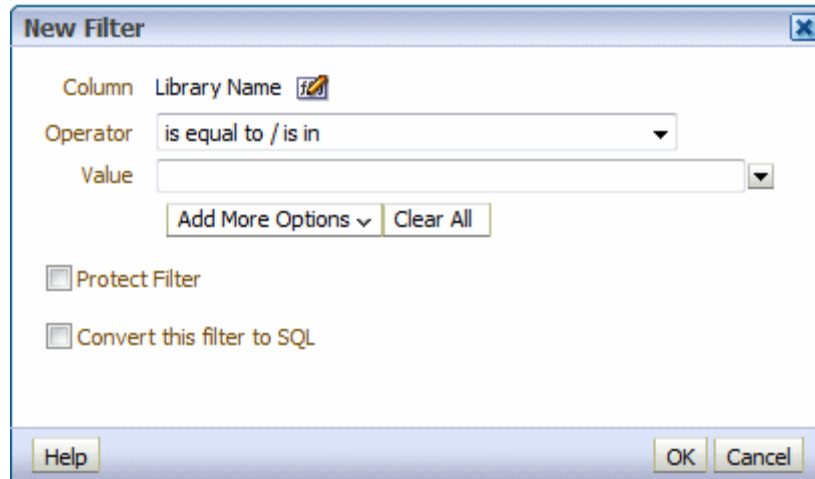
Analysis Editor

- The columns of the selected subject area appear as folder icons in the left pane.
 4. Expand a column, for example Library Unit, and double-click a dimension, for example Library Name, to add it to the Selected Columns pane.
 5. You can add an additional column, for example Vendors > Vendor Name.
 6. You can add an additional column, for example Fund Transactions > Transaction Amount.
- The selected columns appear as follows.



Select Columns


6. You can apply filters to limit the amount of data displayed in the report. Filters are applied before the report is aggregated. Filters affect the report and the resulting values for measures. Filters can be applied directly to attribute columns and measure columns.
 - a. Select the More Options icon  next to the column whose data you want to filter and then select Filter. (Alternatively, select the Filter icon  and then select the appropriate column from the drop-down list.) The New filter dialog Box appears.



The 'New Filter' dialog box contains the following fields and controls:

- Column:** Library Name (with a selection icon)
- Operator:** is equal to / is in (dropdown menu)
- Value:** (text input field with a dropdown arrow)
- Buttons:** Add More Options (dropdown), Clear All
- Checkboxes:** Protect Filter, Convert this filter to SQL
- Footer:** Help, OK, Cancel

New Filter

- b. Select an operator and enter a value. Only items matching the filter will appear in the report.
- c. Select OK to save the filter. The filter appears in the Filter pane of the report.
7. To sort a column: Select the More Options icon  next to the column whose data you want to sort, select Sort, and select a sort option.
8. Select the Results tab to see the report results.

Compound Layout









Title   

Table   

Library Name	Vendor Name	Transaction Amount
Main Library	AAAS	4,000
	Antonio's Casa de Libri	48
	Baker & Taylor	1,334
	Book Sense	9,552
	EBSCO	6,199
	EBSCO PUBLISHING	7,596
	Elsevier Engineering Information, Inc.	20,000
	Elsevier Science	80,000
	LexisNexis	80,000
	Massachusetts Medical Society	3,200
	Mimi's Monographs	2,000
	Mostly Monographs, Inc.	1,476
	Ovid Technologies, Inc.	40,000
	Templar Books	2,837
	The Bookhouse, Inc.	11,052
	Yankee Book Peddler	3,673

Compound Layout

9. To save a report: Select the Save icon  (top right). Note that the name of the report should not contain the following characters: ampersands (&), commas (,) , semicolons (;), colons (:), hashtags (#) , or slashes (/)
 You can save the report under Shared Folders/<your institution>. If it is a private report, you can save the report in the My Folders area. (Do not place reports in the Subject Area Contents folder, since this folder is meant to contain filters.) After you save a report, the title appears at the top of the report. To change the title, from the Results tab, select the Edit icon  in the Views pane and enter a new title in the Title field.