

15 - 19 March 2021: SAN FRANCISCO Alma Workshop

https://3.basecamp.com/3765443/buckets/15553579/documents/3393617249#_recording_3605572439

<https://wiki.library.ucsf.edu/display/SILS/Alma+Workshops+for+UCSF>

1. Information on Alma integrating with multiple financial systems.

https://knowledge.exlibrisgroup.com/Alma/Product_Materials/050Alma_FAQs/General/Integrations#Finance_Systems

2. License functionality re resource sharing.

https://knowledge.exlibrisgroup.com/Alma/Product_Materials/010Roadmap/Alma_Roadmap_Highlights_-_January_2021/Fulfillment_and_Resource_Sharing#Utilize_Electronic_Licenses_for_Resource_Sharing

3. Change PO line type job--how does this work?

Update PO Lines Information - Advanced

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/050Administration/070Managing_Jobs/020Running_Manual_Jobs_on_Defined_Sets](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/070Managing_Jobs/020Running_Manual_Jobs_on_Defined_Sets)


4. Share Slide Deck (with slides on ledger structure)

<https://wiki.library.ucsf.edu/display/SILS/Alma+Workshops+for+UCSF>

5. Ordered single title as an example. Clinical Imaging--PQ CUST_ID for UCSF is entered in Alma CUST_ID did not populate at the portfolio level when purchased a single title. Susan will post to Basecamp. Jenny to take screenshots and forward to Susan.

PO: PO-1002

PO line: POL-105

1  **Clinical imaging : an atlas of differential diagnosis / Ronald L. Eisenberg. (Ebook Central Health & Medicine), Philadelphia ; Wolters Kluwer Health/Lippincott Williams & Wilkins,, 2010, 9780781788601, ISBN** Edit Change Bib Reference ...

MMS ID: 991001679779406536	Total price: 200.00 USD	License status: -
CKB ID: 533710000006418713	Funds: Medicine 1 (100.0%) (FY-2021)	Activation status: Activated E-Resource
Assigned to: -	Vendor/Account: ProQuest LLC / ProQuest LLC proqu	Sent date: 03/16/2021
Type: Electronic Book - One Time	Vendor reference ID: -	
PO line owner: Parnassus Library	Expected activation: 03/16/2021	
Standard number: 9780781788601		
PO: PO-1002 / (Sent)		
PO line: POL-105 / (Waiting for Invoice)		

[Electronic One Time \(1\)](#)

Collection Ebook Central Health & Medicine

Service Editor – Linking tab

***The CUST_ID is not filled in on this tab. That is why it did not populate in the service at the portfolio level.**

Electronic Service Editor

General Linking Information

URL type Dynamic URL Parser Parameters

Parser **EBOOK::Central**

Parser parameters **url=https://ebookcentral.proquest.com/lib/ & cust_id=\$\$CUST_ID**

URL type (override) Dynamic URL Parser Parameters

Parser (override)

Parser parameters (override)

Linking level **Book**

Linking level (override)

Service is free? **Not Free**

Service is free? (override) Not Free Free

Crossref supported **No**

Crossref supported (override) Yes No

Crossref enabled No Yes INHERIT

Proxy enabled No Yes

Proxy selected

Link Resolver Plugin

Plugin name -

Linking Parser Parameters

Parameter	Value
1. CUST_ID	<input type="text"/>

Clinical Imaging Portfolio – Linking tab

The screenshot shows the 'Electronic Portfolio Editor' interface with the 'Linking' tab selected. The configuration is for a service level 'EBOOK::Central'. The 'Service parser parameters' are set to 'url=https://ebookcentral.proquest.com/lib/ & cust_id=\$\$CUST_ID'. The 'URL type' is set to 'Parser Parameters'. The 'Parser parameters' are 'linkurl=https://ebookcentral.proquest.com/lib/exlsite/detail.action?docID=2032101'. The 'URL type (override)' is also set to 'Parser Parameters'. There is an empty text field for 'Parser parameters (override)'. The 'Proxy enabled' setting is 'No'. The 'Proxy selected' dropdown is empty. A 'Test access' button is present. The 'Service Crossref supported' is 'No', 'Service Crossref enabled' is 'INHERIT', 'Service Proxy enabled' is 'No', and 'Service Proxy selected' is '-'. Below this, there is a section for 'Service link resolver plugin' with an empty 'Plugin name' field. At the bottom, there is a table for 'Service linking parser parameters'.

Parameter	Value
1. CUST_ID	-

6. Invoices are going to approval stage. Where is the configuration to change this setting?

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/020Acquisitions/110Configuring_Acquisitions/110Configuring_Invoice_Approval_Rules](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/110Configuring_Acquisitions/110Configuring_Invoice_Approval_Rules)

7. Deposit account and tracking monies left.

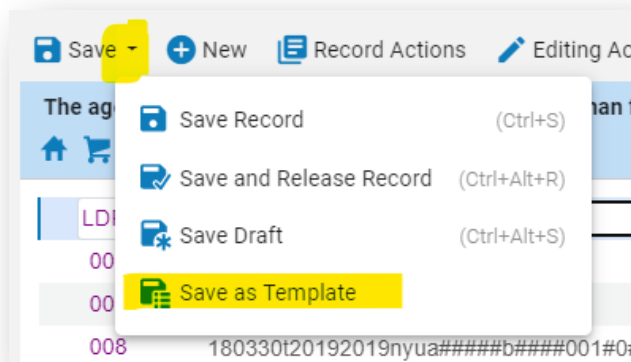
Searching Alma-L I found a post from 2017 where a customer set up a fund and entered in the initial allocation as a negative number. Pay any invoices you receive from that fund.

8. Approve invoice settings--where do you set the threshold for a high invoice amount?

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/020Acquisitions/110Configuring_Acquisitions/110Configuring_Invoice_Approval_Rules](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/110Configuring_Acquisitions/110Configuring_Invoice_Approval_Rules)

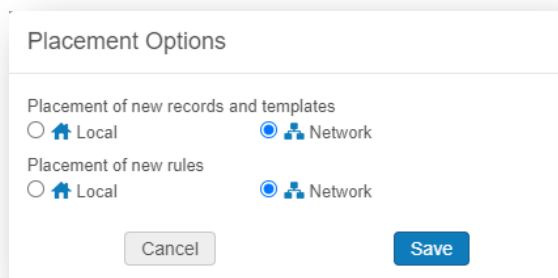
9. Where is the option to create a template from an existing record in the new MD Editor?

Click on the down arrow next to the Save menu and choose Save as Template.



10. Creating a record from a template and choose IZ. Create record and save it. Record goes into NZ because New > Placement Option is set to NZ.

Is this expected?



Marci Deignan [EXL] Mar 26 File...

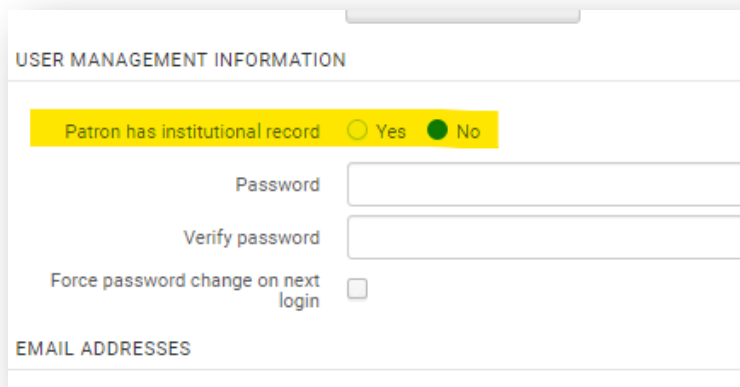
#10 - **Creating a record from a template and choose IZ. Create record and save it. Record goes into NZ because New > Placement Option is set to NZ.**

Is this expected?

- Answer – This is expected. Record will be placed in IZ or NZ depending on record placement configuration.

11. Add users from Fulfillment > Manage Patron Services > Register New User vs. Admin > User Mgmt > Manage Users > Add New User. The form from the Fulfillment > Manage Patron Services has an option to mark if the patron has an institution record.

Quick User Mgmt from Fulfillment Menu



USER MANAGEMENT INFORMATION

Patron has institutional record Yes No

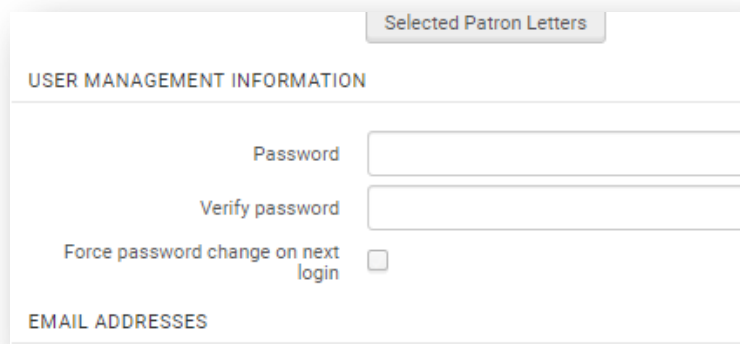
Password

Verify password

Force password change on next login

EMAIL ADDRESSES

Quick User Mgmt from Admin Menu



Selected Patron Letters

USER MANAGEMENT INFORMATION

Password

Verify password

Force password change on next login

EMAIL ADDRESSES

#11 – “Patron has institutional record” option appears only after selecting Register New User.

- [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/050Administration/030User_Management/010Managing_Users](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/030User_Management/010Managing_Users)

12. Is it possible to make fields in digitization request form mandatory?

This functionality is planned for later in 2021.

<https://ideas.exlibrisgroup.com/forums/308176-primo/suggestions/39233350-add-mandatory-choices-for-all-request-forms-in-pri>

13. Work Orders currently recalls loans. Show where to change this configuration setting.

Configuration > General > Work Orders and Departments > Work Order Types > Edit Work Order > Uncheck Recalls Loans

14. Change default location of Quick Cataloging from NZ to IZ.

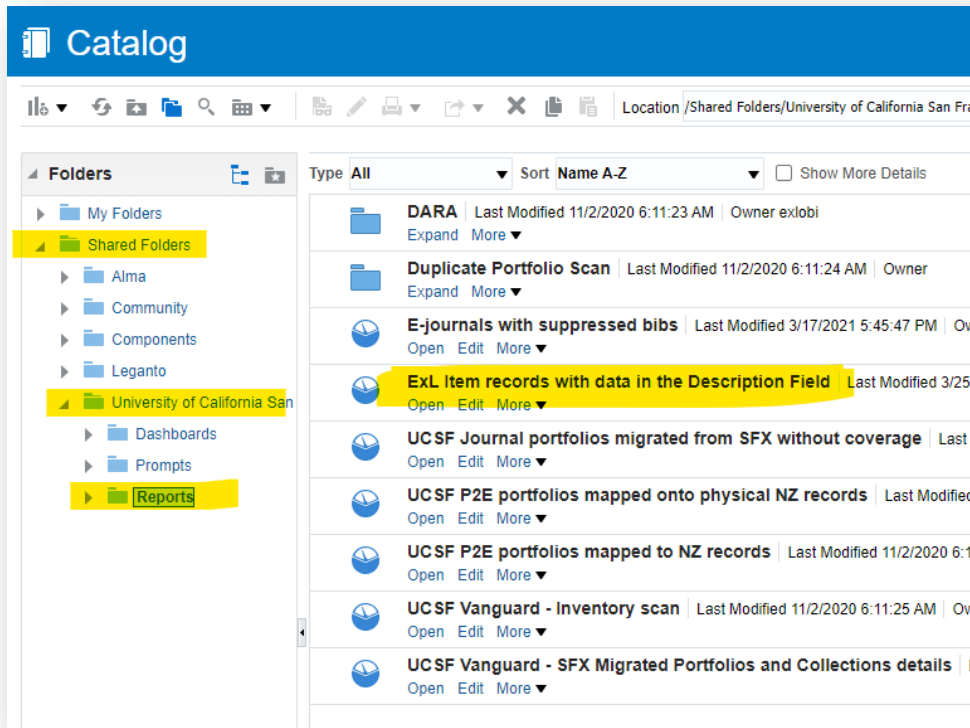
The default location of new records created using the Quick Cataloging form is a parameter titled `central_record_management`. This was set to `DEFAULT_NETWORK` at delivery. Please review if you want to allow institutional changes. The setting can be changed to `DEFAULT_INSTITUTION`.

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/040Resource_Management/080Configuring_Resource_Management/060Configuring_Other_Settings](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/080Configuring_Resource_Management/060Configuring_Other_Settings)

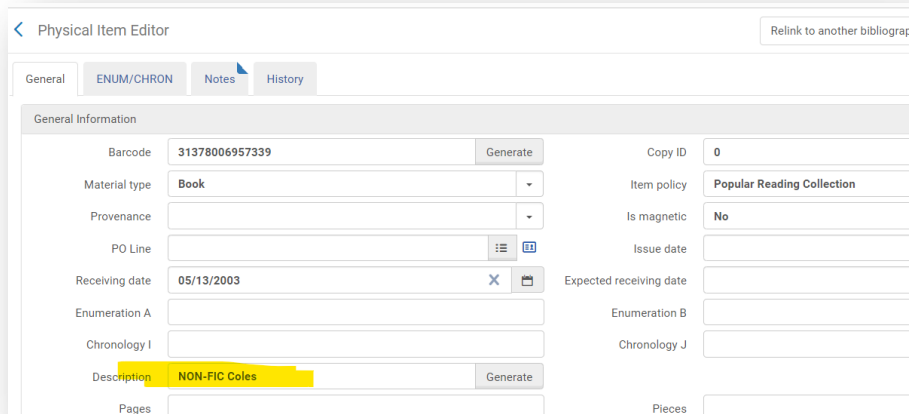
15. Jenny to create report of items with data in the item description field.

Report is titled *ExL Item records with data in the Description Field*

When placing a hold on a resource that has physical inventory (item records) that has data in the Description field, Alma sees that as a unique item and an item-level hold will be required. Some of these items have volume information that does differentiate one item from another. Other items have copy numbers and call information in that field.



Call number information in Description field. Data should be removed.



Volume information in Description field. Items are unique from one another.

Physical Item Editor Rel

General **ENUM/CHRON** Notes History

General Information

Barcode	31378007968335	Generate	Copy ID	1
Material type	Book		Item policy	Book
Provenance			Is magnetic	No
PO Line			Issue date	
Receiving date	10/17/1989		Expected receiving date	
Enumeration A			Enumeration B	
Chronology I			Chronology J	
Description	volume 1 (1969)	Generate		