Alma January 2012 Release Notes

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About the Alma Release Notes

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

These release notes include:

- What's new in Alma January 2012
- A summary of Alma January 2012 features
- Feature/enhancement descriptions for the respective components
  - Acquisitions
  - Metadata
  - Fulfillment
  - Primo Integration
  - SaaS
  - Security

What's New in Alma January 2012

In the January release, Ex Libris has added new features and enhancements around most of Alma's workflows and integration with Primo, the Ex Libris discovery solution. Many of the new features are requests made by development partners and some are part of Alma's roadmap.

Summary of January 2012 Features

Module / Feature	Automatically Visible to All Users. No setup Required	Not Automatically Visible to Users. Setup Required	Visible to Administrator Only	Contact Ex Libris to Activate This Feature
Acquisitions: Order Now				
Acquisition: Enhanced Varied Acquisition Method				
Acquisition: PO Line Templates				
Acquisition: Improved PO Jobs Monitoring				
Acquisitions: Cascade Actions Related to Ledger Funds				
Metadata (MMS): Uniqueness Handling for Holdings Records				

Metadata (MMS): Exporting Metadata Records				
Metadata (MMS): Multilingual Records				
Metadata (MMS): Augmentation of SourceParsers and ContextObject Enhancers				
Fulfillment: Improved Circulation Desk / Digitization Department Interoperability				
Primo Integration: Course and Reserve List Details Added for Discovery				

Acquisitions

The following sections describe the functions provided for Acquisitions in the January 2012 release of Alma.

Order Now

Description

The purpose of this enhancement is to accelerate the library workflow by providing an Order Now action for PO lines.

Current functionality in Alma caters to a workflow (either automated or manual) that mostly follows the steps below.

- A PO line is created
- A PO is created from a number of PO lines
- The PO is approved and sent to vendor

There are some instances where the library may want to accelerate this workflow. With this release, from the PO line, staff can click the Order Now link that creates a PO and sends it to the vendor. If the PO line has already been linked to a PO, the PO is immediately sent. If, for library-defined reasons, the action cannot be completed, staff receive detailed notification.

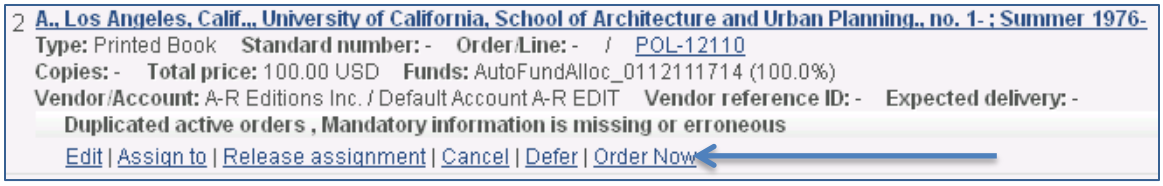

Figure 1 – Order Now Option for PO Line

Improved Support for Varied Acquisition Methods

Description

The purpose of this enhancement is to provide better support for Acquisition methods by providing the Depository option.

A new option, Depository, has been added to the out-of-the-box list of acquisitions methods.

Figure 2 - New Acquisitions Method Option

In addition, the following are refinements pertaining to the business requirements of PO lines for the acquisition types of Gift and Depository:

- Price is optional
- Renewal information is optional
- The billing address on the PO is optional
- Invoicing is not required for PO lines with the type Gift

Support Use and Management of PO Line Templates

Description

The purpose of this enhancement is to support the use and management of PO line templates by providing a template save-as function that allows the user to fill in data from an existing PO line.

Alma supports the use and management of PO line templates using the new Save as Template button at the bottom of the PO line screen.

Figure 3 - Saving a PO Line as a Template

The staff user, upon choosing this option, is prompted to enter a template name and to define if the template is private or can be shared. As part of this dialog, staff also have the option to view existing templates.

Figure 4 - Dialog Box for Creating a New Template

These templates can be used for creating new PO lines without the need to duplicate existing information.

As part of the initial process of creating a PO line, staff are offered the option of loading a template from a pull-down list.

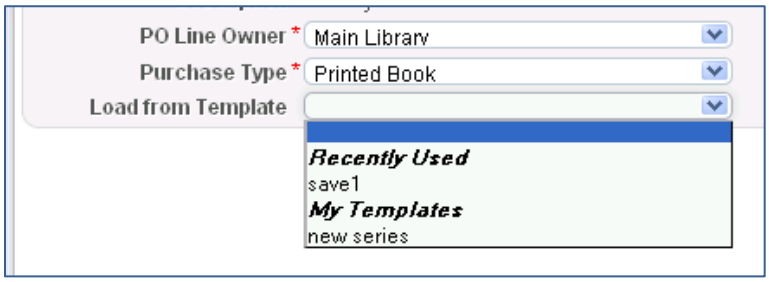

Figure 5 - Option to Create a PO Line Using an Existing Template

Improve Monitoring of Background/Nightly Acquisition Jobs

Description

The purpose of this enhancement is to improve monitoring of various background and nightly jobs in Acquisitions.

More information has been added to the Acquisitions System Job Widget that monitors acquisition-related background jobs. This includes the nightly packaging process, PO line renewal, claims, and more.

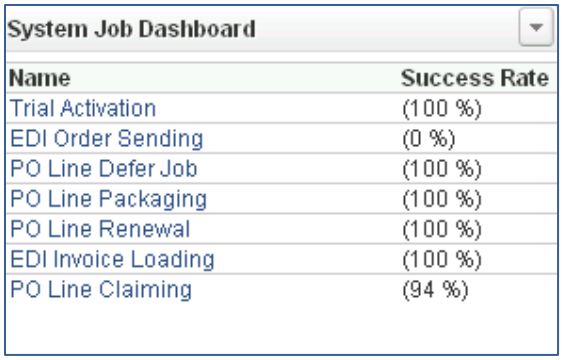

Figure 6 - More Monitoring of Background and Nightly Jobs

Ability to Cascade Actions Related to a Ledger and All Its Linked Funds

Description

The purpose of this enhancement is to provide the capability to deactivate, activate, or close a ledger and all the funds under it.

The following is an example scenario related to this new functionality:

- Ledgers and fund are rolled over at the end of a fiscal period.
- A grace period permits the continuing use of funds left over from the previous fiscal period, after which point, these funds need to be deactivated.
- The relevant ledgers and all their associated funds are deactivated as a cascade action.

Metadata

The following sections describe the functions provided for Metadata in the January 2012 release of Alma.

Uniqueness Handling for Holdings Records

Description

The purpose of this enhancement is to provide holdings uniqueness handling and accession number handling.

When creating a holdings record, Alma considers the $$t (copy ID) both for uniqueness and when editing the holdings form.

Enriched functionality has been added in relation to accession number generation. This is particularly useful for closed stacks and remote storage.

For each physical location, it is possible to define holdings configuration information.

- Accession placement information such as in which field and subfield the accession number is stored

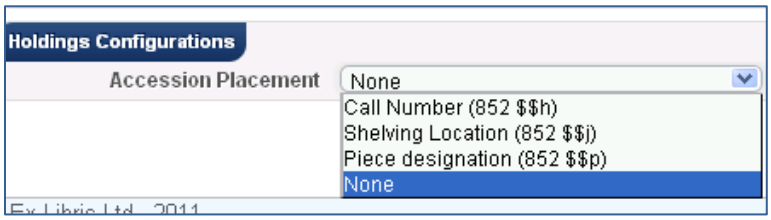

Figure 7 - Accession Configuration - I

- Call number type such as DDC, LC, and so forth

Configuration tables permit defining accession number sequences. More than one sequence can be defined for a physical location such as a sequence for regular items and another sequence for large-sized items.

Library	Location	Sequence Name	Method	Prefix	Next Sequence
UARCV	BAL	Timestamp Sequence	Sequence + Timestamp	-	1
UARCV	BAL	prefix Sequence	Prefix + Sequence	my_seq	1

Figure 8 - Accession Configuration - II

In the MD Editor, when editing a holdings record, a new option to generate an accession number is available:

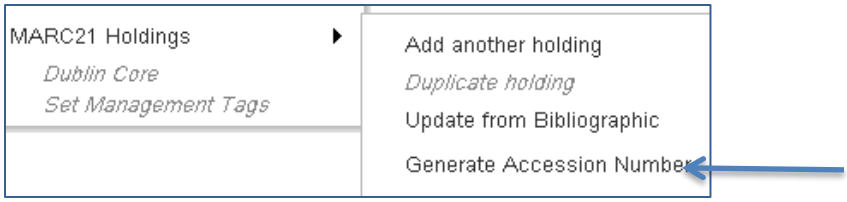

Figure 9 - Generating an Accession Number in the MD Editor - I

If only one sequence has been defined for the Physical Location, a number is automatically generated. However, if more than one sequence has been defined, a dialog box opens and the staff user is able to choose the relevant sequence:

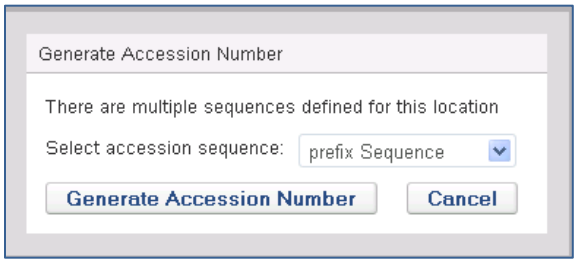

Figure 10 - Generating an Accession Number in the MD Editor - II

Exporting Metadata Records

Description

The purpose of this enhancement is to provide ad hoc exporting of metadata records (Part 1).

A new option allows staff to search for a set of bibliographic records and export them as files to a new My Exports folder.

Figure 11 - My Exports

The records can be downloaded to a PC for further processing.

The workflow starts from the Run Process option in the Resource Management menu.

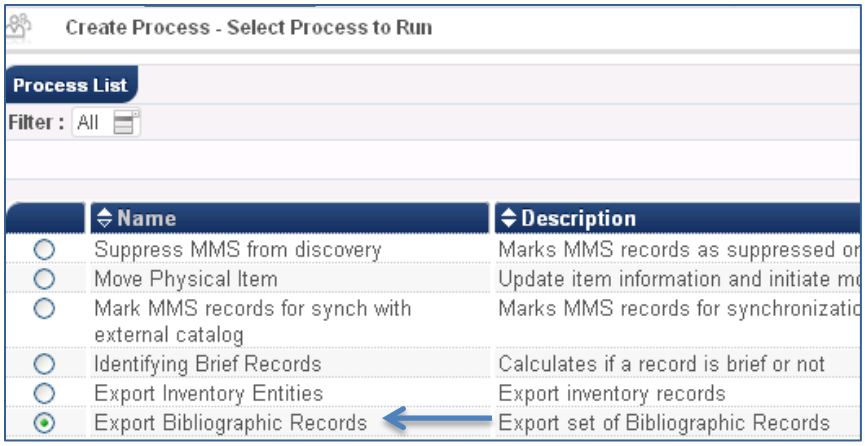

Figure 12 - New Process - Export Bibliographic Records

The staff user is guided through the wizard steps and is presented with options to choose.

- Output format
- Whether the set is private or shared

Multilingual Records

Description

The purpose of this enhancement is to provide multilingual editing of the 880 fields.

A great new feature in the January release permits the editing of paired fields without the complexity of 880 linkage.

Scenario

A record in the MD Editor is open for editing with the focus on a field such as 245, for example.

From the Edit menu, the cataloger can click the Add Alternate Graphic Representation option and choose the relevant script for input.

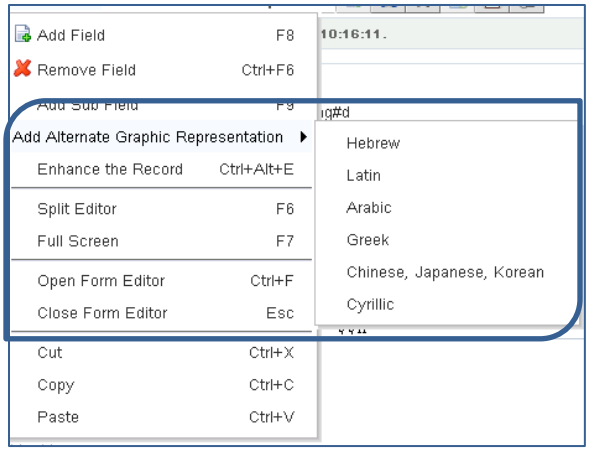

Figure 13 - Add Alternate Graphic Representation

An additional line of information opens for input in the designated script.

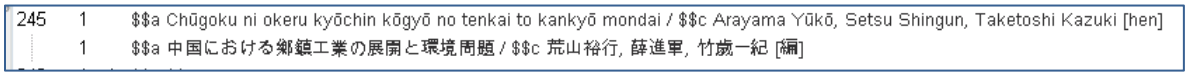

Figure 14 - Paired 245 Field in the Transcript and Original Script

In addition, linked Title pairs of fields display together in the search results.

Figure 15 - Paired Title Field Display in the Search Results

Note: Internally, Alma supports and maintains this information in the relevant 880 fields and fully complies with the MARC21 standard with regard to these fields.

This functionality has been added to Alma in order to help the staff user with the input of these paired fields.

Refer to the following section of Alma online documentation for more information:

Resource Management > Cataloging

Augmentation of SourceParsers and ContextObject Enhancers

Description

The purpose of this enhancement is to provide SourceParsers and ContextObject enhancers to provide better service resolution for the end user.

Support has been added for SourceParsers that go back to source and populate the ContextObject with full information such as EBSCO.

In addition, there is support for ContextObject augmentation such as DOI, OAI, and PubMed that adds additional enhanced information for better service resolution.

What does this mean for the end user? Resolving is more exact and context sensitive because it is based on more detailed information. This is achieved by defining an external system profile that includes options for defining profile definitions for DOI, OAI, and PubMed.

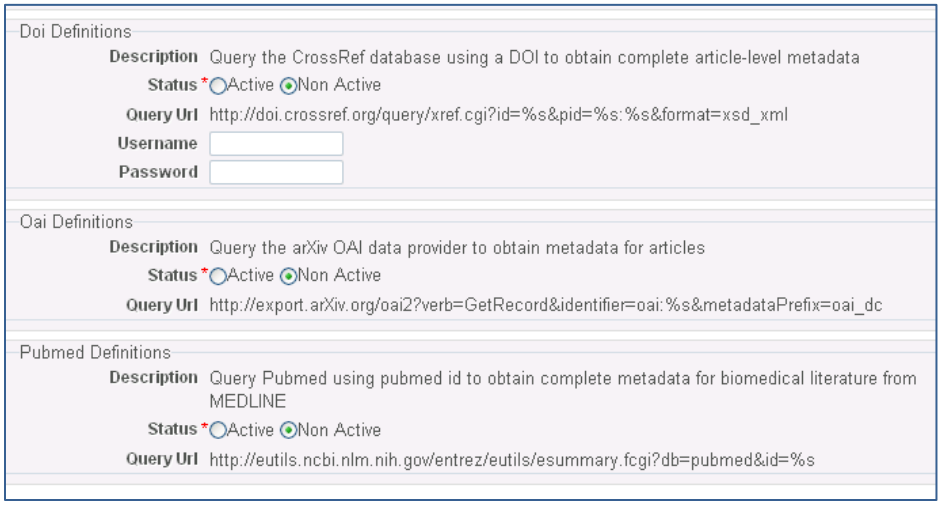

Figure 16 - Profile Definitions for DOI, OAI, and PubMed

What has changed?

Prior to the January release, in order to offer available services for a certain resource for the user, the Uresolver needed to find the proper resource and then analyze the relevant services. To do so, the Uresolver used the information in the request's OpenUrl in order to search for the corresponding MMS record.

With the January release enhancement, when an external system identifier is provided as part of the OpenUrl, the Uresolver queries the external system and enriches the ContextObject with additional metadata before searching the MMS. This is achieved by defining an External System Profile that includes options for defining profile definitions for DOI, OAI, and PubMed.

Once the ContextObject has been created, the system consults the integration profiles for augmentation. Using the integration profiles information, the system queries the external system(s) and enriches the ContextObject, obtaining an Augmented ContextObject.

Fulfillment

The following section describes the function provided for Fulfillment in the January 2012 release of Alma

Improved Circulation Desk and Digitization Department Interoperability

Description

The purpose of this enhancement is to provide improved circulation desk and digitization department interoperability by permitting alternative, more efficient library workflows.

In many institutions, there is no separate digitization department. Circulation desk operators handle both the request for digitization and the digitization process.

To support this, Alma offers the option for the circulation desk operator to handle the complete workflow without the need to switch departments in order to complete the workflow.

Refer to the following section of Alma online documentation for more information:

Fulfillment > Circulation Desk Operations

Item Resource Queue

Description

The purpose of this enhancement is to take into account item updates and changes when calculating the request queue.

The system recalculates the request queue on the inventory based on the physical inventory changes such as location, status, and so forth.

Refer to the following section of Alma online documentation for more information:

Fulfillment > Circulation Desk Operations

Offline Circulation

Description

The purpose of this enhancement is to provide offline circulation and integrate file upload from an ALEPH offline circulation client.

The circulation desk operator and manager have a new link, Offline Circulation, in the Advanced Tools section in the Fulfillment menu. The user can upload a file.

The Upload and Validate button can subsequently load the loans and returns from the file into Alma.

The user can upload a file in the following format:

- Date: 8 characters
- Time: 4 characters
- Flag if loan or return: 1
- Item identifier (Barcode): 80 characters
- User identifier: 20 characters

Primo Integration

The following section describes the function provided for Primo integration in the January 2012 release of Alma

Course and Reserve List Details Added for Discovery

Description

The purpose of this enhancement is to publish details regarding course and reserve lists through the discovery interface.

Information published to Primo is enriched to include course and instructor details for all reading lists.

In order to enable the export of course information to Primo in the Resource Management Configuration Menu in the Export Profiles section, the resource manager must check the Publish Course Information check box. After that, a full publishing needs to be run. Primo should be configured so that the course information is extracted into Primo.

Software as a Service (SaaS)

The following section describes the function provided for SaaS in the January 2012 release of Alma

Configuration of Notification Text Elements

Description

The purpose of this enhancement is to provide institution-level configuration of notifications, printouts, and fixed text elements.

This feature enables you to customize and translate the labels for the letters, notifications, and printouts that Alma sends.

From the *General* > *Letter Configuration* menu link, there is a list of all the notifications and so forth customizable by institution level where you can modify the text in the notification.

Security

The following section describes the function provided for security in the January 2012 release of Alma

FERPA Compliance

Description

The purpose of this enhancement is to provide FERPA compliance access to user information.

Additional security events related to accessing sensitive user information via Alma's User Management screens is provided.