Alma May 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:

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Alma May 2012 Release Highlights

The May release of Alma covers more functions related to Alma workflows as well as additional development items.

The new functionalities were driven by requests and feedback from our development partners as well as the Alma roadmap.

Our May 2012 release highlights are:

- Acquisitions
    - Invoices for Subscriptions and Continuous Orders

      This new functionality offers a staff user the option of entering additional information with regard to the scope of the invoice. Date information is no longer mandatory. In addition, a new field, **Additional Information**, may be used for setting other types of scope information such as volume and issues.

    - Invoices – Payment Information

      In order to help staff with a more efficient workflow, this new enhancement expands the options/information provided that determine when the invoice is exported to the ERP and simplifies the invoice workflow. The process allows for handling cases where the invoice is either still waiting for payment confirmation or has already been closed.

    - Invoices - Separate Delete Role

      In an effort to fine tune the roles and authorizations assigned to a user, a separate role for deleting invoice lines has been defined. This means that only users with this role are able to delete/cancel an invoice line.

    - Manage Department Items

      It is important for staff, when receiving items, to know if an item has been requested by a patron. To cater to this, the receiving process has been enhanced so that staff see an indication when there is a request for an item. Staff can then deal with these items as a higher priority. In addition, there is the option to print request slips for the requested items.

- Resource Management
    - Additional Descriptive Metadata for Database Collections

      The purpose of this enhancement is to provide the ability to associate a bibliographic descriptive record with an electronic database from the electronic collection resource editor.

    - Additional Search Indexes

      In order to further enhance the search experience in Alma, additional bibliographic and holdings search indexes have been added, such as record format, record level (from the leader) and edition.

- Fulfillment
    - Itemless HOL Level Requesting

      Often serials are managed without items. This does not mean that they cannot be requested. New functionality supports the option to create a request on the level of the holdings record.

- Discovery Interface
    - Electronic Availability Information

      As part of an important new development, electronic availability (coverage) now displays as part of the results in a staff search and in the discovery tool (View It in Primo). This helps ensure that the user's discovery experience is more relevant.

Access to May 2012 Features

Note: Refer to the Technical Instructions section for each feature in these release notes for information that describes the roles needed.

Module / Feature	No Activation/ Setup Required (Note: Automatically Visible to All Users with the Appropriate User Role/ Permission)	Activation/ Setup Required	Visible to Administrator Only	Contact Ex Libris to Activate This Feature
Acquisitions: Additional Options for Invoice Export	✓			
Acquisitions: Additional Options for Managing Department Items	✓			
Acquisitions: Additional Scope Information on the Invoice Line	✓			
Resource Management: Additional Descriptive Metadata for the Database Collections	✓			
Resource Management: Additional Bibliographic/Holdings Search Indexes	✓			
Fulfillment: Requests for Holdings with No Items	✓			
General: Role for Deleting Invoice Line Records	✓			

Module / Feature	No Activation/ Setup Required (Note: Automatically Visible to All Users with the Appropriate User Role/ Permission)	Activation/ Setup Required	Visible to Administrator Only	Contact Ex Libris to Activate This Feature
Discovery Interface: Electronic Availability Information with the View It Tab	✓			

Acquisitions

The following sections describe the features provided for the Acquisitions component in the May 2012 release of Alma.

Additional Options for Invoice Export

Description

The purpose of this enhancement is to expand the options that determine when the invoice is exported to the ERP, enabling a prepaid invoice to still be exported to the ERP system.

Technical Instructions

The Invoice Operator can access this enhancement.

This feature is viewable wherever an invoice is created or updated. The steps below highlight this feature for a new and manually created invoice.

To view this enhancement:

1. From the Alma main menu > Acquisitions > Receiving and Invoicing, click **Create Invoice**.
2. Select the **Manually** option for the invoice creation method and click **Next**.
3. Enter the required invoice details, select a **Payment method** other than Accounting Department, and select the **Prepaid** check box in the Payment section.

   The Export to ERP option displays.

Figure 1 - Export to ERP Option

Additional Option for Managing Department Items

Description

The purpose of this enhancement is to provide an additional option for managing department items.

Technical Instructions

The Acquisitions Operator can access this capability.

To view this enhancement:

1 From the Alma main menu > Acquisitions > Post-Receiving Processing, click **Receiving Department Items**.

The Item in Department page displays.

When a patron request exists for a title that is at the Receiving Department, the **Yes** link displays in the Requests column.

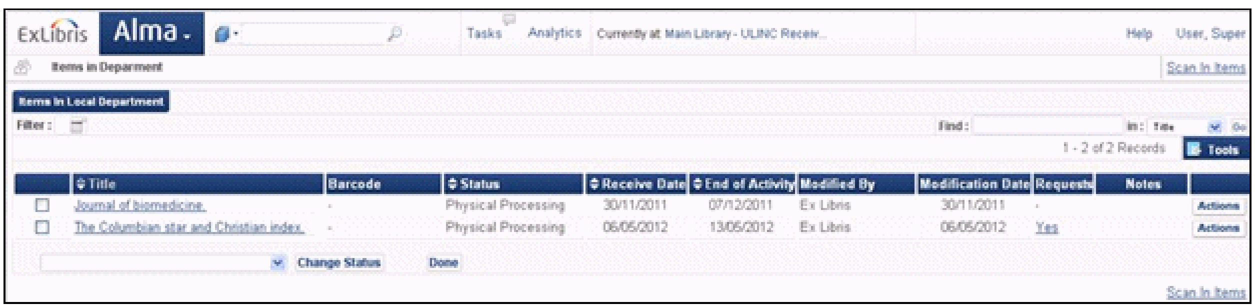

Figure 2 - Requests Column Yes Link

2 Click **Yes** to view the request details provided from the Resource Request Monitoring page.

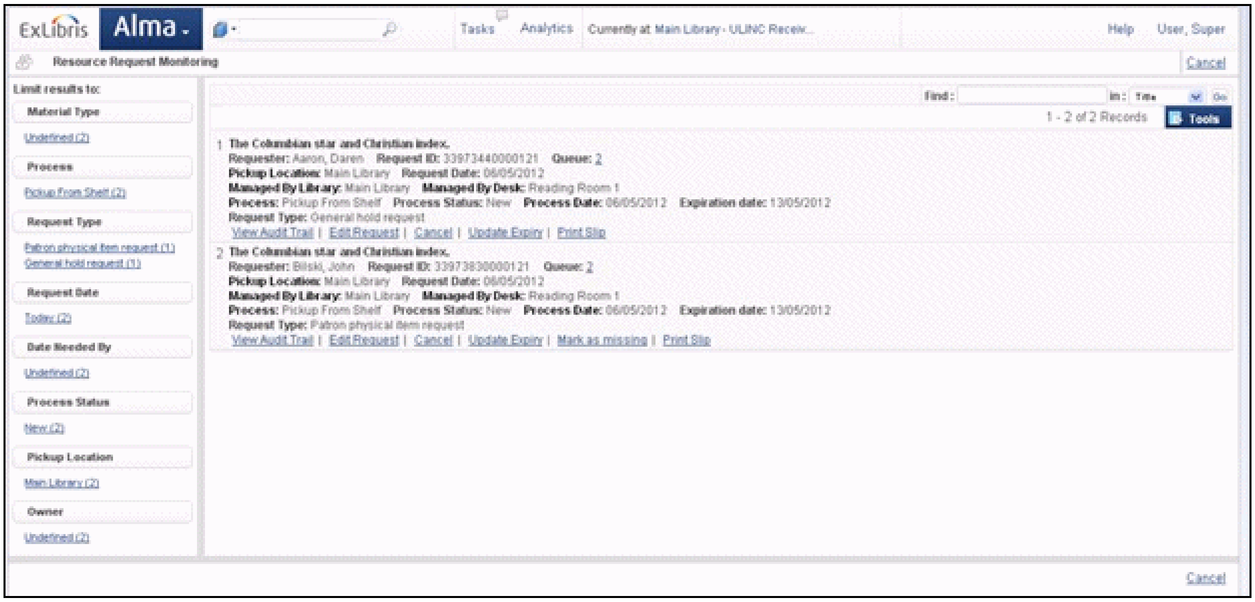

Figure 3 - Yes Link Request Details from the Resource Request Monitoring Page

Additional Scope Information on the Invoice Line

Description

The purpose of this enhancement is to provide additional scope information on the invoice line. Since the scope is not always a date range, this allows for descriptive information, such as from **Volume 7 to 11**.

Technical Instructions

The Invoice Operator may access this enhancement.

This feature is viewable wherever an invoice line is created or updated. The steps below highlight this feature for a new invoice line.

To view this enhancement:

1 From the Alma main menu > Acquisitions > Receiving and Invoicing, click **Review**.

2 Click **Action > Edit** for a subscription invoice.

3 Select the **Invoice Lines** tab.

4 Click **Add Invoice Line**.

The Add Invoice Line pop-up window displays with the Additional Information option.

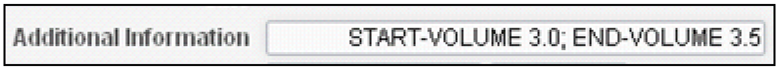

Figure 4 - Additional Information

Resource Management

The following sections describe the functions provided for the Resource Management component in the May 2012 release of Alma.

Additional Descriptive Metadata for the Database Collections

Description

The purpose of this enhancement is to provide the ability to associate a bibliographic descriptive record with an electronic collection of the type database from the electronic collection resource editor.

Technical Instructions

The Electronic Inventory Operator can use this capability.

To view this feature:

1. From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
2. Enter search criteria for an electronic collection and click **Go**.
3. Click **Edit** for an item in the results list with a **database** collection type.
4. Select the **Additional Information** tab.
5. Enter **Additional descriptive information** to associate a bibliographic descriptive record with the electronic database collection.

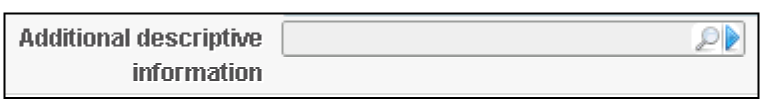

Figure 5 - Additional Descriptive Information

Note: The descriptive metadata that is added to the database is published and, is therefore, discoverable from Primo.

Additional Bibliographic/Holdings Search Indexes

Description

The purpose of this enhancement is to provide additional bibliographic and holdings search indexes.

Technical Instructions

Any user with access to the advanced repository search can use this feature.

To view this capability:

1. From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
2. Click **Advanced Search**.

   The Advanced Search page displays.

   The following additional search options are provided:

   - Edition
   - Bibliographic level
3. View the additional indexes.

Fulfillment

The following section describes the functions provided for the Fulfillment component in the May 2012 release of Alma.

Requests for Holdings with No Items

Description

The purpose of this enhancement is to provide the option to place requests on holdings that contain no items.

Physical items are often received at the library without being registered and barcoded. These items' titles are discoverable, and patrons may want to place requests to receive the items for loan. This new feature enables the requesting of such items, and loaning the items if they are found on open shelves.

Technical Instructions

The following users may access this enhancement:

- Fulfillment Services Operator (in Alma)
- Patron (in Primo)

To view this capability:

1. From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
2. Enter a search for one of the institution's titles that has a holdings record without any associated items.
3. Click the **Request** link for the record.
4. Select the **Request Type** that is available, **General Hold Request**.

Note: This new request option has also been added as a Primo GetIt tab request option.

5. Enter the remaining request options and click **Submit**.
6. View the submitted request.

To attach a physical item to the holdings record from the Scan In Items interface:

1 Access the Scan In Items page.

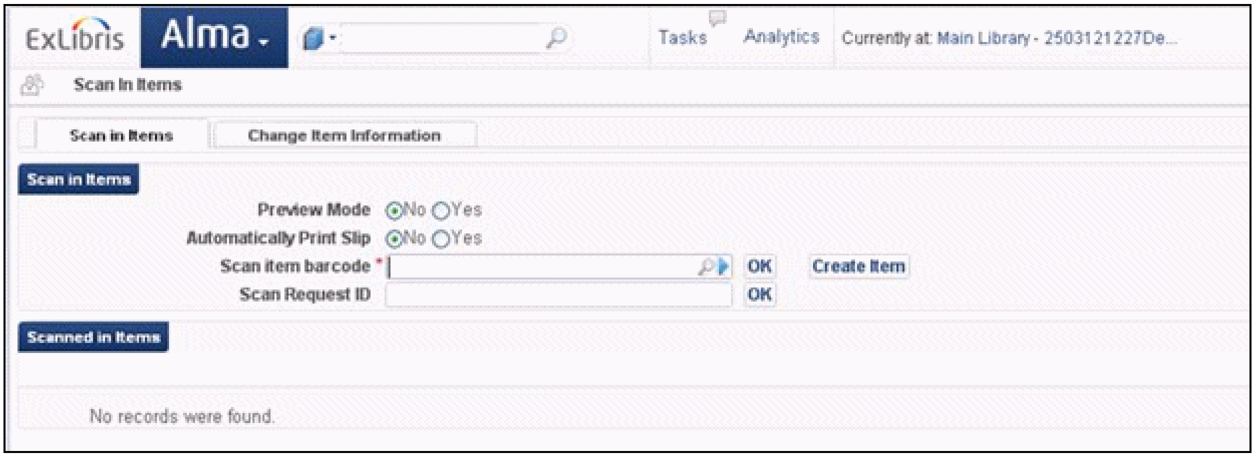

Figure 6 - Scan In Items Page

2 Click **Create Item**.

To attach a physical item to the holdings record from the Patron Services page when charged:

1 Access the Patron Services page.

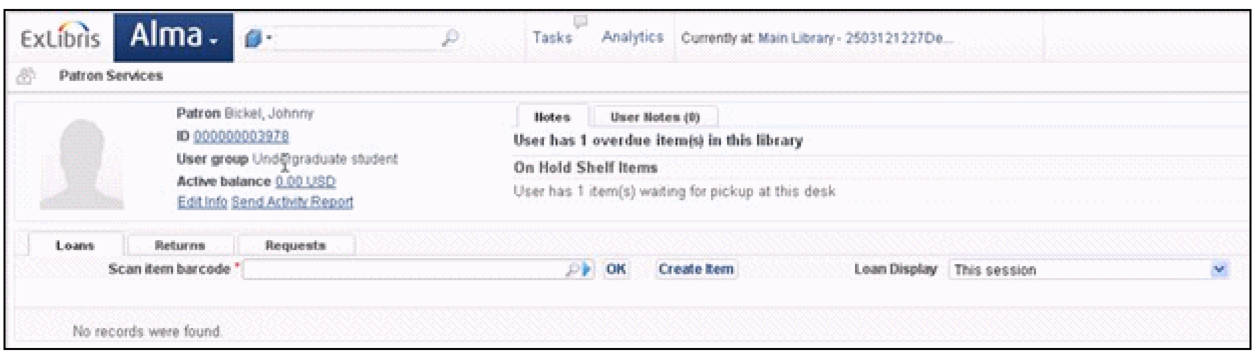

Figure 7 - Patron Services Page

2 Click **Create Item**.

3 Choose the holdings type when prompted.

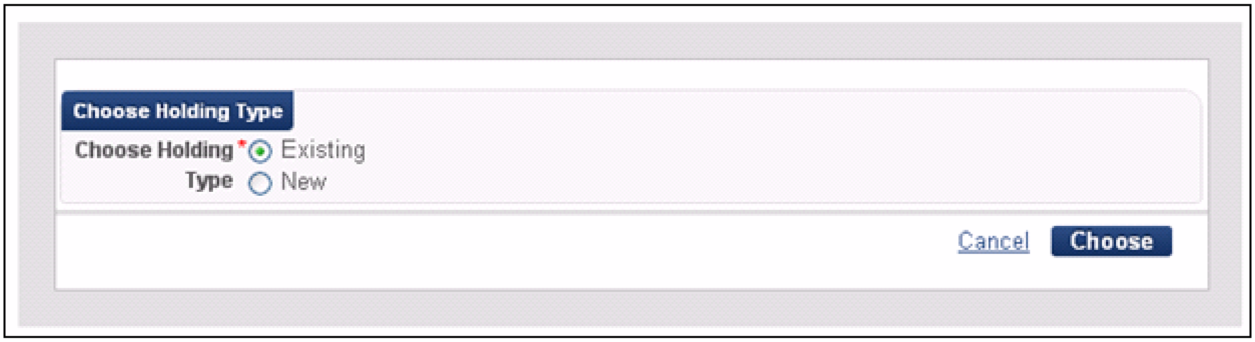

Figure 8 - Choose Holdings Type

General

The following section describes the function provided for the General component in the May 2012 release of Alma.

Role for Deleting Invoice Line Records

Description

The purpose of this enhancement is to provide a separate role for deleting invoice line records in addition to the Invoice Operator role for creating and reviewing invoices.

Technical Instructions

The User Manager role can add the new role in user management.

To add the new role:

1. From the Alma main menu > General > User Management, click **Find and Manage Users**.
2. Select **Actions > Edit** for the user to receive this new role.
3. Click **Add Role**.
4. Select the **Invoice Operator Extended** role and click **Add Role**.

Discovery Interface

The following section describes the function provided for the Discovery Interface with the May 2012 release of Alma.

Electronic Availability Information with the View It Tab

Description

The purpose of this enhancement is to provide electronic availability information from the View It tab in Primo.

Technical Instructions

Primo patrons may access this enhancement.

To view this feature:

1. Using Primo, search for an electronic journal item.
2. Click **View It**.

   The View It tab displays the availability (coverage provided by the library) for this item.

Known Issues and Defect Fixes

The sections below describe the known issues and defect fixes.

Known Issues

- For FTP import, only one re-occurrence of a metadata import job can be defined and multiple re-occurrences should be configurable

Defect Fixes

- The e-resource task list coming back from the e-resource editor does not work