



# **Alma July 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:

- [Alma July 2012 Release Highlights](#)
- [Access to July 2012 Features](#)
- Feature/enhancement descriptions for the respective Alma components and functional areas
  - [Acquisitions](#)
  - [Resource Management](#)
  - [Fulfillment](#)
  - [User Management](#)
  - [Digital Resources](#)
  - [Analytics](#)
- [Known Issues](#)

# Alma July 2012 Release Highlights

## General Updates

- List of Certified External Resource Profiles Expands

As part of the Alma open data strategy, we have extended the number of Alma Resource Management External Resources. Alma now supports certified External Resource profiles for more than 15 institutions such as Oxford University, The National Library of Scotland, Harvard University, the National Library of Australia, The Russian State Library, the National Library of Korea, and more.

- CKB Records

CKB records in the Alma Community Zone have been enriched with about 90,000 CONSER records. (CONSER – Cooperative Online Serials – a LOC initiative). CONSER records are full robust metadata records and will form a welcome addition to the Alma repository. Going forward, CONSER records will be merged with CKB records in the CZ on a periodic basis.

## Acquisitions

- Grouping Invoices Together for Reporting

In order to support the option of reporting on groups of invoices, a new searchable reference number has been added to the invoice header. In addition, it is possible to map existing data to this field as part of the migration from your ILS to Alma.

- Delete Invoice

It is now possible to delete an invoice before it has been approved. This results in the deletion of associated expenditures and the recalculation of encumbrances for the related orders.

- Reload Previously Loaded EDI File

When an EDI file is received out of sequence with the EOD file, the EDI file is loaded but does not find any matches. The staff user can delete the invoice and reload the EDI file after the EOD file has been loaded.

- Recalculation of Exchange Rates

Fund transactions based on updated exchange rates will be recalculated automatically as part of the Exchange Rate function in the Global Data Store.

## Resource Management

- New Subfield Separator

Alma now supports a new subfield separator symbol ‡. For those of you who have grown fond of the Ex Libris subfield indicator \$\$, don't despair. You can still choose to use this option rather than the new indicator symbol. (Configuration of the subfield separator is handled by Ex Libris Professional Services as an institution-level parameter set at implementation.)

- Item-Level Sorting

The functionality related to item-level sorting when searching the repository using the search scope Physical Items has been enhanced. In addition to sorting by call number, it is now possible to sort search results by alternative call number and accession number for primary and secondary sort and also as conditions for Advanced Search.

- Bind Items

Alma now supports the functionality to bind physical items (for example, issues) together. The workflow includes a binding wizard that guides you through the various steps required.

- Bulk Processing – Create Work Order

This feature provides the option to create a set of physical items and then to create work order requests for all the items in the set.

## Course Reserves

- Tagging Course Reserve Items

As part of the Quick Cataloging process for Course Reserves, it is now possible to mark records as belonging to Course Reserves. This allows better handling of this material in the discovery layer.

## User Management

- Limiting Role Options

It is now possible to define a number of limited role options.

- Receiving Operator Limited

This is a role for the Receiving Operator with view-only access to the PO Line.
- Circulation Desk Operator Limited

This role will not allow a number of options such as deleting loans, waiving fines, removing blocks, and so forth. For the full list, refer to the detailed release notes.
- Separate Delete Privileges
  - Delete Privilege for Inventory Records

Only a user with xxx (Digital, Physical, Electronic Inventory Operator – Extended) is able to delete inventory records.
  - Delete Privilege for MMS (Metadata) Records

Only a user with delete privileges is able to delete metadata records.
- SDK Label Printing

This role authorizes users for the Alma web service when doing label printing.

## Digital Resources

- Collection Assignment for Digital Items

Alma now supports functionality related to associating a collection code/group ID to a specific digital resource.
- Publishing Digital Collection Codes to Primo

Digital entities can have optional collection codes. It is now possible to publish this information to Primo. The codes are indexed in Primo in a similar manner to the collection codes of physical items. Primo will, of course, display the collection name rather than the code.

## Alma Analytics

- Analytics Configuration

The analytics configuration menu has been redesigned and greatly enhanced. It includes the option to define three types of configuration:





- Reports
- Widgets
- Scheduler





In addition, the staff user (with the relevant role) is able to subscribe to receive reports via email on a daily, weekly, or monthly basis.

## Access to July 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	Activation/ Setup Required	Visible to Administrator Only	Contact Ex Libris to Activate This Feature
	(Note: Automatically Visible to All Users with the Appropriate User Role/ Permission)			
Acquisitions: <a href="#">Grouping Invoices Together for Reporting</a>				
Acquisitions: <a href="#">Delete an Entire Invoice</a>				
Acquisitions: <a href="#">Reload Previously Loaded EDI File</a>				
Acquisitions: <a href="#">Recalculation of Exchange Rates</a>				
Resource Management: <a href="#">New Subfield Separator</a>				
Resource Management: <a href="#">Item-Level Sorting Expanded</a>				

Module / Feature	No Activation/ Setup Required	Activation/ Setup Required	Visible to Administrator Only	Contact Ex Libris to Activate This Feature
	(Note: Automatically Visible to All Users with the Appropriate User Role/ Permission)			
Resource Management: <a href="#">Binding Items</a>				
Resource Management: <a href="#">Bulk Processing – Create Work Order</a>				
Resource Management: <a href="#">Enhancing Bibliographic Records with Holdings Upon Export</a>				
Fulfillment: <a href="#">Quick Cataloging Enhanced for Course Reserves Limited Access Tagging</a>				
Fulfillment: <a href="#">Enrichment of Alma Export to Bursar</a>				
User Management: <a href="#">Separate Delete Privilege Roles for Inventory Records</a>				
User Management: <a href="#">Separate Delete Privilege Role for MMS Records</a>				
User Management: <a href="#">Receiving Operator Limited Role</a>				
User Management: <a href="#">Circulation Desk Operator Limited Role</a>				

Module / Feature	No Activation/ Setup Required	Activation/ Setup Required	Visible to Administrator Only	Contact Ex Libris to Activate This Feature
	(Note: Automatically Visible to All Users with the Appropriate User Role/ Permission)			
User Management: <a href="#">SDK Label Printing Role</a>				
User Management: <a href="#">Manage Self-Check Verification</a>				
Digital Resources: <a href="#">Publishing Digital Collection Codes to Primo</a>				
Analytics: <a href="#">New Analytics Subscription and Configuration Options</a>				

# Acquisitions

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

## Grouping Invoices Together for Reporting

### Description

The purpose of this enhancement is to provide the capability of grouping invoices together for reporting. For this capability, Alma has been updated to include:

- A new reference number in the invoice header that is searchable
- An addition to the Analytics data mart for the External Invoice Reference Number
- The option to map, during migration, your existing data to the Alma invoice header reference number

### Technical Instructions

The Invoice Operator roles can access the new Invoice Reference Number, and the Design Analytics role can access the reporting options.

#### To view the new Invoice Reference Number option:

- 1 From the Alma main menu > Acquisitions > Receiving and Invoicing, click **Create Invoice**.
- 2 For Invoice Creation, select **Manually** and click **Next**.

The Invoice Details page displays that includes the new invoice reference number field.

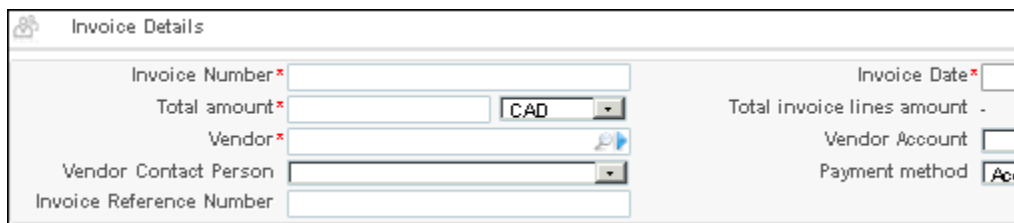
The screenshot shows the 'Invoice Details' form in Alma. It contains several input fields: 'Invoice Number\*', 'Total amount\*', 'Vendor\*', 'Vendor Contact Person', 'Invoice Reference Number', 'Invoice Date\*', 'Total invoice lines amount', 'Vendor Account', and 'Payment method'. The 'Total amount\*' field has a dropdown menu set to 'CAD'. The 'Invoice Reference Number' field is a new addition to the form.

Figure 1 - New Invoice Reference Number Field

#### To view the new External Invoice Reference Number option in Alma Analytics:

- 1 From the Alma main menu > General > Analytics, click **Design Analytics**.
- 2 From the toolbar, click **New > Analysis and Interactive Reporting > Analysis**.

- 3 From the Subject Areas pane, expand the **Funds Expenditure** folder and the **Invoice Line** folder.

The External Invoice Reference Number option displays in the expanded list.

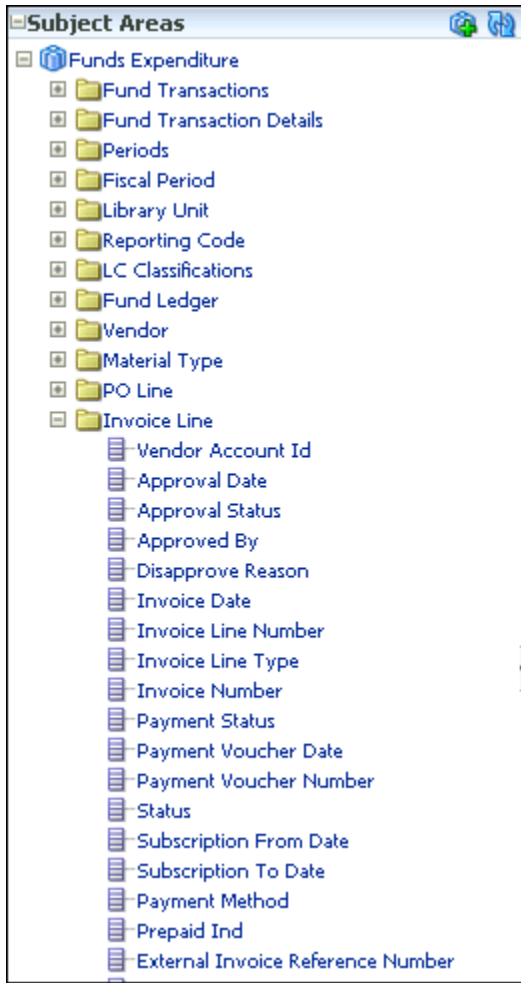


Figure 2 - External Invoice Reference Number

## Delete an Entire Invoice

### Description

The purpose of this enhancement is to provide the ability to delete an entire invoice prior to it being approved.

## Technical Instructions

The Invoice Operator Extended role can access this facility.

### To delete an invoice:

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

The In Review Invoices page displays.

- 2 Click **Actions** for an invoice.

The Delete action displays in the list of actions.



Figure 3 - Delete Invoice Action

- 3 Click **Delete**.

Using **Delete** results in the deletion of associated expenditures and the recalculation of encumbrances for the related orders.

## Reload Previously Loaded EDI File

### Description

The purpose of this enhancement is to provide the ability to reload a previously loaded EDI file.

For instances when the EDI file is received out of sequence with the EOD (this may happen with approval plans) and the EDI is loaded but does not find any matches, the staff user can delete the invoice and reload the EDI file when it is confirmed that the EOD is loaded.

## Technical Instructions

The Vendor Manager role can access this capability.

### To view the reload capability:

- 1 From the Alma main menu > Acquisitions > Acquisitions Infrastructure, click **Vendors**.
- 2 Click **Actions > View EDI Files**.

Active	Vendor Code	Name	Libraries	
✓	AutQA_EDI_Vendor	AutoQA_EDI Vendor	Main Campus(Including)	Actions
				Edit
				Delete
				View History
				View Edi Files

Figure 4 - View EDI Files

The EDI Files List page displays all the EDI files for the vendor selected.

EDI Files list					
Vendor name		AutoQA_EDI Vendor			
Vendor code		AutQA_EDI_Vendor			
File name	File Type	Process Id	Processed By	Processed On	
121.AutQA_EDI_Vend...	EDI Invoice Loading	19089870000121	Ex Libris	24/05/2012	Th
121.AutQA_EDI_Vend...	EDI Invoice Loading	19089420000121	Ex Libris	24/05/2012	Th
121.AutQA_EDI_Vend...	EDI Invoice Loading	19043870000121	Ex Libris	24/05/2012	Th
121.AutQA_EDI_Vend...	EDI Invoice Loading	19056550000121	Ex Libris	24/05/2012	Th
121.AutQA_EDI_Vend...	EDI Invoice Loading	19087870000121	Ex Libris	24/05/2012	Th
121.AutQA_EDI_Vend...	EDI Invoice Loading	18776870000121	Ex Libris	24/05/2012	Th
121.AutQA_EDI_Vend...	EDI Invoice Loading	28089870000121	Ex Libris	24/05/2012	Th

Figure 5 - EDI Files List Page

- 3 Click **Actions** to view the Reload option.

⚡ Processed On	⚡ Notes	⚡ Process Status	
24/05/2012	The invoice edi file	Completed with Errors	Actions
24/05/2012	The invoice edi file	Completed Successfully	Edit
24/05/2012	The invoice edi file	Completed Successfully	Report
24/05/2012	The invoice edi file	Completed Successfully	Download
24/05/2012	The invoice edi file	Completed Successfully	Reload
24/05/2012	The invoice edi file	Completed Successfully	Actions
24/05/2012	The invoice edi file	Completed Successfully	Actions
24/05/2012	The invoice edi file	Completed with Errors	Actions
24/05/2012	The invoice edi file	Completed with Errors	Actions
24/05/2012	The invoice edi file	Completed with Errors	Actions

Figure 6 - Reload Action

---

**Note:** Before running a reload, you need to delete the previously loaded invoice.

---

## Recalculation of Exchange Rates

### Description

The purpose of this enhancement is to provide the facility to recalculate exchange rates automatically. This is helpful for institutions that deal with several currencies and vendor locations.

Ex Libris updates the exchange rate table, and Support runs the Recalculate Transactions Exchange Rate job weekly.

The job that is run identifies/processes only the transactions that are in a foreign currency and start with a specified transaction From Date.

### Technical Instructions

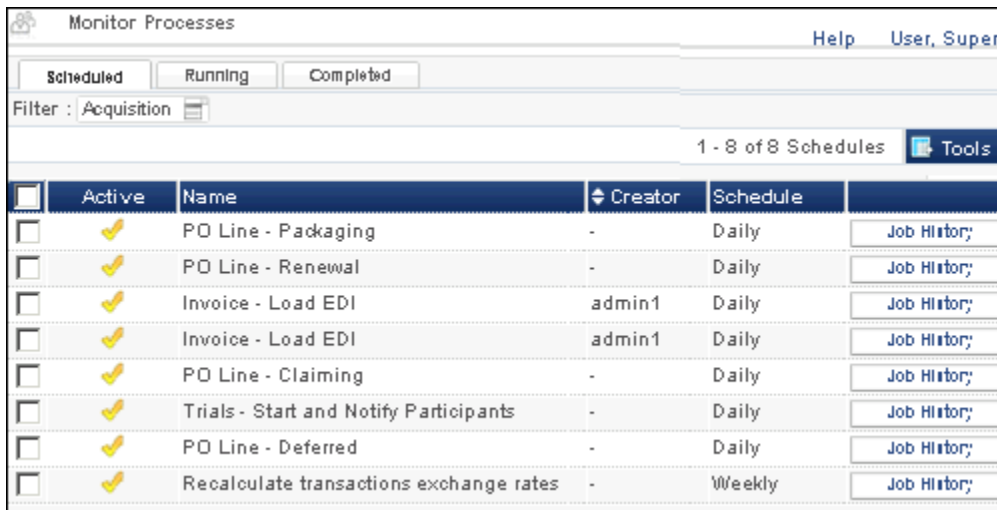
Any role that can view the Monitor Processes can access the Recalculate Transactions Exchange Rate job information.

#### To view the job information:

- 1 From the Alma main menu > Resource Management > Processes, click **Monitor Processes**.
- 2 Select the **Scheduled** tab.
- 3 Select the **Acquisition** filter.



- 4 Confirm that the **Active** check mark is in the active mode.



<input type="checkbox"/>	Active	Name	Creator	Schedule	
<input type="checkbox"/>	✓	PO Line - Packaging	-	Daily	<a href="#">Job History</a>
<input type="checkbox"/>	✓	PO Line - Renewal	-	Daily	<a href="#">Job History</a>
<input type="checkbox"/>	✓	Invoice - Load EDI	admin1	Daily	<a href="#">Job History</a>
<input type="checkbox"/>	✓	Invoice - Load EDI	admin1	Daily	<a href="#">Job History</a>
<input type="checkbox"/>	✓	PO Line - Claiming	-	Daily	<a href="#">Job History</a>
<input type="checkbox"/>	✓	Trials - Start and Notify Participants	-	Daily	<a href="#">Job History</a>
<input type="checkbox"/>	✓	PO Line - Deferred	-	Daily	<a href="#">Job History</a>
<input type="checkbox"/>	✓	Recalculate transactions exchange rates	-	Weekly	<a href="#">Job History</a>

Figure 7 - Recalculate Transactions Exchange Rates Job

- 5 Select **Job History** or check the **Running** and/or **Completed** tabs for additional information.

## Other Acquisitions Module Enhancements

The list below highlights recent enhancements in the Acquisitions module:

- Closed PO lines are now included when the **Status** filter is set to **All**.
- The EDI invoice job report now includes an invoice number, the number of invoice lines, and the number of related POs. In addition, an error section now displays a table with an error description and value.
- The new purchase types are now properly displayed for imported EOD profiles.
- The **Assign to** drop-down list now displays users based on their roles.
- Portfolios can now be ordered from the Community Zone.
- A file with local portfolio information can now be uploaded to an existing local package.

# Resource Management

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

## New Subfield Separator

### Description

The purpose of this enhancement is to provide a new subfield separator. With this release, the following subfield separators are available with Alma:

- \$\$
- ‡

Configuration of the subfield separator is handled by Ex Libris Professional Services as an institution-level parameter set at implementation.

The value set at implementation is used:

- As a separator between subfields when editing with the Metadata Editor
- When subfields are added with F9
- When loading and saving records as a subfield separator
- In the item editor as a separator between the temporary and alternative call number strings
- For parsing the temporary and alternative call number type in the item editor when normalizing for sorting

### Technical Instructions

The Cataloger role can use this new feature while creating and maintaining the Alma inventory.

#### To view the new subfield (when installed for your system):

- 1 From the Alma main menu > Resource Management > Cataloging, click **Open Metadata Editor**.
- 2 Click **File > New > MARC21 Bibliographic**.

The template opens for entering a new record.

LDR	#####nam#a22#####u#4500		
008	#####s2012####xx#####r#####000#0#eng#d		
020	ta		
035	ta (OCoLC)		
040	ta		
041	0	ta	
050	0	0	ta
100	1	ta tb tc td	
240	1	ta	
245	1	ta tb tc th	
246	1	1	ta tb
250	ta tb		
260	ta tb tc		
300	ta		
490	ta tv		
500	ta		
502	ta		

Figure 8 – New ‡ Subfield Separator

## Item-Level Sorting Expanded

### Description

The purpose of this enhancement is to expand item-level sorting beyond the existing rank and call number sort. With this release, additional/alternative call number types (such as government documents/SuDoc classification) and accession number sorting have been added.

New sort indexes have been created for:

- Holdings – Accession number
- Items – Alternative call number

This is based on the alternative call number type and alternative call number that are defined as attributes of the physical item.

For each of the new sort indexes, the options to sort in ascending or descending order is also provided.

## Technical Instructions

Any role can access this capability through the search facility.

To view an example of this capability:

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

- 1 Enter a physical items search and click **Go**.

The Repository Search page displays with the results and the Primary Sort by and Secondary Sort by options.

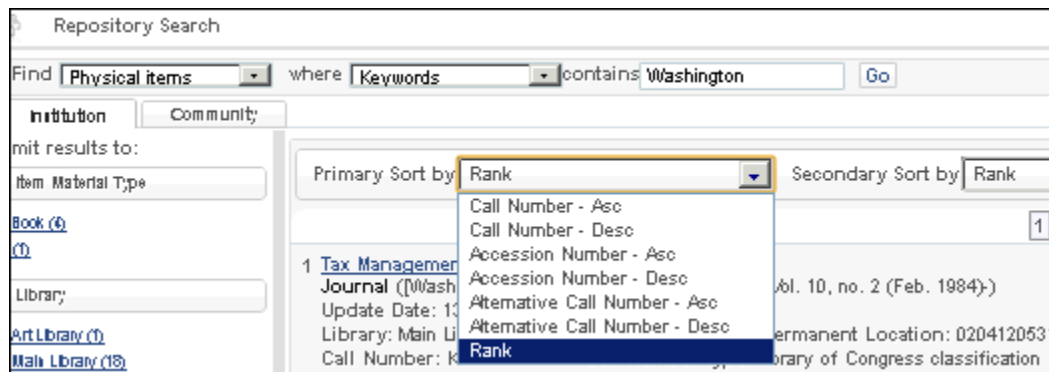


Figure 9 - Repository Search Page with Primary/Secondary Sort By Options

- 2 Select from the sort drop-down lists to view the results in a new sort order.

## Binding Items

### Description

The purpose of this enhancement is to provide the capability to bind two or more items into a new volume.

The binding process does the following:

- Creates a new item (volume) from the items selected for binding
- Links the new item to the same holdings record that the original items belong to
- Sets the values of the fields in the new item in the following manner:
  - The material type is set to ISSBD
  - The receiving date is set to the current date
  - If all the items have the same PO line ID, the new item's PO line ID is set to the same value. Otherwise, it is left blank.

- If all the original items are in a temporary location, the new item is placed in the same temporary location
- Sets the original items' statuses to Withdrawn
- Opens the new item in the resource editor (where you can Save the new item)

To ensure a successful bind when the bind option is selected, the system verifies that:

- All the items are at the same location
- None of the items are on loan
- None of the items are in Acquisitions
- None of the items are missing

If any of the items fail the verification, binding does not occur.

Items can be selected for binding from:

- A list of holdings
- A list of items
- The item editor Services tab

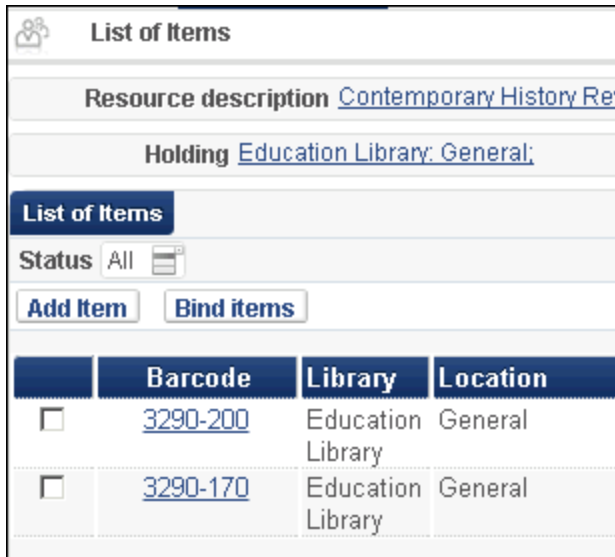
## Technical Instructions

The Cataloger role can access this capability.

### To view an example of the binding process:

- 1 From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
- 2 Enter a physical items search and click **Go**.
- 3 Select the Items link for a particular record.

The List of Items page displays.




	Barcode	Library	Location
<input type="checkbox"/>	<a href="#">3290-200</a>	Education Library	General
<input type="checkbox"/>	<a href="#">3290-170</a>	Education Library	General

Figure 10 - List of Items Page

- 4 Select the items to bind and click **Bind items**.

The binding wizard displays the Bind Items – Items List

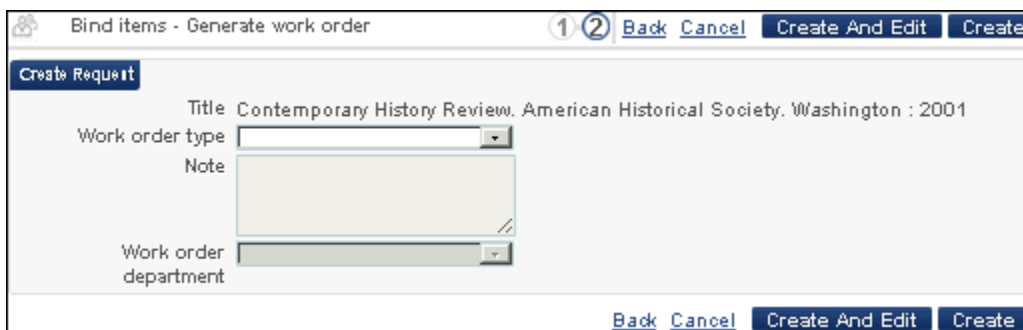


Barcode	Library	Location	Call Number	Description	Temporary Location	Status
<a href="#">3290-200</a>	Education Library	General	-	Volume 10	No	Item in
<a href="#">3290-170</a>	Education Library	General	-	Volume 6	No	Item in

Figure 11 - Bind Items - Items List Page

- 5 Visually confirm the selected items are accurate and click **Next** (or **Cancel**).

The Bind Items – Generate Work Order page displays.



Bind items - Generate work order

1 2 Back Cancel Create And Edit Create

Create Request

Title Contemporary History Review. American Historical Society. Washington : 2001

Work order type

Note

Work order department

Back Cancel Create And Edit Create

Figure 12 - Bind Items - Generate Work Order Page

- 6 Enter the **Work order type** and click **Create**.

The new bound item is created.

List of Items

Items have been successfully bounded into new volume 235548000000121

Resource description [Contemporary History Review. American Historical Society. Washington : 2001](#)

Holding [Education Library: General;](#) [View all holdings](#)

List of Item

Status: All

Find:

Add Item

Bind items

	Barcode	Library	Location	Call Number	Description	Temporary Location	Status
<input type="checkbox"/>	<a href="#">000235548000000121</a>	Education Library	General	-	-	No	Item not in place

Figure 13 - Bound Item Created

## Bulk Processing – Create Work Order

### Description

The purpose of this enhancement is to provide the capability for creating a work order for bulk processing.

### Technical Instructions

The Fulfillment Services Operator and Fulfillment Services Manager roles can access this capability.

#### To create a work order for bulk processing:

- 1 From the Alma main menu > Resource Management > Processes, click **Run Process**.

The Create Process – Select Process to Run page displays.

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Tasks Analytics Currently at: Digitization Department For... Help User, Super

Create Process - Select Process to Run

Process List

Filter: Physical items

1 - 8 of 8 Task Chains

Name	Description	Content Type	Type
<input type="radio"/> Move Physical Item	Update item information and initiate moving a set of physical items to a new location.	Physical item	Move Items
<input type="radio"/> Export Physical Items Labels	Export physical items labels for printing	Physical item	Export
<input type="radio"/> Export Physical Items	Export Physical Items	Physical item	Export
<input checked="" type="radio"/> Create Physical Item Work Order Requests	This task chain creates work order requests on the physical items.	Physical item	Request
<input type="radio"/> Close lost loans	Delete item loans marked as lost.	Physical item	Loan
<input type="radio"/> Change Physical Item	Update item information for a set of physical items.	Physical item	Move Items
<input type="radio"/> Change loan to claimed returned	Update item loan status to claimed returned.	Physical item	Loan
<input type="radio"/> Cancel physical items requests	Cancel open requests for physical items.	Physical item	Request

1 - 8 of 8 Task Chains

Cancel Next

Figure 14 – Create Process – Select Process to Run Page

- From the Process List section, select the new **Create Physical Item Work Order Requests** option and click **Next**.

The Create Process – Select Set page displays.

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Tasks Analytics Currently at: Digitization Department For... Help User, Super

Create Process - Select Set

1 - 5 of 5 Sets

Name	Type	Content Type	Create Date
<input checked="" type="radio"/> Due Date Today	Itemized	Physical items	11/12/2011 05:04:48 MST
<input type="radio"/> FTP TEST	Logical	Physical items	22/03/2012 24:06:25 MST
<input type="radio"/> Move to Remote Storage	Logical	Physical items	18/12/2011 07:21:01 MST
<input type="radio"/> t	Itemized	Physical items	18/03/2012 08:35:48 MST
<input type="radio"/> Yoels	Itemized	Physical items	07/11/2011 24:27:35 MST

Back Cancel Next

Figure 15 – Create Process – Select Set Page

- Select a physical item set from the list and click **Next**.

The Create Process – Enter Task Parameters page displays.

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Tasks Analytics Currently at: Digitization Department For... Help User, Super

Create Process - Enter Task Parameters

Task Parameters: Create Work Order Requests

Work Order Type\* Bind Department\* Bindery department 1

Back Cancel Next

Figure 16 – Create Process – Enter Task Parameters Page



- 4 Select a work order type and department from the corresponding drop-down lists and click **Next**.

The Create Process – Process Details and Schedule page displays.

ExLibris Alma

Tasks Analytics Currently at: Digitization Department For... Help User, Super

Create Process - Process Details and Schedule 1 2 3 4 5 Back Cancel Next

General Information

Process Name \*

Schedule Process

Tools

As soon as possible

Back Cancel Next

Figure 17 – Create Process – Process Details and Schedule Page

- 5 Enter a process name, select a scheduling option, and click **Next**.

The Create Process – Review and Confirm page displays.

- 6 Click **Save**.

## Enhancing Bibliographic Records with Holdings Upon Export

### Description

The purpose of this enhancement is to provide the capability to enhance bibliographic records with holdings when exporting.

### Technical Instructions

The following roles can access this capability:

- Cataloger
- Catalog Manager
- Repository Manager
- Inventory Operator

### To view this capability:

- 1 From the Alma main menu > Resource Management > Processes, click **Run Process**.
- 2 Select **Export Bibliographic Records** and click **Next**.  
The Create Process – Select Set page displays.
- 3 Select a set and click **Next**.  
The Create Process – Enter Task Parameters page displays.
- 4 Select the **Add Holdings Information** option from the **Expand routine** drop-down list, click **Next**, and complete the remaining process parameters.

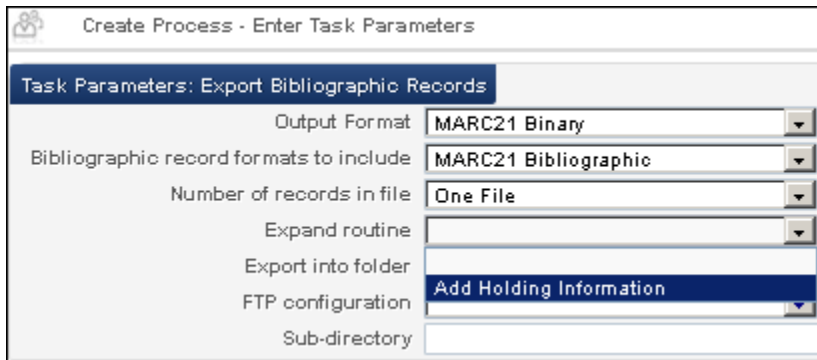


Figure 18 - Expand Routine - Add Holdings Information

## Other Resource Management Module Enhancements

The list below highlights recent enhancements in the Resource Management module:

- A new page has been added for the technical analysis of Resource Information Packages (RIPs).
- If a manual import was aborted, it no longer appears in the list of running import processes.
- When searching for a title that contains only holdings records and no items, the holdings information is now available, without the additional item details.
- When you select to overlay a local record with a record retrieved via an external search, the local record is now replaced properly with the imported record.
- When you select to merge a local record with a record retrieved via an external search, the local record is now merged properly with the imported record.

# Fulfillment

The following sections describe the functions provided for the Fulfillment component in the July 2012 release of Alma.

## Quick Cataloging Enhanced for Course Reserves Limited Access Tagging

### Description

The purpose of this enhancement is to provide the capability to restrict a bibliographic record to a course reserve so that Primo can differentiate restricted course reserve records from other records.

### Technical Instructions

The Cataloger Administrator role can define the field/subfield in the MARC record for this capability.

The Course Reserves Operator and Course Reserves Manager roles can perform the configuration to restrict a record to a course reserve.

#### To define the field/subfield in the MARC record that is used to hold the course restricted indicator:

- 1 From the Alma main menu > Resource Management > Resource Configuration, click **Configuration Menu**.

The Resource Management Configuration page displays.

- 2 From the General section, click **Other Settings**.

The Customer Parameters mapping table displays.

**Mapping Table** Cancel Save

You are configuring: Main Campus [Organization Unit List](#)

**Table Information**

Sub System: INFRA Table Name: CustomerParameters

Updated By: - Last Updated: -

Table Description: Customer Parameters

**Mapping Table Rows** Tools

Enabled	parameter key	parameter module	parameter value	free text description	Updated By	Last Updated	
<input checked="" type="checkbox"/>	access_right_default_g	repository	Restrict		-	-	<a href="#">Customize</a>
<input checked="" type="checkbox"/>	call_number_type	repository	0		admin1	10/07/2012	<a href="#">Restore</a>
<input checked="" type="checkbox"/>	course_restricted_field	repository	999\$\$j		admin1	10/07/2012	<a href="#">Restore</a>
<input checked="" type="checkbox"/>	distribute_repository_c	repository	false		admin1	10/07/2012	<a href="#">Restore</a>
<input checked="" type="checkbox"/>	marc_holding_in_use	repository	true		-	-	<a href="#">Customize</a>
<input checked="" type="checkbox"/>	merge_method	repository	com.exlibris.urm.mms.i		-	-	<a href="#">Customize</a>
<input checked="" type="checkbox"/>	non_serial_match_profi	repository	com.exlibris.repository		-	-	<a href="#">Customize</a>
<input checked="" type="checkbox"/>	publishing_test_mode	repository	true		admin1	10/07/2012	<a href="#">Restore</a>
<input checked="" type="checkbox"/>	search_limit	repository	-1		-	-	<a href="#">Customize</a>
<input checked="" type="checkbox"/>	serial_match_profile	repository	com.exlibris.repository		-	-	<a href="#">Customize</a>
<input checked="" type="checkbox"/>	system_date_format	repository	dd/MM/yyyy		admin1	10/07/2012	<a href="#">Restore</a>
<input checked="" type="checkbox"/>	use_holdings_form	repository	false		admin1	10/07/2012	<a href="#">Restore</a>

Tools Cancel Save

Figure 19 – Customer Parameters Mapping Table (course\_restricted\_field)

- For the course\_restricted\_field parameter key, enter the MARC field/subfield in the **parameter value** column.
- Click **Save**.

#### To restrict a record to a course reserve:

- From the Alma main menu > Fulfillment > Course Reading, click **Reading Lists**.  
The Reading Lists Task List page displays.
- Scroll to the reading list that you want to manage and click **Actions > Work On**.  
The Edit Reading List page displays.
- Click **Add Brief**.  
The Citation Type shadow box displays.
- Select a citation type in the drop-down list and click **Choose**.  
The Quick Cataloging page displays.

Figure 20 – Quick Cataloging Page (Course Restricted Check Box)

- 5 Enter the resource and item information, select the **Course Restricted** check box, and then click **Save**.

## Enrichment of Alma Export to Bursar

### Description

The purpose of this enhancement is to enrich the fines/fees data that Alma exports to the Bursar. A status date has been implemented and is updated when there is a change in status. With this release, it also becomes part of the exported data. In addition, the item title information (when it exists) is exported. This enriched data export is especially useful for instances when the patron with fines and fees has been partially processed.

### Technical Instructions

The XML file at the FTP location that has been defined for the Bursar export profile now includes the fines/fees' status date and linked title.

## Other Fulfillment Module Enhancements

The list below highlights recent enhancements in the Fulfillment module:

- The accession number now appears in the Resource Request Slip Letter.
- When clicking the **Mark as missing** link in an Active Hold Shelf Items list, **Yes/No** options are now presented instead of the former **Confirm/Cancel** options.
- When cancelling a request, there is a new check box enabling you to choose whether to send notification of the cancellation to patrons.
- When browsing user lists from Fulfillment pages, a search mechanism, rather than a full list of users, is now displayed.
- The order of the **Actions** options in the course list has been changed to **Edit, Reading list, Remove**.
- A **Status** column and **Term** filter have been added to the Courses page.

# User Management

The following sections describe the functions provided for the General component in the July 2012 release of Alma.

## Separate Delete Privilege Roles for Inventory Records

### Description

The purpose of this enhancement is to provide separate roles with privileges for deleting inventory records. As a result, not all inventory operators can delete inventory records. Only specific users with the delete privilege may delete inventory records.

### Technical Instructions

The User Manager role can add the new roles in User Management.

#### To add the new roles:

- 1 From the Alma main menu > General > User Management, click **Find and Manage Users**.
- 2 Select **Actions > Edit** for the user to whom you want to assign this new role.
- 3 Click **Add Role**.
- 4 From the Inventory section, select one or more of the following roles and click **Add Role**.
  - **Digital Inventory Operator Extended**
  - **Electronic Inventory Operator Extended**
  - **Physical Inventory Operator Extended**

## Separate Delete Privilege Role for MMS Records

### Description

The purpose of this enhancement is to provide a separate role with privileges for deleting MMS records. As a result, only specific users with the delete privilege may delete MMS records.

### 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 whom you want to assign this new role.
- 3 Click **Add Role**.
- 4 From the Catalog section, select **Cataloger Extended** and click **Add Role**.

## Receiving Operator Limited Role

### Description

The purpose of this enhancement is to provide a separate role, Receiving Operator Limited, with view-only access for a PO line when receiving in Acquisitions. The existing Receiving Operator role can open a PO line in edit mode. This new role cannot edit a PO line.

### Technical Instructions

The User Manager role can add the new roles 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 whom you want to assign this new role.
- 3 Click **Add Role**.
- 4 From the Acquisitions section, select the **Receiving Operator Limited** role and click **Add Role**.

## Circulation Desk Operator Limited Role

### Description

The purpose of this enhancement is to provide a separate circulation desk operator role that is limited/prevented from doing the following:

- Delete loans
- Add, delete, or edit user notes
- Change the due date
- Mark an item as lost



- Change item information
- Pay fines/fees
- Waive or dispute fines/fees
- Create or remove persistent blocks
- Change a return date
- Create a daily report
- Upload offline circulation activity

## 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 whom you want to assign this new role.
- 3 Click **Add Role**.
- 4 From the Fulfillment section, select the **Circulation Desk Operator Limited** role and click **Add Role**.

## SDK Label Printing Role

### Description

The purpose of this enhancement is to provide a role that is authorized for label printing via the Alma web service. Each user that does label printing over the Alma web service needs this role.

### Technical Instructions

The User Manager role can add this 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 whom you want to assign this new role.
- 3 Click **Add Role**.
- 4 From the Miscellaneous section, select **SDK Label Printing** and click **Add Role**.

## Manage Self-Check Verification

### Description

The purpose of this enhancement is to allow a PIN to be assigned to a user so that it can be used as the password to log on to the self-check machine (SIP2). A notification will be sent to the user if the PIN is changed.

### Technical Instructions

The User Manager role can add the new PIN for the user, and the User Administrator role can define the format of the PIN.

### To add a PIN for a user:

- 1 From the Alma main menu > General > User Management, click **Find and Manage Users**.
- 2 Select **Actions > Edit** for the user to whom you want to add a PIN.

The User Details page displays.

The screenshot shows the Alma User Details page for a user named Oscar Aaberg. The page is divided into several sections: User Details, General Information, Contact Information, Identifiers, Notes, Blocks, Fines/Fees, and Attachments. The 'User Information' tab is selected, showing fields for First name, Last name, Middle name, User name, PIN number, Job category, Gender, Campus, Preferred language, Status date, Expiration date, Created By, and Updated By. The 'PIN number' field is highlighted with a red circle, and the 'Generate' button is also circled in red.

User Details	
Name Aaberg, Oscar	ID 252571
Account Type External	User group Graduate Student
<a href="#">Manage fulfillment activities</a>	Record type Public

User Information	
First name * Oscar	Middle name
Last name * Aaberg	User name * 252571
<b>PIN number</b>	<b>Generate</b>
Job category Please select a value	Job description
Gender	User group Graduate Student
Campus	Website URL
Preferred language English	Status Active
Status date 16/07/2011	Birth date -
Expiration date -	Purge date -
Created By admin1 (17/10/2006)	Updated By User, Super (29/04/2012)

Figure 21 – User Details Page (PIN Number Field)

- 3 In the **PIN number** field, enter a 4-digit number. Otherwise, click **Generate** to generate a PIN for the user.
- 4 Click **Save**.

#### To define the format of the PIN:

- 1 From the Alma main menu > General > User Management Configuration, click **Configuration Menu**.

The User Management Configuration page displays.

- 2 From the General section, click **Other Settings**.

The Customer Parameters mapping table displays.

Mapping Table
Cancel Save

You are configuring: Main Campus
[Organization Unit List](#)

Table Information

Sub System

INFRA

Table Name

CustomerParameters

Updated By

-

Last Updated

-

Table Description

Customer Parameters

Mapping Table Rows
Tools

Enabled	parameter key	parameter module	parameter value	free text description	Updated By	Last Updated	
<input checked="" type="checkbox"/>	address_line1_regex	user_management			-	-	Customize
<input checked="" type="checkbox"/>	address_line2_regex	user_management			-	-	Customize
<input checked="" type="checkbox"/>	address_line3_regex	user_management			-	-	Customize
<input checked="" type="checkbox"/>	address_line4_regex	user_management			-	-	Customize
<input checked="" type="checkbox"/>	address_line5_regex	user_management			-	-	Customize
<input checked="" type="checkbox"/>	email_regex	user_management	^[0-9a-zA-Z]([-.\w]*[0-9a	must have a valid form	-	-	Customize
<input checked="" type="checkbox"/>	email_updating_new_use	user_management	true		-	-	Customize
<input checked="" type="checkbox"/>	password_regex	user_management	^(?=.*d)(?=.*[a-z])(?=.*[A	must be at least 8 charac	-	-	Customize
<input checked="" type="checkbox"/>	phone_regex	user_management	(((\s)*?\d(\s)*?-?)*(\d))?\s	must be numeric	-	-	Customize
<input checked="" type="checkbox"/>	photo_identifier_type	user_management	01		admin1	10/07/2012	Restore
<input checked="" type="checkbox"/>	photo_server_url	user_management	http://demo.alma.exlibris		admin1	10/07/2012	Restore
<input checked="" type="checkbox"/>	pin_number_method	user_management	fourDigit	method for generating a p	admin1	10/07/2012	Restore
<input checked="" type="checkbox"/>	postal_code_regex	user_management	[A-Z0-9\-\ ]{0,16}	must be between 0 to 16	-	-	Customize
<input checked="" type="checkbox"/>	preferred_identifier	user_management	Barcode		admin1	10/07/2012	Restore
<input checked="" type="checkbox"/>	url_regex	user_management	^http:\/\/[a-zA-Z0-9\-\.	must have a leading prot	-	-	Customize
<input checked="" type="checkbox"/>	username_regex	user_management			-	-	Customize

Tools
Cancel Save

Figure 22 – Customer Parameters Mapping Table (pin\_number\_method)

- 3 For the `pin_number_method` parameter key, enter the method used to generate the PIN.
- 4 Click **Save**.

## Other General Module Enhancements

The list below highlights recent enhancements in the General module:

- An expiration date has been added for new user records. Date fields on user-related pages are now limited to the defined dates.

# Digital Resources

The following sections describe the functions provided for digital resources in the July 2012 release of Alma.

## Publishing Digital Collection Codes to Primo

### Description

The purpose of this enhancement is to provide support for digital collection information publishing to Primo.

This is implemented by:

- Defining/creating the digital collection code table
- Setting a relevant Group ID on the Digital IE Resource Editor page
- Publishing digital resources from the Resource Management configuration menu

### Technical Instructions

The following roles can access the resources to implement digital collection publishing:

- General System Administrator
- Catalog Administrator
- Repository Administrator

#### To create a digital collection code table:

- 1 From the Alma main menu > Resource Management > Resource Configuration, click **Configuration Menu**.
- 2 From the General section, click **Digital Collection**.

The Code Table page displays.

Code Table

You are configuring: Main Campus

**Table Information**

Sub System: INVENTORY      Table Name: Digital Collection  
 Updated By: exl\_support      Updated on: 04/07/2012  
 Table Description: Digital Collection

**Digital Collection**

Import

Enabled	Display	Order	Code	Description	D
<input checked="" type="checkbox"/>			col_1	Collection1	

**Create a New Code Table Row**

Code:       Description:   
 Default Value:       [Add Row](#)

Figure 23 - Code Table Page

- Enter the new code table parameters in the Create a New Code Table Row section and click **Add Row**.
- Click **Save**.

### To set the relevant group ID:

- From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
- Enter search criteria for digital titles and click **Go**.

The Repository Search page displays with your search results.

Repository Search

Find:  where:  contains:

**Institution**      **Community**

Limit results to:

Language:   
[English \(1\)](#)

Publication Year:   
[1984 \(1\)](#)

Preservation Type:

1  Journal (Norwood, N.J. : Ablex Pub. Corp., 1984)  
 SIP: 117425960000121      Update Date: 12/07/2012  
 Availability: [Digital version](#) of type DERIVATIVE\_COPY (1 file/s)

[Image understanding](#)  
[Deliver](#) | [View](#) | [Edit](#) | [Export](#) | [Order](#) | [More info](#)

Figure 24 - Repository Search Page - Digital Titles

- Click **Edit**.

The Group ID option displays on the General Information tab of the Digital IE Resource Editor page.

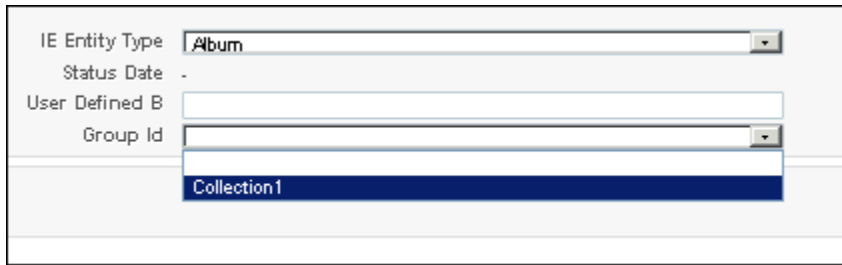
The screenshot shows a web form with several fields. The 'IE Entity Type' dropdown is set to 'Album'. The 'Status Date' field contains a hyphen. The 'User Defined B' field is empty. The 'Group Id' dropdown is open, showing a list with 'Collection1' selected and highlighted in blue. The form has a light gray background and a white border.

Figure 25 - Group ID Option

- 4 Complete the information for the General Information tab (including the Group ID) and click **Save**.

#### To publish the digital collection information:

- 5 From the Alma main menu > Resource Management > Resource Configuration, click **Configuration Menu**.
- 6 From the Record Export section, click **Export Profiles**.  
The Publishing Profiles page displays.
- 7 Confirm that **Publish bib records to Primo** is an active option (Active column check mark) and click **Actions > Run** for the **Publish bib records to Primo** row.

# Analytics

The following sections describe the functions provided for Analytics in the July 2012 release of Alma.

## New Analytics Subscription and Configuration Options

### Description

The purpose of this enhancement is to provide the capability for users to subscribe to Analytics reports and dashboards created by the Analytics Designer. In addition, the Analytics configuration options have been updated to allow:

- Selecting Scheduled Report or Scheduled Dashboard as one of the Analytics object types and specifying frequency (daily, weekly, or monthly)
- Defining multiple roles for an Analytics object
- Managing subscription users (Alma and non-Alma users)

Reports are sent to subscription users via email in PDF format.

### Technical Instructions

Any user role can access the Analytics subscription options, and the Analytics Designer role can access the Analytics configuration options.

#### To view the new subscription capability:

- 1 From the Alma main menu > General > Analytics, click **Subscribe to Analytics**.

The list of available scheduled reports and scheduled dashboards available for the user's role type display.

- 2 Click the check mark for a report or dashboard to subscribe or unsubscribe.

Title	Description	Frequency	Subscribe
Top 5 vendors spending YTD	-	Daily	
CC_Scheduled_Dashboard_Example	-	Daily	

Figure 26 - Analytics User Subscription

When reports are sent via email, the Title is used as the Subject of the email.



### To view the new configuration capability:

- 1 From the Alma main menu > General > Analytics, click **Configuration Menu**.
- 2 From the Analytics Objects section, click **Analytics Objects List**.
- 3 Select **Actions** > **Edit** for one of the objects.
- 4 Open the **Type** drop-down list to view the Scheduled Dashboard and Scheduled Report options.

The screenshot shows the 'Analytics Configuration' form. The 'General Information' tab is active. The 'Type' dropdown menu is open, showing options: Dashboard, Report, Scheduled Dashboard, Scheduled Report (highlighted), and Widget. Other fields include Title: 'Top 5 vendors spending YTD', Location: 'Alma/Acquisitions/Report', Name: 'Top 5 vendors spending YTD', Frequency: 'Daily', and Updated By: 'admin1'.

Figure 27 - Scheduled Dashboard and Scheduled Report Types

- 5 Open the **Frequency** drop-down list to view the Daily, Weekly, and Monthly options.
- 6 Observe that multiple roles may be authorized to view an Analytics object.

The screenshot shows the 'Analytics Configuration' form with the 'Role' dropdown menu open. Below the form, a table lists roles and their descriptions.

Role	Description
Acquisitions Administrator	Manages Acquisitions configurations such as Acquisitions
Approving Manager	Manages authoritative digital deposit approval related ac
Approving Operator	Manages digital deposit approving actions
Arranging Manager	Manages authoritative arranging related deposit actions
Arranging Operator	Manages the arranging related deposit actions
Assessing Manager	Manages authoritative assessing related deposit actions

Figure 28 - Multiple Roles

### To view the manage subscription options:

- 1 From the Alma main menu > General > Analytics, click **Configuration Menu**.
- 2 From the Analytics Objects section, click **Analytics Objects List**.

- 3 For an object with a type of Scheduled Dashboard or Scheduled Report, click **Actions > Manage Subscription**.

The Manage Subscription page displays.

**Manage Subscription**

**General Information**

Title: Top 5 vendors spending YTD  
Location: Alma/Acquisitions/Reports  
Type: Scheduled Report  
Description: -  
Last Update: 24/06/2012  
Name: Top 5 vendors spending YTD  
Frequency: Daily  
Updated By: admin1

**Subscribers**

User	Preferred Email	Updated By	Last Updated
Support, Ex Libris		Ex Libris	-
User, Super		Ex Libris	-
-	galit.levitats@exlibrisgroup.com	Ex Libris	-
-	naftali.liberman@exlibrisgroup.com	Ex Libris	-

**Add New**

User:  Preferred Email:

[Add Row](#)

Figure 29 - Manage Subscription Page

## Known Issues

The following identifies any known issue(s) with this release:

- The **View license** link is not displayed in **More info** for an **Electronic Portfolio** search.