# Alma July 2012
# Release Notes

The bridge to knowledge

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Document updated: July 2012

Web address: http://www.exlibrisgroup.com

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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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- 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<br>(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: Grouping Invoices Together for Reporting | ✓ | | | |
| Acquisitions: Delete an Entire Invoice | ✓ | | | |
| Acquisitions: Reload Previously Loaded EDI File | ✓ | | | |
| Acquisitions: Recalculation of Exchange Rates | ✓ | | | |
| Resource Management: New Subfield Separator | ✓ | | | |
| Resource Management: Item-Level Sorting Expanded | ✓ | | | |

| 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: Binding Items | ✓ | | | |
| Resource Management: Bulk Processing – Create Work Order | ✓ | | | |
| Resource Management: Enhancing Bibliographic Records with Holdings Upon Export | ✓ | | | |
| Fulfillment: Quick Cataloging Enhanced for Course Reserves Limited Access Tagging | ✓ | | | |
| Fulfillment: Enrichment of Alma Export to Bursar | ✓ | | | |
| User Management: Separate Delete Privilege Roles for Inventory Records | ✓ | | | |
| User Management: Separate Delete Privilege Role for MMS Records | ✓ | | | |
| User Management: Receiving Operator Limited Role | ✓ | | | |
| User Management: Circulation Desk Operator Limited Role | ✓ | | | |

| Module / Feature | No Activation/ Setup Required<br>(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 |
|---|---|---|---|---|
| User Management: SDK Label Printing Role | ✓ | | | |
| User Management: Manage Self-Check Verification | ✓ | | | |
| Digital Resources: Publishing Digital Collection Codes to Primo | ✓ | | | |
| Analytics: New Analytics Subscription and Configuration Options | ✓ | | | |

# 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.

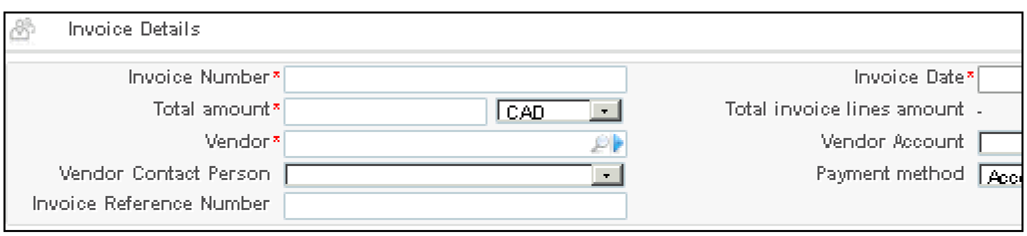



**Figure 1 - New Invoice Reference Number Field**

#### 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.

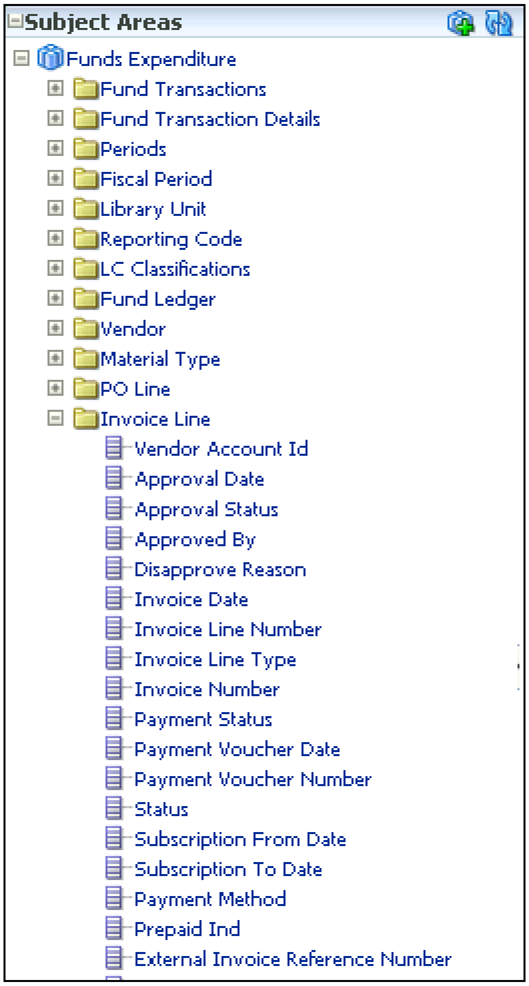



**Figure 2 - External Invoice Reference Number**

# 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**.

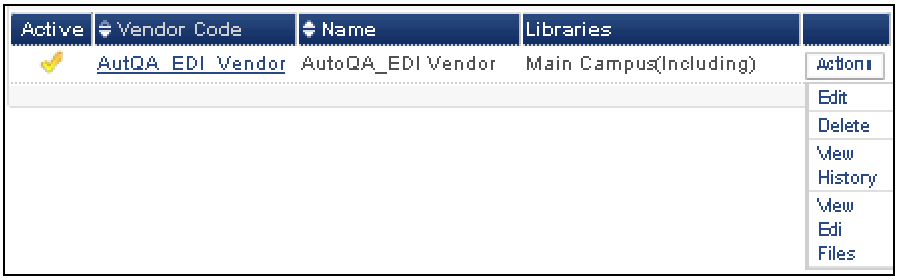



**Figure 4 - View EDI Files**

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

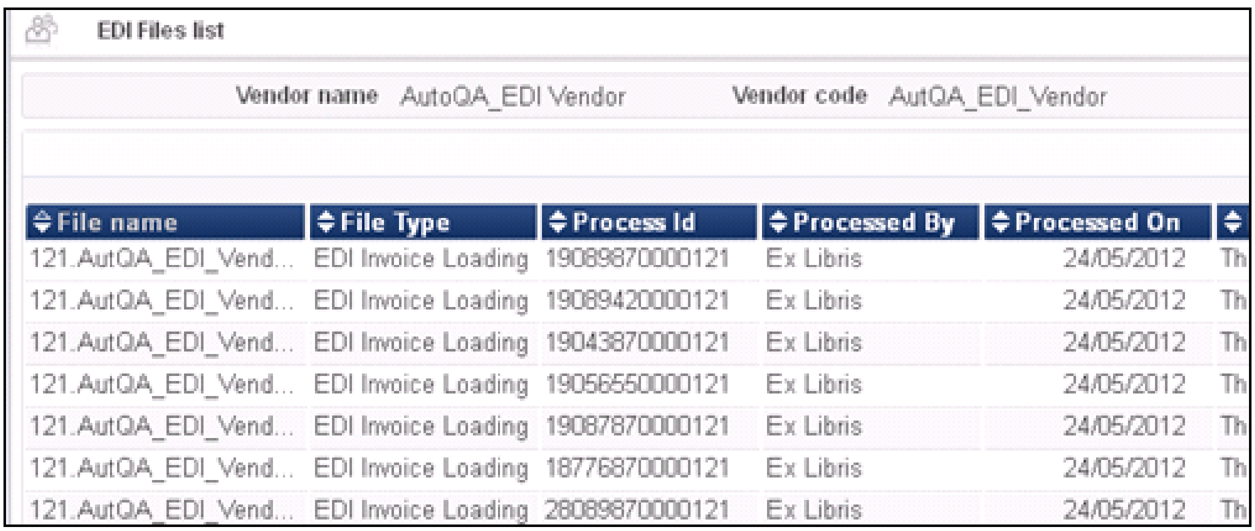



**Figure 5 - EDI Files List Page**

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

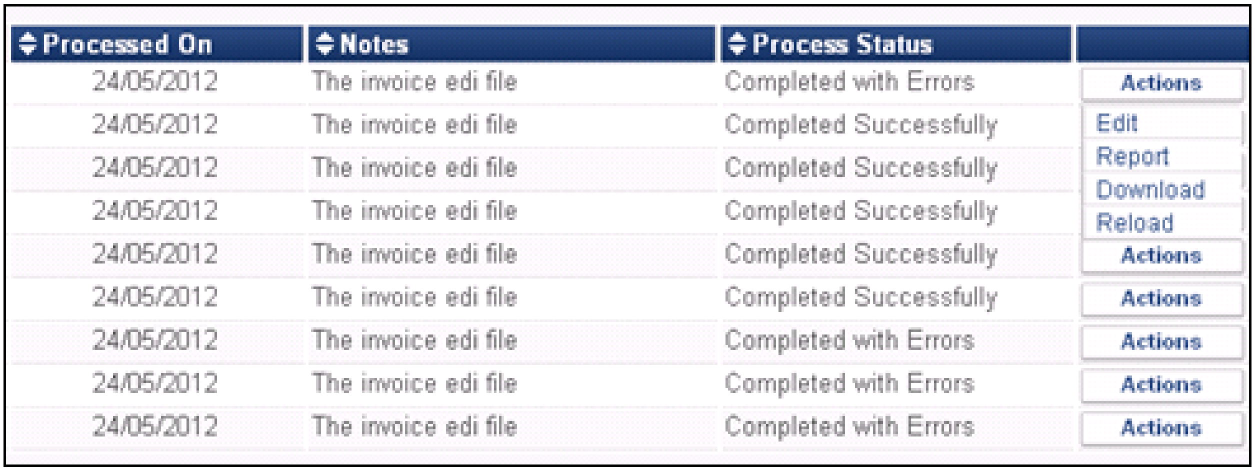



**Figure 6 - Reload Action**

**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.

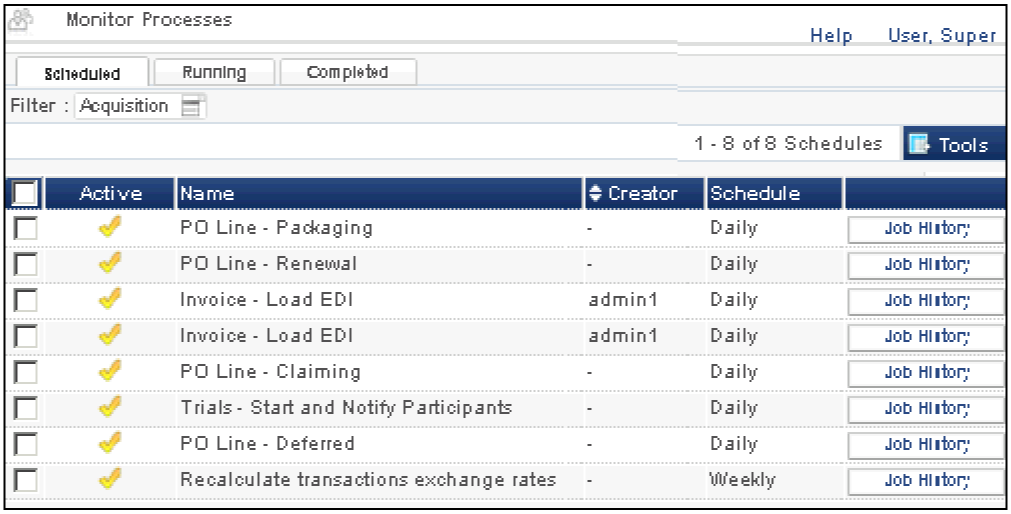



**Figure 7 - Recalculate Transactions Exchange Rates Job**

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 | | | ‡a |
| 035 | | | ‡a (OCoLC) |
| 040 | | | ‡a |
| 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 |
| 260 | | | ‡a ‡b ‡c |
| 300 | | | ‡a |
| 490 | | | ‡a ‡v |
| 500 | | | ‡a |
| 502 | | | ‡a |

**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.

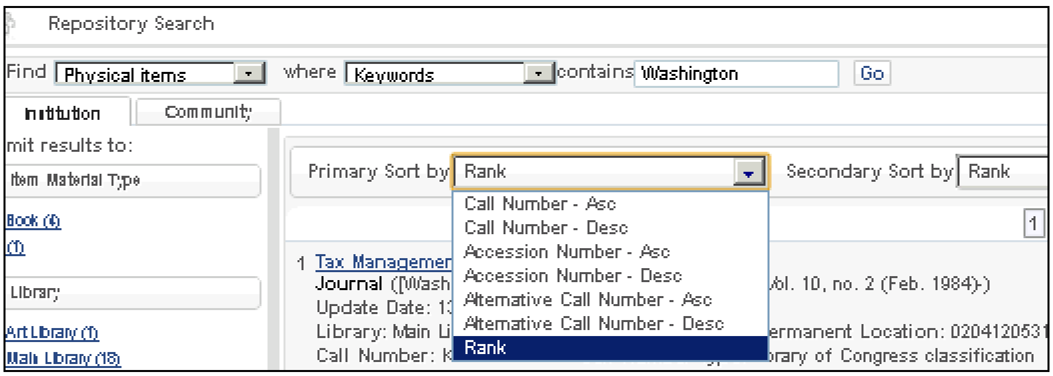



**Figure 9 - Repository Search Page with Primary/Secondary Sort By Options**

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.

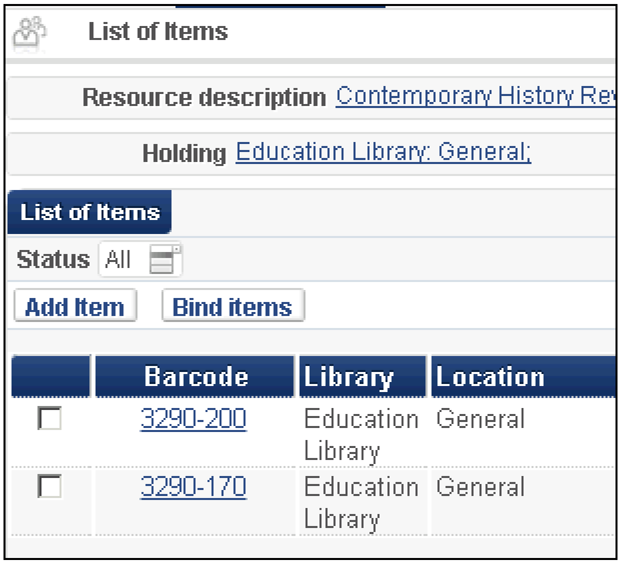



**Figure 10 - List of Items Page**

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

The binding wizard displays the Bind Items – Items List

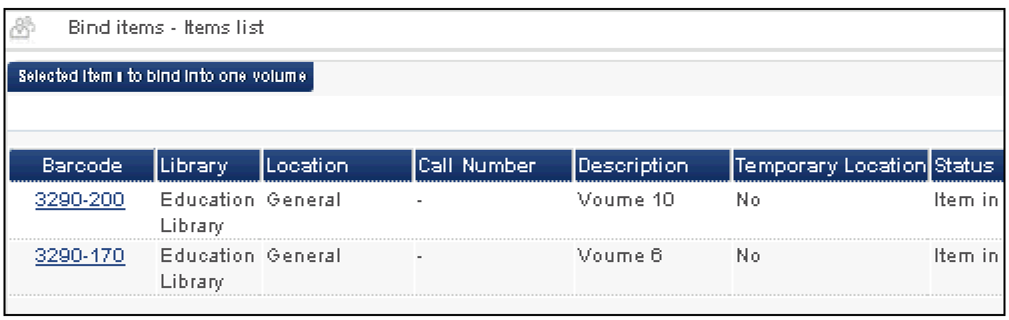



**Figure 11 - Bind Items - Items List Page**

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

The Bind Items – Generate Work Order page displays.

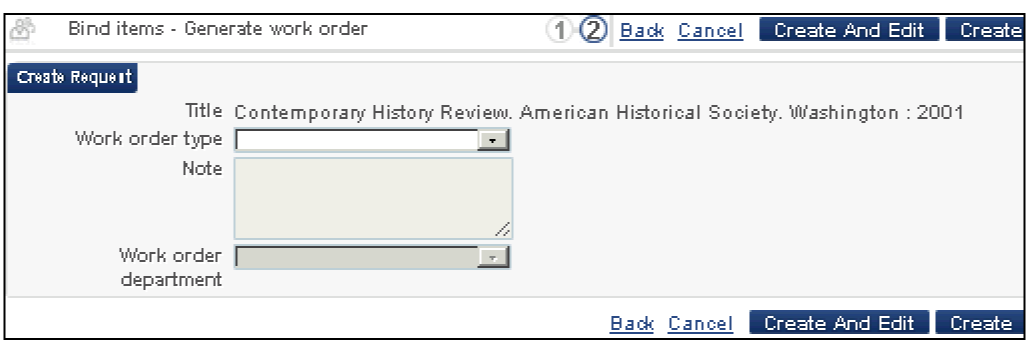



**Figure 12 - Bind Items - Generate Work Order Page**

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

The new bound item is created.

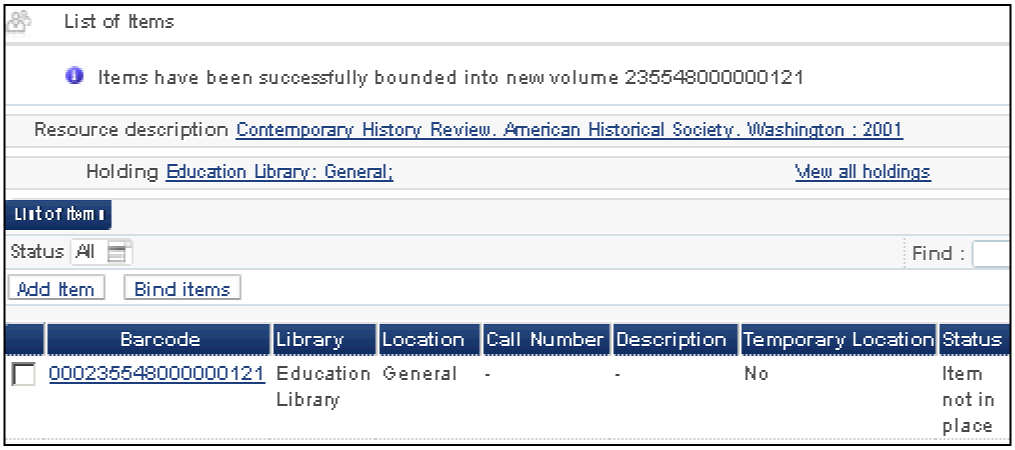



**Figure 13 - Bound Item Created**

# 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.

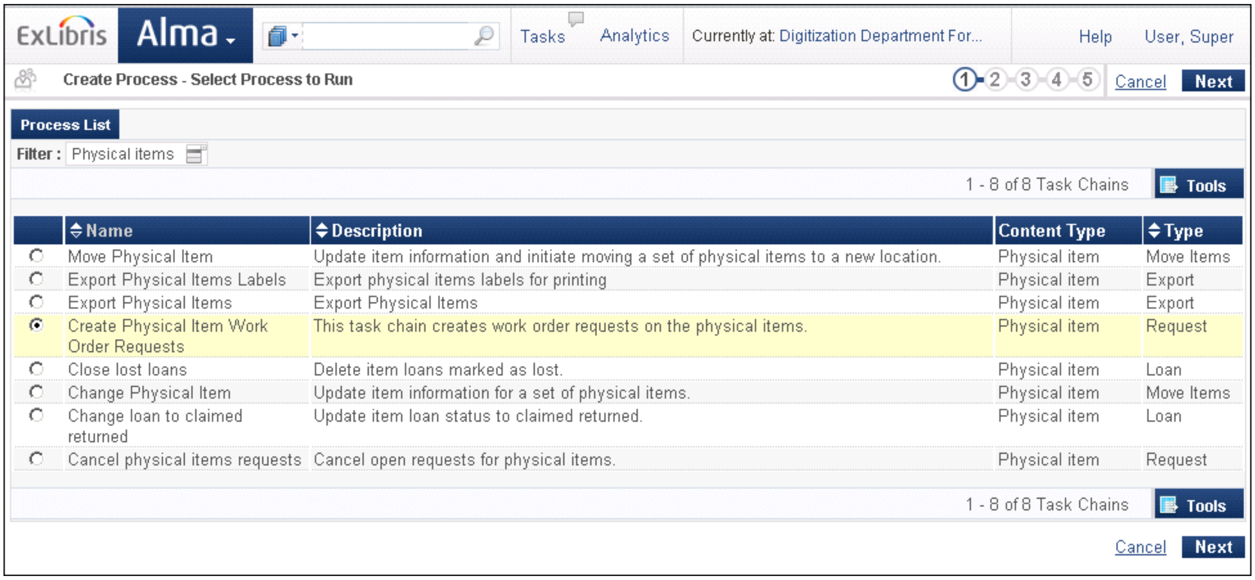



**Figure 14 – Create Process – Select Process to Run Page**

2 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.

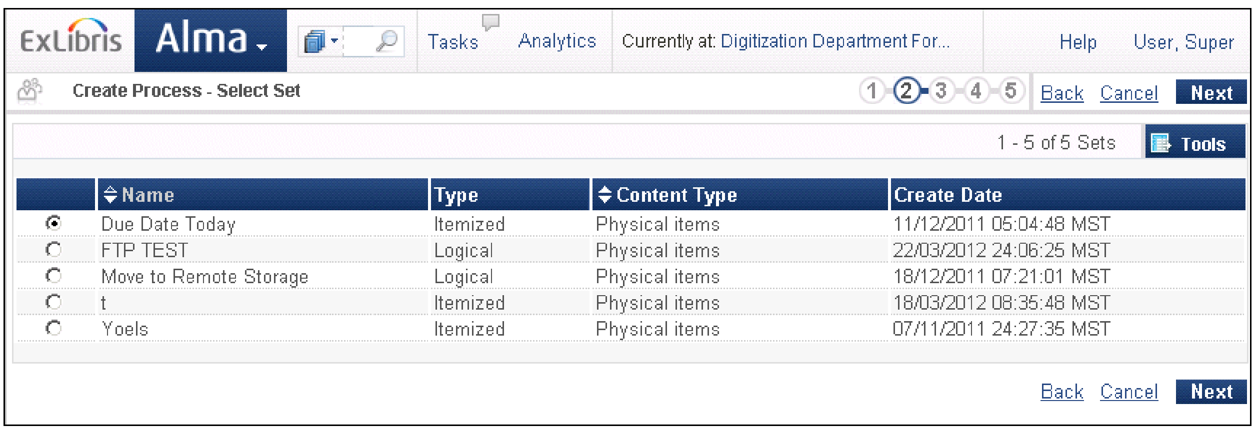



**Figure 15 – Create Process – Select Set Page**

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

The Create Process – Enter Task Parameters page displays.

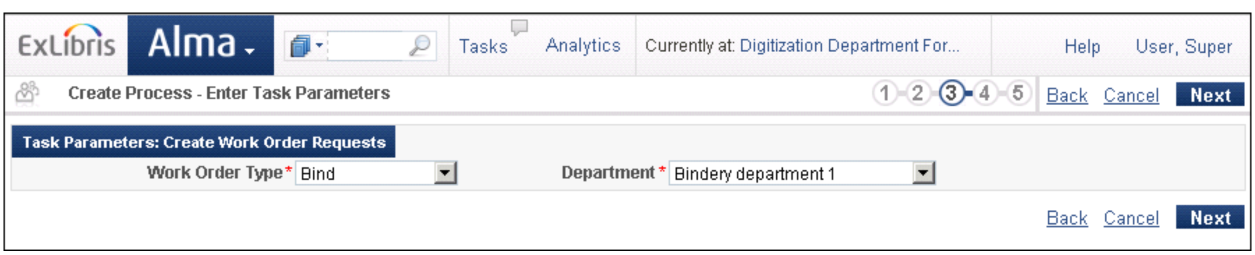



**Figure 16 – Create Process – Enter Task Parameters Page**

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.

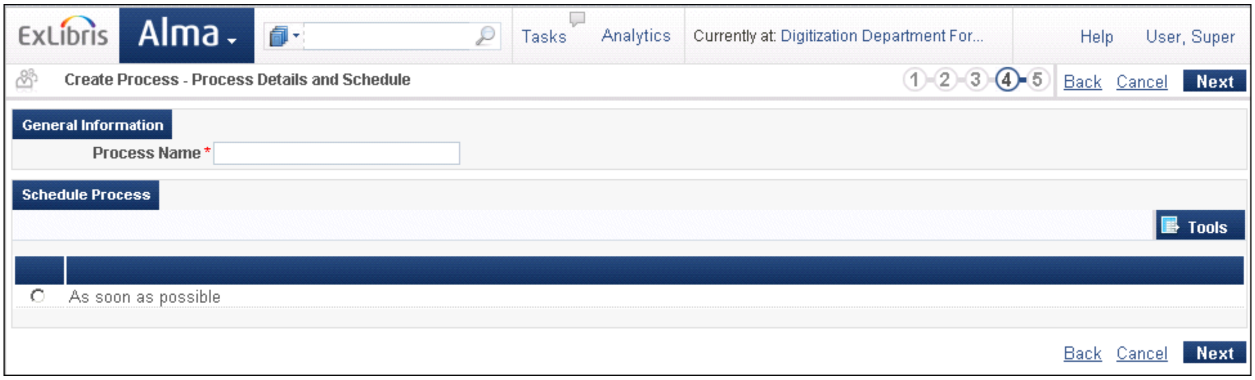



**Figure 17 – Create Process – Process Details and Schedule Page**

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.

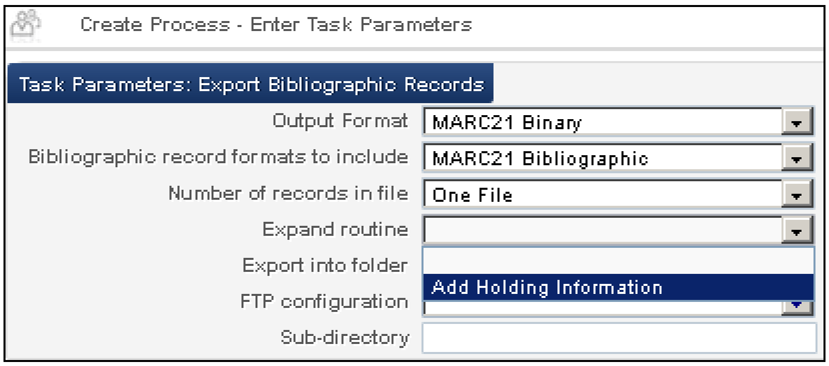



**Figure 18 - Expand Routine - Add Holdings Information**

# 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.

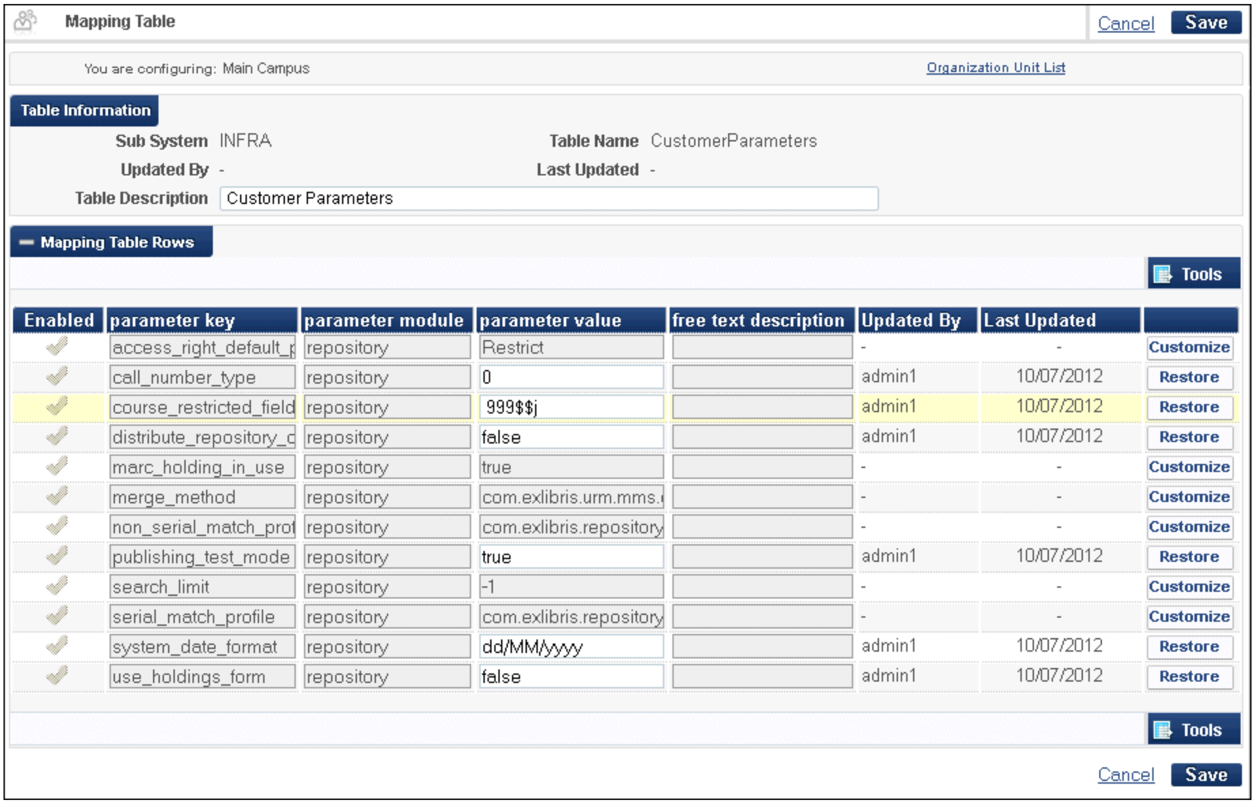
#### To define the field/subfield in the MARC record that is used to hold the course restricted indicator:

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 | |
|---|---|---|---|---|---|---|---|
| ✓ | access_right_default_p | repository | Restrict | | - | - | Customize |
| ✓ | call_number_type | repository | 0 | | admin1 | 10/07/2012 | Restore |
| ✓ | course_restricted_field | repository | 999$$j | | admin1 | 10/07/2012 | Restore |
| ✓ | distribute_repository_c | repository | false | | admin1 | 10/07/2012 | Restore |
| ✓ | marc_holding_in_use | repository | true | | - | - | Customize |
| ✓ | merge_method | repository | com.exlibris.urm.mms. | | - | - | Customize |
| ✓ | non_serial_match_prof | repository | com.exlibris.repository | | - | - | Customize |
| ✓ | publishing_test_mode | repository | true | | admin1 | 10/07/2012 | Restore |
| ✓ | search_limit | repository | -1 | | - | - | Customize |
| ✓ | serial_match_profile | repository | com.exlibris.repository | | - | - | Customize |
| ✓ | system_date_format | repository | dd/MM/yyyy | | admin1 | 10/07/2012 | Restore |
| ✓ | use_holdings_form | repository | false | | admin1 | 10/07/2012 | Restore |

Tools

Cancel  Save

**Figure 19 – Customer Parameters Mapping Table (course_restricted_field)**

3 For the course_restricted_field parameter key, enter the MARC field/subfield in the **parameter value** column.

4 Click **Save**.

## To restrict a record to a course reserve:

1 From the Alma main menu > Fulfillment > Course Reading, click **Reading Lists**.

The Reading Lists Task List page displays.

2 Scroll to the reading list that you want to manage and click **Actions** > **Work On**.

The Edit Reading List page displays.

3 Click **Add Brief**.

The Citation Type shadow box displays

4 Select a citation type in the drop-down list and click **Choose**.

The Quick Cataloging page displays.

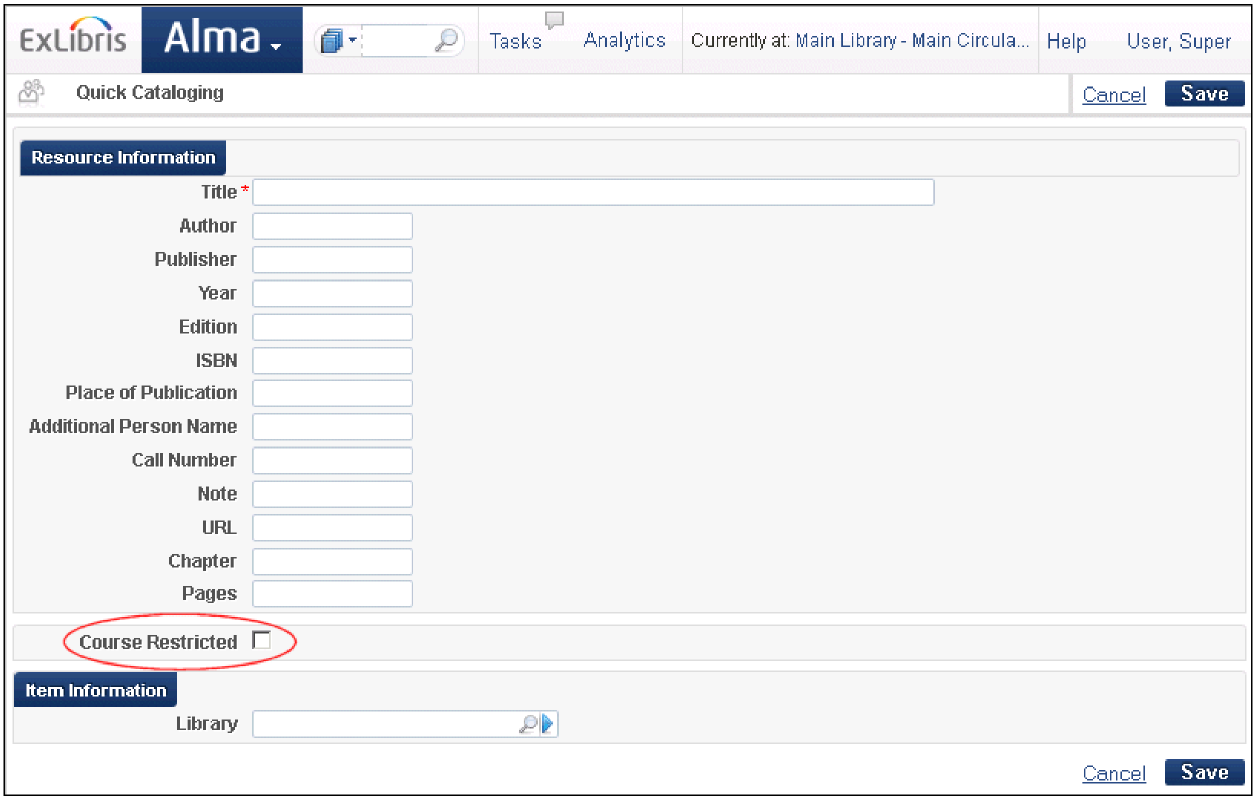



**Figure 20 – Quick Cataloging Page (Course Restricted Check Box)**

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.

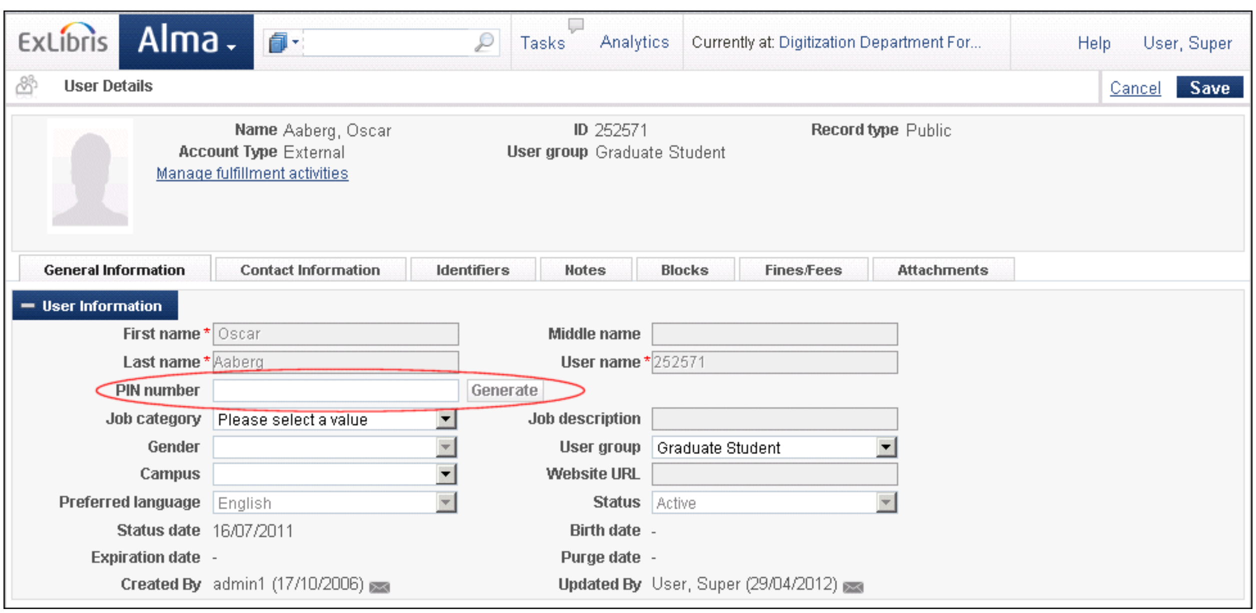


Figure 21 – User Details Page (PIN Number Field)

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

4 Click **Save**.

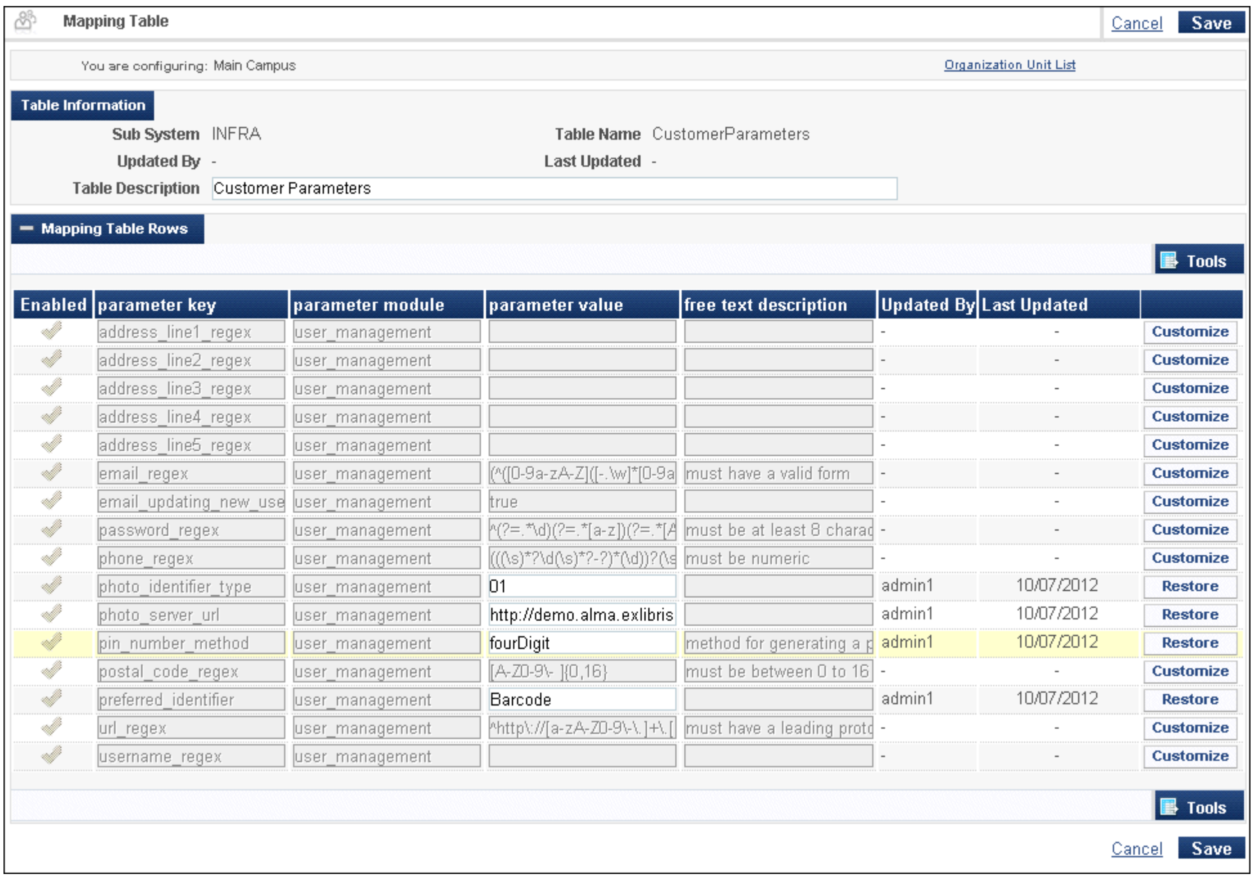
## To define the format of the PIN:

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 | |
|---|---|---|---|---|---|---|---|
| ✓ | address_line1_regex | user_management | | | - | - | Customize |
| ✓ | address_line2_regex | user_management | | | - | - | Customize |
| ✓ | address_line3_regex | user_management | | | - | - | Customize |
| ✓ | address_line4_regex | user_management | | | - | - | Customize |
| ✓ | address_line5_regex | user_management | | | - | - | Customize |
| ✓ | email_regex | user_management | (^([0-9a-zA-Z]([-.\w]*[0-9a | must have a valid form | - | - | Customize |
| ✓ | email_updating_new_use | user_management | true | | - | - | Customize |
| ✓ | password_regex | user_management | ^(?=.*\d)(?=.*[a-z])(?=.*[A | must be at least 8 charac | - | - | Customize |
| ✓ | phone_regex | user_management | (((\s)*?\d(\s)*?-?)*(\d))?(\s | must be numeric | - | - | Customize |
| ✓ | photo_identifier_type | user_management | 01 | | admin1 | 10/07/2012 | Restore |
| ✓ | photo_server_url | user_management | http://demo.alma.exlibris | | admin1 | 10/07/2012 | Restore |
| ✓ | pin_number_method | user_management | fourDigit | method for generating a p | admin1 | 10/07/2012 | Restore |
| ✓ | postal_code_regex | user_management | [A-Z0-9\- ]{0,16} | must be between 0 to 16 | - | - | Customize |
| ✓ | preferred_identifier | user_management | Barcode | | admin1 | 10/07/2012 | Restore |
| ✓ | url_regex | user_management | ^http\://[a-zA-Z0-9\-\.]+\.[ | must have a leading proto | - | - | Customize |
| ✓ | 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.

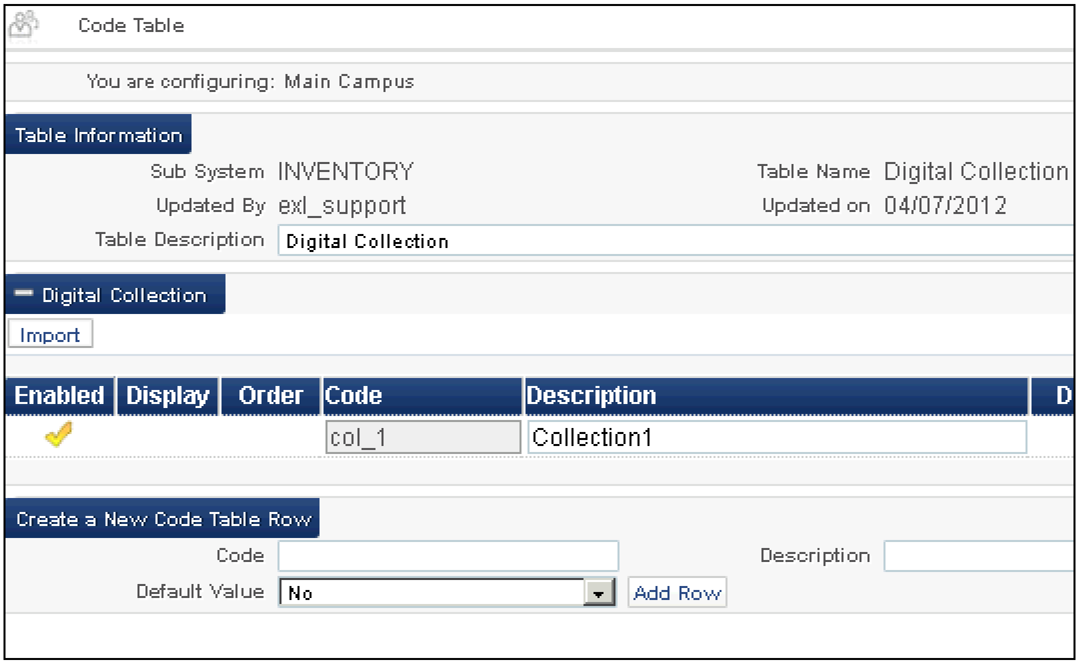



**Figure 23 - Code Table Page**

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

4 Click **Save**.

## To set the relevant group ID:

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

2 Enter search criteria for digital titles and click **Go**.

The Repository Search page displays with your search results.

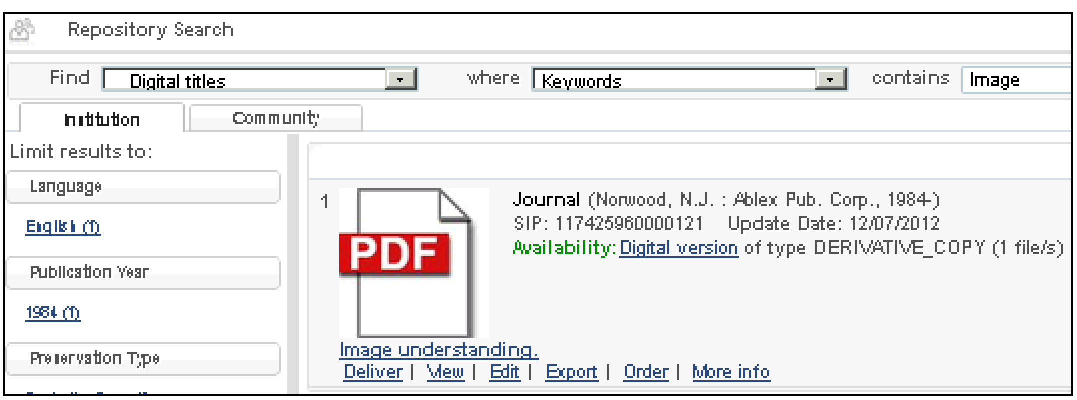



**Figure 24 - Repository Search Page - Digital Titles**

3 Click **Edit**.

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

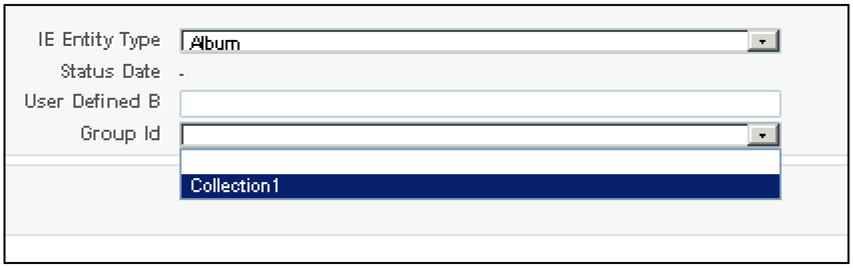



**Figure 25 - Group ID Option**

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.

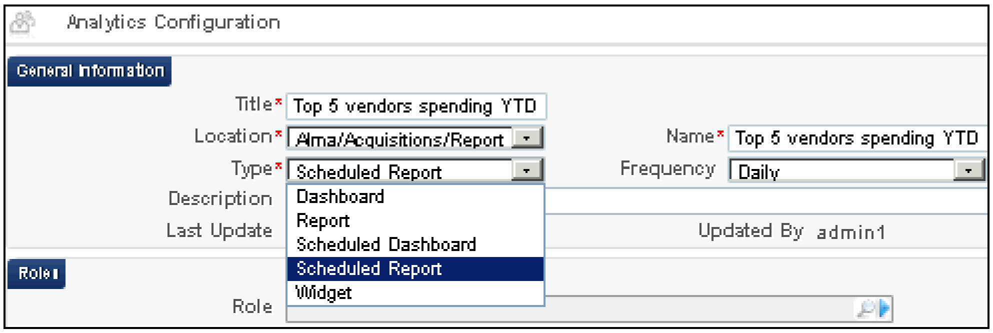



**Figure 27 - Scheduled Dashboard and Scheduled Report Types**

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.

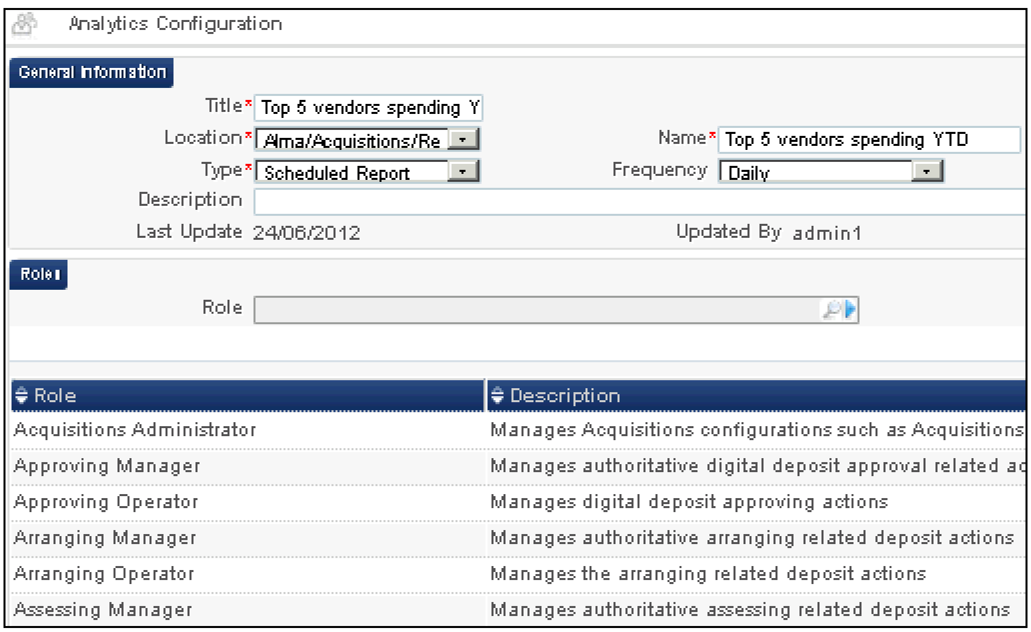



**Figure 28 - Multiple Roles**

### 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.

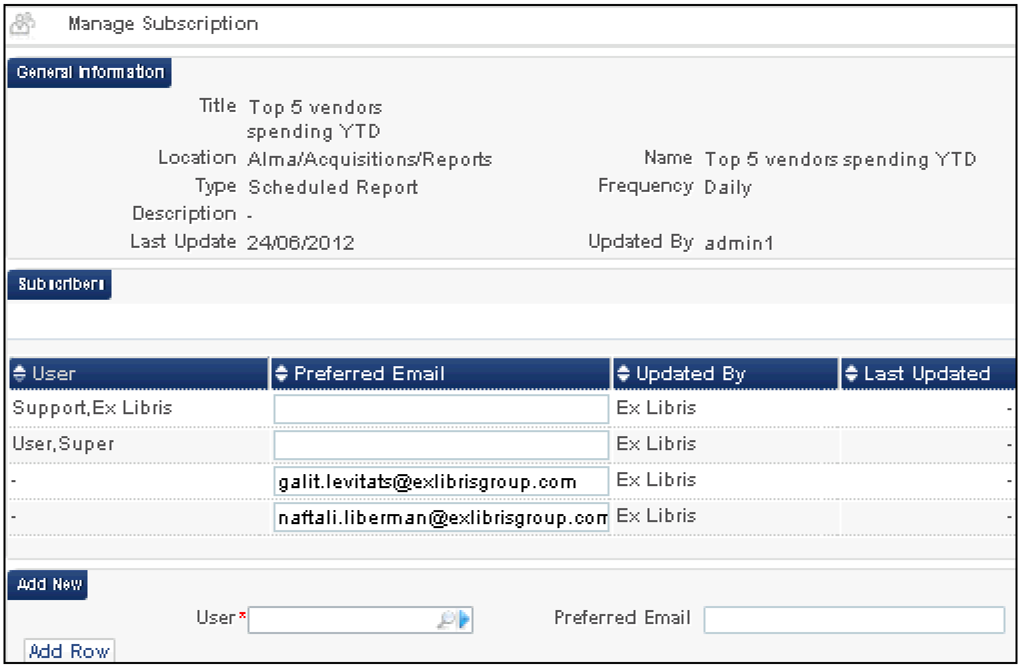



**Figure 29 - Manage Subscription Page**

# 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.