Alma September 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 September 2012 Release Highlights
- Access to September 2012 Features
- Feature/enhancement descriptions for the respective Alma components and functional areas
  - Data Services
  - Primo
  - Acquisitions
  - Resource Management
  - Fulfillment
  - General
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Alma September 2012 Release Highlights

Primo

- New Get It Tab

  The new Get It tab in Primo displays more detailed, accessible information about item location and availability. Depending on the number of locations per title, the type of resource, and the request options for the logged in patron, the Get It tab may display either holdings information, item-level information, or request information. Serial item display can be filtered by year, volume, and description.

- Suppress Records from Discovery

  The functionality related to suppressing records from Discovery has been enhanced to allow for the option of suppressing records (items) from a specific physical location. This means that the suppressed items will not be used to calculate available actions such as request or digitization.

- Enhancement to Allow Display of Linking Records in Primo

  As part of publishing to Primo, metadata and inventory records in Alma are enriched so that relationships between records (76X-78X fields) display in Primo.

Acquisitions

- Enhancements to Vendor Interface Records

  Vendor interface records have been enhanced with additional options such as a generic notes tab and a number of new fields in the administrative tab.

- New Option to Define Fund Types

  A new field, Fund Types (such as gift, endowment, general, and so forth), has been added to the fund record. Alma Acquisitions configuration allows for defining the values for this field

- Packaging of PO Lines

  There is now more flexibility related to packaging PO Lines. Previously, automatic or manual packaging parameters were configured at the institution level which meant that all PO Lines were set to either automatic or manual packaging. With this enhancement, manual packaging can be set at the PO Line level.

Resource Management

- Enhancements to the Delete Items Process

  In the August release, we reported about a new delete item process. This process has been further enhanced with additional parameters for defining how to handle childless holdings and bibliographic record suppression.

- Additional Field Added to External Search Template

  In order to allow for a more exact search result, a system number field has been added to the field options for searching External Resources. The field is populated with the numeric value of the 035 $$a field (if it exists).

- Republish a Set of Records

  A new process now offers the option of republishing a set of records either to Primo or to OCLC.

- New Description Templates

  Description templates allow for defining description information that populates the description field in the item record (such as Vol. no., part, and so forth) The descriptions for the physical items are generated using description templates that are applied to the items using a set of rules. The description templates and rules are defined in a new Description Templates editor.

- Generate/Validate Physical Item Barcodes

  Alma now offers the option for defining which barcode generation routine is used to automatically generate barcodes when a barcode value is empty.

Fulfillment

- SIP2 Sort Bin Configuration

  The Alma development team continues to enhance SIP2 and self-service functionality. Fulfillment configuration now allows for defining which items go into which bins when a patron returns an item through a self-check machine. Some of the parameters that can be defined are library, call number range, if requested, and so forth.

- View Loan Information Related to Fine/Fee

  This enhancement provides the ability to view loan information related to a user's fines/fees and why fines/fees were created as well as the option to view the loan history within this context.

Access to September 2012 Features

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

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)			
Primo: The Alma Get It Tab	✓			
Primo: Suppressing Records from Discovery	✓			
Primo: Enhancement to Allow Display of Linking Records in Primo	✓			
Acquisitions: Generic Notes for Vendor Interface Details Page	✓			
Acquisitions: Fields Added to Administrative Information Tab on Vendor Interface Details Page	✓			
Acquisitions: Fund Types	✓			
Acquisitions: Packaging of PO Lines	✓			
Acquisitions: New Acquisition Method - Technical	✓			

Feature	No Activation/ Setup Required (Note: Automatically Visible to All Users with the Appropriate User Role/ Permission)	Activation/ Setup Required	Visible to Administrator Only	Contact Ex Libris to Activate This Feature
Resource Management: Bibliographic Record Suppression and Withdraw Items Process	✓			
Resource Management: System Number Field Added to External Search	✓			
Resource Management: Handling Multiple Instances of the Same External Target	✓			
Resource Management: Republishing a Set of Titles	✓			
Resource Management: Description Templates	✓			
Resource Management: Support for Local Definition of Interface at the Portfolio Level	✓			
Resource Management: Generate/Validate Physical Item Barcodes	✓			
Fulfillment: SIP2 Sort Bin Configuration	✓			
Fulfillment: Items Requiring Action	✓			
Fulfillment: Items Requiring Action	✓			

Feature	No Activation/ Setup Required (Note: Automatically Visible to All Users with the Appropriate User Role/ Permission)	Activation/ Setup Required	Visible to Administrator Only	Contact Ex Libris to Activate This Feature
Fulfillment: Cancel Resource Sharing Requests - Staff	✔			
Fulfillment: Cancel Resource Sharing Requests - Patron	✔			
Fulfillment: Remote Storage Integration Extensions	✔			
Fulfillment: Items Requiring Action View Loan Information Related to Fine/Fee	✔			
General: Manage Self-Check Verification XSLT Access for Printouts/Notices	✔			
Analytics: Report List Lookup	✔			

Data Services

The Alma September Central KnowledgeBase and Community Zone package has been applied to the Alma production environment.

New Electronic Packages Added to the Alma CKB

The following packages were added to the Alma CZ during the period 20-August-2012 through 23-September-2012:

- Alexander Street Press Anthropology Online
- Alexander Street Press Asian American Drama
- Alexander Street Press Audio Drama
- Alexander Street Press Black Short Fiction and Folklore
- Alexander Street Press Classical Scores vol. 2
- Alexander Street Press Digital Library Catholic Reformation
- Alexander Street Press Early Encounters in North America
- Alexander Street Press Filmakers Library Online (NA)
- Alexander Street Press Filmakers Library Online (Outside NA)
- Alexander Street Press Gilded Age
- Alexander Street Press Irish Women Poets
- Alexander Street Press Latin American Women Writers
- Alexander Street Press Manuscripts Women's Letters
- Alexander Street Press North American Indian Drama
- Alexander Street Press North American Women's Drama
- Alexander Street Press Nursing Education in Video
- Alexander Street Press Smithsonian Global Sound
- Alexander Street Press World History in Video
- Alexander Street Press World History in Video (Outside NA)
- American College of Chest Physicians
- Cambridge University Press MRS Proceeding
- Classique Garnier

- CRKN Cambridge University Press Journals
- EBSCOhost ATLA Historical Monographs Coll. 1
- EBSCOhost ATLA Historical Monographs Coll. 2
- Gale Listener Historical Archives
- Julius Beltz
- Karger Books 2012
- Metapress Innovision Group
- OCUL eBook Cambridge
- OCUL eBook Collection Duke
- OCUL eBook Collection IEEE
- OCUL eBook Collection ITER
- OCUL eBook Collection LWW
- OCUL eBook Collection Morgan Claypool
- OCUL eBook Collection Taylor and Francis
- OCUL eBook Collection University of Ottawa Press
- ProQuest Barrons New Platform
- ProQuest New York Times New Platform
- ProQuest UK Newsstand New Platform
- Royal Society Chemisty Journals Free
- Sage Imeche
- Sage Imeche without archives
- Sage Knowledge Books Collection
- Sage Knowledge Books Collection
- Sage Knowledge Business And Management Collection
- Sage Knowledge Counselling And Psychotherapy Collection
- Sage Knowledge Criminology Collection
- Sage Knowledge Education Collection
- Sage Knowledge Geography Collection
- Sage Knowledge Health And Social Care Collection

- Sage Knowledge Media And Communication Collection
- Sage Knowledge Politics And International Relations Collection
- Sage Knowledge Psychology Collection
- Sage Knowledge Reference Collection
- Sage Knowledge Sociology Collection
- Society of Exploration Geophysicists Journals
- Thieme Ebooklibrary Klinik und Praxis

New External Resources That Are Open for Searching

This section highlights the new external resource names. The following external resource was added for this release:

- New Zealand National Library

Primo

The following sections describe the functions provided for Primo in the September 2012 release of Alma.

The Alma Get It Tab

Introduction

The Get It tab on the Alma Services page allows patrons to determine the following information for each physical title displayed in the search results:

- The locations in which the title can be found
- The availability of the title
- The request options

Depending on the number of locations per title, the type of resource, and the request options for the logged in patron, the Get It tab may display either holdings information, item-level information, or request information.

Holdings List

If multiple holdings (852 fields) exist for a title, the system displays each location on a separate line and includes the following information for each entry:

- Owning library (852 $$b)
- Shelving location (852 $$c)
- Call number (852 $$h - $$m)
- Accession number (852 $$p) – If it exists, the system will prefix the number with "**Accession:**" and omit the call number.
- Availability information

For example:

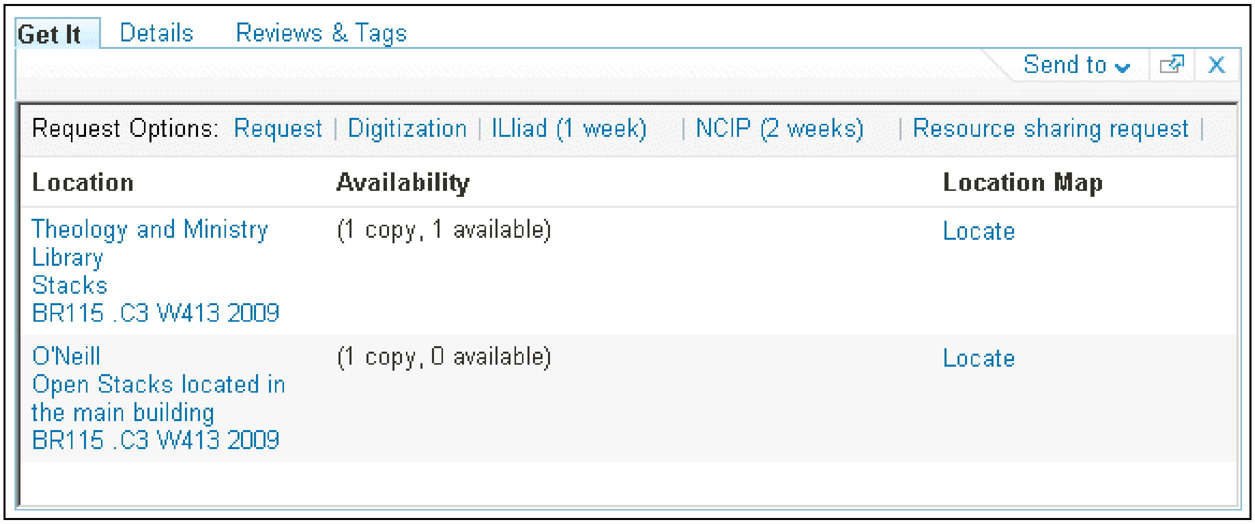

Figure 1 – Get It Tab – Non-Serial Title with Multiple Locations

For serial titles, the following information is also included:

- Summary holdings statement (866 $$a)
- Public note (866 $$z)

Note: The availability information is omitted for serials.

For example:

Figure 2 – Get It Tab – Serial Title with Multiple Locations

Items List

Users can view the items that are related to a specific holdings record by clicking the holdings entry in the Get It tab. After an entry has been clicked, the system displays the items that are associated with the selected holdings record (up to 10 per page). For each item, the system displays the following information:

- Barcode
- Material type
- Policy – When a patron is not signed in, the system displays Loanable if there is at least one rule that has a loanable policy.
- Description – Displays only for items that have a Description field.
- Item status

For example:

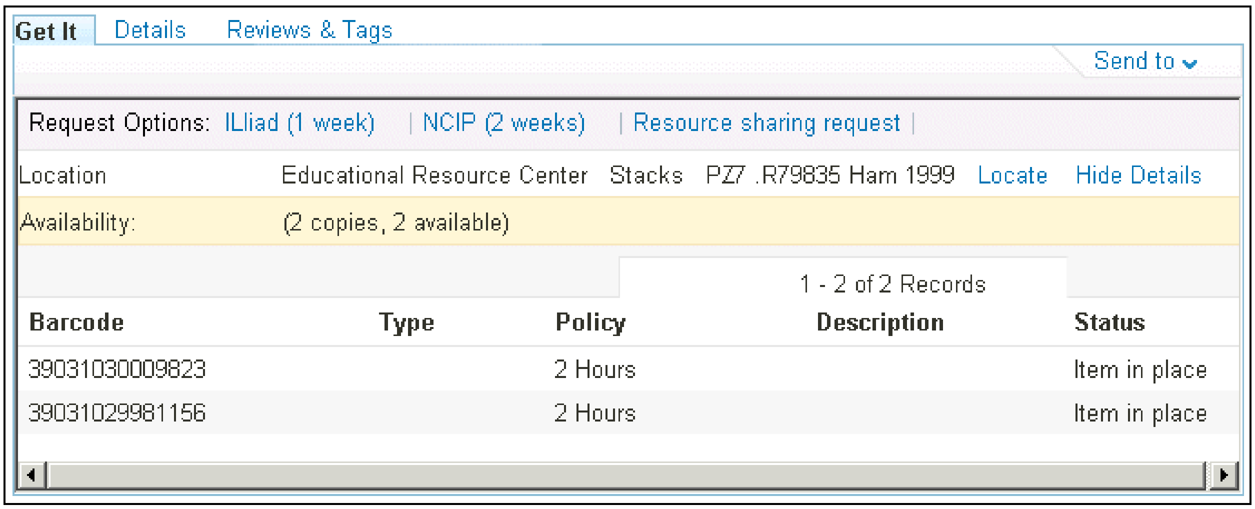

Figure 3 – Get It Tab – Displaying Item-Level Information for Non-Serials

If users want to narrow the scope of a serial's list, they may use the following filters, which contain values that are relevant to the items in the list: **Year**, **Volume**, and **Description**.

For example:

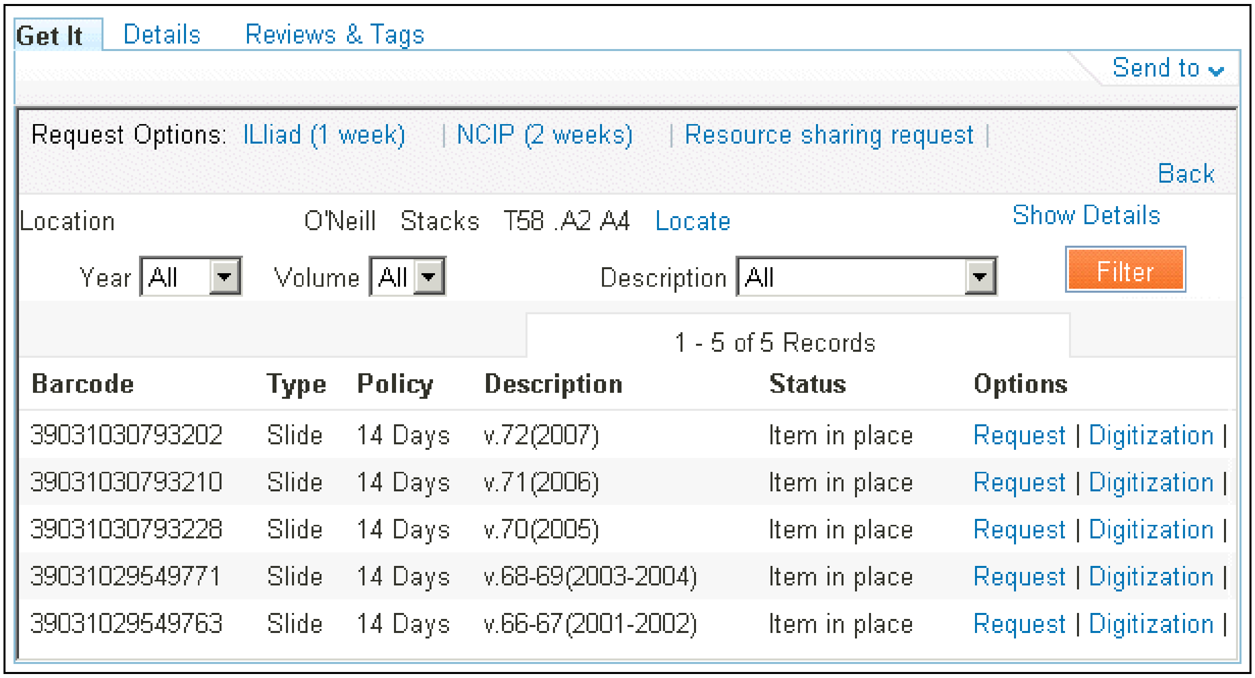

Figure 4 – Get It Tab – Displaying Item-Level Information for Serials

Request Options

The Get It tab allows users to perform the following types of requests, if permitted for the user, for the selected title: Request, Digitization, and other (such as resource-sharing requests and document delivery).

All request options appear as buttons above the holdings for non-serials and within the list of items for serials. For example:

Figure 5 – Get It Tab – Request Options in the Holdings List

The system only displays the request options if the signed-in user is eligible to place them. If the user is not signed in, the system displays the following message above the list of holdings or items:

```
Please sign in for request options
```

For serial titles, users must perform requests at the item level. For example:

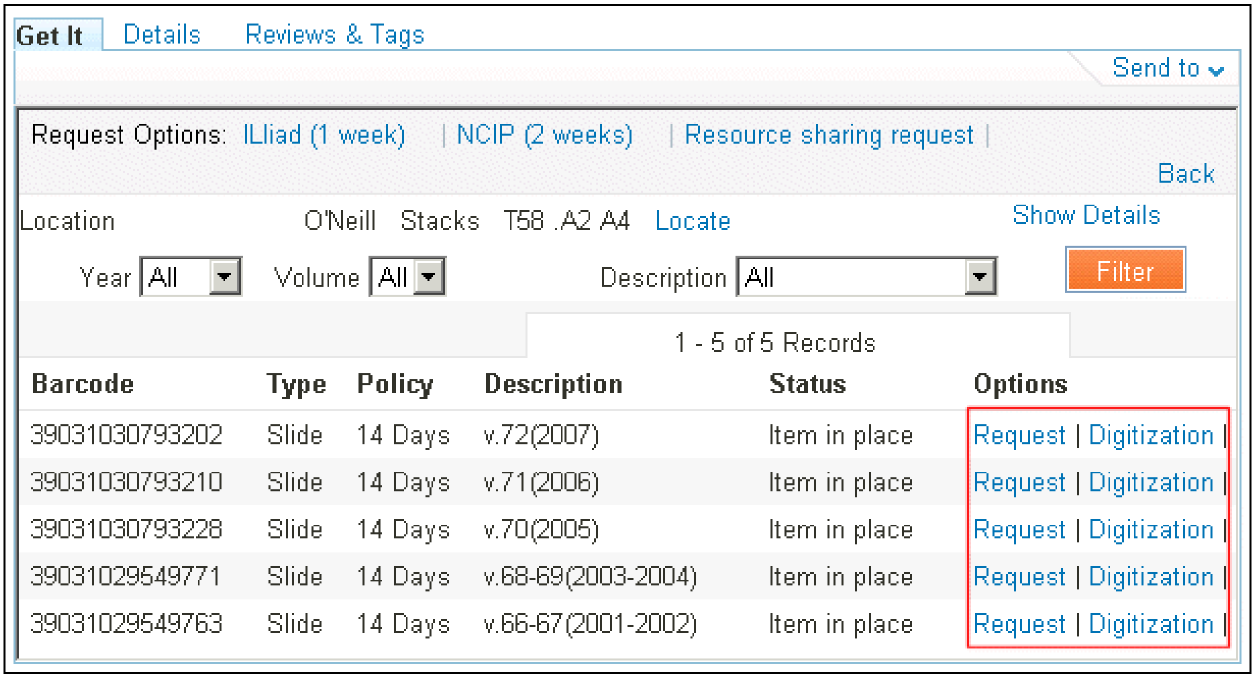

Figure 6 – Get It Tab – Request Options in the Items List for Serials

Suppressing Records from Discovery

Description

The purpose of this enhancement is to allow customers to suppress records from discovery in the following ways:

- Mark a location in order to suppress all records at a physical location. After a location has been suppressed/ unsuppressed, you must execute a republishing job in order to update the availability information for the holdings. For more information, see **Republishing a Set of Titles**.
- Mark a holdings record in order to suppress an individual record.

If the holdings record (either the holdings record itself or the location to which it belongs) is suppressed, the Primo Get It tab is affected as follows:

- Services resulting from the items of suppressed holdings are omitted.
- Holdings are omitted from the holdings list and its items are not used to calculate the available action buttons (such as Request/Digitize).

Technical Instructions

The following roles can access this facility:

- Inventory Operator
- Cataloger
- Repository Manager

To mark a physical location for suppression:

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

   The Configuration menu opens.
2. From the **You are configuring** drop-down list, select the library you want to suppress.
3. From Configuration > Locations, click **Physical Locations**.

   The Physical Locations List page opens.
4. Select **Edit** from the Actions drop-down list for the location you want to suppress.

   The Edit Physical Location page opens.
5. In the Holdings Configurations section, select **Suppress from Externalization**.

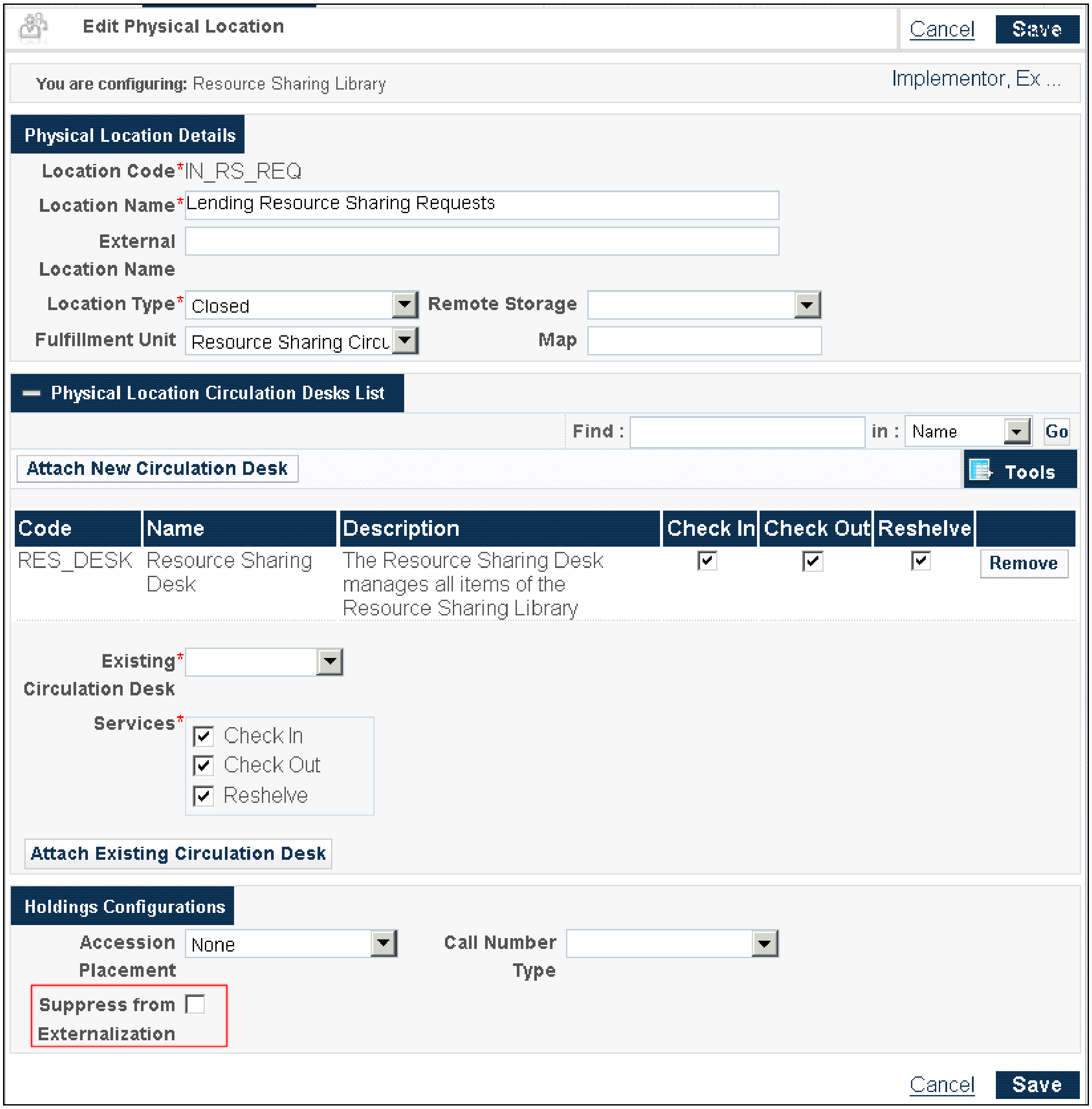

Figure 7 – Edit Physical Location - Suppress from Externalization

To mark a holdings record for suppression:

1 Perform a search in order to locate the record to suppress.

2 Click the **Holdings** link for the record.

The List of Holdings page opens.

3 Select **Edit** from the Actions drop-down list for the record you want to suppress.

The record displays in the MD Editor.

4 From MD Editor > Tools > Set Management Tags, click **Suppress from Discovery**.

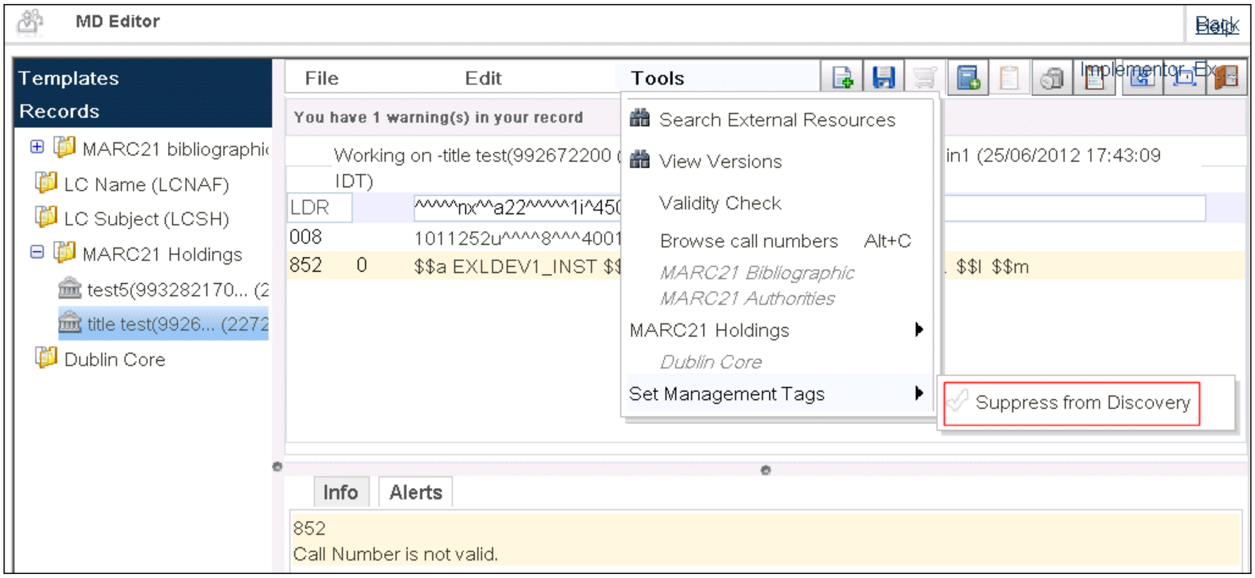

Figure 8 – Holdings - Suppress from Discovery

Enhancement to Allow Display of Linking Records in Primo

Description

As part of publishing to Primo, metadata and inventory records in Alma are enriched so that relationships between records (76X-78X fields) display in Primo.

To enrich these records, the `PLK` tag is added via normalization. The `PLK` tag is structured as follows, where the `link_type` is the type of relationship (such as `ADDITIONAL_FORM` for MARC 776):

```
<datafield tag=" PLK " ind1=" " ind2=" ">
              <subfield code="a">link type</subfield>
              <subfield code="b">MMS ID</subfield>
</datafield>
```

Other Primo Enhancements

The list below highlights recent enhancements for Primo:

- Digital items are now available in the View It tab.

Acquisitions

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

Generic Notes for Vendor Interface Details Page

Description

The purpose of this enhancement is to provide a generic notes option for the Vendor Interface Details page.

Technical Instructions

The Vendor Manager role can access this facility:

To access the generic notes facility:

1 From the Alma main menu > Acquisitions > Acquisitions Infrastructure, click **Vendors**.

2 Select **Actions > Edit** for a vendor with the Access Provider option selected on the Vendor Details page.

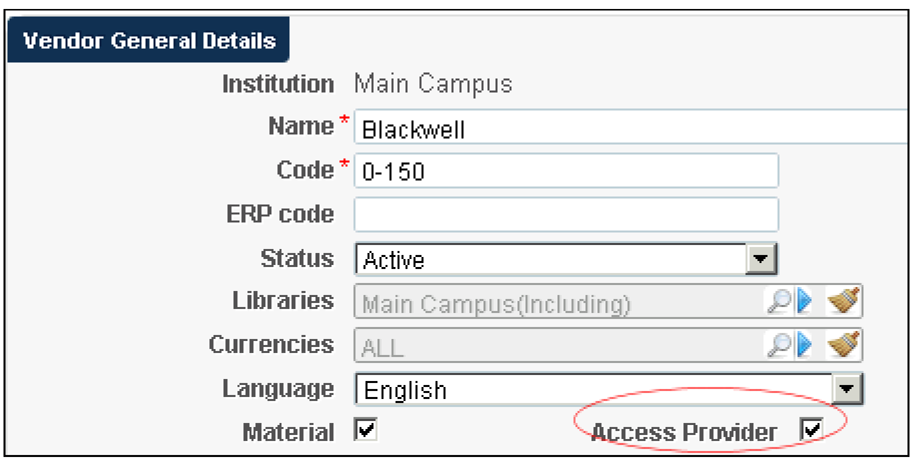

Figure 9 - Access Provider Option Selected

3 From the Interfaces section of the Vendor Details page, select **Actions > Edit** for one of the interfaces.

The Summary tab on the Vendor Interface Details page displays.

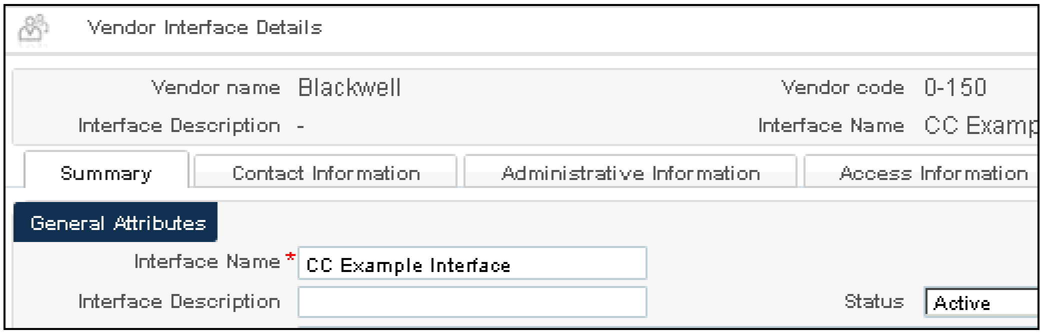

Figure 10 - Summary Tab on the Vendor Interface Details Page

4 Select the **Notes** tab.

5 Enter a note in the space provided.

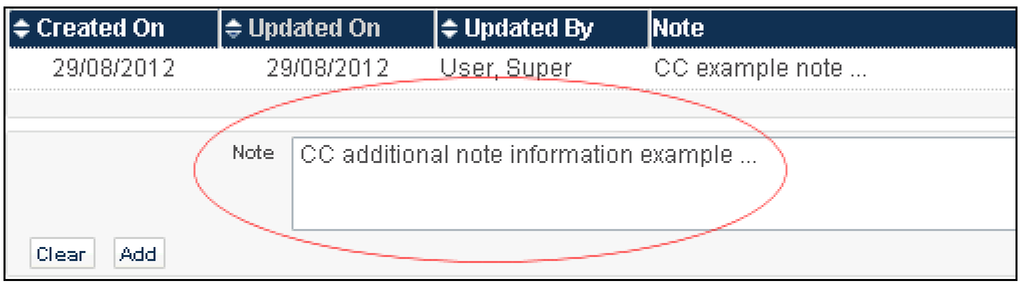

Figure 11 - Vendor Interface Details Note Tab

6 Click **Add**.

Another note row is added to the display.

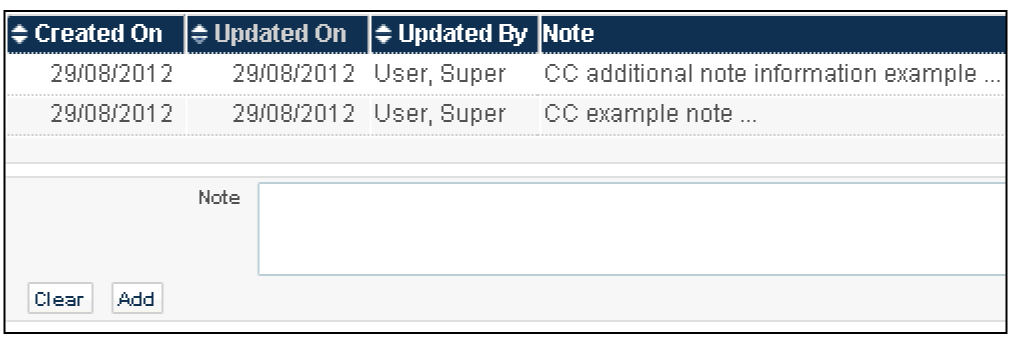

Figure 12 - Additional Note Row Displays

7 Click **Save**.

Fields Added to Administrative Information Tab on Vendor Interface Details Page

Description

The purpose of this enhancement is to provide additional fields in the Administrative Information tab on the Vendor Interface Details page. The following fields have been added:

- Hardware requirements (internal and public)
- Software requirements (internal and public)
- Maintenance window value
- Admin URI

Technical Instructions

The Vendor Manager role can access these options:

To access these new fields:

1 From the Alma main menu > Acquisitions > Acquisitions Infrastructure, click **Vendors**.

2 Select **Actions > Edit** for a vendor with the Access Provider option selected on the Vendor Details page.

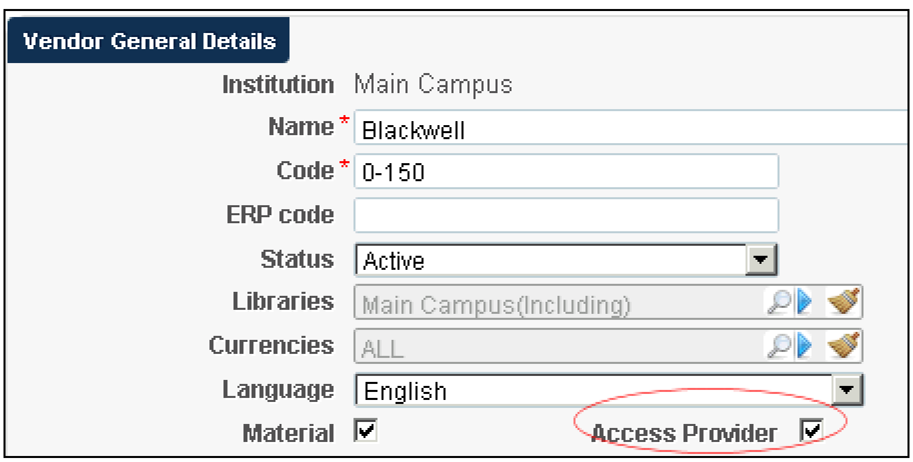

Figure 13 - Access Provider Option Selected

3 From the Interfaces section of the Vendor Details page, select **Actions > Edit** for one of the interfaces.

The Summary tab on the Vendor Interface Details page displays.

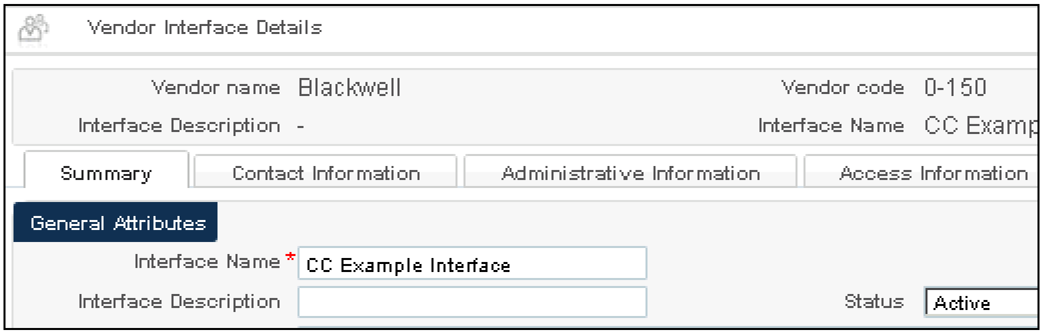

Figure 14 - Summary Tab on the Vendor Interface Details Page

4 Select the **Administrative Information** tab.

The new fields display on this tab.

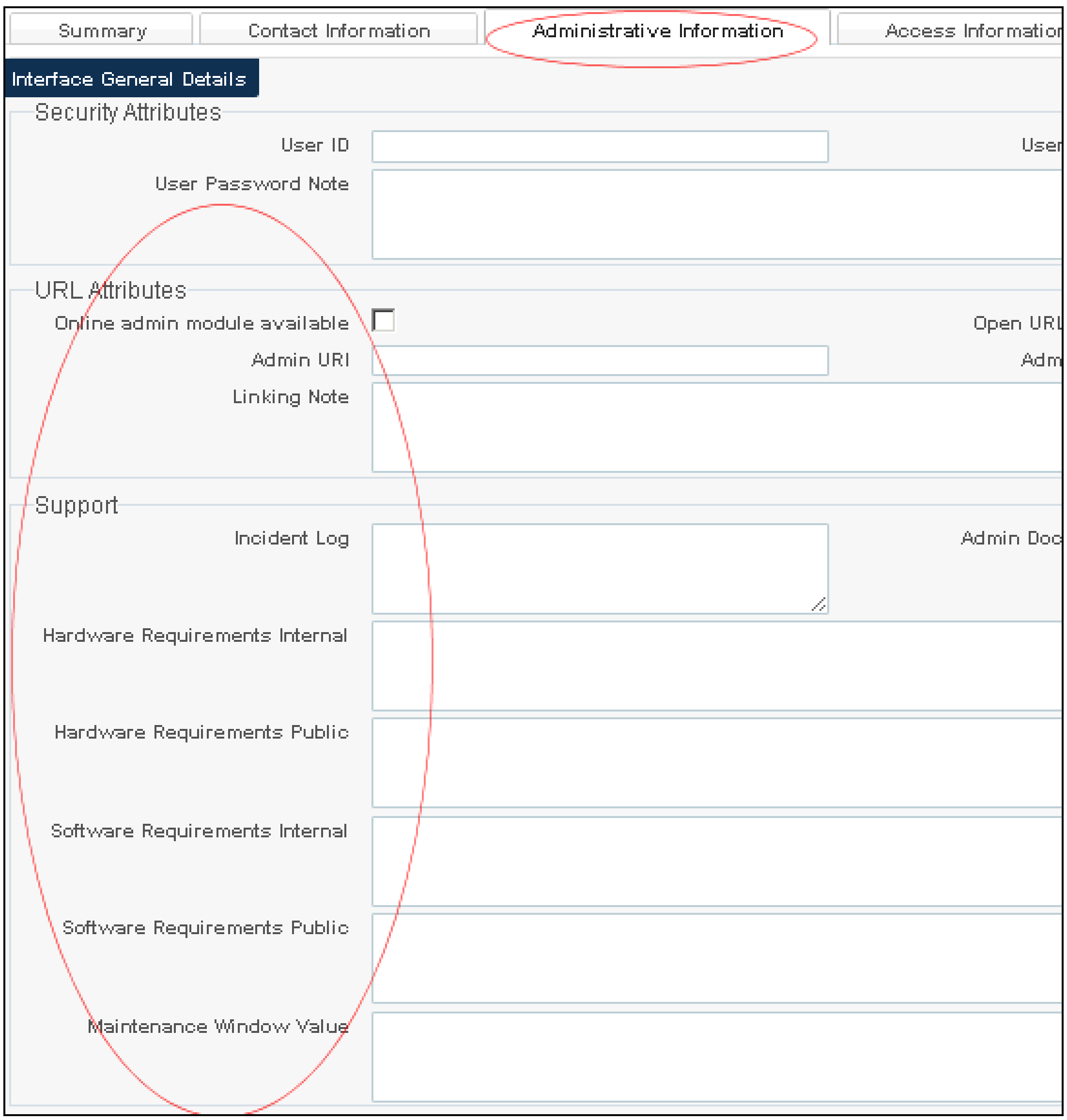

Figure 15 - Administrative Information Tab Additional Fields

Fund Types

Description

The purpose of this enhancement is to provide the capability for defining fund types. Usually, this refers to the source of the money and is helpful for reporting purposes. A fund type may indicate areas such as General, Endowed, Gift, Grant, Income, and so forth. These fund types can be imported when migrating from another system.

Technical Instructions

The following roles can access this facility:

- Administrator, Acquisitions Administrator (to add fund types)
- Acquisitions Operator, Acquisitions Manager (to use the fund types that have been added)

To access adding fund types:

1. From the Alma main menu > Acquisitions > Acquisitions Configuration, click **Configuration Menu**.
2. From the General section, click **Fund Types**.

   The Code Table page displays.

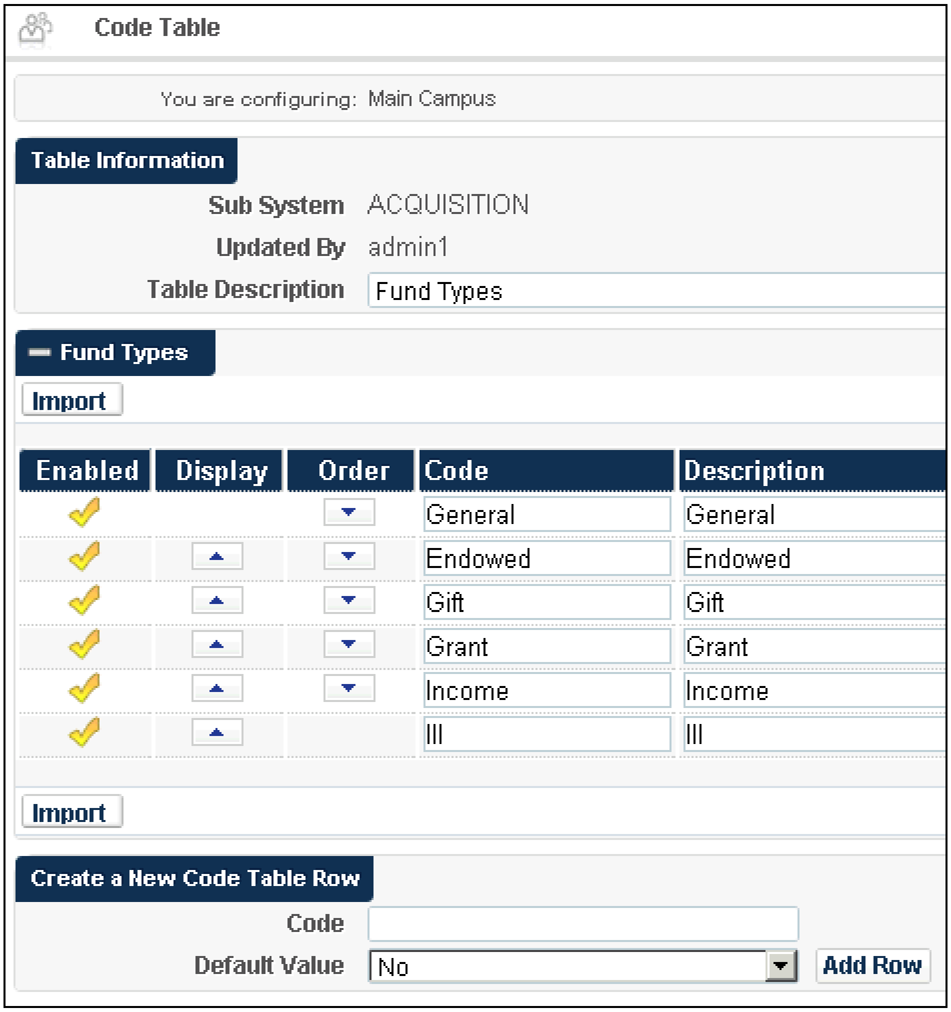

Figure 16 - Code Table Page for Fund Type

3 Enter a new Fund Type, and click **Add Row**.

Figure 17 - Create/Add New Fund Type

4 Click **Save**.

The Fund Type list/option displays on the Summary Details page and the Allocated Funds page.

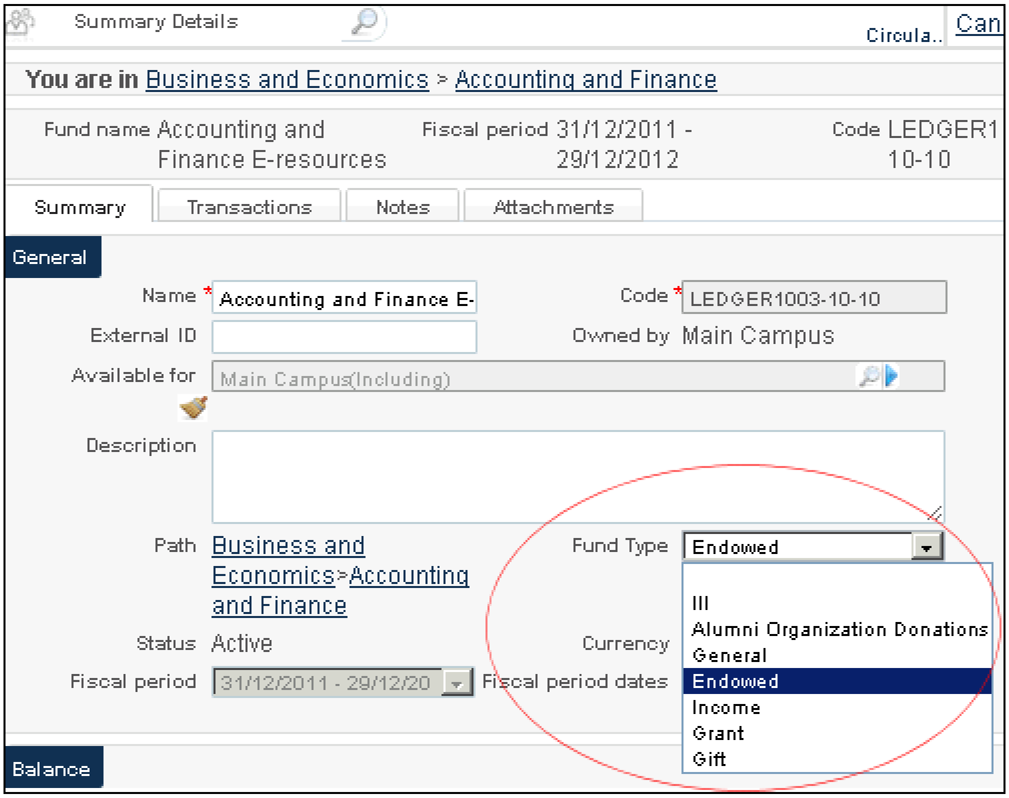

Figure 18 - Summary Details Page Fund Type Example

Packaging of PO Lines

Description

The purpose of this enhancement is to provide more flexibility for your PO packaging workflow. Previously, automatic or manual packaging parameters were configured at the institution level which meant that all PO Lines were set to either automatic or manual packaging. With this enhancement manual packaging can be set at the PO Line level.

With this enhancement, you can manually:

- Select PO Lines to be packaged together
- Add PO Lines to an existing PO

Technical Instructions

The following roles can access this facility:

- Purchasing Operator
- Purchasing Manager

To manually package PO lines:

1 Specify manual packaging for PO Lines at the PO Line level.

   a From the Alma main menu > Acquisitions > Purchase Order Lines, click **Review**.

   b For a specific PO Line, click **Edit**.

   The PO Line Summary page displays.

   c Expand the **Additional** section on the PO Line Summary page.

   The Manual Packaging option displays.

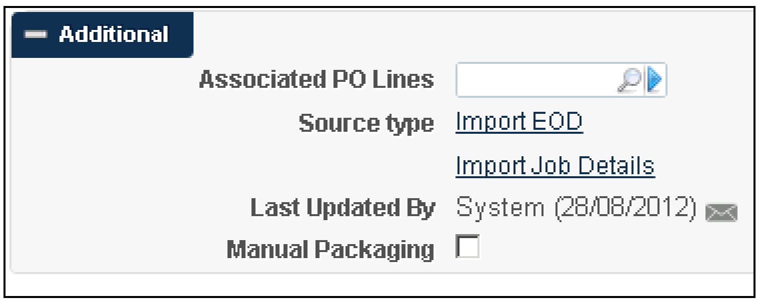

Figure 19 - Manual Packaging Option

   d Select **Manual Packaging** and **Save and continue/Go**.

Note: The Alma packaging default is automatic unless the Manual Packaging option is selected. The Manual Packaging check box is only editable when the PO line is in the In Review status.

---

2 Select the PO Lines to be packaged manually.

   a From the Alma main menu > Acquisitions > Purchase Order, click **Package**.

   The PO Lines to Package page displays with the PO Lines that have been identified for manual packaging.

   b Select the PO Lines to be packaged together manually.

   c Click **Create new PO**.

To manually add PO lines to an existing PO:

1 From the Alma main menu > Acquisitions > Purchase Order, click **Review**.

2 For a specific PO, select **Actions > Edit**.

3 Select the **PO line list** tab.

   The PO Lines page displays.

4 Select a PO Line and click **Add PO Line**.

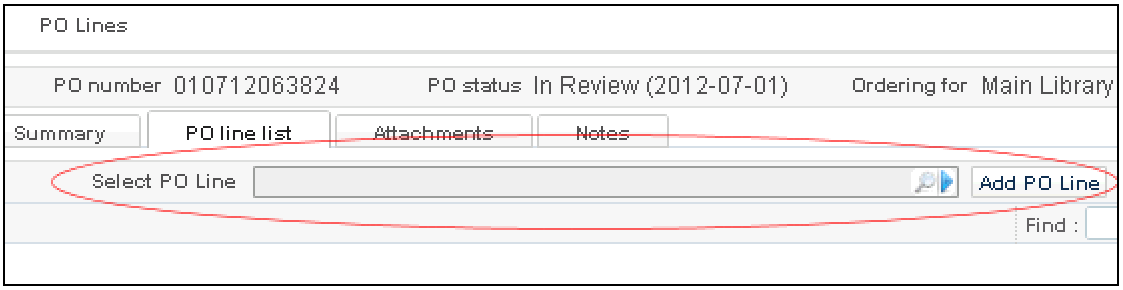

Figure 20 - Select PO Line to Manually Add

New Acquisition Method - Technical

Description

The purpose of this enhancement is to provide a new acquisition method identified as Technical.

The Technical acquisition method permits you to create an order without specifying/adding any amount to the order. This facility can be useful when you are purchasing electronic and print items together. When purchasing electronic and print items together, you can create two orders, one with the full amount and another with no amount specified.

Technical Instructions

The following roles can access this facility:

- Purchasing Operator
- Purchasing Manager

To access the Technical acquisition method:

1. Create or edit a PO Line.

   The PO Line Summary page displays.

2. From the PO Line details section on the Summary tab, open the drop-down list for **Acquisition method**.

   The Technical option displays in this list.

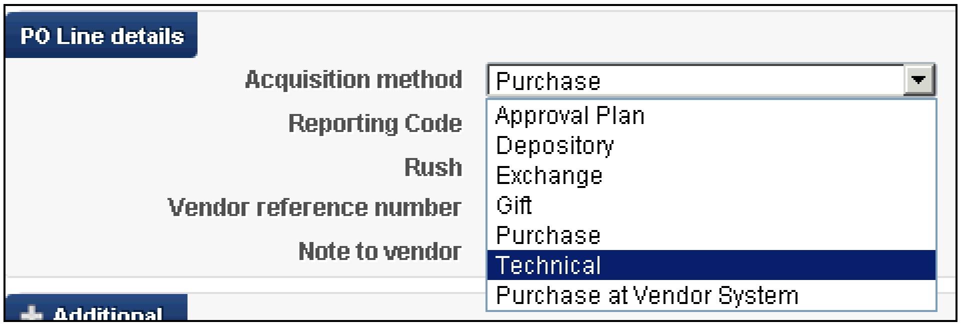

Figure 21 - Technical Acquisition Method

Other Acquisitions Enhancements

The list below highlights recent enhancements in Acquisitions:

- The link to the Run Import page has been moved to the Import Processing section of the Acquisitions menu.
- PO lines and invoices are locked for editing by other users only when they are being edited from one of the assignment tabs (Assigned to Me or Unassigned).
- An electronic resource activation task is deleted when the portfolio with which it is associated is deleted.

Resource Management

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

Bibliographic Record Suppression and Withdraw Items Process

Description

The purpose of this new capability is to:

- Define how to handle bibliographic record suppression, with the following two new parameters, in case a holdings record has been deleted or suppressed:
  - Suppress the bibliographic record if all of its holdings are deleted (True/False)
  - Suppress the bibliographic record if all of its holdings are suppressed (True/False)
- Enhance the withdraw items process that enables you to identify how to handle childless holdings (suppress, delete, or nothing)

Technical Instructions

The Repository Administrator role can access this new capability.

To configure bibliographic record suppression:

1. From the Alma main menu > Resource Management > Resource Configuration, click **Configuration Menu**.
2. From the General section, click **Other Settings**.

   The Mapping Table page displays.
3. Click **Customize** and specify **true** or **false** for the **parameter value** fields for:
   - suppressBibWithDeletedHol
   - suppressBibWithSuppressedHol
4. Click **Restore** for those mapping rows.
5. Click **Save**.

To execute the withdraw items process:

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

2 Select the option to **Withdraw** items and click **Next**.

3 Select the appropriate set (already created) for the action you intend and click **Next**.

4 Continue entering the information required for the wizard.

5 Enter a **Process Name**, select the process schedule option you prefer, and click **Next**.

6 Review/confirm your process request and click **Save**.

System Number Field Added to External Search

Description

The purpose of this enhancement is to provide a System Number field for external searches.

Technical Instructions

The following roles can access this facility:

- Repository Administrator
- Catalog Administrator

The System Number field is populated with the 035 ‡a, if it exists. Any character prefix is removed and the remaining numeric value is used in the System Number field. When there are multiple occurrences of this field, the first one is used for the System Number field. The query is submitted to the external system as `SYS=<value of the System Number>`.

To access this enhancement:

1 From the Alma main menu > Resource Management > Cataloging, click **Search External Resources**.

The MD Editor opens to the Search External Resources display.

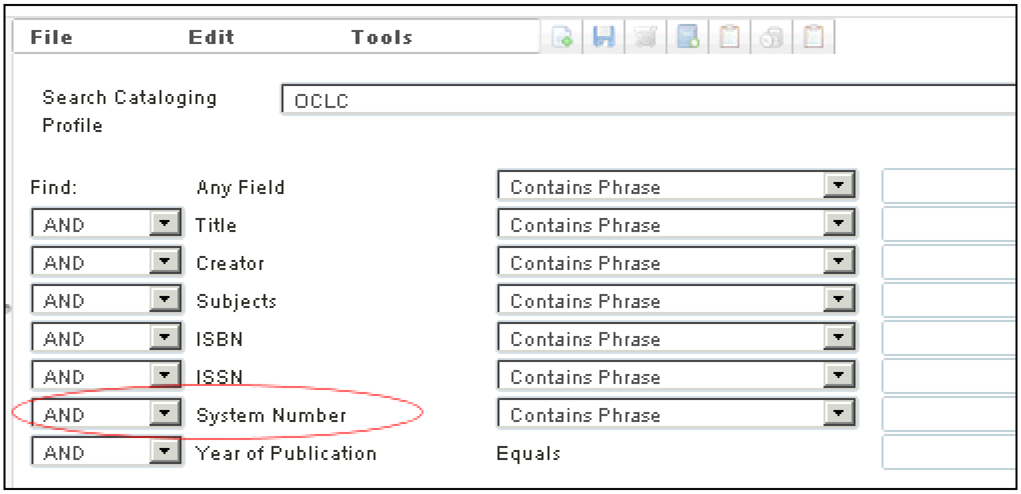

Figure 22 - System Number External Search Option

2 Enter your search criteria using the System Number option and click **Search**.

To access this enhancement from editing a record:

1 Edit an existing record in the MD Editor.

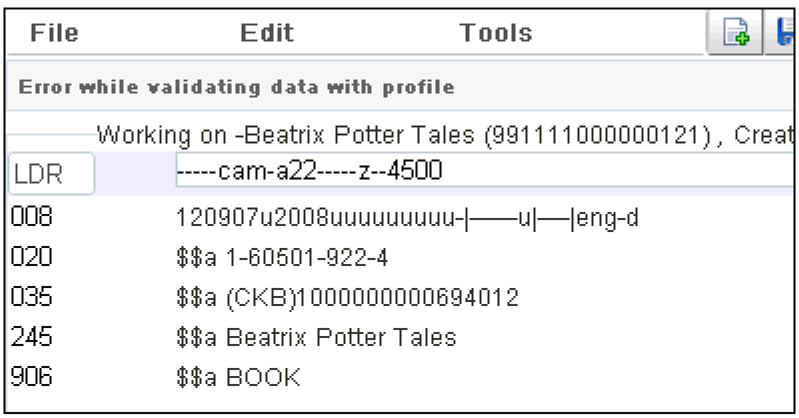

Figure 23 - Editing Record Example

2 Click **Tools > Search External Resources**.

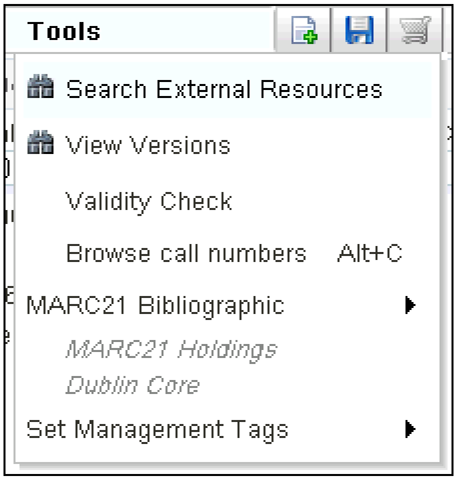

Figure 24 - Search External Resources Option

The Search External Resources dialog opens.

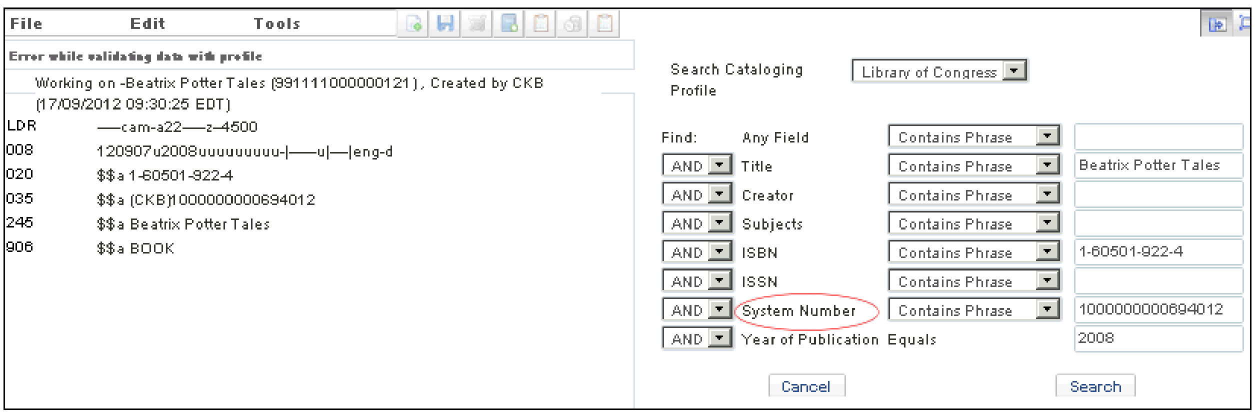

Figure 25 - Search External Resources Using System Number

3 Enter your search criteria using the System Number option and click **Search**.

Handling Multiple Instances of the Same External Target

Description

The purpose of this enhancement is to provide the ability to handle multiple instances of the same external target.

Technical Instructions

The following roles can access this facility:

- Repository Administrator
- Catalog Administrator

To access this enhancement:

1 Create another instance of an existing external resource.

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

   b From the Search Configuration section, click **External Search Resources**.

   c To make a copy of an external resource, select **Actions > Copy**.

   d Enter the Institution Details that change for this copy of the external resource, specify a new Resource Name, and click **Save**.

2 Add the external resource created in the previous step to an External Search Profile that already uses an instance of this external resource.

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

   b From the Search Configuration section, click **External Search Profile**.

   c Edit the existing profile with the existing instance of the external resource.

   d From the External Resources Pool, select the additional instance of the external resource created in step 1 and click **Add to Selection**.

   e Click **Save** to save the updated External Search Profile.

Republishing a Set of Titles

Description

The purpose of this enhancement is to allow records that belong to a set to be published.

Technical Instructions

The following roles can access this facility:

- Inventory Operator
- Cataloger
- Repository Manager

To republish a set of titles:

1 Create a set of titles to publish.

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

The Create Process page opens.

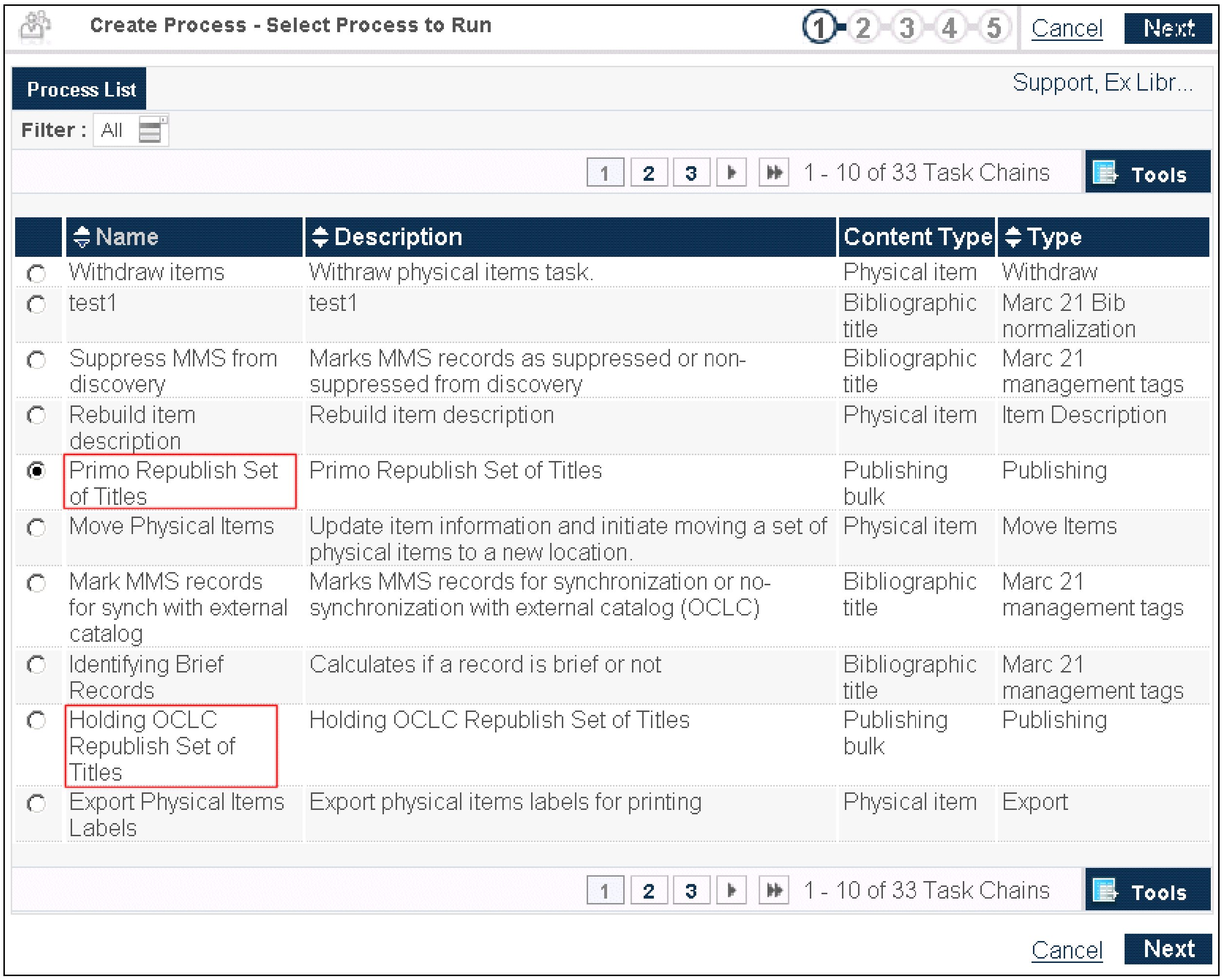

Figure 26 – Create Process – Republish Processes

3 From the following processes, select the process that corresponds to your publishing target:

- **Primo Republish Set of Titles**
- **Holding OCLC Republish Set of Titles**

4 Click **Next**.

5 Select the set of records that you created in step 1.

6 Continue with the wizard to schedule the process.

Description Templates

Description

The purpose of this enhancement is to allow staff to generate descriptions that populate the description field of physical items. The generated descriptions are based on the values of the Chronology and Enumeration fields of the item record. Staff can generate the description manually while editing the item or automatically when saving the item.

The descriptions for the physical items are generated using description templates that are applied to the items using a set of rules. The rules are based on the following item attributes:

- Chronology and Enumeration fields
- Material type
- Library

The description templates and rules are defined in the Description Templates editor that is accessed from the General section of the Resource Management Configuration menu.

In addition, the **Rebuild item description** process has been added to generate the descriptions for a set of physical items.

Technical Instructions

The following roles can access this facility:

- Repository Manager
- Repository Administrator

To generate a description for a physical item:

1. Perform a repository search in order to locate the physical item.
2. Click the **Items** link for the physical item.

   This List of Items page displays.
3. Select **Actions > Edit**.

   The Physical Item Editor page opens.
4. Select the **General Information** tab.
5. Enter the **Enumeration** and **Chronology** fields as needed.

Note: The Chronology I and J fields and Generate button are new.

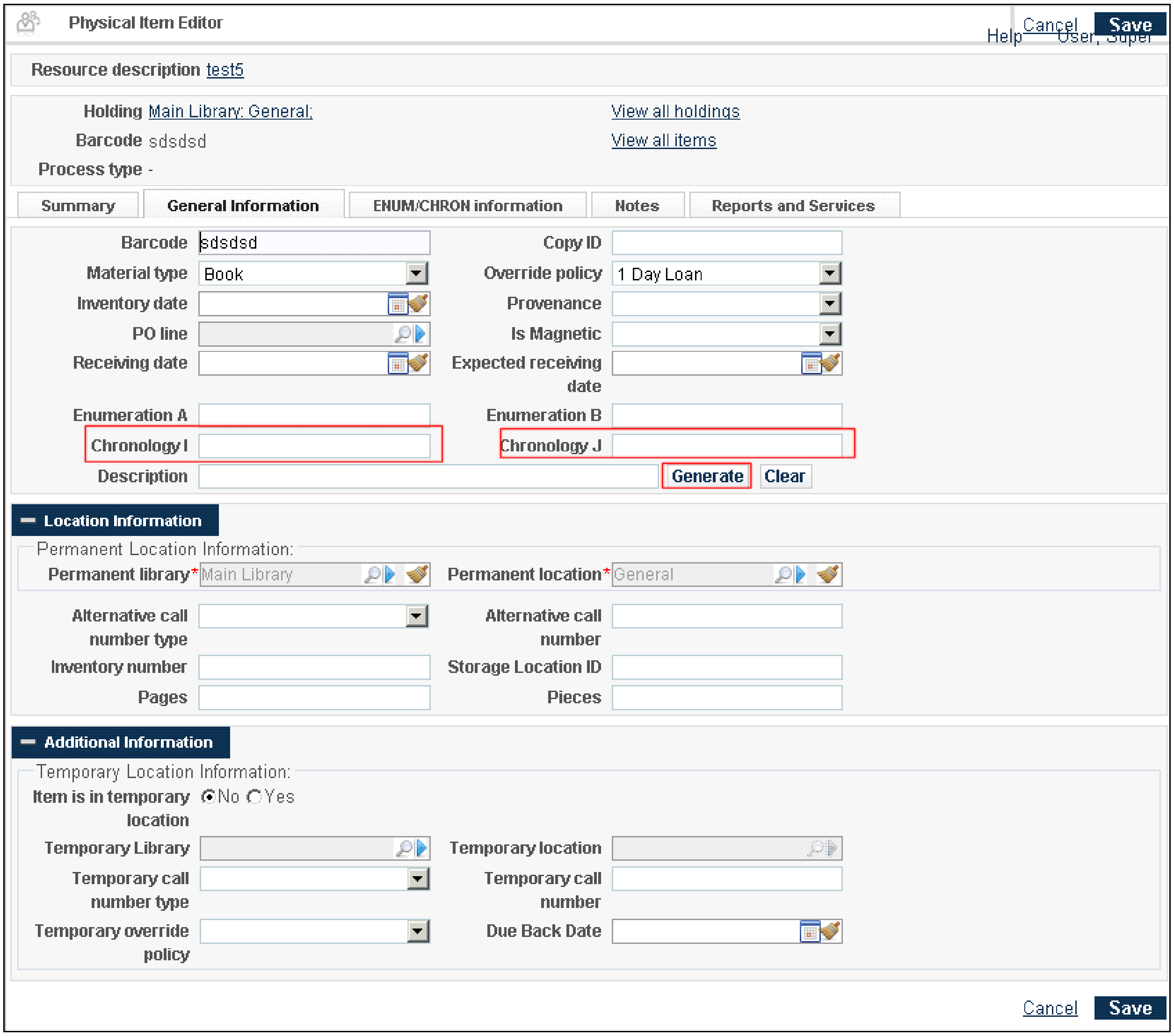

Figure 27 – Physical Item Editor (Generate Button)

6 Click **Generate** to update the Description field.

7 Click **Save** to save your changes to the item.

To access the Description Rule Template Editor:

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

The Resource Management Configuration page opens.

2 In the General section, click **Description Templates**.

The Description Template Setup Rules page opens.

3 To access the editor, perform either of the following actions:

- Click **Add Rule** to create a new rule.
- Select **Edit** from the Actions drop-down list for the rule you want to edit.

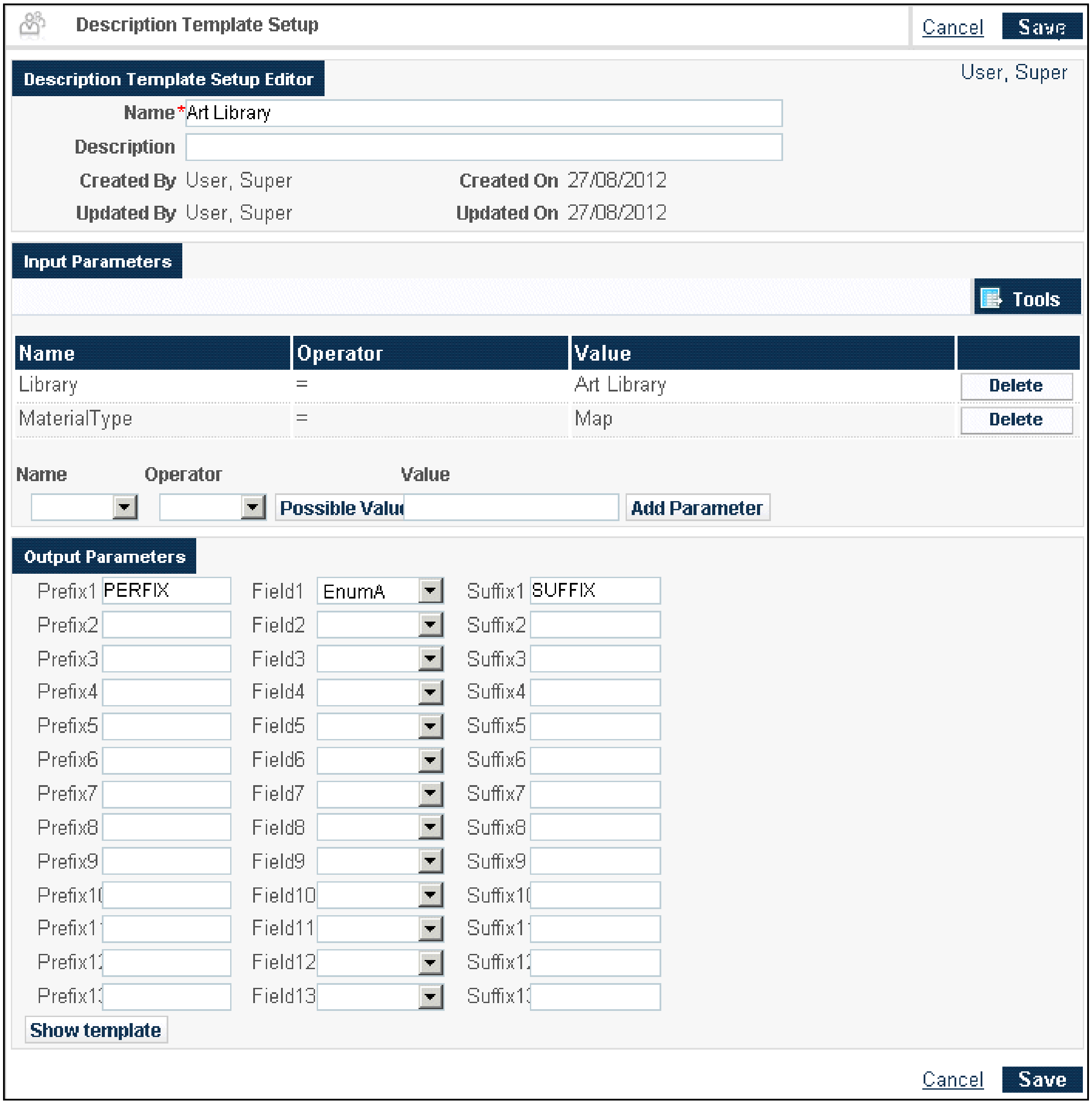

Figure 28 – Description Template Setup Editor

To generate the description for a set of physical items:

1 Create a set of physical items.

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

The Create Process page opens.

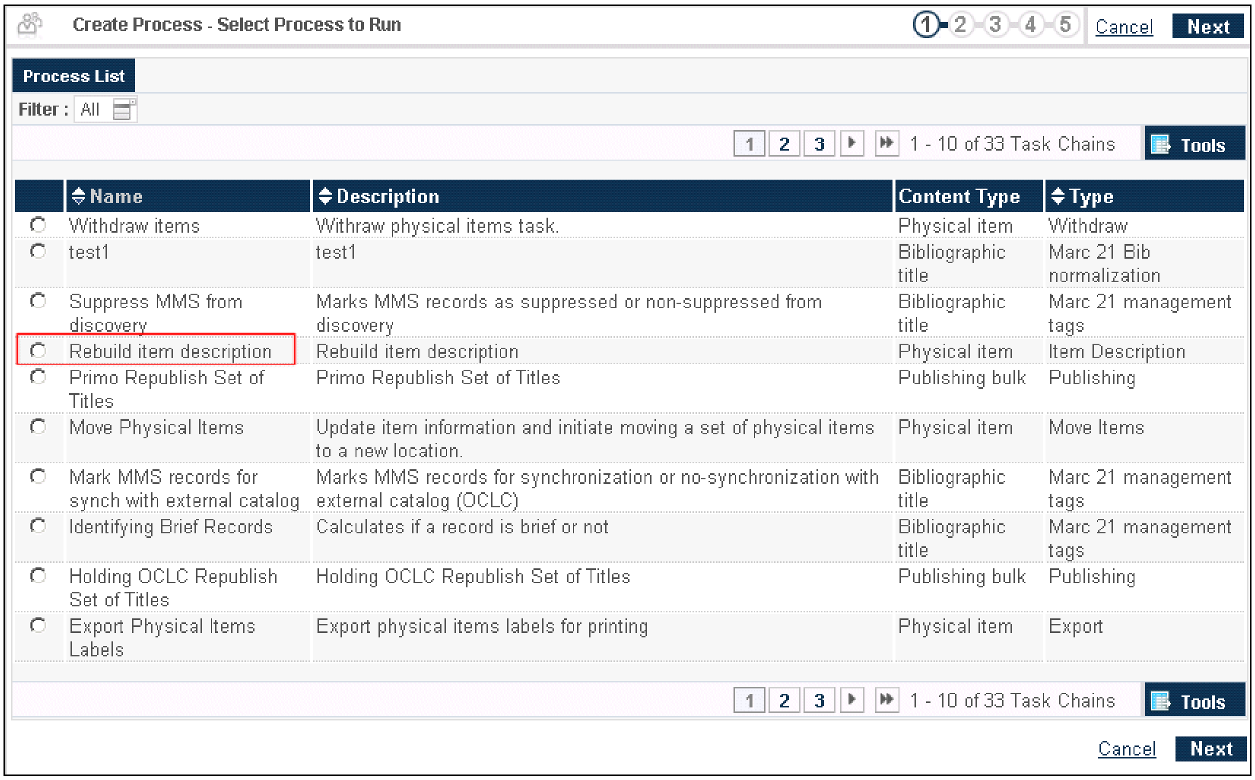

Figure 29 – Create Process – Rebuild Item Description

3 Select the **Rebuild item description** process.

4 Click **Next**.

5 Select the set of records that you created in step 1.

6 Continue with the wizard to schedule the process.

Support for Local Definition of Interface at the Portfolio Level

Description

The purpose of this enhancement is to allow customers to define the interface locally for standalone electronic portfolios.

Technical Instructions

The following roles can access this facility:

- Repository Manager
- Repository Administrator

To define an interface locally for an electronic portfolio:

1 Perform a repository search in order to locate the standalone electronic portfolio.

2 Click the **Edit** link for the portfolio.

The Electronic Portfolio Editor page opens.

3 Select the Portfolio Information tab to display the **Interface Name** field.

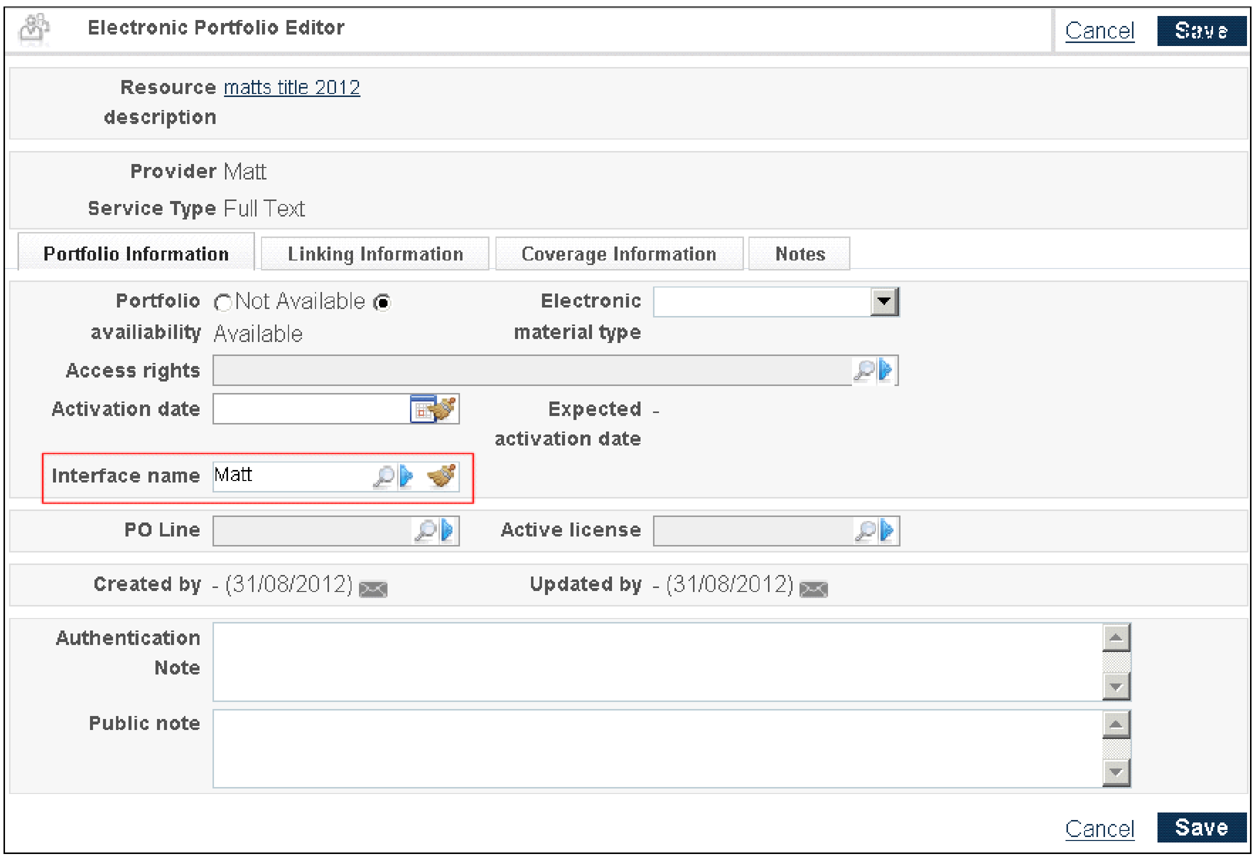

Figure 30 – Electronic Portfolio Editor (Interface Name Field)

Generate/Validate Physical Item Barcodes

Description

The purpose of this enhancement is to provide access to the physical item barcode generation/validation facility in Alma.

Technical Instructions

The Repository Administrator role can access this capability.

Unique Identifier

The barcode is a unique identifier (at the institution level) given to each item. The institution can define which barcode generation routine is used to automatically generate barcodes when a barcode value is empty.

Validation

The barcode is validated for uniqueness.

- Valid value

  If the barcode has a value and it is unique, the barcode format is validated as described below.

- Not valid value

  If the barcode format is not valid, a warning message is generated; and the item's record is not saved. However, if the user confirms saving the item in the Metadata Editor, it is saved.

- Validation at import

  When an item is imported, it is created/saved and any resulting validation warning messages are stored in the import report.

The list of all the barcode format validation routines supported by Alma are saved in a mapping table and maintained by Ex Libris Professional Services for institutions. The validation routines can be enabled or disabled. The list of enabled validation routines are scanned until the barcode is found valid, or there are no more entries in the list.

Initially, the list of validation routines include:

- Codabar 13

  This validates the contents of the barcode using the Codabar 13 validation algorithm.

- Prefix + sequence

  This validates that the barcode starts with the value specified in the Prefix field (see instructions below) followed by a number.

Note: If barcodes without values are allowed, an empty value is not validated for format or uniqueness.

To access this enhancement:

1. From the Alma main menu > Resource Management > Resource Configuration, click **Configuration Menu**.
2. From the General section, click **Barcode Generation**.

   The Barcode Generation Configuration page displays.

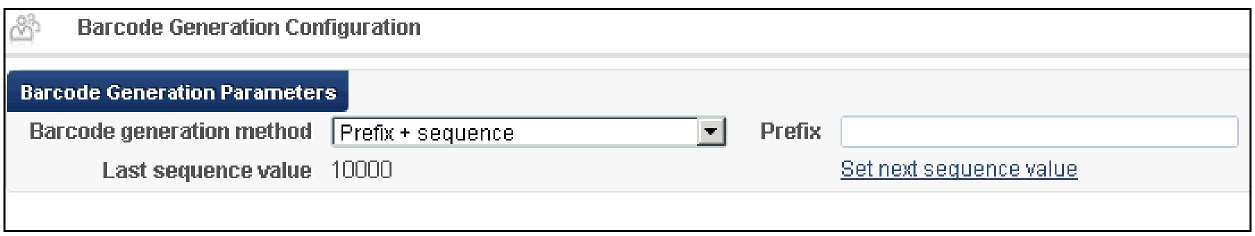

Figure 31 - Barcode Generation Configuration Page

- Barcode generation method

  The **Barcode generation method** is configured by Ex Libris Professional Services at implementation. Optionally, Professional Services can change the barcode generation method over time. The default value is **Prefix + sequence**.

- Prefix

  Use this field to define the prefix used (any string) when the **Barcode generation method** selected is **Prefix + sequence**.

- Last sequence value

  This field is for your information only and cannot be edited. This is the top value in the barcode sequence. This value can be changed using the **Set next sequence value** option.

- Set next sequence value

  Click this option to open the **Set next number value** pop-up window and enter a sequence value. This value must be unique within the sequence and higher than the current top value.

Figure 32 - Set Next Number Value

Other Resource Management Enhancements

The list below highlights recent enhancements in Resource Management:

- The RSS feed name should not include any of the following characters: dot, space, apostrophe, parentheses.
- A user without permissions for the Acquisitions area is no longer able to view the **Orders** link when clicking **More Info** in the search results.
- A job status filter was added to the Monitor and View Imports page.

Fulfillment

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

SIP2 Sort Bin Configuration

Description

The purpose of this enhancement is to provide the ability to configure Alma for SIP2 equipment that uses the sort bin parameter.

Technical Instructions

The following roles can access this facility:

- General System Administrator
- Fulfillment Administrator

To access the configuration capability:

1. From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.
2. From the Library section, click **SIP2 Bin Configuration**.

   The SIP2 Bin Configuration Rules page displays.
3. Click **Add Rule**.

   The purpose of the rule is to define which items go into certain bins. When a patron returns an item through the self-check machine, the Alma checks these rules/definitions set by the administrator and sends a response to the self-check machine indicating in which bin to place the item.
4. Enter the rule name and description.
5. Enter the rule parameters.

   a. Specify the parameter name from the following drop-down list of options:

      - Destination library

        This is a list of libraries. The destination library can be either the library where the item needs to be reshelved (if there are no further requests) or the library where the item needs to be sent in order to fulfill the next request.

- Destination circulation desk

  This is the circulation desk that is responsible for reshelving the item.

- Destination service unit

  This is a list of the service units. Use this option if the item has a request to be handled at a service unit.

- From call number/to call number

  This identifies the call number range to which the returned item belongs.

- Is requested

  Yes or no.

- Reshelf item location

  This is a list of locations. This is the location where the item needs to be reshelved if there is no request on the item.

- Self-check circulation desk

  This is the self-check desk where the item is checked in.

b Specify the operator from the following drop-down list of options:

- Equals
- In list
- Not equals
- Not in list

c Select one of the possible values.

d Click **Add Parameter**.

6 Enter the **Bin number** (a text field to indicate the bin in which to place the item) and click **Save**.

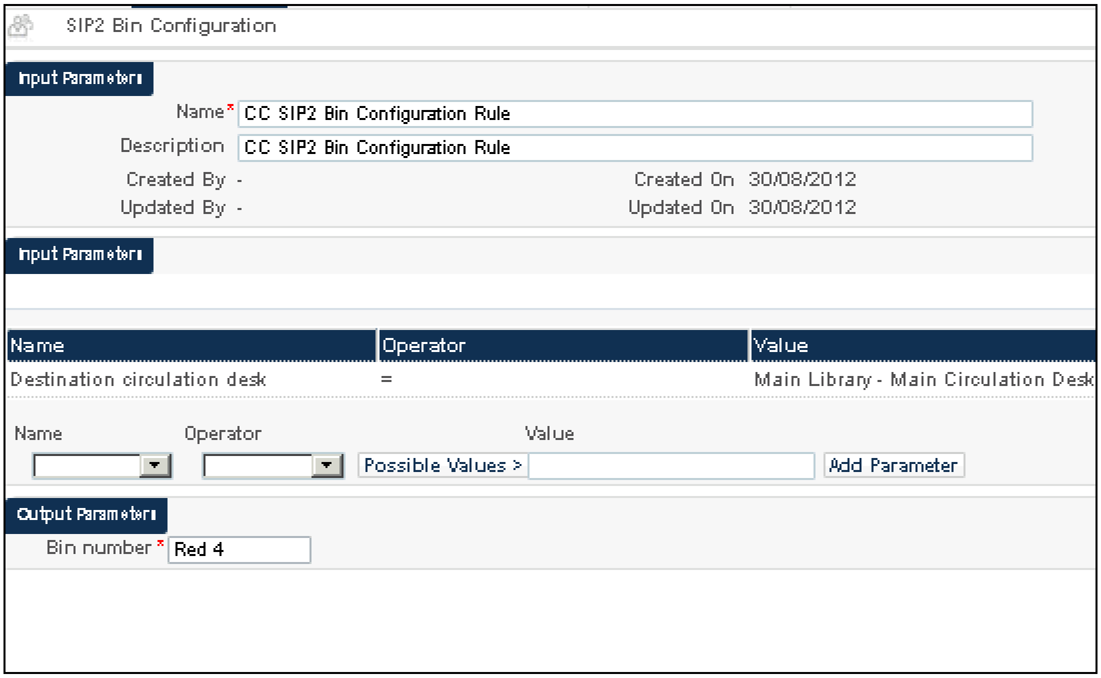

Figure 33 - SIP2 Bin Configuration Example

After a rule has been saved, the following actions are available for additional work with this rule:

- Edit
- Duplicate
- Delete

Items Requiring Action

Description

The purpose of this enhancement is to provide the capability to compile a text file of items that require special attention/action and should not be reshelved at the current location . These may be items with requests, items belonging to a different library, or items that require cataloging.

Through Alma, you identify the input parameters that determine what items to include in the text file. The resulting file contains the barcode and title of each item.

Technical Instructions

The following roles can access this facility:

- Fulfillment Services Operator
- Fulfillment Services Manager
- Request Operator

To create the text file of items requiring action:

1. From the Alma main menu > Fulfillment > Advanced Tools, click **Items Requiring Action**.

   The Items Requiring Action page displays.

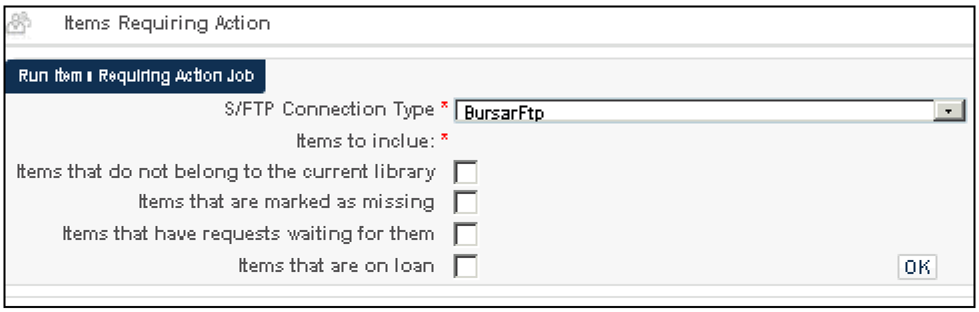

Figure 34 - Items Requiring Action Page

2. Select the **S/FTP Connection Type**.

   This identifies where the text file with the items should be placed.

Note: The S/FTP Connection Type options are defined in the S/FTP Definitions in the General Configuration menu.

3. To identify the items to be placed in the text file, select the criteria from the options provided:
   - **Items that do not belong to the current library**
   - **Items that are marked as missing**
   - **Items that have requests waiting for them**
   - **Items that are on loan**
4. To process your request, click **OK**.

   The text file is created and displays on the Items Requiring Action page with the following information:
   - Job ID
   - Status

- Creator
- Time Started
- Time Ended
- Entities Finished
- Entities Failed
- View Report action button

Job Id	Status	Creator	Time Started	Time Ended	Entities Finished
60259500000121	Completed Successfully	admin1	29/08/2012 19:54:22	29/08/2012 19:54:23	8

Figure 35 - Text File Results

Cancel Resource Sharing Requests - Staff

Description

The purpose of this enhancement is to allow cancellation of resource sharing requests by staff.

Technical Instructions

The following roles can access this capability:

- Circulation Desk Operator/Manager (from Fulfillment > Checkout/Checkin > Manage Patron Services)
- Requests Operator (from Fulfillment > Resource Requests)
- Fulfillment Services Operator/Manager (from Fulfillment > Resource Sharing)

Cancelling resource sharing requests can be processed through several fulfillment options. Refer to the following list:

- Fulfillment > Checkout/Checkin > Manage Patron Services > Requests tab > Cancel action
- Fulfillment > Resource Requests > Monitor Requests > Cancel action
- Fulfillment > Resource Requests > Expired Hold Shelf > Cancel Request action
- Fulfillment > Resource Requests > Active Hold Shelf > Cancel Request action
- Fulfillment > Resource Requests > Pick From Shelf > Cancel Request action
- Fulfillment > Resource Sharing > Borrowing Requests> Cancel action

- Fulfillment > Resource Sharing > Borrowing Requests > Change Status to Cancel requested
- Fulfillment > Resource Sharing > Borrowing Requests > Edit action > Parameters tab > Queries Codes > Request to cancel > send (for ARTEmail partners)

The cancel option is available when the following criteria is met:

- Resource sharing request is active
- Resource sharing request is not associated with a partner or is associated with a partner whose workflow profile allows request cancellation
- Item has not yet been loaned to a patron

Cancel Resource Sharing Requests - Patron

Description

The purpose of this enhancement is to allow cancellation of resource sharing requests by patrons.

Technical Instructions

For patrons to cancel requests, they need to log in to Primo, access My Account > Requests, and cancel the active resource sharing request that is no longer wanted. The same conditions that are required to allow staff cancellations are also required to allow patron cancellations.

Remote Storage Integration Extensions

Description

The purpose of this feature is to enhance the process for handling digitization requests for titles located in remote storage. With this enhancement, the workflow is as follows:

- Patron or staff request a title that is stored in remote storage for digitization
- The request is sent to the remote storage in a file of requests
- The item requested is retrieved, digitized at the remote storage facility, and the file is sent to the patron
- The request is closed

To accommodate this enhancement:

- The export file that is created by the integration profile has been updated to include:

  - Patron information such as patron name, preferred identifier, and email for the request
  - Request information that provides information such as description and part to digitize in the request file
- The remote storage has been updated to include the new field, **Handles digitization requests locally**

Technical Instructions

The following roles can access this facility:

- General System Administrator
- Fulfillment Administrator

To create a remote storage profile to handle digitization requests at the remote storage facility:

1 From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.

2 From the Physical Locations section, click **Remote Storage**.

3 Click **Add Remote Storage**.

The Add Remote Storage dialog box opens.

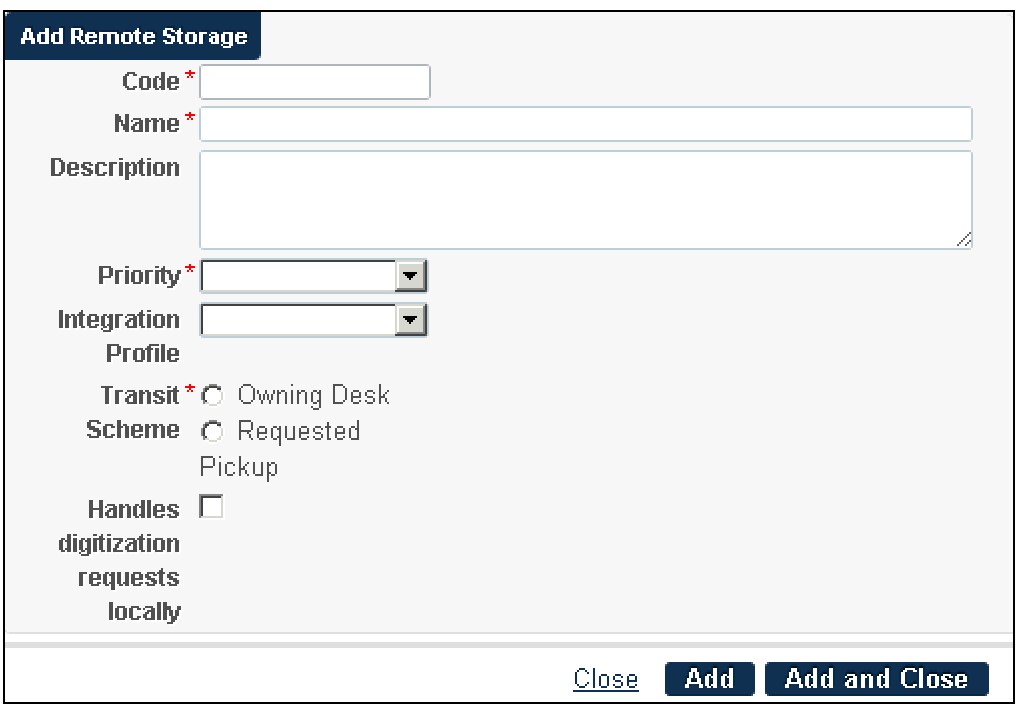

Figure 36 - Add Remote Storage Dialog Box

4 Enter the profile information.

a For Integration Profile, select **Remote Storage System**.

b Select the **Handles digitization requests locally** option.

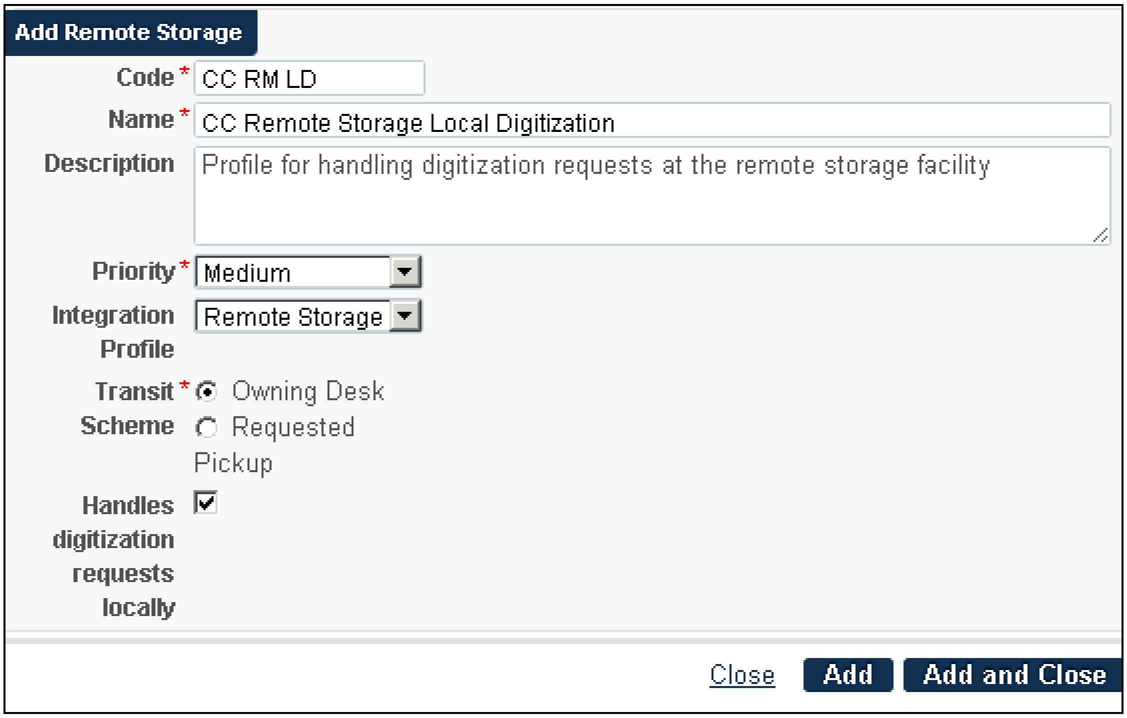

Figure 37 - Remote Storage Profile Example

5 Click **Add and Close**.

View Loan Information Related to Fine/Fee

Description

The purpose of this enhancement is to provide the ability to view loan information related to a user's fines/fees. This capability enables staff to explain why fines/fees were created and to view the loan history within that context. This provides staff with the information needed to respond to patron-disputed fines/fees.

Technical Instructions

The following roles can access this capability:

- User Manager
- User Administrator
- Circulation Desk Operator

- Circulation Desk Operator Limited
- Circulation Desk Manager

To access this capability:

1. From the Alma main menu > General > User Management, click **Find and Manage Users**.
2. Select **Actions > Edit** for the user whose loan information you want to view related to fines/fees.

   The User Details page displays.
3. Click the **Fines/Fees** tab.
4. Select the action to view the loan information in the fine/fee row of interest.

Other Fulfillment Enhancements

The list below highlights recent enhancements in Fulfillment:

- If a requested item has an alternative call number, this number is printed on the resource request slip used for picking up the item from the shelf.

General

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

XSLT Access for Printouts/Notices

Description

The purpose of this enhancement is to provide access to XSLT for customization of email/SMS notices at the institution level.

Technical Instructions

The following roles can access this capability:

- Letter Administrator
- Administrator

To customize email letters/SMS notices:

1. Complete the following prerequisites:
   a. Add the letter administrator's email to the allowed email list
      i. From the Alma main menu > General > General Configuration, click **Configuration Menu**.
      ii. From the External Systems section, click **Allowed Emails**.
      iii. Enter the information for a new mapping row and click **Add Row**.
      iv. Click **Save**.
   b. Confirm that all the appropriate emails/notifications are enabled.
      i. From the Alma main menu > General > General Configuration, click **Configuration Menu**.
      ii. From the General Configuration section, click **Letter Activity**.
      iii. View/confirm that the appropriate pieces are enabled.
   c. Set up a private folder to be used for working on the XSL and XML files before customizing them in the system.
2. Customize any email letter/notification.
   a. From the Alma main menu > General > General, click **Configuration Menu**.

b From the General section of the Configuration page, click **Customize Letters**.

c Click **Customize** for the letter/notification that you want to change.

d Edit the Content and click the **Customize** button.

3 Validate the email and test that it generates as you expect using the following steps:

a From the Alma main menu > General > General, click **Configuration Menu**.

b From the General section of the Configuration page, click **XML to Letter Admin**.

c Select the XML Letter Receiver from the drop-down list, select the letters/notices to be sent, and click **Save**.

Note: Use this option with some degree of caution. It is possible to send several thousand emails to the letter admin and impact system processing/performance.

---

d Run any workflow in Alma that sends the selected email.

The receiver gets the email with the XML in the body of the email.

e From the Alma main menu > General > General, click **Configuration Menu**.

f From the General section of the Configuration page, click **Notification Template**.

i. Specify the XML to upload

ii. Choose to receive the result as an email or by pop-up window (XSL+HTML).

Analytics

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

Report List Lookup

Description

The purpose of this enhancement is to provide a drop-down of available reports from which to select.

Technical Instructions

The View and Design Analytics role can access the list lookup capability.

To access the list lookup 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 an existing object or click **Add New Analytics Object**.

   The Analytics Configuration page displays.
4. Select the Analytic folder you prefer and open the drop-down list of names to select a report from the list.

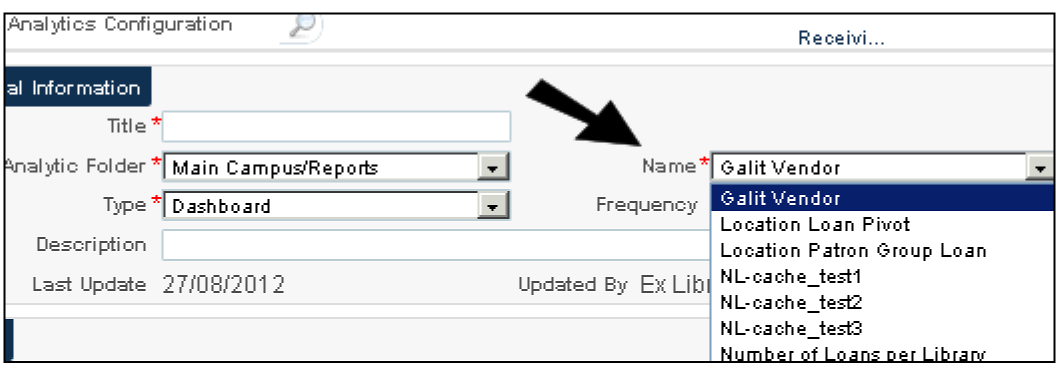

Figure 38 - Drop-down List of Reports

Security

The following highlights recent enhancements for Security:

- With this release unauthorized access to a browser URL address field is blocked. The purpose of this change is to enhance security related to configuration tables. Specifically, users (without appropriate authorization) are blocked from accessing the configuration displays when attempting to directly access them using the URL address field in a browser instead of a valid link in Alma. There is no change to the workflow with this enhancement.

Known Issues

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

- Related to the new Fund Types feature for September: the new Fund Type field is not defined in BI for reporting
- The **View license** link is not displayed in **More info** for an **Electronic Portfolio** search.