Alma October 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.

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- Feature/enhancement descriptions for the respective Alma components and functional areas
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Alma October 2012 Release Highlights

Alma Show Me How

- The Alma October release includes a great new tool, Alma Show Me How. This new menu option has been added to Alma to guide staff through common tasks or new functionality. The step-by-step instructions will either walk you through a scenario in a series of steps allowing you to activate the task or function in a guided manner, or it will simply point out a new option and refer you to the relevant documentation for more detail. Show Me How scenarios are linked to a staff user's authorizations. Each Alma release will have a new set of Show Me Hows.

Primo

- Additional Display Logic for Primo Get It and View It Tabs

  This new enhancement provides additional display logic rules for the Primo Get It and View It tabs. For example, it is possible to hide resource-sharing requests when the resource belongs to the library. Rules are sensitive to a user group.

- Location Prioritization in the Get It Tab

  This new functionality allows for prioritizing the items listed in the Get It tab in order to place more relevant items at the top of the holdings list. Holdings are sorted by availability and location (such as non-remote locations before off-site storage).

- Excluding Process Types From Publishing

  The purpose of this enhancement is to provide the configuration options to exclude process types from publishing.

Acquisitions

- PO Lines

  Alma now offers the option to delete a PO line that has not yet been sent to the vendor. A separate delete authorization (role) is required. In addition, PO lines can now be edited at any stage of the PO line workflow. Depending on the workflow stage, some fields may be blocked for editing.

- New Options for Invoices

  New functionality allows for the option of creating invoices without sending them to the ERP financial system. Another new development allows for sending invoices that have been approved, closed, or sent to the ERP back for review to allow for editing of the invoice (such as when the ERP has rejected the invoice).

Resource Management

- Merge Profile Management

  Metadata Management has been further enriched with the new option for defining and configuring different merge profiles. A merge profile can contain a number of conditional actions (such as if xxx exists then delete xxx) or unconditional actions. Wildcards may be used (such as RemoveField "9*").

- View Harvesting Operations Report

  This new option allows for viewing a report of harvesting operations. These reports provide information about what was done after harvesting, such as portfolios added or deleted.

- Assigned Import Issues Added to Task List

  A new option has been added to the Task List that enables an assigned staff user to quickly and easily navigate to the Import Issues screen.

Fulfillment

- New Configuration Option – Cancelled Recall Due Date

  This new configuration option provides the flexibility to configure a loan policy for handling cancelled recalls. The due date can be changed back to its original due date if the recall is cancelled or fulfilled by another item.

- More SIP2 Functionality

  In the September release, we reported on new functionality related to SIP2. This release implements enhancements to SIP2 user messages related to fines and fees information, the number of fine items for the patron, as well as the patron's open accumulated fees.

Resource Sharing

- Resource Sharing Incoming/Outgoing Requests have been added to the relevant staff user's Tasks widget.

User Management

- APIs for User Management

  The purpose of this enhancement is to provide APIs that allow a library to query Alma regarding patron information. External third-party applications may interact with Alma by reading user information based on this Web service. The retrieved information includes all segments of the user record information.

- Enhancements to Password Management

  This development includes a number of features related to passwords for users managed in Alma (internal users). It allows staff users to change their own passwords. Staff can be forced to change their passwords on login (this is a parameter setting in the user record), and an expiration date can be set for passwords.

Access to October 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 (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: Relink Order to Different Bibliographic Record	✓			
Acquisitions: Ability to Delete PO Lines	✓			
Acquisitions: Edit PO Lines	✓			

Feature	No Activation/ Setup Required (Note: Automatically Visible to All Users with the Appropriate User Role/ Permission)	Activation/ Setup Required	Visible to Administrator Only	Contact Ex Libris to Activate This Feature
Acquisitions: New Options for Invoice Creation Without Sending It to the ERP Financial System	✔			
Acquisitions: Send Invoices Back to Review	✔			
Resource Management: View Harvesting Operations Reports	✔			
Resource Management: Merge Profile Management	✔			
Resource Management: Match Routine Added	✔			
Resource Management: Assigned Import Issues Added to Task List	✔			
Resource Management: Bibliographic Export Task Expanded	✔			
Resource Management: Display Temporary Location	✔			
Resource Management: Extended Search Options	✔			

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: Additional SIP2 Fine/Fee Information Provided	✓			
Fulfillment: Cancelled Recall Due Date Policy	✓			
User Management: Configuring Role Privileges	✓			
User Management: User Web Service for User Management	✓			
User Management: Password Management Enhanced	✓			
General: Multiple External Interface Support for Proxy Definitions	✓			
General: Multiple Institution OCLC Publishing Symbols	✓			
Analytics: Fund Area Field Exposed	✓			
Primo: Additional Display Logic for Primo Get It and View It Tabs	✓			

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
Primo: Configuration Enabled for Excluding Process Types From Publishing	✓			
Primo: Location Prioritization in the Get It Tab	✓			
Resource Sharing: Resource Sharing Incoming/Outgoing Requests Added to Tasks Link	✓			

Data Services

The Alma October 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 24-September-2012 through 14-October-2012:

- American Marketing Association
- Brill Online Journal Archive Part 1
- Brill Online Journal Archive Part 2
- Brillonline eBooks International Law and human rights
- Brillonline eBooks Global Oriental
- Brillonline eBooks Language and Linguistics
- Brillonline eBooks Humanities and Social Sciences
- Cambridge University Press Journals Complete
- CCC Get It Now Expert Reviews
- Emerald Health and Social Care
- Gale Times Literary Supplement Centenary Archive
- OCUL eBook Collection Pharmapress
- OCUL University of Chicago Press
- ProQuest Entertainment Magazine Archive
- Springer Journals French National Licence
- University Press Scholarship Online Anthropology
- Tidsskrift DK Open Acess

Alma Show Me How

The following sections describe Alma Show Me How for the October 2012 release of Alma.

Alma Show Me How – October

Description

The purpose of this enhancement is to provide a menu-driven interface to prompt you through the steps of new or common tasks, or to point out new options such as a check box and direct you to the documentation that describes it in further detail.

Technical Instructions

Each Show Me How scenario may address different areas of Alma. The authorizations required to access the Show Me How scenarios are specific to the functional areas of the scenario.

To access Show Me How:

1. From the Alma home page, click the **Show Me How** button.

   The How Can We Assist You? pop-up window displays.

2. Select one of the processes in order to start the prompted step-by-step instructions.

   For the October release, the following Show Me How scenarios are available:

Process	Authorization
Change Your Alma Password	---
Delete a PO Line	Acquisitions
New Field in External Search	Cataloging
Merge Profile Management	Cataloging

Acquisitions

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

Relink Order to Different Bibliographic Record

Description

The purpose of this enhancement is to provide the capability to relink an order to a different bibliographic record. Typical scenarios for needing to relink a PO line are:

- An EOD record comes in for one volume of a multivolume work when there already exists a bibliographic record for the multivolume set
- When an item arrives, you can see that it matches an existing bibliographic record rather than a new one that was imported at the time of the order

This feature is the first part of the development. In a future release, it will also be possible to relink the bibliographic records of continuous orders.

The Relink option is available for one-time PO lines with the following statuses: In Review, Deferred, Ready.

Note that the Relink action cannot be performed in the following cases:

- If the PO lines are related to the CKB (option unavailable)
- If the PO lines contain items belonging to two different bibliographic records
- If there are requests associated with the resource

Technical Instructions

The following roles can access this facility:

- Purchasing Operator
- Purchasing Manager

To access the Relink option from the PO Line Summary:

1. Edit a PO line.

   The PO Line Summary page displays.

2. From the page actions field, open the drop-down list.

   The Relink option displays in this list.

Figure 1 - Relink Option (PO Line Summary)

To access the Relink option from one of the task lists:

Locate a PO line that meets the criteria for relinking and go to the PO line's task list.

The Relink action link displays for that PO line.

Figure 2 - Relink Option (Purchase Order Lines in Review)

To relink a PO line:

1 Click **Relink**. The Advanced Search page opens with the title field (and possibly other fields) populated.

Figure 3 – Advanced Search

2 Accept the default search parameters or modify them as required. Add additional conditions if necessary (see the Alma documentation for more information on the Advanced Search).

3 Click **Go**. You receive a list of matching records – both in your institution and in the Community Zone.

Figure 4 – Search Results

4 Select the bibliographic record to which you want to relink the PO line and click **Select**.

You receive a confirmation message with information about the new link you want to create, including the number of items that will be moved to the alternative bibliographic record.

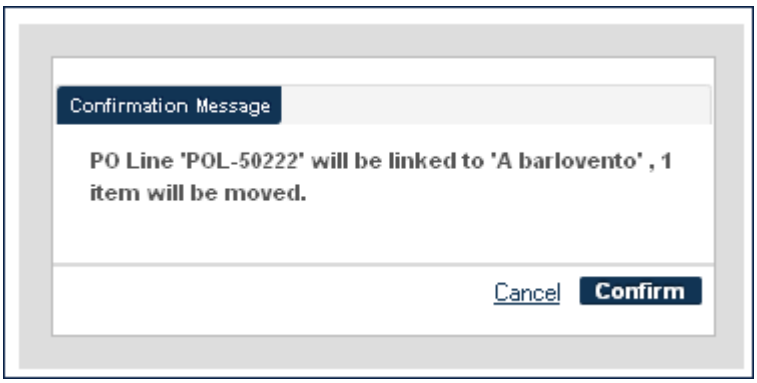


Figure 5 – Confirmation Message

5 Click **Confirm**.

Ability to Delete PO Lines

Description

The purpose of this enhancement is to provide the ability to delete PO lines.

Note: If a PO line is linked to an invoice line, or any of the PO line resources is received or activated (even if it is in Review), the PO line is not deleted and an error message is displayed.

Technical Instructions

The Purchase Operator Extended role can access this capability.

The delete PO line action:

- Deletes the PO line
- Deletes any transaction related to the PO line
- Deletes any inventory resource associated with the PO line

This option is available for PO lines with the following statuses:

- In review
- In auto/manual packaging
- Deferred
- Cancel

To access an example of the delete PO lines option:

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

The Delete action displays in the row of actions for the PO line.

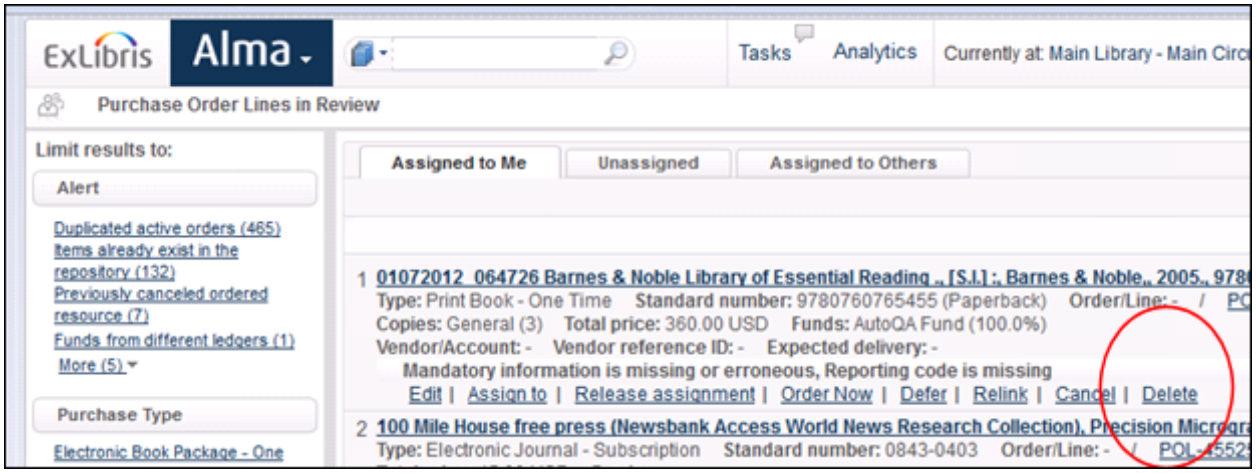


Figure 6 - Delete PO Lines

2 Click **Delete**.

3 When the pop-up warning message displays, click **Confirm** to delete the PO line.

Edit PO Lines

Description

The purpose of this enhancement is to provide the ability to edit PO lines in all stages of a workflow, including the following stages:

- Ready
- Closed
- Cancelled

Technical Instructions

The following roles can access this capability:

- Purchasing Operator
- Purchasing Manager

With this capability, you can access the editing function at any stage of the PO line workflow. However, certain fields may be blocked from editing when an editing change interferes with the workflow/package. For example:

- Material supplier is editable as long as the PO line is not yet packaged
- Access provider is editable as long as the PO line is not yet packaged
- Acquisition method is only editable when in Review

The following fields that have an impact on packaging rules are not editable after the PO line is packaged into a purchase order:

- Currency
- Location
- Material supplier
- Access provider

New Options for Invoice Creation Without Sending It to the ERP Financial System

Description

The purpose of this enhancement is to provide new options for the creation of invoices without sending them to the ERP financial system. Until now, unless the **Prepaid** option was selected,

invoices were sent to the ERP system. With this new development, you can create an invoice that is not prepaid and choose not to have it exported to the ERP system.

This capability supports scenarios in which the library, for whatever reason, does not want to send invoices to the ERP system, but does want to load the invoices into Alma for documentation and tracking purposes.

Technical Instructions

The following roles can access this capability:

- Invoice Operator
- Invoice Manager

To create a non-prepaid invoice and stipulate that it should not be sent to the ERP system:

1. From the Alma main menu > Acquisitions > Receiving and Invoicing, click **Create Invoice**.
2. Under Invoice Creation, select one of the available options and click **Next**.
3. On the Invoice Details page, in the **Payment** section, select **Internal Copy**.

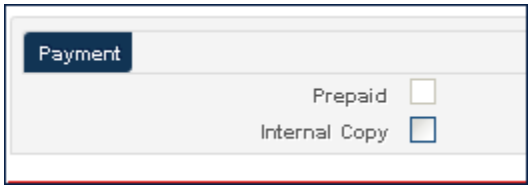


Figure 7 – Do not send to ERP system

Note: This option is also available when editing an invoice that is in the Review or Approval stages.

Send Invoices Back to Review

Description

The purpose of this enhancement is to provide the capability to send invoices back to Review. With this feature, you can send invoices that have been closed or sent to the ERP back to Review to allow editing of the invoice in cases where the ERP has rejected the invoice.

Technical Instructions

The following roles can access this feature:

- Invoice Operator
- Invoice Manager

To access this feature:

1. From the Alma main menu > Acquisitions > Receiving and Invoicing, click **Waiting for Payment**.
2. For a specific invoice, click **Actions > Set to Review**.

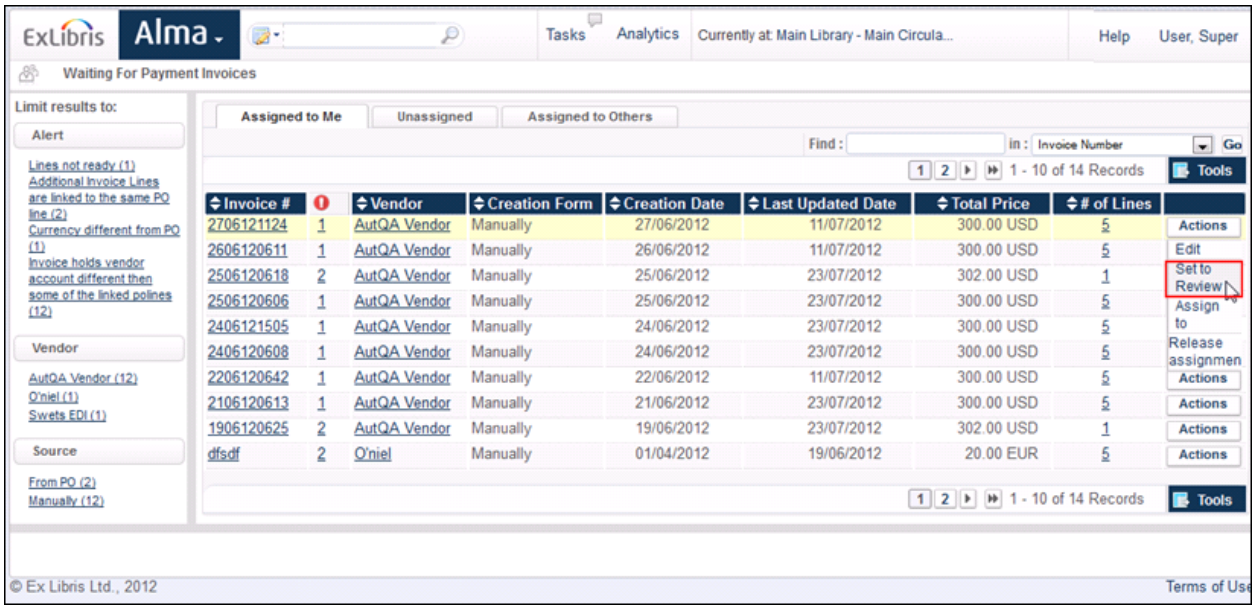


Figure 8 - Set to Review Action

Note: This process assumes that there is coordination with the ERP outside of Alma.

Resource Management

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

View Harvesting Operations Reports

Description

The purpose of this enhancement is to enable you to view the harvesting operations reports related to electronic records. The harvesting operations reports provide information about what was done after harvesting, such as portfolios added or deleted, and so forth. The reports are generated according to type.

Technical Instructions

The Repository Manager role can access this capability.

To access harvesting reports:

1 From the Alma main menu > Resource Management > Manage Inventory, click **Community Zone Updates Task List**.

The Review tab on the Community Zone Updates Task List page displays.

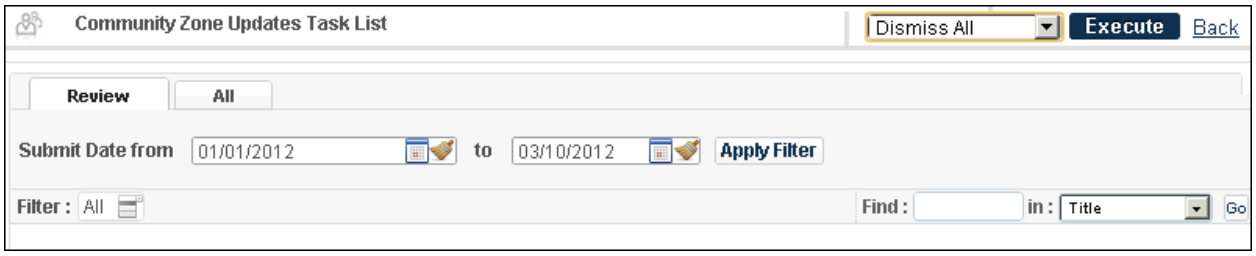


Figure 9 - Review Tab on the Community Zone Updates Task List Page

2 Use the **Submit Date from/to** and **Filter** options to display the list as you prefer.

You can filter on:

- All
- Package deleted
- Package linking parameters update
- Package base URL updated
- Portfolio added to auto-active package

- Portfolio added to non auto-active package
- Portfolio coverage update
- Portfolio deleted from auto-active package
- Portfolio deleted from non auto-active package
- Package service deleted

3 To manage the list, select **Dismiss All** or **Dismiss Selected** from the drop-down list.

   You may also use the **Actions** button for each row to manage the list.

4 When you are finished, click **Execute**.

Note: The All tab lists all the reports for viewing. There are no actions provided on the All tab.

Merge Profile Management

Description

The purpose of this enhancement is to provide the ability to define and configure different merge profiles using the Metadata Editor interface. These merge profiles can be used for importing, copy cataloging, and so forth.

Technical Instructions

The following roles can access this capability:

- Catalog Administrator
- Repository Administrator
- General System Administrator

General

When merging two records (via importing, copy cataloging, and so forth), one is the preferred record and the other is the non-preferred or incoming record. The decision regarding which record is preferred and which record is non-preferred is accomplished with the merge routine.

The preferred record is the basis for the merged record. The merged record is initialized as a copy of the preferred record and the merge rules remove, add, and/or replace fields with values from the non-preferred/incoming record.

The merge rule files contain one rule that specifies one or more actions that apply to the merged record. Each action can be performed unconditionally or may be subject to a condition on the

non-preferred record. The order of the actions specified is important, as it impacts the intended end result.

Syntax

The merge rules follow a specific syntax. Refer to the examples below.

Example 1:
rule "merge 01 routine"
when
merge
then
RemoveField "59*"
ReplaceControl "001"
Replace "9*"
ReplaceControl "LDR"
AddField "09*"
AddField "5*"
AddField "79*"
end

Example 2:
rule "merge 02 routine"
when
merge
then
ReplaceControl "001"

Replace "9*" excluding "998"
Replace "998" if exists "998"
end

Record Elements

Actions apply to merged record elements specific to one or more of the following MARC record components:

- Fields
- Indicators
- Subfields
- Field/subfield combinations

Conditions apply to the non-preferred record elements. In order to test a condition or apply an action to a record element, the element must match the syntax in the table below.

Expression	Meaning
”<tag>”	Match field <tag>
”<tag>{<ind1>,<ind2>}”	Match field <tag> where 1st indicator is <ind1> and 2nd indicator is <ind2>
”<tag>.<code>”	Match subfield <code> in field <tag>
”<tag>{<ind1>,<ind2>}.<code>”	Match subfield <code> in field <tag> if 1st indicator is <ind1> and 2nd indicator is <ind2>
”<tag>.<code>.<value>”	Match subfield <code> in field <tag> if value of subfield <code> is <value>
”<tag>{<position>,<length>}”	Match control field <tag>, starting at position <position> and length of <length>. First position in the control field is 0
”<tag>{<position>,<length>}.<value>”	Match control field <tag> if value equals <value>

Wildcard Characters

An asterisk (*) is used to match any string. For example, "<tag>.<*>.<value>" applies to all the subfields in tag <tag> that have the value <value>. "<tag_prefix>*" applies to all the tags starting with <tag_prefix>.

Empty fields, subfields, and indicators are indicated by a hyphen (-). For example, "<tag> {-,<ind2>}" returns all the fields where the MARC tag is <tag>, the first indicator is not defined, and the second indicator is <ind2>.

Excluded Fields

When the excluding clause is used, the indicated action takes place except for the fields identified in the excluded list.

Structure of Conditions

Conditions are divided into two groups:

- exists <element>

  At least, one match is found in the incoming record.

  There is a further differentiation between data fields and control fields.

  - exists <element> applies to data fields
  - existsControl <element> applies to control fields
- not exists <element>

  No match is found in the preferred (merged) record.

  There is a further differentiation between data fields and control fields.

  - not exists <element> applies to data fields
  - not existsControl <element> applies to control fields

Conditions are always defined at the specific action level (if clause). Refer to the following tables.

General Structure of Actions:		
Action	**Condition**	**Comments**
Action 1		Action 1 is executed unconditionally
Action 1	If (condition 1)	Action 1 is executed only if condition 1 is true

List of Actions:		
Replacing fields with values from the nonpreferred field	Replace “<tag>” Replace “<tag_prefix*>” [excluding “<tag1, tag2, tag3>]” Example: Replace “020” Replace “5*”excluding “581,582” **Note:** This rule replaces old rules Replace {field} Replace {field} if exists Replace {field} excluding {list}	This deletes the tag in the merged record and adds the same tag from the nonpreferred record. If the tag does not exist in the nonpreferred record, no addition is done, and the original tag does not exist in the merged record. If the excluding <list> clause is used, the fields in the <list> are not replaced.
	ReplaceControl “<tag>” ReplaceControl “<tag_prefix*>” [excluding “<tag1, tag2, tag3>]” Example: ReplaceControl “001” ReplaceControl “LDR” ReplaceControl “00*” excluding “001”	This is the same as above but for control fields.
Adding fields and subfields	AddField “<tag>” AddField ”<tag>{<ind1>,<ind2>}” AddField “<tag_prefix*>” [excluding “<tag1, tag2, tag3>]” Example: AddField ”999 “ AddField ”9* “ excluding “901, 980, 981” AddField ”790 “ if exists “790.i.*SRI01*” AddField ”790 “ if not exists “790” **Note:** This rule replaces old rules Add {field} Add {field} excluding {list of fields} Add {field} when {field} contains “string”	This adds fields to the merged record. If the excluding <list> clause is used, the fields in the <list> are not added. The if exists clause checks the condition in the nonpreferred record. The if not exists clause checks the condition in the merged record.

	AddControlField “<tag>” AddControlField “<tag_prefix*>” [excluding “<tag1, tag2, tag3>]” Example: AddControlField “008”	This is the same as above but for control fields.
Removing fields	RemoveField “<tag>” RemoveField “<tag_prefix*>” [excluding “<tag1, tag2, tag3>]” Example: RemoveField ”999 “ RemoveField”9*“ excluding “901, 980, 981”	This removes the field <tag> (all occurrences).
	RemoveControlField “<tag>” RemoveControlField “<tag_prefix*>” [excluding “<tag1, tag2, tag3>]” Example: RemoveControlField ”001 “	This is the same as above but for control fields.

To access this feature:

1 From the Alma main menu > Resource Management > Cataloging, click **Open Metadata Editor**.

The MD Editor page displays.

Figure 10 - MD Editor Page

2 Click the **Rules** tab (to display the merge rules).

Figure 11 - Merge Rules

3 Click **File > New > Merge rules** (to create a merge rule).

4 Enter your merge rule properties.

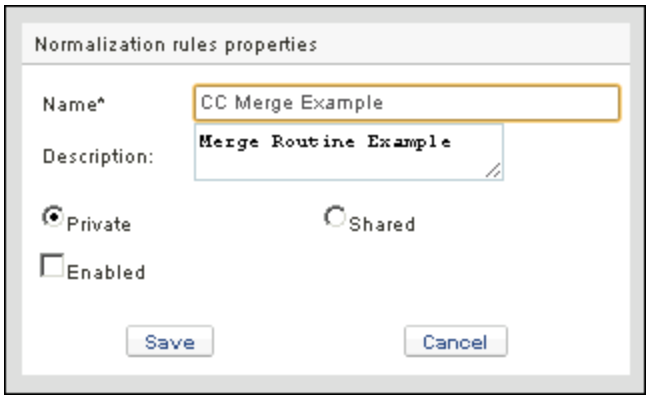


Figure 12 - Merge Rules Properties

5 Click **Save**.

The rules editor opens.

6 Enter your rule details.

a. Click **Edit > Add Rule > Merge Snippet custom rule**.

This provides an initial template for entering your merge rule.

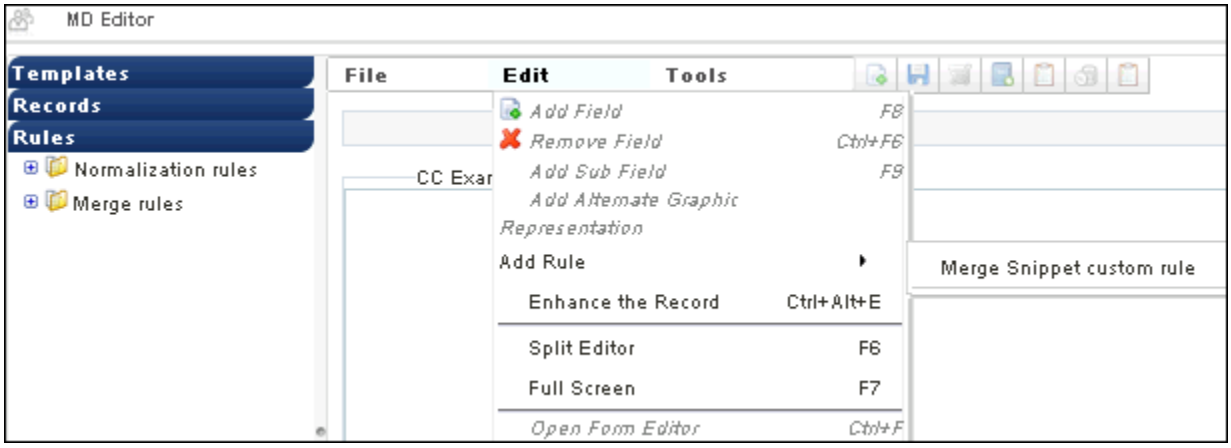


Figure 13 - Merge Snippet Custom Rule

b. Enter the specific information for your merge rule.

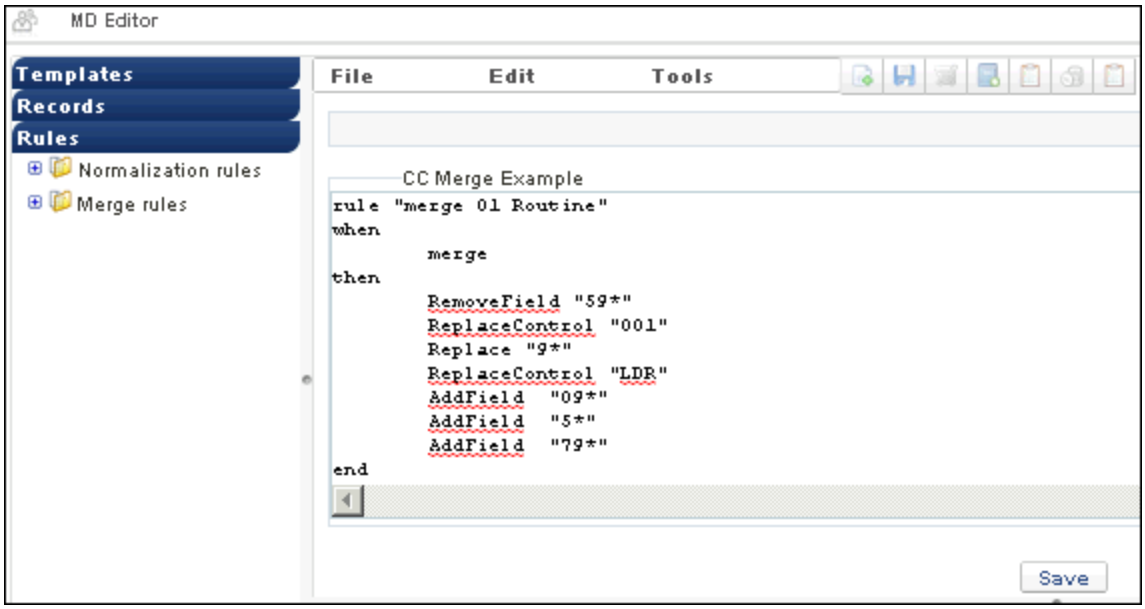


Figure 14 - Merge Rule Details

7 Click **Save**.

Saved merge rules display in the Rules tab.

Figure 15 - Saved Merge Rules

Saved merge rules can be edited, deleted, and duplicated (to create new merge rules).

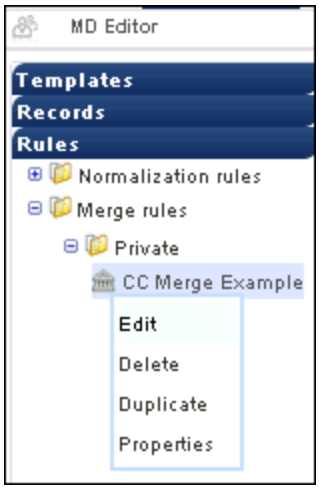


Figure 16 - Saved Merge Rule Options

Match Routine Added

Description

The purpose of this enhancement is to provide the 001 to MMS_ID Match Method as a match profile option. This match routine is intended for records that have already been imported by Alma and, for some reason, needed to be re-imported (to enrich or fix the data from other systems).

Technical Instructions

The following roles can access this feature:

- Catalog Administrator
- Cataloger
- Purchasing Manager

To access this feature:

1. From the Alma main menu > Resource Management > Resource Configuration, click **Configuration Menu**.
2. From the Record Import section, click **Import Profiles**.
3. Edit an existing import profile.
4. Select the **Match Profile** tab.

5 From the Match Profile section, select the **001 to MMS_ID Match Method** option from the drop-down list.

6 Click **Save**.

Assigned Import Issues Added to Task List

Description

The purpose of this enhancement is to provide a quick and easy method for accessing import match and validation issues that are assigned to the current user.

Technical Instructions

The following roles can access this new capability:

- Cataloger
- Catalog Administrator
- Purchasing Manager

Note: The METADATA_IMPORTING privilege is required in order to access the EOD import match and validation issues.

This capability can be accessed by clicking the **Tasks** link on the Alma home page.

Figure 17 - Tasks Link

Bibliographic Export Task Expanded

Description

The purpose of this enhancement is to expand the bibliographic export task capability to accept any title set as input.

Technical Instructions

The Catalog Administrator role can access this capability.

To access this capability:

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

2 Select **Export Bibliographic Records** and click **Next**.

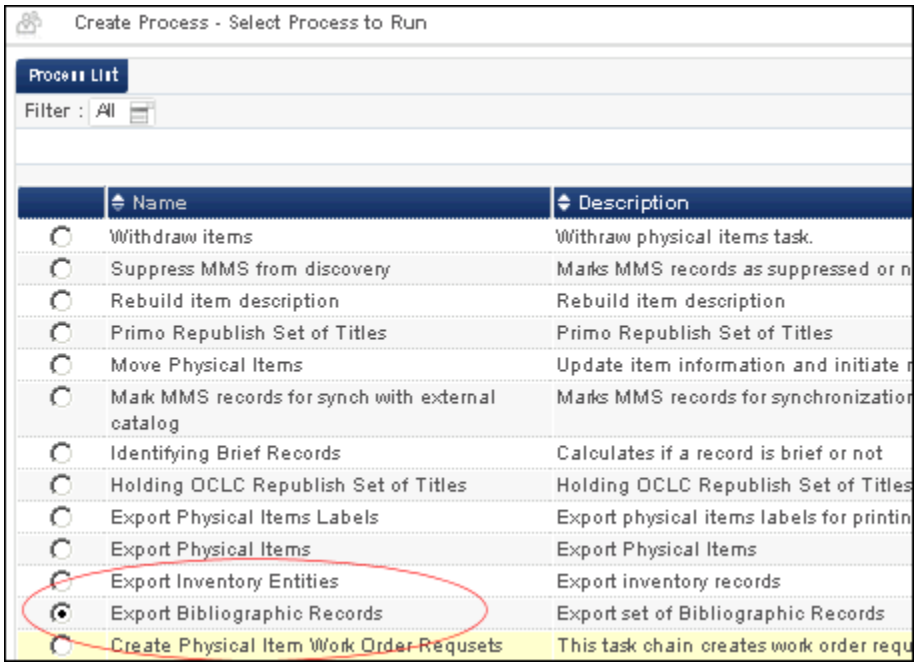


Figure 18 - Export Bibliographic Records Process

3 Select a set and click **Next**.

4 Complete the Task Parameters section and click **Next**.

5 Specify the process name and schedule and click **Next**.

6 Review the process details and click **Save**.

Display Temporary Location

Description

The purpose of this enhancement is to provide enriched search results that display the temporary location of physical items.

Technical Instructions

Any role that can access Repository Search is able to access this new feature.

Extended Search Options

Description

The purpose of this enhancement is to provide the ability to search by library portfolios and packages using **Advanced Search**.

Technical Instructions

Any role that can access **Repository Search** is able to access this new feature.

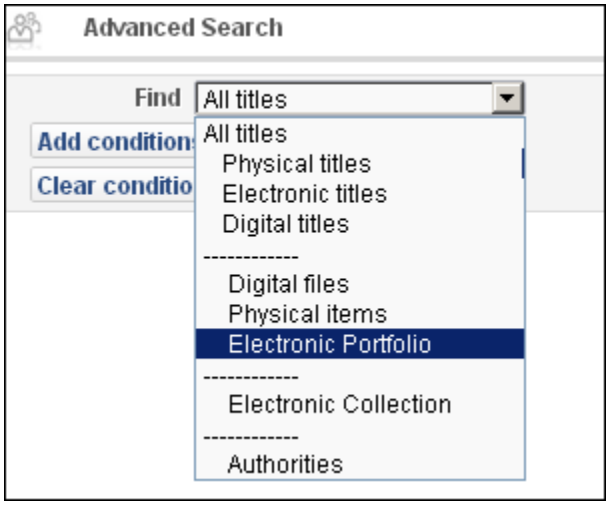


Figure 19 - Advanced Search

Fulfillment

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

Additional SIP2 Fine/Fee Information Provided

Description

The purpose of this enhancement is to enrich Alma's support of the SIP2 Patron Information Response (64) message to provide additional fine/fee information and the related barcodes for overdue (active) loans and any past overdue fines/fees.

With this enhancement, the system:

- Calculates the overdue fine/fee for each loan that is still active (and not lost)
- Generates a response message that includes:
  - The total amount of the accrued fines that are calculated for overdue loans

    This is reported in the fee amount (BV) field.
  - Loans that have already incurred actual fines/fees and their related barcodes

    This information is reported in the repeatable fine items (AV) field.
  - The number of active loans that have accrued fines/fees

    This is reported in the fine items count component of the SIP2 message.

Cancelled Recall Due Date Policy

Description

The purpose of this enhancement is to provide the flexibility to configure a loan policy for handling cancelled recalls.

This feature enables the administrator to set the system behavior with regard to a recalled loan when a recall is cancelled or is fulfilled by another item. The options are to:

- Keep the same recalled due date unchanged
- Restore the original due date
- Attempt to renew the recalled loan utilizing standard renew procedures

  If the renew action is not possible, the recalled due date remains unchanged.

Cancelling a recall also triggers an appropriate message to the borrower and is recorded on the loan's history.

This allows the library to define how to handle loans that are no longer recalled. Until now, these loans had to be returned earlier than expected even though no one else is interested in the item.

Technical Instructions

The Fulfillment Administrator roles can access this capability.

To access this enhancement:

1. From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.
2. From the Physical Fulfillment section, click **Terms of Use and Policies**.
3. For Terms of Use entries with Loan as the identified Type, select **Actions > Edit**.

   The Terms of Use Details page displays with the option for Cancelled Recall Due Date.

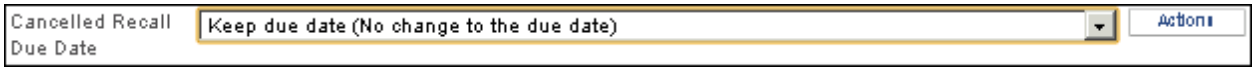


Figure 20 - Cancelled Recall Due Date Option

4. Display the drop-down list to change this option from Keep due date to:
   - Attempt automatic renewal
   - Restore to original due date
5. Select one of the followings Actions:
   - **Add policy**
   - **Edit policy via update**
   - **Add policy via add**
6. Click **Save** (on the Policy Details page).

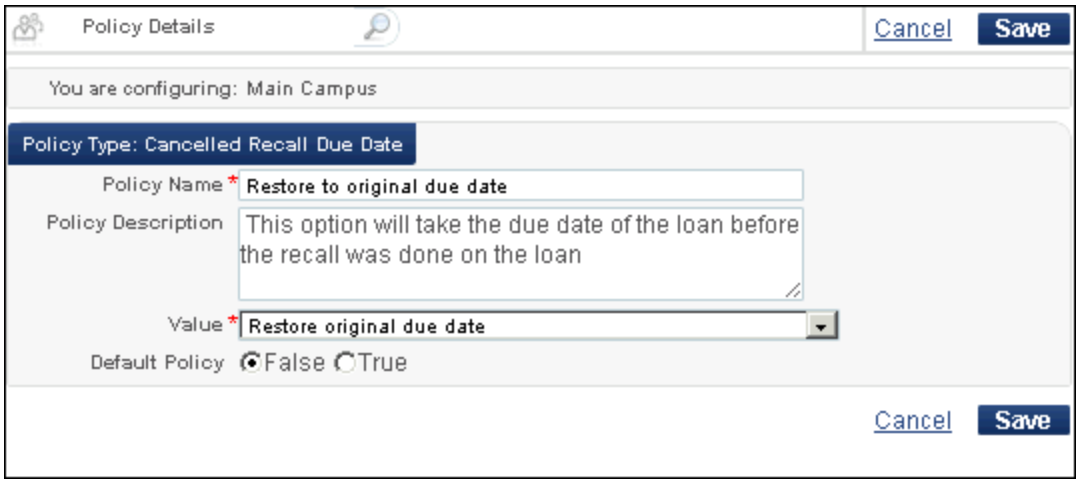


Figure 21 - Policy Details Page

Other Fulfillment Enhancements

- The patron information response message now contains AU information for active loans.
- Call number information has been added to the Excel document that is created when exporting a list of user loans.

User Management

The following sections describe the functions provided for User Management in the October 2012 release of Alma.

Configuring Role Privileges

Description

The purpose of this enhancement is to provide some flexibility in setting what certain roles may do. Contact Ex Libris Support if you need to fine-tune the allowed privileges of some roles.

User Web Service for User Management

Description

The purpose of this enhancement is to provide a user Web service that allows a library to query Alma to determine whether patrons are active and locate their patron information. Specifically, the user Web service gets user details.

External third-party applications may interact with Alma by reading user information based on this Web service. The retrieved information includes all segments of the user record information.

Technical Instructions

The API User Information Read role is needed to access this capability.

Get User Details

This API uses the following input to search for a user match:

- Institution code
- User identifier (unique to the user)
- Identifier type (optional)
- User name (to validate if the service should be provided)
- Password (to validate if the service should be provided)

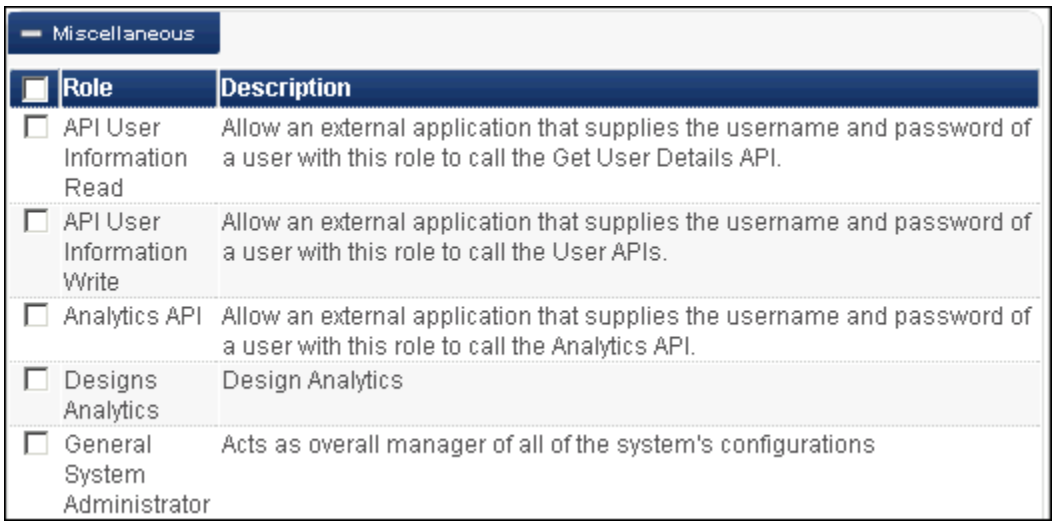
The system responds with the following output:

- User core information
- User contact information
- User segments

Note: With this API, the password, force password, and PIN number are not retrieved. These display in the XSD since they can be sent in the create/update API. The password and force password are only relevant for internal users.

To select the API User Information Read role:

1. From the Alma main menu > General > User Management, click **Find and Manage Users**.
2. Add a new user or edit an existing user profile.
3. From the User Details page, click **Add Role**.
4. From the Miscellaneous section, select **API User Information Read**.



Miscellaneous

Role	Description
API User Information Read	Allow an external application that supplies the username and password of a user with this role to call the Get User Details API.
API User Information Write	Allow an external application that supplies the username and password of a user with this role to call the User APIs.
Analytics API	Allow an external application that supplies the username and password of a user with this role to call the Analytics API.
Designs Analytics	Design Analytics
General System Administrator	Acts as overall manager of all of the system's configurations

Figure 22 - API User Information Read Role

Password Management Enhanced

Description

The purpose of this enhancement is to provide the following password management capabilities:

- Allow users that are managed in the system to change their own passwords
- Allow staff to force a change of password upon the next login

Upon the user's next login, this option causes the change password pop-up to be activated with the message "You need to change your password."

- Provide support for an expiration date for passwords

  Controlling password change is done by setting an institution-level parameter that defines how long after the last password change a new password change is required.

Technical Instructions

The User Manager role can force a user to change a password upon the next login. The User Administrator can control the number of days after which a new password change is required.

To access the change password option:

1 From the banner on the Alma home page, click the user name to open the user options.

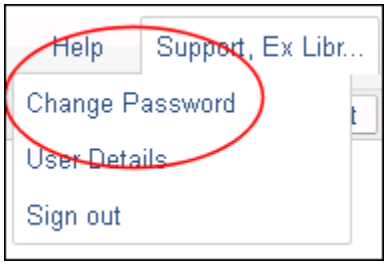


Figure 23 - Change Password Option

2 Click **Change Password**.

  The Change Password pop-up window displays.

Figure 24 - Change Password Pop-up Window

3 Enter the password information and click **Save**.

To access the force change of password at login option:

1 From the Alma main menu > General > User Management, click **Find and Manage Users**.

2 For a user with the type Internal, select **Actions > Edit**.

  The User Details page displays.

3 Select the **Force password change on next login** option.

This causes the change password pop-up to be activated after the user logs in with the message, "You need to change your password."

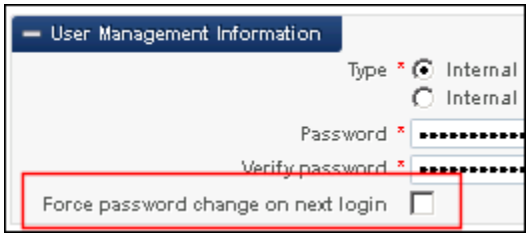


Figure 25 - Force Password Change on Next Login Option

4 Click **Save**.

To set a password expiration:

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

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

3 For the `days_password_change` option, select **Customize**.

4 Click **Save**.

General

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

Multiple External Interface Support for Proxy Definitions

Description

The purpose of this enhancement is to provide support for proxy definitions for multiple external interfaces. This is specific to electronic packages/portfolios.

Technical Instructions

The General System Administrator role can access this capability.

To create a proxy definition:

1. From the Alma main menu > General > General Configuration, click **Configuration Menu**.
2. From the External Systems section, click **External Interfaces**.
3. Click **Add External System**.
4. For Integration type, select **Proxy Definition** (from the drop-down list) and complete the remainder of the external system definition.

Note: Select the **Default** check box for the default proxy definition. If a previously entered proxy definition is no longer the default, you need to edit the definition, remove this selection, and subsequently, indicate the new default proxy definition.

5. Click **Next**.
6. For Use Proxy, select **Selective**.
7. Complete the remaining proxy definition information and click **Save**.

To select a proxy definition:

1. From the Alma main menu > Resource Management > Resource Configuration, click **Configuration Menu**.
2. From the Record Import section, click **Import Profiles**.
3. Click **Add New Profile**.

4 Click **Next**.

5 Enter the import profile details and click **Next**.

6 Specify normalization and validation information as needed and click **Next**.

7 Specify the match information as needed and click **Next**.

8 Specify the set management information as needed and click **Next**.

9 For Inventory Operations, select **Electronic**.

10 For Enable Proxy, select **True**.

11 For the Proxy Selected option, select the proxy definition from the drop-down list and click **Save**.

Note: The default proxy displays twice, once as the default and again in the drop-down list.

Multiple Institution OCLC Publishing Symbols

Description

The purpose of this enhancement is to provide the capability for institutions to use multiple OCLC publishing symbols for synchronizing bibliographic and holdings records with OCLC. This allows for instances where institutions have libraries that have an OCLC institution publishing symbol that is separate/different from the institution's OCLC publishing symbol.

Technical Instructions

The General System Administrator role can access the synchronize holdings with OCLC capability.

To specify additional OCLC institutional symbols:

Contact Ex Libris support to add additional OCLC symbols for your institution.

To synchronize holdings with OCLC:

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

2 From the Record Export section, click **Export Profiles**.

3 For the synchronize option, select **Actions > Run**.

Other General Enhancements

- The external system profile configuration for z39.50 no longer requires the stipulation of a user name and password.

Analytics

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

Fund Area Field Exposed

Description

The purpose of this enhancement is to expose the Fund Type field in the Funds Expenditure Subject Area under the Fund Ledger.

Note: This addresses the known issue identified in the September release notes regarding the Fund Type field in BI reporting.

Technical Instructions

The Design Analytics role can access this capability.

To access this enhancement:

1. From the Alma main menu > General > Analytics, click **Design Analytics**.
2. Click **New > Analysis > Funds Expenditure**.

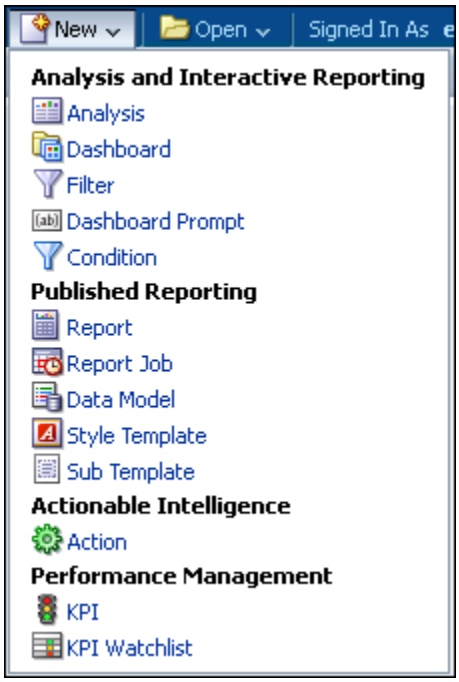


Figure 26 – Design Analytics > New > Analysis Option

Figure 27 - Funds Expenditure Exposed in Analytics

Primo

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

Additional Display Logic for Primo Get It and View It Tabs

Description

The purpose of this enhancement is to accommodate the display logic rules for the changes that have been introduced to the Get It tab in previous releases. With this new capability, you can hide resource-sharing requests when the resource belongs to the library.

Technical Instructions

The Fulfillment Administrator role can access the configuration options for this enhancement.

To access the configuration options for the new display logic rules:

1. From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.
2. From the Discovery Interface Display Logic section, click **Display Logic Rules**.
3. Click **Add Rule**.

   The Add Rule pop-up window displays.

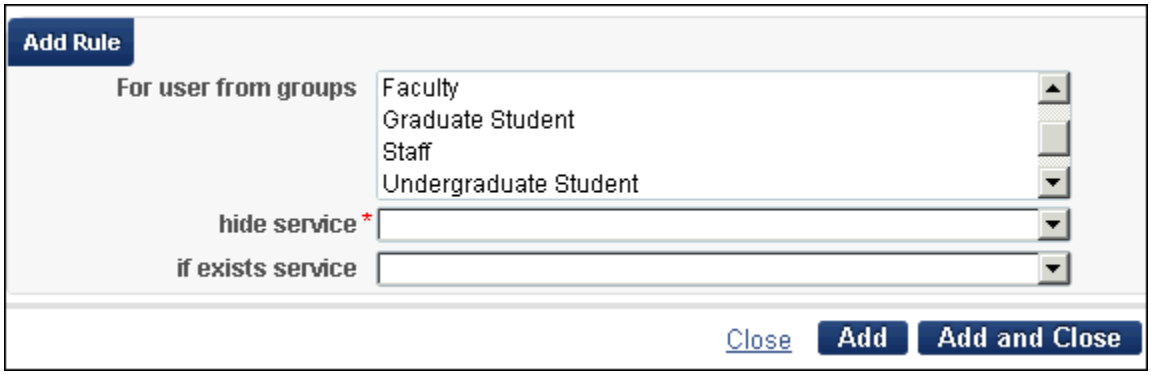


Figure 28 - Add Rule Pop-Up Window

4. Click the group name for this rule from the **For user from groups list**.

5 Select one of the **hide service** options from the drop-down list (required).

The pop-up window dynamically changes to display other options, depending on the hide service option you choose.

6 Complete the selection of the remaining options as needed and click **Add and Close**.

Configuration Enabled for Excluding Process Types From Publishing

Description

The purpose of this enhancement is to provide the configuration options to exclude process types from publishing.

- Items with matching process types are not displayed in the Get It items list
- Holdings for which all items are at unavailable process types are omitted from the publishing and real time availability service
- Items with matching process types are not included in the RSS

Technical Instructions

Contact Ex Libris support to fine-tune the exact list of process types you want to omit from publishing.

Location Prioritization in the Get It Tab

Description

The purpose of this enhancement is to prioritize the items listed in the Get It tab in order to place more relevant items at the top of the holdings list. This is accomplished by sorting the holdings in the following order:

1 Availability

Available holdings are listed first.

2 Location

The holdings are sorted by location in the following order:

a. Non-remote storage holdings

b. Temporary storage locations

For example, the following table lists five items for a record, three in permanent locations and two in temporary locations. Because priority is given to availability over the current location, the Get It tab lists locations with available items first (see the figure below).

Library	Location	Availability	Current Place
O'Neil	Off-site Collection (K-C MICRO)	Item in place	Permanent
O'Neal	Off-site Collection (K-C MICRO)	Item in place	Permanent
Main Library	General Stacks	Item in place	Temporary
Law	U.S. Supt. of Docs. Coll.	Missing	Permanent
Social Work Library	Stacks	Missing	Temporary

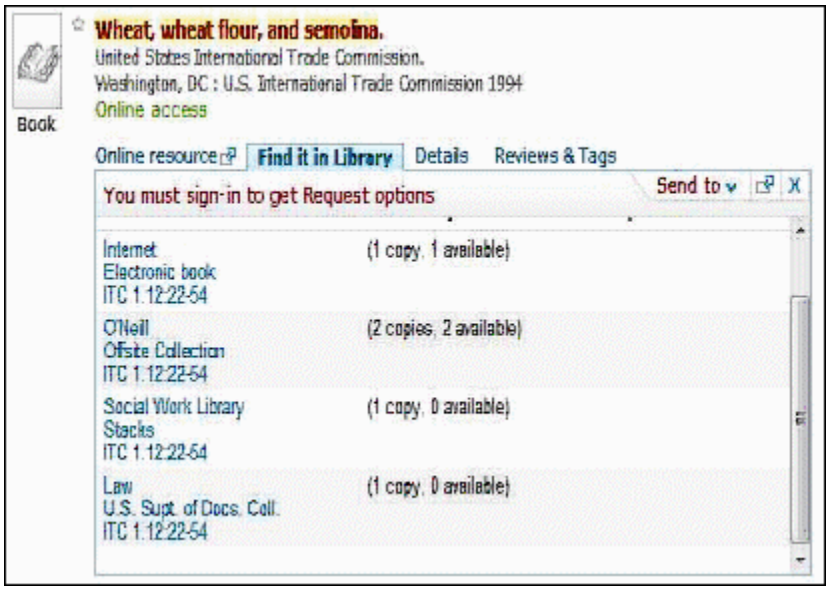


Figure 29 – Prioritization by Location in the Get It Tab

Other Primo Enhancements

- With this release, there are performance improvements for publishing headings. This is an extension of the development described in the August release notes in the section "Enriching Primo Publishing with Headings."

Resource Sharing

The following sections describe the functions provided for resource sharing in the October 2012 release of Alma.

Resource Sharing Incoming/Outgoing Requests Added to Tasks Link

Description

The purpose of this enhancement is to add ILL incoming and outgoing requests to the Tasks link.

Technical Instructions

The following roles can access this facility:

- Fulfillment Services Operator
- Fulfillment Services Manager

When there are outstanding ILL requests that require staff attention, click the **Tasks** link located on the Alma home page to quickly access and process these requests.

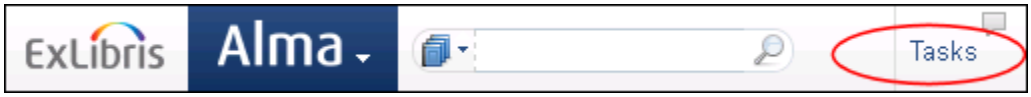


Figure 30 - Tasks Link

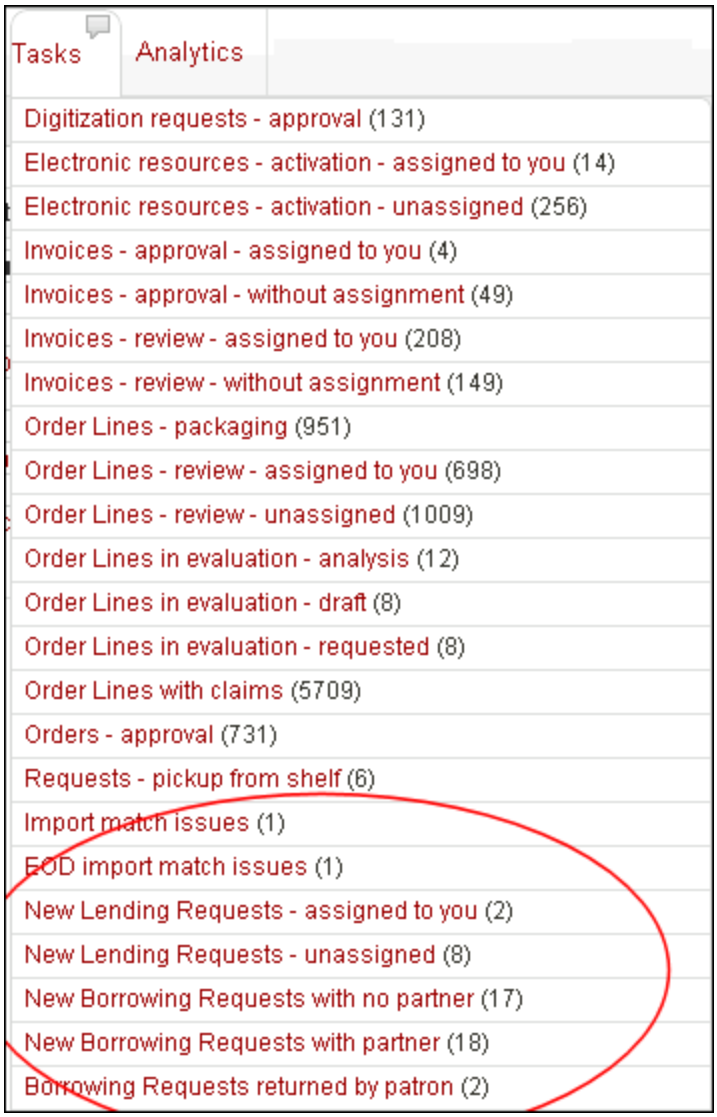


Figure 31 - Tasks List

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.