



Alma December 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 December 2012 Release Highlights](#)
- [Access to December 2012 Features](#)
- Feature/enhancement descriptions for the respective Alma components and functional areas
 - [Data Services](#)
 - [Alma Show Me How](#)
 - [Acquisitions](#)
 - [Resource Management](#)
 - [Fulfillment](#)
 - [General](#)
 - [Primo](#)
 - [Course Reserves](#)
 - [Analytics](#)
- [Known Issues](#)

Alma December 2012 Release Highlights

General

- Alma Developers

This exciting new enhancement provides a new centralized area for downloading Alma developer information. The area contains integration information, downloads for additional tools, and comprehensive information regarding Alma Web services.

Acquisitions

- Claims for Electronic and Physical Continuous Orders

Claims for electronic and physical continuous orders have now been added to the Claims task list. As part of this new functionality, a new Subscription Grace Period field has been added to the Delivery and Claim Information section in the Vendor Account. This field will be used to calculate claims for continuous orders. In addition, a new Subscription Interval field has been added to the PO line for defining the receipt interval of continuous orders.

- Filter PO Lines for Patron Requests

A new filter option in receiving allows for filtering new items by patron requests. This will help staff prioritize receipt and processing of items that have been requested by patrons. In conjunction with this development, it is now also possible to search for items in the receiving department by barcode.

- Enhancements to Notices to Interested Users

New functionality that was implemented in Alma a few months ago allowed for defining interested users as part of the PO line information. These users are notified when an ordered item is received. The December release sees more specific communication options regarding acquisitions item processing (such as transit time from the receiving department to the library.)

Resource Management

- Additional Information Provided with External Search Results

This great new option in Alma offers additional information in the external search results when searching WorldCat — specifically, Record Source (taken from the 040 \$\$a), Held By Me (that is, a Yes/No indication based on the analysis of the 952\$\$b fields), and Total Found (that is, a count of the 952 fields in the retrieved record).

- **Version History for Holdings Records**

The option to view versions of a record that was available for MARC21 bibliographic records is now also possible for holdings records.

- **Global Change of Physical Items**

The process that allowed for globally updating a set of physical items now allows for greatly expanded field change options.

Fulfillment

- **Enhanced Loan Items Handling and Related Primo Functionality**

New developments provide for more flexibility related to processing loaned items. Loans that are claimed as returned or lost are identified separately from other loans. To support this, Alma has added new process types (such as regular loan, claimed return, and so forth) that are available as facets when searching Alma using the presearch filter of Physical Items. In addition, the Primo Get It features have been adapted for these changes. Based on the process type, records can be suppressed for display or relabeled to indicate that they are not regular loans.

- **Enhancements to Work Order Processing**

There is now more flexibility with regard to work order processing. It is now possible to create a work order without the Pickup from Shelf step.

- **Next Action After Cancel from the Active Hold Shelf List**

The purpose of this enhancement is to provide information about the next step after selecting a cancel action from the active hold shelf list.

Course Reserves

- **Searchable Notes in Course Reserves**

Note fields in the Course Reserves can now be searched.

User Management

- **Authentication Information Web Services**

With this enhancement, Alma enables submitting credentials in a secure, SSL-based manner to trigger Alma's existing authentication process, which may be based either on Alma's internal User Management or on an external LDAP authentication server.

Primo

- Enhanced Publishing for Electronic Resources

New functionality provides for publishing configuration options for electronic resources that consider availability status.

- Expanded Link Resolution for Related Records


This enhancement expands the link resolution capability for related records. From the Primo View It display, related record information is provided. Configuration options in Alma allow for defining related record parameters.

- Defining Display Logic Rules for the Discovery Interface

Configuration options in Alma allow for defining logic rules for the display of electronic resources.



Access to December 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)			
Acquisitions: Filter PO Lines for Patron Requests				
Acquisitions: Allow Closing/Cancelling PO Lines				
Acquisitions: VAT/GST Handling				

Feature	No Activation/ Setup Required	Activation/ Setup Required	Visible to Administrator Only	Contact Ex Libris to Activate This Feature
	(Note: Automatically Visible to All Users with the Appropriate User Role/ Permission)			
Acquisitions: Claims for Electronic and Physical Continuous Orders				
Acquisitions: Notice to Interested Users Enhanced				
Acquisitions: Barcode Search for Items in Receiving Department Items				
Resource Management: Version History for Holdings Records				
Resource Management: Global Change of Physical Items				
Resource Management: Additional Information Provided with External Search Results				
Fulfillment: Enhancements to Work Order Processing				
Fulfillment: Next Action After Cancel from the Active Hold Shelf List				
Fulfillment: Enhanced Loan Items Handling and Related Primo Functionality				

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)			
Fulfillment: Reporting Enhancements for Fulfillment Jobs				
Fulfillment: Request Information Web Services				
General: Alma Developers				
General: Default, Sequence-Based User ID Generation				
General: Authentication Information Web Service				
Primo: Enhanced Publishing for Electronic Resources				
Primo: Expanded Link Resolution for Related Records				
Primo: Discovery Interface Display Logic Rules				
Course Reserves: New Print Slip Report Option				

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)			
Course Reserves: Searchable Notes in Course Reserves				
Analytics: Statistics Note Fields Exposed				

Data Services

The Alma December 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 12-November-2012 through 9-December-2012:

- Repere
- EBSCOhost Antiquarian Collection 5
- OCUL eBook Collection SPIE
- OCUL eBook Collection Springer
- Erudit CRKN Cultural Magazines
- Erudit CRKN Additional Journals
- Erudit CRKN Scholarly Journals
- Alexander Street Press Scottish Women Poets
- Oxford Quick Reference
- Oxford Reference Library
- Alexander Street Press Black Drama Edition 2
- Alexander Street Press Women & Social Mvts in US Basic Ed.
- IngentaConnect Rosenberg & Selliers
- IngentaConnect AMS Press
- IngentaConnect British Dermatological Nursing Group
- IngentaConnect James Nicholas Publishers
- IngentaConnect Assoc. Perioperative Practice
- Alexander Street Press NA Immigrant Letters, Diaries, and Oral Histories
- University of Illinois Press
- UTB studi-e-book

Alma Show Me How

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

Alma Show Me How – December

Description

Alma Show Me How provides 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 December release, the following Show Me How scenarios are available:
 - Global Change of Physical Items
 - WorldCat (OCLC) External Search Results
 - Manual Packaging of PO Line
 - Default Fields in the New Bibliographic Record
 - New Course Notes Search Option
 - Manage VAT/GST in Invoice

Acquisitions

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

Filter PO Lines for Patron Requests

Description

The purpose of this enhancement is to enable the Receiving Department Operator to be able to prioritize the handling of orders/items that have patron requests (such as patron physical requests or digitization requests) using a dedicated filter on the Receive New Material and Items in Department pages.

Note: The filter on the Receive New material page is currently available only for one-time orders.

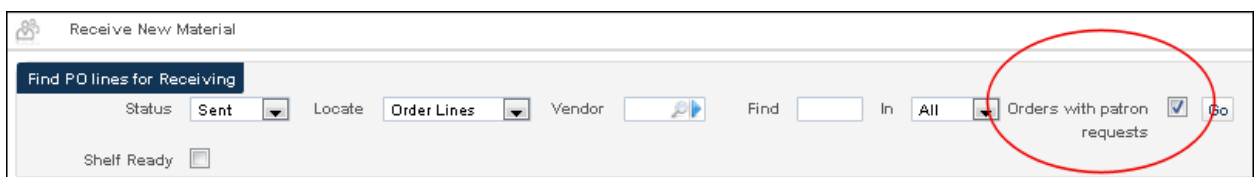
Technical Instructions

The following roles can access this facility:

- Receiving Operator
- Receiving Manager

To filter by patron request on the Receive New Material page:

- 1 From the Alma main menu > Acquisitions > Receiving and Invoicing, click **Receive**.
The Receive New Material page displays.
- 2 Select the **One Time** tab.
- 3 To filter by patron requests, select the **Orders with patron requests** check box.



The screenshot shows the 'Receive New Material' interface. At the top, there's a 'Find PO lines for Receiving' button. Below it, there are several filters: 'Status' set to 'Sent', 'Locate' set to 'Order Lines', 'Vendor' with a search icon, 'Find' with a text input, 'In' set to 'All', and a checkbox for 'Orders with patron requests' which is checked. A red circle highlights the 'Orders with patron requests' checkbox. At the bottom left, there's a 'Shelf Ready' checkbox. At the bottom right, there's a 'Go' button.

Figure 1 - Patron Requests Filter (Receive New Material Page)

To filter by patron request on the Items in Department page:

- 1 From the Alma main menu > Acquisitions > Post-Receiving Processing, click **Receiving Department Items**.
- 2 To filter by patron request, open the **Request** filter drop-down list.

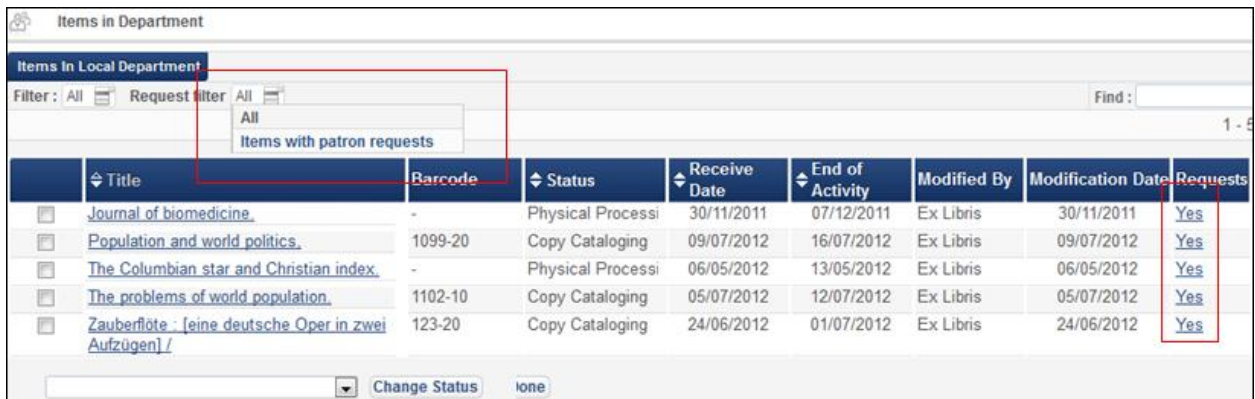


Figure 2 - Patron Requests Filter (Items in Department Page)

- 3 Select **Items with patron requests**.

Allow Closing/Cancelling PO Lines

Description

The purpose of this enhancement is to enable:

- the manual closing of one-time PO lines that have been sent (with at least one received or activated resource) and are waiting for invoice payment, and of continuous PO lines that are waiting for renewal. For example, if a continuous PO line is waiting for renewal but items will no longer be received for it, the PO line can be manually.

Note: When closing PO lines, inventory is not deleted. For PO lines associated with electronic resources, a task is added to the electronic activation task list with the following note: *The order for this resource was closed. Please check whether deactivation is required.*

- the manual cancellation of all active PO lines (except those that are being evaluated and those that are waiting for invoice payment), to provide greater flexibility when user errors occur. When a PO line is cancelled, Alma attempts to delete its inventory. If the inventory cannot be deleted, a confirmation message is displayed informing the user that if the PO line is cancelled, the link between the PO line and its inventory will be lost. Canceling a PO line that has an e-task deletes the e-task.

- the Close and Cancel actions that are also available from the PO line search results.

Note: For both the close and cancellation actions, encumbrances are released.

Technical Instructions

The following roles can access this facility:

- Purchasing Operator
- Purchasing Manager

To access the Close/Cancel options from the PO line task list:

- Access one of the PO line task lists. For example, from the Alma main menu, select Acquisitions > Purchase Order Lines, and click **Renew**.
- Select **Close** or **Cancel**.

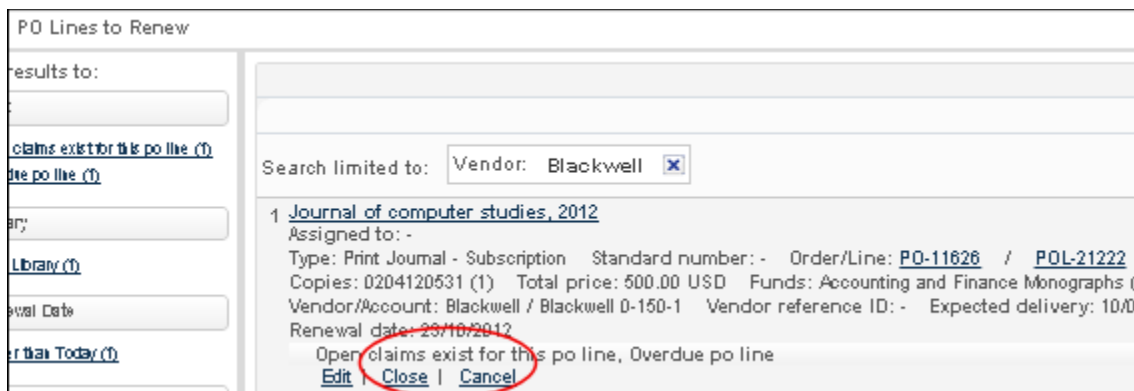


Figure 3 - Close/Cancel Options from the PO Line Task List

To access the Close/Cancel options from the PO Line Summary page:

- Access the PO Line Summary page. For example, from the Alma main menu, select Acquisitions > Purchase Order Lines, and click **Renew**.
- Click **Edit**.
- Open the processing options drop-down list.

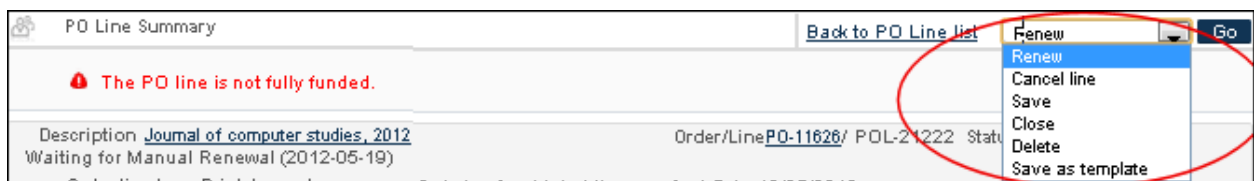


Figure 4 - Close/Cancel Options from the PO Line Summary Page

VAT/GST Handling

Description

The purpose of this enhancement is to provide additional VAT/GST handling capabilities (expanding upon the November release). Specifically, the December enhancement provides the ability to upload VAT/GST data in Excel format.

Technical Instructions

The following roles can access this facility:

- Invoice Operator
- Invoice Manager

To access this new capability:

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

The Invoice From File page displays.

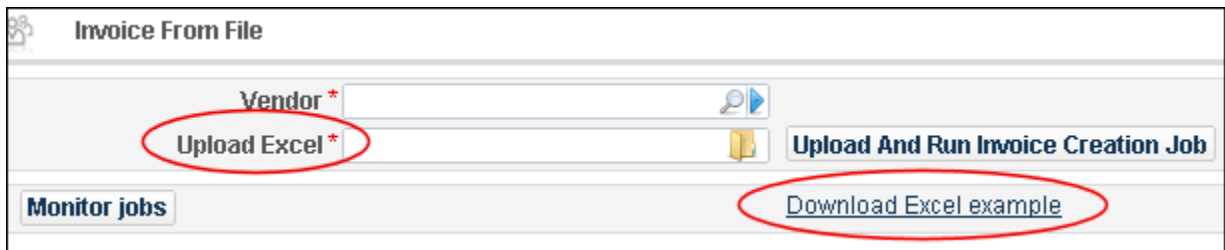


Figure 5 - Upload VAT/GST Excel File

Note: To view an example of the proper Excel file format to use (prior to uploading), click [Download Excel example](#).

- 3 Enter the required Vendor selection.
- 4 Enter the Excel file name and click **Upload and Run Invoice Creation Job**.

Claims for Electronic and Physical Continuous Orders

Description

The purpose of this enhancement is to add both electronic and physical continuous orders to the Claims task list. Until now, only physical one-time orders whose expected receipt date passed

were sent to the Claims task list. With this new development, idle subscriptions can be detected and closed, if necessary.

Note: Claims for standing orders are not currently available.

Technical Instructions

The following roles can access this facility:

- Purchase Operator
- Purchase Manager

To support this functionality, several fields were modified/added on the PO Line Summary and Vendor Account Details pages. These fields are described in the following table:

Parameter	Description
Expected receipt after ordering (days)	The value specified for this parameter is used to calculate the expected receipt date for physical orders. The default value displayed on the PO Line Summary page is taken from the Vendor Account Details page (Acquisitions > Acquisitions Infrastructure > Vendors).
Expected activation after ordering (days)	The value specified for this parameter is used to calculate the expected activation date for electronic orders. The default value displayed on the PO Line Summary page is taken from the Vendor Account Details page (Acquisitions > Acquisitions Infrastructure > Vendors).
Claiming grace period (days)	The value specified for this parameter is the number of days from the expected receipt/activation date to the receipt/activation of the resource. This value is used to calculate the claim date. The default value displayed on the PO Line Summary page is taken from the Claiming grace period field on the Vendor Account Details page (Acquisitions > Acquisitions Infrastructure > Vendors) for one-time PO lines, and from the Subscription grace period field on the Vendor Account Details page for continuous PO lines.

Parameter	Description
Subscription interval	The value specified for this parameter is the receipt interval of the continuous order (30 for monthly, 90 for quarterly, and so forth).

Delivery and Claim Information	
Expected receipt after ordering (days) 4	Claiming grace period (days) 2
Expected invoice interval (days) 2	Expected activation after ordering (days) 1
Renewal evaluation interval (days) 5	Subscription grace period (days) 90

Figure 6 - Delivery and Claim Information Section on the Vendor Account Details Page (example of field changes)

Alma assigns a Claims status to PO lines as follows:

- For one-time physical PO lines – Alma calculates the claim date by adding the **Expected receipt date** to the **Claiming grace period** value. When this date arrives and associated items have not yet been received, Alma assigns a **Claims** status to the PO line and sends it to the Claims task list.

PO Line Summary

Description: 04072012_032724 Barnes & Noble Library of Essential Reading - ISBN: Barnes & Noble - 2005 - 9780760765455 (Paperback) ISBN

Order line type: **Print Book - One Time** Ordering for: Main Library OrderLine: 0807121804/ POL-2515 Status: In Review (2012-12-11)

Summary Description Alerts Invoice Lines Associated PO Lines Communications Notes Attachments Interested Users

Ordered items

Quantity: 1 Library/Location: ULINC/ASIAN Add Location

Quantity: 1 Ordering for: Main Library Location: Asian Collection

Vendor information

Material Supplier: * AutQA/Vendor/AutQA/VendorAcc

Claiming grace period (days): 2 Expected receipt after ordering (days): 4

Figure 7 - One-Time Physical PO Line

- For continuous physical PO lines – Alma sets the **Expected receipt date** to the **Receipt date + the Subscription interval** (defined when creating the PO line – see above table). When the **Expected receipt date + Claiming grace period** arrives and associated items have not yet been received, Alma assigns a **Claims** status to the PO line and sends it to the Claims task list. Note that no notification is sent to the vendor for continuous physical claims

PO Line Summary

Description: Israelis and Palestinians - conflict and resolution / Moshé Machover - Haymarket Books, 2012 - 1608461483 (alk. paper) ISBN

Order line type: **Physical - Subscription** Ordering for: Music Reading Room OrderLine: - / POL-2912 Status: In Review (2012-12-11)

Summary Description Alerts Invoice Lines Associated PO Lines Communications Notes Attachments Interested Users

Ordered items

Quantity: 1 Library/Location: Add Location

Quantity: 3 Ordering for: Music Reading Room Location: gerstel

Vendor information

Material Supplier: * SWETS/12345676

Claiming grace period (days): 90 Expected receipt after ordering (days): 4

Subscription interval: 30

Figure 8 - Continuous Physical PO Lines

- For electronic PO lines – Alma calculates the claim date (**Expected activation date + Claiming grace period**). When this date arrives, and the PO line (either one-time or continuous) is still not activated, Alma assigns it a **Claims** status and sends it to the Claims task list. Note that no notification is sent to the vendor for electronic claims.

PO Line Summary

Back to PO Line list Save and continue

Description Books@Ovid Purchase, Order line type Electronic Book Package - Subscription Ordering for Main Library Order/Line - POL-1609 Status In Review (2012-05-06) Sent Date -

Summary Description Alerts Invoice Lines Associated PO Lines Communications Notes Attachments Interested Users

Ordered resource

eResource Books@Ovid Purchase License Books@Ovid Purchase

Go to Inventory View license

Vendor information

Material Supplier * SWETS/12345676 Swets EDI (SWETS)/ Account (M) (12345676)

Access Provider Claiming grace period (days) 2

Expected Activation after Ordering (days) 1 Or Expected Activation Date

Figure 9 - Electronic PO Lines

Notice to Interested Users Enhanced

Description

The purpose of this enhancement is to enable a more specific communication to interested users regarding acquisitions item processing (cataloging, barcoding, and so forth) that also includes transit time to the library from the receiving department. See below for an example of this communication.

Order Interested In

User Super
1 Bills Dr.
Fourth Floor - Office 201
Orchard Park 10203
NY USA

Dear Sir/Madam User

You were specified as an 'Interested In' for the following order:

Order Number: : POL-5424

Title: : 04072012_032724 Barnes & Noble Library of Essential Reading ., Barnes & No

Message : Item was received. Will be available in 12 hours.

Sincerely

Figure 10 - Notice to Interested Users


Technical Instructions

The General System Administrator role can customize this communication.

To access the Interested In communication:

- 1 From the Alma main menu > General > General Configuration, click **Configuration Menu**.
- 2 From the General Configuration section, click **Letter emails**.
- 3 For the Interested In Letter, click **Actions > Customize**.
- 4 Edit the communication to match your preferences and click **Customize**.

Enabled	Code	Description	Updated By	Last Updated	Language	
✔	message	Message	-	-	English	Customize
✔	letterName	Order Interested In	-	-	English	Customize
✔	subject	Order Interested In	-	-	English	Customize
✔	orderNumber	Order Number:	-	-	English	Customize
✔	sincerely	Sincerely	-	-	English	Customize
✔	title	Title:	-	-	English	Customize
✔	You_were_specify	You were specified as an 'Interested In' for	-	-	English	Customize
✔	department	Your Department	-	-	English	Customize
✔	addressFrom	Your.Department@organization.com	-	-	English	Customize

 Tools

Cancel Customize

Figure 11 - Interested In Letter

Note: The transit time information is configured by clicking the **Transit Time** link from the Library section of the Fulfillment configuration page (Alma main menu > Fulfillment > Fulfillment Configuration > Configuration menu).

Barcode Search for Items in Receiving Department Items

Description

The purpose of this enhancement is to enable a barcode search for items in Receiving Department Items (Acquisitions > Post-Receiving Processing > Receiving Department Items) similar to that on the Receive New Material page. The Receiving Operator role can access this feature.

Resource Management

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

Version History for Holdings Records

Description

The purpose of this enhancement is to provide the ability to view version history for holdings records.

Technical Instructions

The following roles can access this facility:

- Cataloger
- Catalog Administrator

To access this facility:

- 1 Search for a physical record.
- 2 From the results list, click **Edit** for a specific record.
The Metadata Editor opens.
- 3 Click **Tools > View Versions**.

Global Change of Physical Items

Description

The purpose of this enhancement is to provide expanded (optional) field change options when running a Change Item job.

Technical Instructions

The following roles can access this facility:

- Catalog Administrator
- Repository Manager
- General System Administrator

To access this facility:

- 1 From the Alma main menu > Resource Management > Processes, click **Run Process**.
- 2 Select **Change Physical Item** and click **Next**.
- 3 Select a set and click **Next**.
- 4 Make selections to change fields and click **Next**.

Figure 12 - Make Field Changes Selections

- 5 Enter the **Process Name**, schedule, and click **Next**.
- 6 Review/confirm your changes and click **Save**.

Additional Information Provided with External Search Results

Description

The purpose of this enhancement is to provide additional information in the WorldCat external search results. Specifically, this includes:

- Record source - taken from the 040 \$\$a
- Held by me (WorldCat) - a Yes/No indication based on the analysis of the 952 \$\$b fields
- Total number (WorldCat) - a count of the 952 fields in the retrieved record

Technical Instructions

Any role with the ability to process an external search can access this capability.

To view this capability:

- 1 From the Alma main menu > Resource Management > Cataloging, click **Open Metadata Editor**.
- 2 Click **Tools > Search External Resources**.
The external search options display.
- 3 For Search Cataloging Profile, select **WorldCat** from the drop-down list.

Search Cataloging Profile: Worldcat

Find: AND Any Field

AND Title

AND Creator

AND Subjects

AND ISBN

AND ISSN

AND System Number

AND Year of Publication

Contains Phrase

Contains Phrase

Contains Phrase

Contains Phrase

Equals

Cancel Search

Figure 13 - WorldCat Search Cataloging Profile Option

- 4 Enter your search criteria and click **Search**.

5 View the results list for the additional information provided.

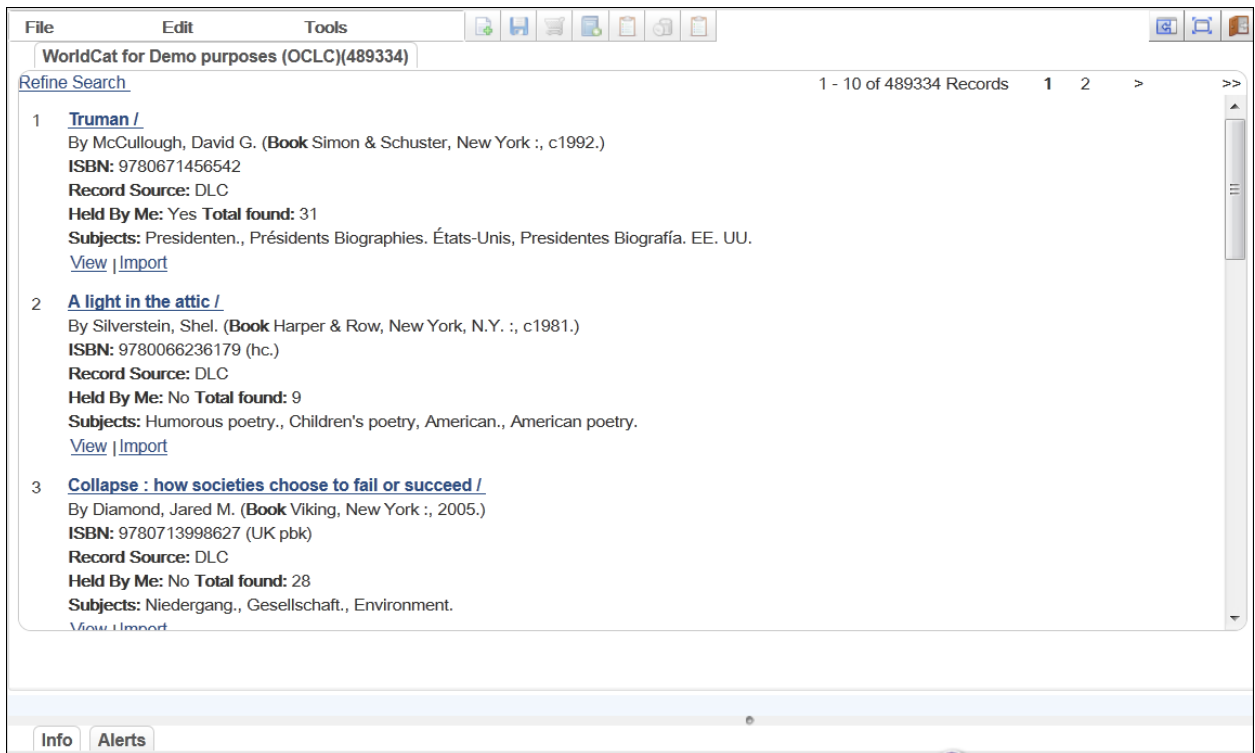


Figure 14 - WorldCat External Search Results

Fulfillment

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

Enhancements to Work Order Processing

Description

The purpose of this enhancement is to provide more flexibility for creating work orders. With this enhancement, it is possible to create a work order without the Pickup from Shelf step. When created this way, the request starts with the next step in the workflow, at the work order department, and in the default status. This enhancement also includes an indication on the Items in Department page for requests that are cancelled. Separately, the Alma persistent search option now allows you to find an item barcode associated with a request to make the process easier for cancelling requests.

Technical Instructions

The following roles can access this facility:

- Fulfillment Services Operator (to create request)
- Work Order Operator (to manage department items)

To view this capability:

- 1 Create a request.
 - a Search for a physical item and click **Request**.



1 [Least cost design of urban drainage systems / by Ji Han, A. Ramachandra Rao, Mark H. Houck.](#)
Book By Han, Ji. (West Lafayette, Ind. : Water Resources Research Center Purdue University [1980].)
Library: Main Library **Permanent Location:** General
Call Number: BP360.A23
Status: Item in place **Item Policy:** Four Week Loan **Barcode:** 3333-10 **Material Type:** EBOOK
[Holdings](#) | [Items](#) | [Request](#) | [More info](#)

Figure 15 - Request

- b Select a work order **Request Type** from the drop-down list and select **Do not pick up from shelf**.

Create Request

Create Request

Title: Least cost design of urban drainage systems /

Institution: Main Campus

Request Type *: Acquisition technical services

Do not pick from shelf: ☒

Note:

Target Destination *:

Figure 16 - Request Type/Do not pick up from shelf

- c Select a target destination from the drop-down list and click **Submit**.
- 2 Process the resource request.
 - a From the Alma main menu > Fulfillment > Resource Requests, click **Monitor Requests**.

Resource Request Monitoring

Find: 0002392470280001021 in: Barcode Go

1 - 1 of 1 Records Tools

1 The bluest eye /

ID: 535238010001021 Queue: 1

Material Type: Book Pickup Location: ONL Acquisition Department Request Date: 02/07/2012

Call Number: PS3563.O8749 B55 1993 Barcode: 0002392470280001021

Managed By Department: ONL Acquisition Department

Process: Work Order Department Process Status: In Approval Process Date: 02/07/2012 Expiration Date: 03/07/2012

Request Type: Acquisition technical services

[View Audit Trail](#) | [Edit Request](#) | [Cancel](#) | [Update Expiry](#) | [Mark as missing](#) | [Print Slip](#)

Figure 17 - Resource Request Monitoring Page

- b Use the Alma persistent search to find the request in the previous step, using the barcode for your search criteria.

3333-10 Tasks Analytics Currently at: Main Library - Main Circula... Help Support, E

Find : 3333-10 in : All

1 - 1 of 1 Records

1 Least cost design of urban drainage systems /
 ID: 115440050000121 Queue: 1
 Pickup Location: ac Request Date: 03/12/2012
 Call Number: BP360.A23 Barcode: 3333-10
 Managed By Department: ac
 Process: Work Order Department Process Date: 03/12/2012 Expiration Date: 10/12/2012
 Request Type: Acquisition technical services
[View Audit Trail](#) | [Edit Request](#) | [Cancel](#) | [Update Expiry](#) | [Mark as missing](#) | [Print Slip](#)

Figure 18 - Persistent Search for Requests Using Barcode

Note: The Process description indicates Work Order Department.

c Click **Cancel** and then click **Confirm**.

3 View the cancelled request.

Items in Local Department

Filter :

Find : in : Title

1 2 3 1 - 10 of 231 Records

<input type="checkbox"/>	Title	Barcode	Status	Receive Date	End of Activity	Modified By	Modification Date	Cancelled	Notes	Action
<input type="checkbox"/>	01022012_041613	-	Physical Processing	08/02/2012	15/02/2012	Ex Libris	18/03/2012		✓	Action
<input type="checkbox"/>	01022012_041613	-	Physical Processing	08/02/2012	15/02/2012	admin1	20/06/2012		✓	Action
<input type="checkbox"/>	01022012_045043	-	Copy Cataloging	29/03/2012	05/04/2012	admin1	20/06/2012			Action
<input type="checkbox"/>	01022012_045043	-	Physical Processing	20/03/2012	27/03/2012	Ex Libris	20/03/2012			Action
<input type="checkbox"/>	01022012_050646	-	Physical Processing	02/02/2012	09/02/2012	Ex Libris	02/02/2012			Action
<input type="checkbox"/>	01022012_050646	-	Physical Processing	02/02/2012	09/02/2012	Ex Libris	02/02/2012			Action
<input type="checkbox"/>	01022012_050646	-	Physical Processing	02/02/2012	09/02/2012	Ex Libris	02/02/2012			Action
<input type="checkbox"/>	01022012_052155	-	Physical Processing	02/02/2012	09/02/2012	Ex Libris	02/02/2012			Action
<input type="checkbox"/>	01022012_052155	-	Physical Processing	02/02/2012	09/02/2012	Ex Libris	02/02/2012			Action
<input type="checkbox"/>	01022012_052155	-	Physical Processing	02/02/2012	09/02/2012	Ex Libris	02/02/2012			Action

1 2 3 1 - 10 of 231 Records

Figure 19 - Items in Department - Cancelled

Next Action After Cancel from the Active Hold Shelf List

Description

The purpose of this enhancement is to provide information about the next step after selecting a cancel action from the active hold shelf list.

Technical Instructions

The Requests Operator role can access this capability.

To access this feature:

- 1 From the Alma main menu > Fulfillment > Resource Requests, click **Active Hold Shelf**.

The Active Hold Shelf Items page displays.

- 2 Select Cancel Request for an item in the list.

The Confirm Request Cancellation page displays.

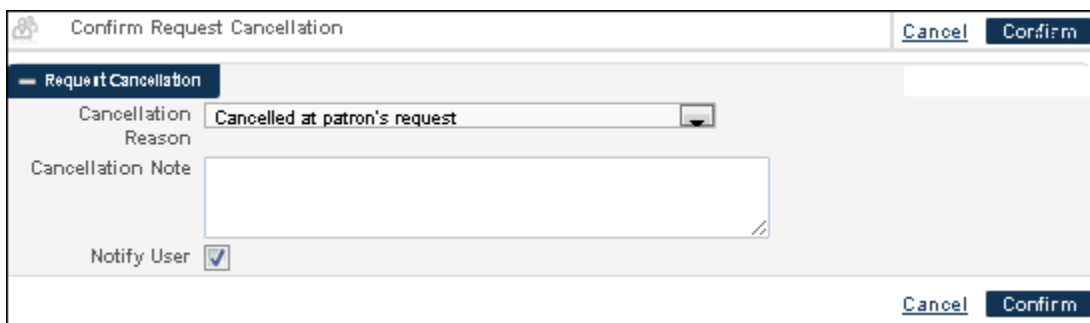


Figure 20 - Confirm Request Cancellation Page

- 3 Select the cancellation reason from the drop-down list and enter a **Cancellation Note** and/or select **Notify User** as needed.

- 4 Click **Confirm**.

The next step displays.

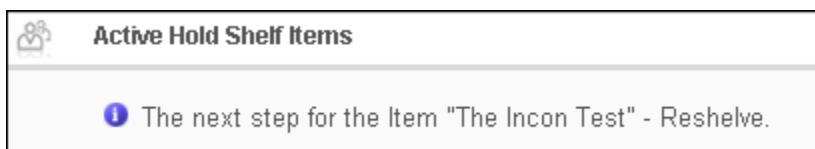


Figure 21 - Cancel Request Next Step Displays

Enhanced Loan Items Handling and Related Primo Functionality

Description

The purpose of this enhancement is to provide more flexibility for processing loaned items. Specifically, loans that are claimed as returned or lost are identified separately from other loans in order for them to be processed/displayed differently.

With this change, Alma has new physical item process types that identify loaned physical items as being in one of three separate and distinct process types:

- Regular loans
- Loans that are lost
- Loans that are claimed returned

Primo Get It features have been adapted for these changes. Records can be removed from the Get It display, or relabeled to indicate that they are not regular loans. The default label Loan is used for all three loan/process types in the system. This enables you to remain with the existing functionality. See below for the steps to customize/configure the labels.

In the Exclude Process Types from Publishing in the Resource Management configuration, the new process types are available for configuration so that they can be excluded from display in the Primo Get It tab.

The current Fulfillment rules apply to the new process types. Since rules can be applied based on process type, rules can be built based on these new process types. This enables you to restrict lost loan items from being requested.

The facets in the physical item search results include all the different process types so that each group can be selected separately. In addition, the advanced search options enable finding items based on process type or several process types combined.

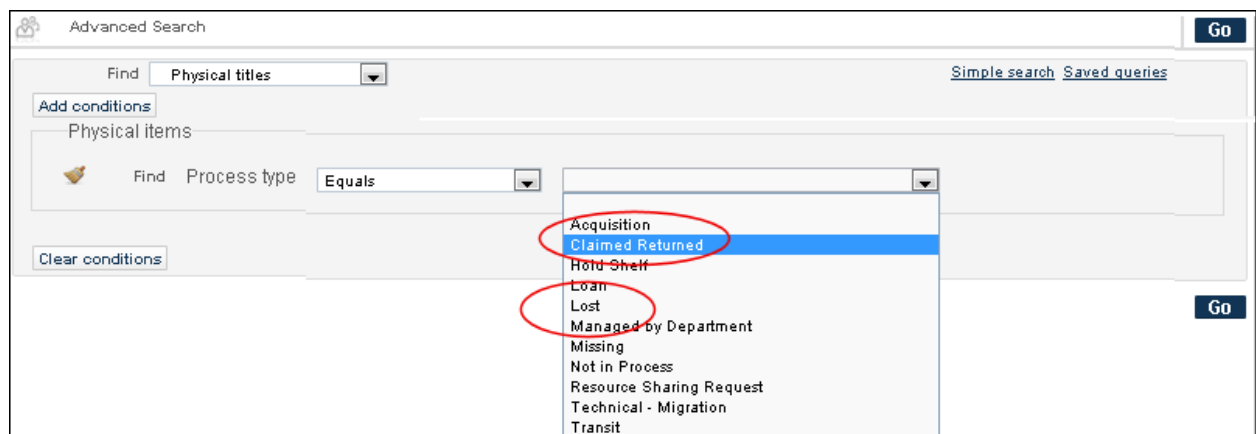


Figure 22 - Advanced Search Options (Process Types)

Technical Instructions

The Fulfillment Administrator role is needed to access the Alma configuration options.

To configure labels for this enhancement:

- 1 From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.
- 2 From the Discovery Interface Display Logic section, click **Labels**.
- 3 For the rows that display **Lost** and **Claimed Returned** in the Description column, select the **Customize** button to modify the labels to match your preference.
- 4 When you have completed your changes, click the page **Customize** button.

To configure exclude process types from publishing:

- 1 From the Alma main menu > Resource Management > Resource Configuration, click **Configuration Menu**.
- 2 From the Record Export section, click **Exclude Process Types from Publishing**.
- 3 Select **Claimed Returned** and/or **Lost** from the drop-down list, and click **Add Row** for each selection.

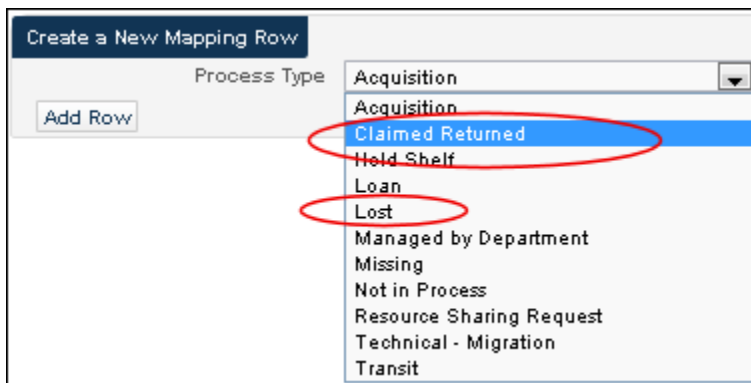


Figure 23 - Exclude from Publishing

- 4 Modify the added row to specify Exclude as **True** or **False**.



Figure 24 - Exclude True/False Setting

- 5 When you are finished, click **Customize**.

To configure the fulfillment rules in order to use the new process types:

- 1 From the Alma main menu > Fulfillment > Fulfillment Configuration Configuration, click **Configuration Menu**.
- 2 In the Physical Fullfiment section, click **Fulfillment Units**.
- 3 Select a fulfillment unit by clicking its code.
- 4 In the Fulfillment Unit Rules tab, select the request rule type from the drop down list and click **Add Rule**.

The option to set a rule for **Lost** or **Claimed Returned** items is now available.

The screenshot shows the 'Fulfillment Unit Rules Editor' interface. At the top, there's a header with 'Fulfillment Unit Rules Editor' and 'Cancel' and 'Save' buttons. Below this, there's a section for 'Fulfillment Unit' with fields for 'Code' (REGULAR) and 'Name' (Regular Location Circulating Material). The main area is divided into 'Input Parameters' and 'Output Parameters' sections. In the 'Input Parameters' section, there's a table with columns 'Name', 'Operator', 'Possible Values', and 'Value'. The 'Process Type' dropdown is open, showing a list of options: 'Acquisition', 'Acquisition', 'Claimed Returned', 'Hold Shelf', 'Loan', 'Lost', 'Managed by Department', 'Missing', 'Not in Process', 'Resource Sharing Request', 'Technical - Migration', and 'Transit'. The 'Claimed Returned' and 'Lost' options are circled in red. The 'Output Parameters' section has a 'Terms of Use' dropdown and an 'Add Terms Of Use' button. At the bottom, there's a footer with '© Ex Libris Ltd., 2012'.

Figure 25 - Fulfillment Unit Rules Editor Page – Claimed Return/Lost Options Displayed

Reporting Enhancements for Fulfillment Jobs

Description

The purpose of this feature change is to provide enhancements to the reporting function for the fulfillment job, Notifications – Send Courtesy Notices and Handle Loan Renewals, to make it easier to identify where there is a failure and to locate additional information related to the failure.

Technical Instructions

Any role that has privileges for monitoring fulfillment processes can access this reporting enhancement.

To view this enhancement:

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

The Monitor Processes page displays.

- 2 Select the **Completed** tab, filter on **Fulfillment**, and select (Apply Filter) a date range as needed.

The list of completed fulfillment processes displays. This includes a column labeled Failed Records.

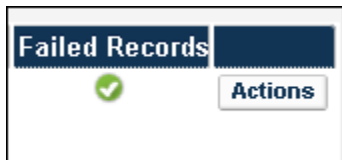


Figure 26 - Failed Records Column

If everything processed successfully, there is a checkmark in a green circle that displays. If there are any failures, an exclamation point in a red circle displays.

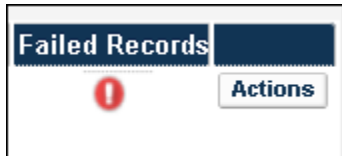


Figure 27 - Failed Records Column Failure

- 3 For additional information, click **Actions > Report** for the Notifications – Send Courtesy Notices and Handle Loan Renewals job row that you want to view.

The Job Report page displays with additional information provided in the Job Events section.

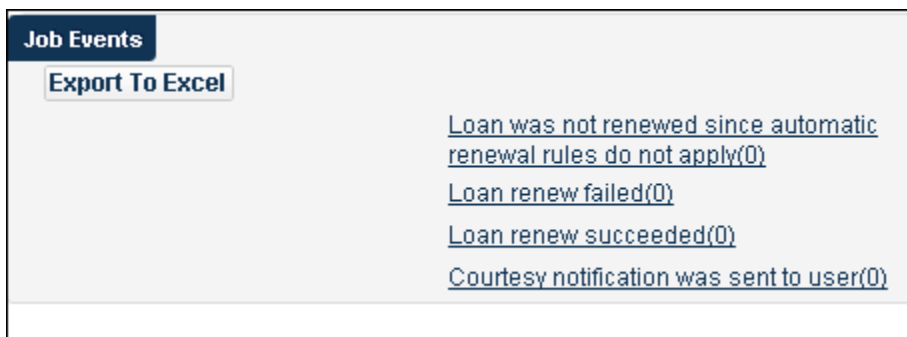


Figure 28 - Additional Job Events Information

Each link represents a subset of the Notifications – Send Courtesy Notices and Handle Loan Renewals job that processed. These links allow you to more narrowly focus on a particular part of the process. In addition, you have the flexibility to click the **Export to Excel** button to view and manipulate this information in Excel format.

- 4 Click one of the links to view a subset of the report.

For each subset, you may also click **Tools > Excel** to download the subset and Excel to view and manipulate the information in Excel format.

- 5 Click **Cancel** to exit when you are finished.

Request Information Web Services

Description

The purpose of this enhancement is to provide user request management Web services. With this enhancement, Alma enables retrieving user-placed requests, viewing their status, and cancelling them. The Web service may be used by external systems for looking up and cancelling patron-placed requests.

For related Web service information, refer to the Alma Developers page (Alma main menu > General > General Configuration > Alma Developers and select Web Services > Fulfillment).

Other Fulfillment Enhancements

- When returning an item that is not on loan to a self-check machine, the system now responds with a success message.
- When using a self-check machine to borrow an item that is currently on loan and whose renewal due date is the same as the current due date, the system now responds with a success message.
- **All Minutes** was added as an option in the **Unit of measurement** drop-down list on the Overdue Fine Policy Details page (Fulfillment Configuration > Advanced Policy Configuration).
- The Fulfillment Item Change Due Date email notification was renamed **Loan Status Notice**. The notification is now triggered in all cases of recalls, regardless of whether there was a change in due date. The following three fields are now configurable: **Recall with due date change**, **Recall without due date change**, and **Due date change**.

General

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

Alma Developers

Description

The purpose of this enhancement is to provide a working area where an integrator (who is working on creating a new Alma integration) can find all of the tools and relevant documentation that is required for developing the integration that is needed. In this area, the integrator finds valuable links such as:

- Sample XML files
- XSD files
- WSDL files
- Sample Java code
- Lists of codes that are relevant for the required integrations

The area includes this type of information for:

- Alma Web services
- Alma integrations such as:
 - Student Information System
 - Institutional ERP system
 - Institutional bursar system
- Alma downloadable tools such as the Offline Circulation Utility

This area is introduced in the December release and will continue to grow in content over the next several months.

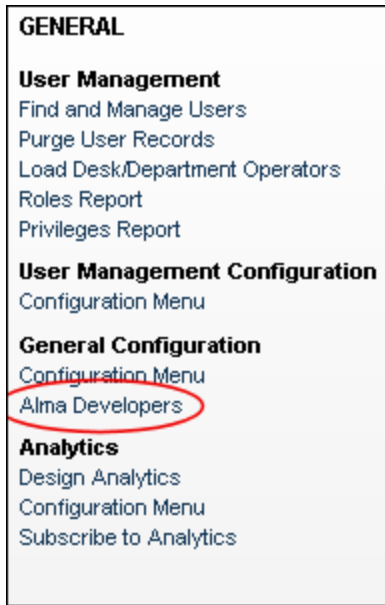


Figure 29 - Alma Developers Link

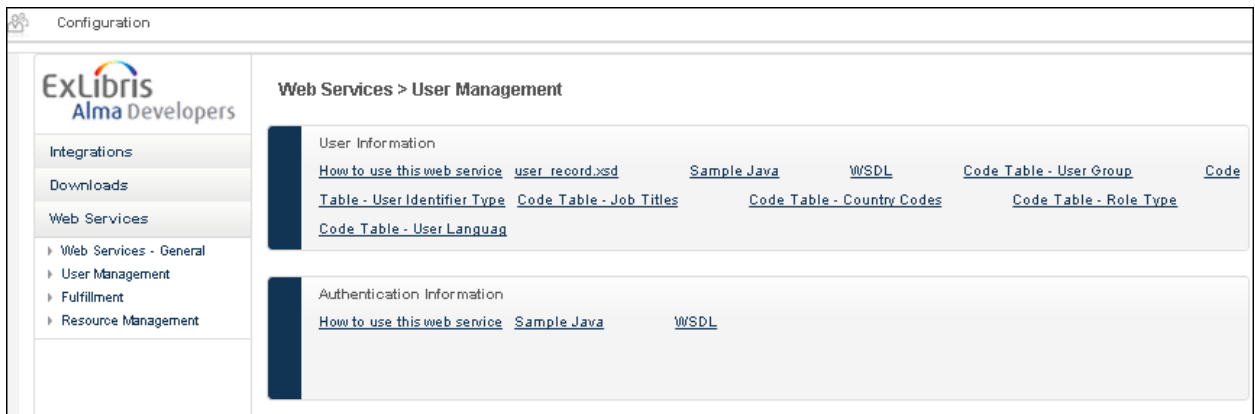


Figure 30 - Alma Developers Page

Default, Sequence-Based User ID Generation

Description

The purpose of this enhancement is to provide an automated option for creating sequence-based user IDs. This is enabled through a default configuration setting.

Technical Instructions

The User Administrator role can configure this option.

The User Manager can use this configured option when creating a new internal user.

To configure the default sequence settings:

- 1 From the Alma main menu > General > User Management Configuration, click **Configuration Menu**.
- 2 From the General section, click **Automatic User Identification Routine**.
- 3 Enter the Automatic User Identification Parameters.
 - a Select an identifier type from the drop-down list.

The options that display in this list have been previously configured by the User Administrator.
 - b If your user ID requires a prefix, enter the prefix in the parameter provided.
 - c Click **Set next sequence value**.
 - d Enter the starting sequence value in the pop-window provided and click **Save**.

A pop-up window titled "Set next number value" with a dark blue header bar. Below the header is a text input field labeled "New Value". At the bottom right of the window are two buttons: "Cancel" (underlined) and "Save" (dark blue).

Figure 31 - User ID Starting Sequence Value Pop-Up Window

- e Verify your settings and click **Save**.

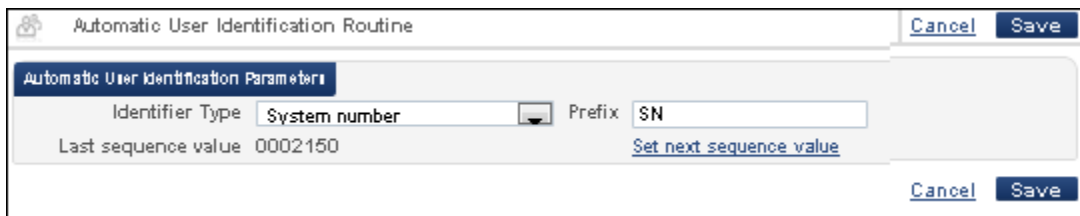
A window titled "Automatic User Identification Routine" with a dark blue header bar. Below the header is a section titled "Automatic User Identification Parameters". This section contains a dropdown menu for "Identifier Type" (set to "System number"), a text input field for "Prefix" (set to "SN"), and a text input field for "Last sequence value" (set to "0002150"). There is a link "Set next sequence value" below the "Last sequence value" field. At the bottom right are two buttons: "Cancel" (underlined) and "Save" (dark blue).

Figure 32 - Automatic User ID Parameter Settings

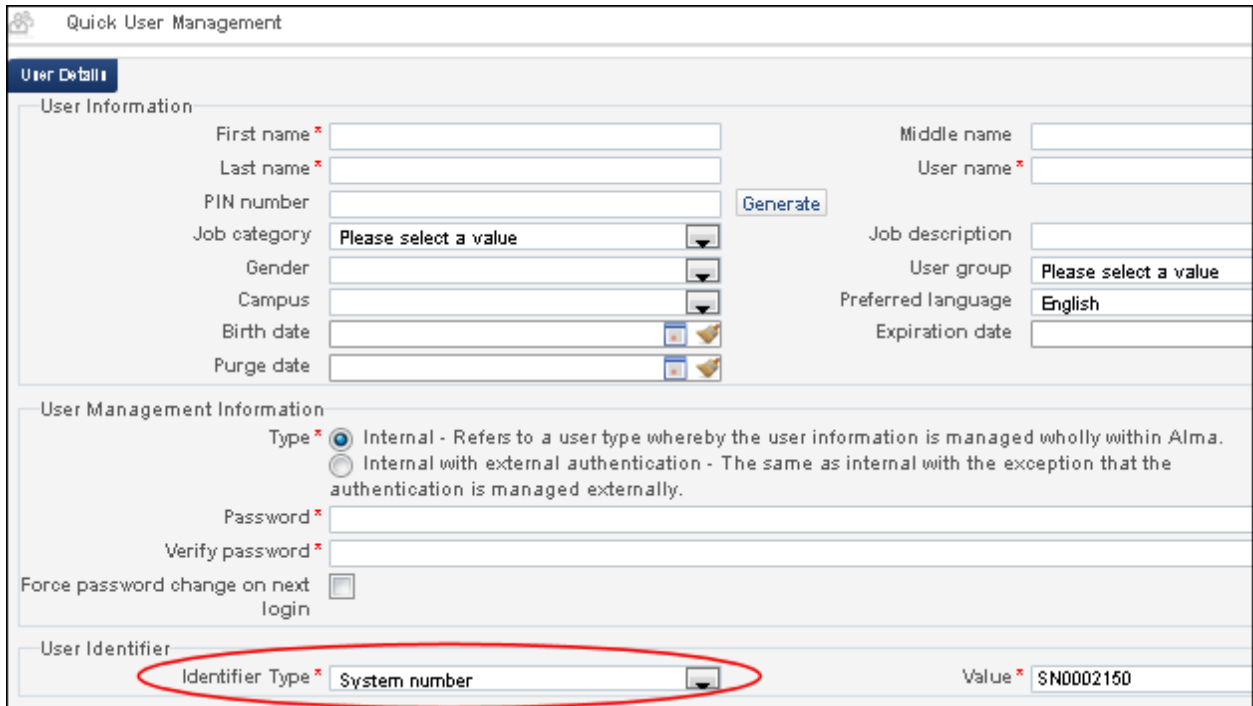
To access the automatic user ID generation facility:

- 1 From the Alma main menu > General > User Management, click **Find and Manage Users**.
- 2 Click **Add User** and select the type.

The Quick User Management page displays.
- 3 Select an identifier type from the drop-down list.

Note: The **Identifier Type** field is displayed only if user IDs have been defined as mandatory fields in the Public User Mandatory Fields table (User Management Configuration > Configuration Menu > Mandatory Fields > Public).

After you select an identifier type, Alma automatically populates the Value parameter with the appropriate preset sequencing value.



The screenshot displays the 'Quick User Management' interface. The 'User Identifier' section at the bottom is highlighted with a red oval. It contains a dropdown menu for 'Identifier Type' with 'System number' selected, and a corresponding 'Value' field containing 'SN0002150'. Above this, the 'User Management Information' section shows 'Type' set to 'Internal' and a 'Password' field. The 'User Information' section includes fields for 'First name', 'Last name', 'PIN number', 'Job category', 'Gender', 'Campus', 'Birth date', 'Purge date', 'Middle name', 'User name', 'Job description', 'User group', 'Preferred language', and 'Expiration date'.

Figure 33 - Select Identifier Type

Authentication Information Web Service

Description

The purpose of this enhancement is to provide user authentication Web services. With this enhancement, Alma enables submitting credentials in a secure, SSL-based manner to trigger Alma's existing authentication process, which may be based either on Alma's internal User Management or on an external LDAP authentication server, if one has been set up to serve as Alma's identity provider system.

For related Web service information, refer to the Alma Developers page (Alma main menu > General > General Configuration > Alma Developers and select Web Services > User Management).

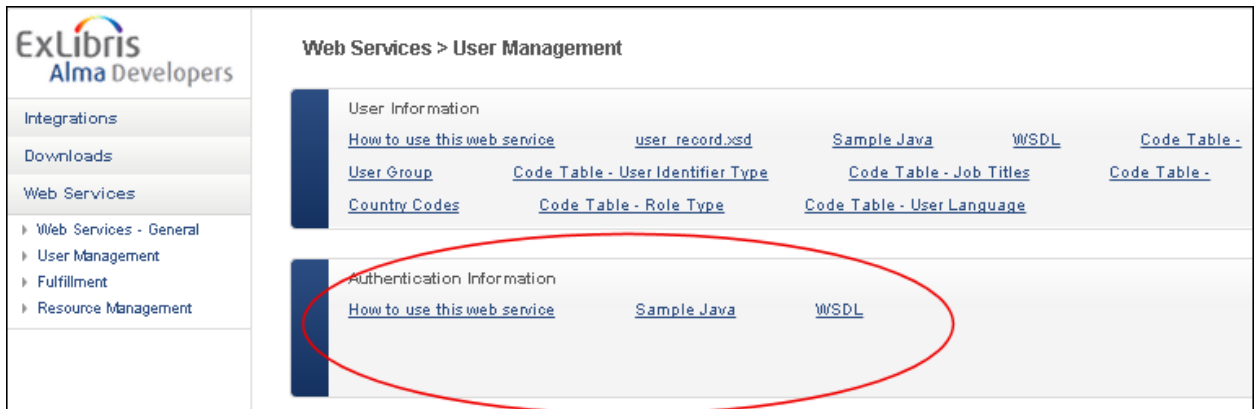


Figure 34 - Alma Developers Authentication Information

Other General Enhancements

- Show Me How – The Show Me How icon can now be either hidden or removed.
- User Management – When an incorrect user name is sent by the AUTHENTICATE_USER Web service, Alma returns a *False* message rather than *User not found*.

Primo

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

Enhanced Publishing for Electronic Resources

Description

The purpose of this enhancement is to take into account the availability status of electronic resources when publishing electronic resources to Primo.

Electronic resources are published to Primo when the bibliographic record is not suppressed and when the portfolio is active. (If the portfolio is associated with a package, the package service also needs to be active.)

Note: This development is relevant only for records that will be published from this point going forward.

Expanded Link Resolution for Related Records

Description

The purpose of this enhancement is to provide electronic services for related titles via the Primo View It tab or Services page.

Services for electronic resources are relevant to end users for the following reasons:

- Articles sought may be available only in related versions of the journal.
- Metadata in the OpenURL can be for one publication, but in fact, a related journal by another name is what the end user sought.
- Vendors can list previous or newer versions in their holdings causing inconsistencies in the CKB. For example, the journal *Civil Engineering Systems* does not have full text, but it is followed by *Civil Engineering and Environmental*, which is available in full text.

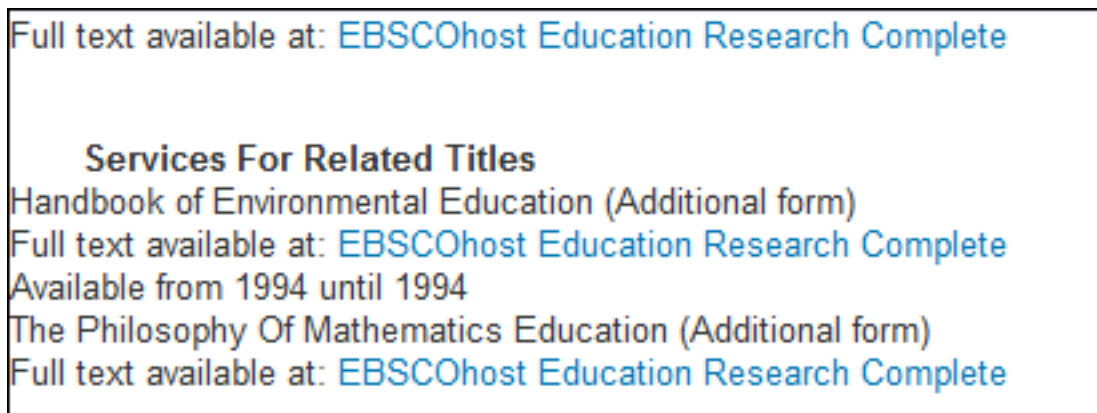


Figure 35 - Primo View It Related Records

A distinction is made between close relations—where the full text of the related record is identical or very close to the original record requested—and more remote relations.

Close Relations

If the record requested in the OpenURL has related records with close relations, services from the related record will be included in the View It tab with no indication that these are services for the related record. (This is configurable; refer to the configuration section.)

Close relation types are:

- Proceeding series
- Proceeding
- Other book edition

To the end user, it seems as if these services are for the record sent in the OpenURL. Since the relation type is very close, it can be considered equivalent; and as far as the user is concerned, no distinction needs to be made.

Remote Relations

For more distant relation types, the services of the related record are not displayed in the View It tab as regular services but should display separately with an indication that these services are for a related record. This is the case for the following remote relation types:

- Absorbed by
- Absorbed in part by
- Continued by
- Continued in part by
- Continues
- Continues in part

- Formed by the union of
- Merged into
- Other edition
- Related to
- Split into
- Supplement parent
- Supplement
- Translated as

Technical Instructions

The Fulfillment Administrator role is needed to access the Alma configuration options for related records.

To configure related records for Primo View It:

- 1 From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.
- 2 From the Discover Interface Display Logic section, click **Related Records**.

The Related Record Services Configuration page displays.

Figure 36 - Alma Related Records Configuration

- 3 For **Enabled related records services**, select **Yes** to enabled the features and make other selections needed. Refer to the table below.

Parameter	Description
Display related services if full text is available	Select this option to display services for related records if full text is available. Services for related records will not be shown if there is a full-text service for the original record in the OpenURL.
Display related services for serials	Select this option to include related services for serials.
Display related services for monographs	Select this option to include related services for monographs.
Deduplicate package services	Use deduplication of package services for remote related services. This will show only one service if related records are associated with the same package.
Enable direct link for related services	The direct-linking feature will be turned on/off according to this selection.
Display closely related record services	<p>Select how closely related services should be displayed:</p> <ul style="list-style-type: none"> ▪ With no indication that these services are for the related records ▪ Separately from regular services with an indication that these services are for related records

4 Click **Save**.

Discovery Interface Display Logic Rules

Description

The purpose of this enhancement is to provide discovery interface display logic for electronic resources.

Technical Instructions

The Fulfillment Administrator role is needed to configure the discovery interface display logic rules.

To define discovery interface display logic rules:

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

The Add Rule pop-up window displays.

- 4 Enter the display logic rule parameters.

Figure 37 - Add Rule Pop-up Window

The display logic rule can be extended by selecting a service from the **if exists service** drop-down list.

- 5 Click **Add and Close**.

The rule displays in the list of rules on the Discovery Interface Display Logic page.



Figure 38 - New Rule Added to the List

- 6 When multiple rules have been added to the list, use the **Move Up/Move Down** column options to place the rules in your preferred order.



Figure 39 - Move Up/Move Down for Multiple Rules

Course Reserves

The following sections describe the functions provided for Course Reserves in the December 2012 release of Alma.

New Print Slip Report Option

Description

The purpose of this enhancement is to provide an alternative to printing one slip for each reading list citation when retrieving the items to be moved to a course reserve area. This enhancement enables printing a single report that contains all of the information for all of the reading list citations.

Technical Instructions

The Course Reserves Operator role is needed to access this capability.

To access this facility:

- 1 From the Alma main menu > Fulfillment > Course Reading, click **Reading Lists**.
- 2 Select a reading list (click the link in the Code column).
- 3 Click the **Print Slip Report** button.

The screenshot shows the 'Edit Reading List' window. At the top, there are buttons: 'Cancel', 'Print Slip', 'Being Prepared' (with a dropdown arrow), 'Change Status', and 'Print Slip Report' (which is circled in red). Below these buttons, the course information is displayed: Course Code: Apo, Section: -, Course Name: Apocaliptyca, Processing Department: Hard Rock, and Instructor: -. The 'Reading List Information' section contains fields for Code (* hard rock), Name (* Metallica reading list), Owner: Avivi, Shuli, Status: Being Prepared, and Due Back Date: 29/02/2012. Below this, there are tabs for 'Citations' and 'Notes'. The 'Citations' tab is active, showing a list of citations. The first citation is 'Living music. Physical Article' with ISSN: 8755-092X, Subject: Music Periodicals. 20th century, Citation Status: Being Prepared, and Resource Locate Status: Resource Located. The second citation is 'More. Physical Article By More (Fort Worth, Tex.)' with ISSN: 8750-0299 and Citation Status: Being Prepared. At the bottom of the citations list, there are links: Edit, Resource Locate, Set Complete, Manage Fulfillment Options, Remove, Duplicate, Print Slip, and Detach from Repository.

Figure 40 - Print Slip Report

The print pop-up window displays.

The screenshot shows the 'Print Pop-Up Window'. It has two radio buttons for 'Type': 'Email' and 'Printer'. The 'Printer' option is selected. Below the 'Email' option is an 'Email:' text field. Below the 'Printer' option is a 'Printer:' dropdown menu showing 'Art Library - te'. At the bottom right, there are 'Cancel' and 'Send' buttons.

Figure 41 - Print Pop-Up Window

- 4 Select a printer from the drop-down list or type in an email address, and click **Send**.

Searchable Notes in Course Reserves

Description

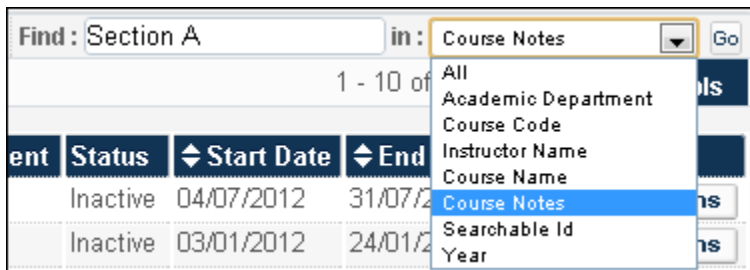
The purpose of this enhancement is to enable searching the Notes field in course reserves.

Technical Instructions

The Course Reserves Operator role can access this capability.

To access this feature:

- 1 From the Alma main menu > Fulfillment > Course Reading, click **Courses**.
The Courses page displays.
- 2 Enter your search criteria in the **Find** field for some content in the Course Reserves Notes and select **Course Notes** from the drop-down list.

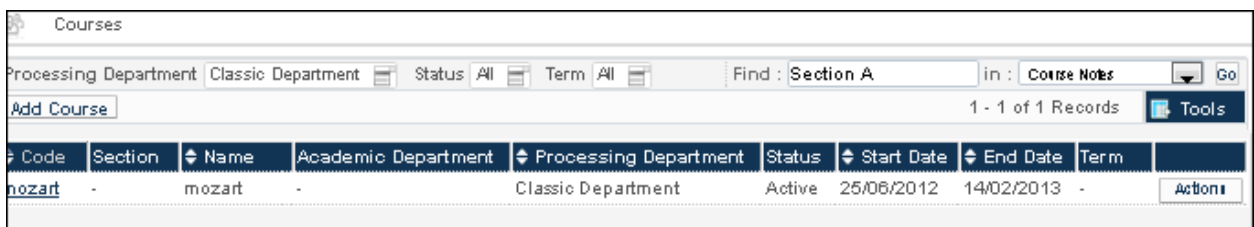


ent	Status	Start Date	End
Inactive	04/07/2012	31/07/2012	
Inactive	03/01/2012	24/01/2012	

Figure 42 – Entering Course Reserves Notes Search Criteria

- 3 Click **Go**.

The search results display the course(s) matching your criteria.



Code	Section	Name	Academic Department	Processing Department	Status	Start Date	End Date	Term
mozart	-	mozart	-	Classic Department	Active	25/06/2012	14/02/2013	-

Figure 43 - Course Reserves Notes Search Results

- 4 Select **Actions > Edit**.
- 5 Select the **Notes** tab to view the note.

Manage Course Information Cancel

Course Code: mozart Section: - Course Name: mozart
 Processing: Classic Instructor: -
 Department: Department

Course Information **Notes**

Find : in : Created by Advanced

1 - 1 of 1 Records

Created On	Updated On	Updated By	Note
09/12/2012	09/12/2012	User, Super	Section A: Family and early years Section B: 1762-73, Years of travel Section C: 1773-77, The Salzburg Court Section D: 1777-78, The Paris Journey Section E: Vienna Section F: Final illness and death

Figure 44 - Course Reserves Notes Field Displayed

Analytics

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

Statistics Note Fields Exposed

Description

The purpose of this enhancement is to expose the following fields for physical items:

- Statistics Note 1
- Statistics Note 2
- Statistics Note 3

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 > Physical Items**.

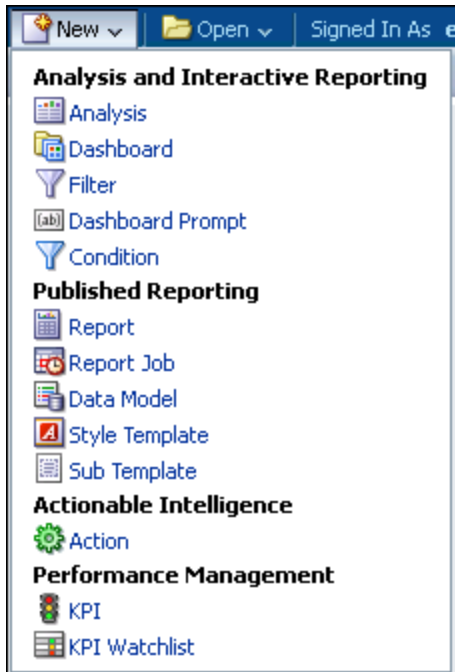


Figure 45 - Design Analytics > New > Analysis Option

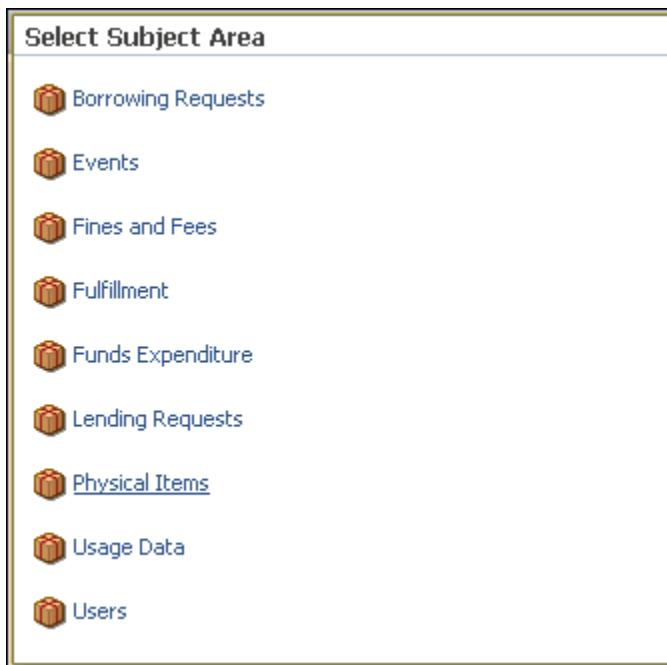


Figure 46 - Design Analytics > New > Analysis Option > Physical Items

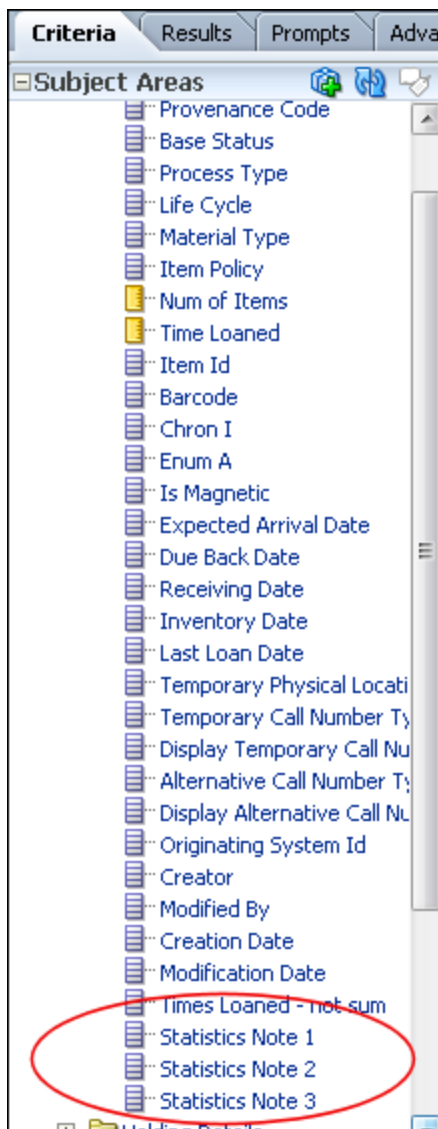


Figure 47 - Statistics Note Fields

Other Analytics Enhancement

- **Additional Code** and **ERP Code** columns were added under Vendor in the Fund Expenditure subject area.

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.