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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 January 2013 Release Highlights](#)
- [Access to January 2013 Features](#)
- Feature/enhancement descriptions for the respective Alma components and functional areas
  - [Data Services](#)
  - [Alma Show Me How](#)
  - [Acquisitions](#)
  - [Resource Management](#)
  - [Fulfillment](#)
  - [General](#)
  - [Alma Developers](#)
  - [Primo](#)
  - [Resource Sharing](#)

# Alma January 2013 Release Highlights

## General

- Alma Developers

Ex Libris continues to enhance Alma Developers. In this month's release, the following Web Services have been added: Course Management; Cash Management; Alma Analytics/OBI (Oracle Business Intelligence).

- Primo Widget for Alma Home Page

The purpose of this enhancement is to provide the capability to search for items at an institution's Primo while working in Alma. This provides high-level information regarding the last publish-to-Primo job from the Alma home page.

- More Information Pop-Up Windows

This new enhancement adds More Information pop-up windows to audit fields throughout Alma. The window provides more detailed information about users who have created or modified records.

## Acquisitions

- PO Line Rollover Simulation

This enhancement offers the option of running a PO line rollover simulation that generates a report identifying any errors that need to be resolved before a final rollover is committed/saved in Alma.

- PO Line Details in the Vendor Record

This great new feature allows for viewing all PO lines linked to a vendor in the vendor record. It is similar to the Inventory tab that is already part of the vendor record. However, the PO lines display in manner similar to the PO Lines in Review page, including facets.

- Receiving Department Validation Checks

This release sees new options for validation checks for barcodes and brief bibliographic records of physical items when exiting Receiving Department Items. New configuration options allow you to activate these validation checks. A pop-up message, for example, will prompt if a barcode is missing.

- **Option for Releasing Encumbrance Balance**

This enhancement provides the capability for releasing encumbrances on continuous orders at the time an invoice is created (in cases where the total invoices amount is less than the encumbrance for the PO line).

## Resource Management

- **Physical Item Editor History Tab Added**

This new enhancement provides a history of the changes related to physical items such as item and holdings changes, as well as fulfillment activities. In addition to showing the changes made, the report lists the name of the operator and the date of the change.

- **Call Number Parsing for Label Printing**

New configurations allow for defining additional call number, label-printing options. This is achieved through alternative configurations for parsing the call number information that is to print on the label.

- **MD Editor Workflow Enhancements**

Additional workflow flexibility is now available for catalogers. When working in the MD Editor, the following new options are available: Reassign record to another cataloger and Release assignment. In addition, a View Notes option has been added to view working copy notes.

## Fulfillment

- **Option to Renew All**

This new option provides a renew all capability for items that a patron currently has on loan.

- **Pickup from Shelf Circulation Desk Configuration Option**

The purpose of this enhancement is to provide an additional circulation desk configuration option. It is now possible to specify that a circulation desk can reshelve items but not pick up items from the shelf, thus providing more granularity for circulation desk functions.

- **Short Loan Reminder**

When loaning out an item for which the due date policy is defined in hours/minutes as the unit of measurement, an email to the borrower will be issued at the time of the loan.

## Primo

- Primo Republish Set of Titles Process Enhanced

In December, we reported about new functionality related to expanded link resolution for related records. The Alma process Primo Republish Set of Titles has been updated to handle publishing the 773 relationship information. This enables Primo to display the inventory of a related record when a search in Primo locates a bibliographic record without inventory that contains linking 773 information. The linked bibliographic record inventory is displayed.

- Option to Display Alternative Call Number in Primo

This enhancement provides for a configurable option in Alma to display the alternative call number information on the Get It tab in Primo.

## Access to January 2013 Features

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

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Feature	No Activation/ Setup Required	Activation/ Setup Required	Visible to Administrator Only	Contact Ex Libris to Activate This Feature
	(Note: Automatically Visible to All Users with the Appropriate User Role/ Permission)			
Acquisitions: <a href="#">PO Line Rollover Simulation</a>				
Acquisitions: <a href="#">PO Line Details in the Vendor Record</a>				
Acquisitions: <a href="#">New Sort PO Lines in Alma Receiving</a>				



Feature	No Activation/ Setup Required	Activation/ Setup Required	Visible to Administrator Only	Contact Ex Libris to Activate This Feature
	(Note: Automatically Visible to All Users with the Appropriate User Role/ Permission)			
Acquisitions: <a href="#">Receiving Department Validation Checks</a>				
Acquisitions: <a href="#">Non-Unique Invoice Numbers Permitted</a>				
Acquisitions: <a href="#">Locate PO Line/PO by Vendor Invoice Number</a>				
Acquisitions: <a href="#">Order Options Added for Electronic Collections</a>				
Acquisitions: <a href="#">Option for Releasing Encumbrance Balance</a>				
Resource Management: <a href="#">New Search Index – Other Classification Number (084 \$\$a)</a>				
Resource Management: <a href="#">Physical Item Editor History Tab Added</a>				
Resource Management: <a href="#">Call Number Parsing for Label Printing</a>				
Resource Management: <a href="#">Repository Search Results Enhanced for Physical Titles to Indicate Linked Title Information</a>				

Feature	No Activation/ Setup Required	Activation/ Setup Required	Visible to Administrator Only	Contact Ex Libris to Activate This Feature
	(Note: Automatically Visible to All Users with the Appropriate User Role/ Permission)			
Resource Management: <a href="#">Cataloging Workflow Enhancements</a>				
Fulfillment: <a href="#">Option to Renew All</a>				
Fulfillment: <a href="#">Additional Title Information Provided in the Pickup List</a>				
Fulfillment: <a href="#">Option to Not Recall Loans for Work Orders</a>				
Fulfillment: <a href="#">Pickup from Shelf Circulation Desk Configuration Option</a>				
Fulfillment: <a href="#">Bulk Due Date Change Enhancement</a>				
Fulfillment: <a href="#">Short Loan Reminder</a>				
General: <a href="#">Secure TCP Communication Support for 3M SelfCheck (SIP2) Machines</a>				
General: <a href="#">xsl:include Support for Letters</a>				

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)			
General: <a href="#">Primo Widget for Alma Home Page</a>				
General: <a href="#">More Information Pop-Up Windows Added</a>				
Alma Developers: <a href="#">Alma Developers – Course Management Web Services</a>				
Alma Developers: <a href="#">Alma Developers – Analytics/OBI (Oracle Business Intelligence) Web Services</a>				
Alma Developers: <a href="#">Alma Developers – User Cash Management Web Services</a>				
Primo: <a href="#">MMS Relations – Item Level Filters</a>				
Primo: <a href="#">Title 773 Relations Included in the Republish Set of Records to Primo Process</a>				
Primo: <a href="#">Option to Display Alternative Call Number in Primo</a>				

Feature	No Activation/ Setup Required	Activation/ Setup Required	Visible to Administrator Only	Contact Ex Libris to Activate This Feature
	(Note: Automatically Visible to All Users with the Appropriate User Role/ Permission)			
Resource Sharing: <a href="#">Loan Renewal for Borrowed Items through Resource Sharing</a>				

# Data Services

The Alma January 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 10-December-2012 through 13-January-2013:

- EBSCOhost ebooks Academic North America
- Elsevier ClinicalKey Books
- Gale Making of Modern Law
- Gale Times Literary Supplement Historical Archive
- Intech Books
- Intech Journals
- JSTOR Jewish Studies Collection
- Metapress Manchester University Press
- MIT Press Books
- ProQuest Middle East Newsstand New Platform
- Sage Premier 2013
- Wiley Online Library 2013 Full Collection
- Wiley Online Library 2013 SSH
- Wiley Online Library 2013 STM
- Wiley Online Library Medicine & Nursing 2013

## New External Resources That Are Open for Searching

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

- Hessische Bibliothekssystem (HeBIS)
- Katalog des Bibliotheksverbunds IDS Basel Bern

- Netzwerk von Bibliotheken und Informationsstellen in der Schweiz (NEBIS)
- OCLC WorldCat (through Libraries Australia)
- Réseau des bibliothèques de Suisse occidentale (RERO)

# Alma Show Me How

The following sections describe Alma Show Me How for the January 2013 release of Alma.

## Alma Show Me How – January

### 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 January release, the following Show Me How scenarios are available:

- Renew All Loans
- New Fields in Pick Up from Shelf List
- New Year Field in Article Borrowing Requests
- Filter PO Lines with Patron Requests
- View PO Lines for a Vendor
- Delivery and Claim Information in Vendor Account
- Send Invoice to ERP Without Payment Notification
- New Course Notes Search Option
- WorldCat (OCLC) External Search Results
- Manage VAT/GST in Invoice
- Global Change of Physical Items
- Manual Packaging of PO Line

# Acquisitions

The following sections describe the features provided for the Acquisitions component in the January 2013 release of Alma.

## PO Line Rollover Simulation

### Description

The purpose of this enhancement is to provide the capability to run a PO line rollover simulation that generates a report identifying any errors that need to be resolved before a final rollover is committed/saved in Alma.

### Technical Instructions

The Fiscal Period Manager role can access this facility.

#### To perform this rollover simulation:

- 1 From the Alma main menu > Acquisitions > Advanced Tools, click **Rollover PO Lines**.  
The Rollover PO Lines page displays.
- 2 Click the **Add Job** button.  
The Add Job pop-up window displays.




Figure 1 - Add Job Pop-Up Window

- 3 Select **Report Mode**.  
By selecting this option, a rollover is simulated but not saved to the system.
- 4 Click **Add and Close**.



When the job has completed running, the Status column on the Rollover PO Lines page indicates that the job was completed successfully or with errors.

### To view job results:

- 1 For the completed job on the Rollover PO Lines page, click **Actions > View**.

The Job Report page displays.

Job Report
Back

Process ID 100487560000121  
Started on 11/12/2012 14:30:05 PM IST  
Total run time 2 Minutes 6 Seconds  
Status Completed with Errors  
Records processed 3982

Name PO Line - Fiscal Period Rollover  
Finished on 11/12/2012 14:32:12 PM IST  
Created by admin1  
Status date 11/12/2012 14:32:12 PM IST  
Records with exceptions 3929

Job Parameters

From Fiscal Year CURRENT  
New Encumbrance Calculation ENCUMBRANCE  
FPC Factor (%) -  
Report Mode true

Job Events

Export To Excel

Next fiscal period does not exist(0)  
Fund for next fiscal period does not exist(2)  
No encumbrance linked to PO line(3358)  
Fund does not have enough money(0)  
Fund is not active(569)  
General Error(0)

Report Table
Tools

Continuity Type	PO Line Success	PO Line Failed
One-Time	36	3496
Continuous	15	429
Standing Order	2	4

Report Table
Tools

Error Type	PO Line Failed
There are no Transactions of type encumbrance that are linked to this PO Line.	3358
Fund for next fiscal period was not created for fund .	2
Fund is not active	569

Figure 2 - Rollover PO Line Simulation Job Report

- 2 View the report results.
- 3 Optionally, export the job results to Excel for further analysis.
- 4 Make changes in Alma to correct any errors.
- 5 Repeat the steps to run the rollover PO lines simulation job and evaluate your results until you have determined that the data in the system is ready for the final rollover to be committed/saved in the system.

# PO Line Details in the Vendor Record

## Description

The purpose of this enhancement is to provide easy access to all of a vendor's PO lines from the Vendor Details page.

## Technical Instructions

The following roles can access the new PO Lines tab from the Vendor Details page:

- Vendor Manager
- Acquisitions Manager
- Acquisitions Operator

### To view this new capability:

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

The Search Vendors page displays.

- 2 Click **View** for a specific vendor.

The Summary tab on the Vendor Details page displays.

- 3 Click the **PO Lines** tab to displays all the PO lines for the vendor you are viewing.

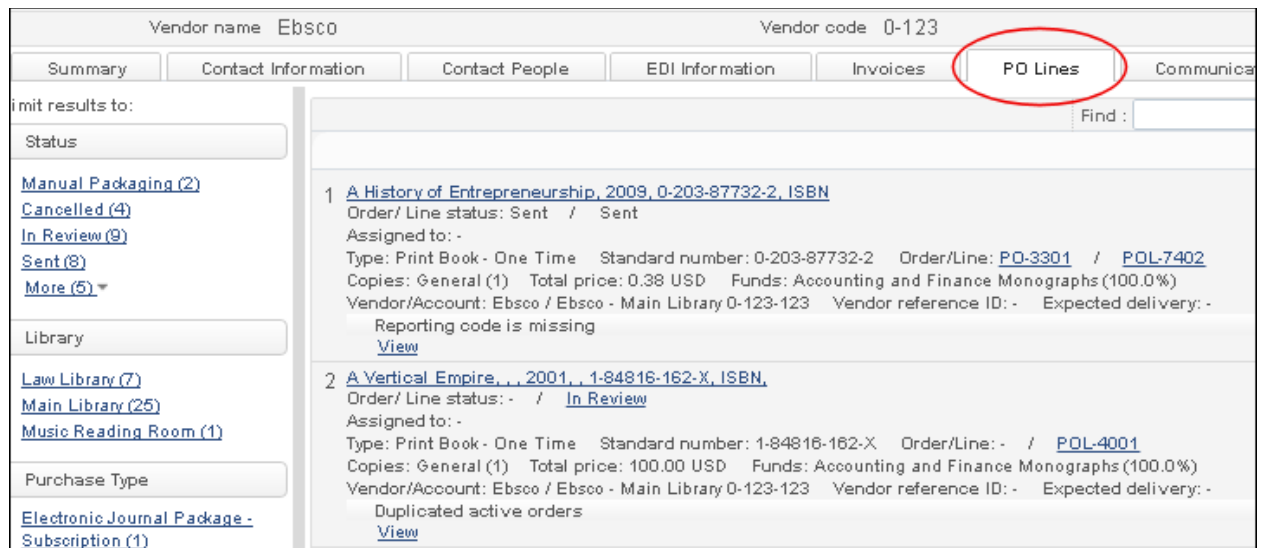


Figure 3 - PO Lines Tab Access from Vendor Details Page

# New Sort PO Lines in Alma Receiving

## Description

The purpose of this enhancement is to provide a new sort option for PO lines on the Receive New Material page. With this new capability, you can sort the **Date Sent** column in ascending or descending order.

## Technical Instructions

The following roles can access the new sort capability:

- Receiving Operator
- Invoice Operator
- Invoice Manager

### To sort PO lines on the Receive New Material page:

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

The Receive New Materials Page displays.

- 2 To change the sort order (ascending/descending), click the up/down arrows in one of the columns with this new capability.

#	Item description	Status	Locations	# Ordered	Items Received	Date Sent	Next Step	Rush	Notes	Manage Item
POL-5708	01022012 045043 Barnes & Noble Library of Essential Reading, [S.I.], Barnes & Noble, 2005, 9780760765455 (Paperback), ISBN	Sent	General (3)	8	3	01/02/2012	-			Manage Item
POL-5905	01022012 045043 Barnes & Noble Library of Essential Reading, [S.I.], Barnes & Noble, 2005, 9780760765455 (Paperback), ISBN	Sent	General (3)	3	1	02/02/2012	-			Manage Item
POL-1222	01032012 034800 Barnes & Noble Library of Essential Reading, [S.I.], Barnes & Noble, 2005, 9780760765455 (Paperback), ISBN	Sent	General (3)	3	0	25/04/2012	-			Manage Item

Figure 4 - PO Line Sort Options in Receiving

# Receiving Department Validation Checks

## Description

The purpose of this enhancement is to provide validation checks for barcodes and brief bibliographic records of physical items when exiting Receiving Department Items. New configuration options allow you to choose to activate these validation checks. Pop-up validation warning messages prompt you if, for example, a barcode is missing.

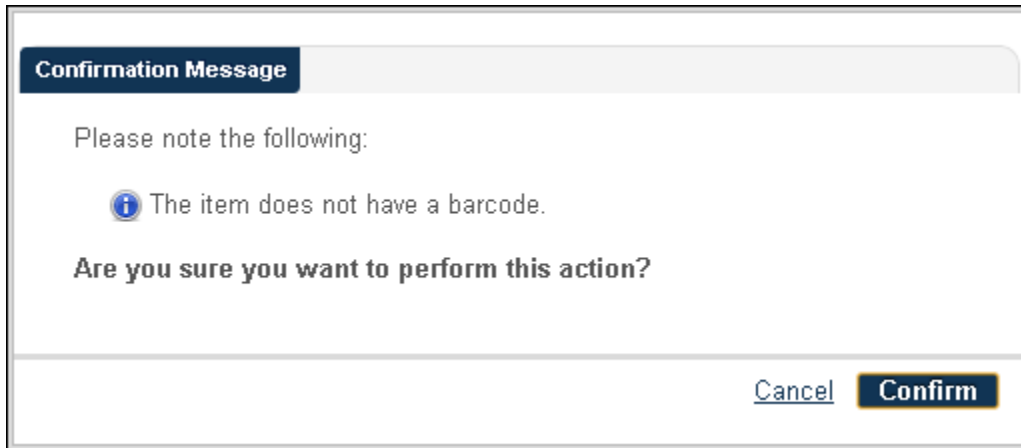


Figure 5 - Validation Pop-Up Message

## Technical Instructions

The Receiving Operator role can access this new capability.

### To configure Alma for the new validation checks:

- 1 From the Alma main menu > Acquisitions > Acquisitions Configuration, click **Configuration Menu**.
- 2 From the General section, click **Receiving Department Validations**.
- 3 In the Active column, click **Yes** or **No** from the drop-down list.

Selecting Yes activates the option to validate.

Mapping Table

You are configuring: Male Campus

Organization Unit Use

**Table Information**

Sub System: ACQUISITION

Table Name: ReceivingDepartmentValidations

Updated By: -

Last Updated: -

Table Description: Validate item when leaving receiving department

**Mapping Table Rows**

Enabled	Id	Description	Active	Updated By	Last Updated
✓	Barcode	Check if item has a barcode	Yes	-	-
✓	Brief	Check if Bibliographic record is brief	Yes	-	-

Tools

Cancel Customize

Figure 6 - Activating Validation for Receiving Department Items

- 4 Click **Customize** to save your selections.

## Non-Unique Invoice Numbers Permitted

### Description

The purpose of this enhancement is to provide the capability to save non-unique invoice numbers with the same vendor in the inventory database. A unique invoice identifier field has been added to enable uniquely identifying records with the same invoice number and the same vendor.

### Technical Instructions

The following roles can view this new capability.

- Invoice Operator
- Invoice Manager

#### To configure Alma to allow non-unique invoice numbers:

- 1 From the Alma main menu > Acquisitions > Acquisitions Configuration, click **Configuration Menu**.
- 2 From the General section, click **Other Settings**.
- 3 For `invoice_not_unique`, click **Customize** and enter **true** for the parameter value.

Mapping Table Cancel Save

You are configuring: **Main Campus** Organization Unit Us1

**Table Information**

Sub System: INFRA Table Name: CustomerParameters  
Updated By: - Last Updated: -  
Table Description: Customer Parameters

**Mapping Table Rows** Tools

Enabled	parameter key	parameter module	parameter value	free text description	Updated By	Last Updated	
	assertion_over_po_line_price	acquisition	10001		ext_impl	25/12/2012	Restore
	auto_claim	acquisition	Y	Send Claim notification to vendor	-	-	Customize
	expended_from_fund_default	acquisition	true		-	-	Customize
	exportPrepaidInv	acquisition	TRUE	TRUE this will be Export to ERP	ext_support	25/12/2012	Restore
	handle_invoice_payment	acquisition	true		-	-	Customize
	invoice_high_total_price	acquisition	2500		-	-	Customize
	invoice_not_unique	acquisition	true		admin1	25/12/2012	Restore
	invoice_prefix	acquisition	INV-		-	-	Customize

Figure 7 - Non-Unique Invoice Configuration

4 Click **Save**.

## Locate PO Line/PO by Vendor Invoice Number

### Description

The purpose of this enhancement is to provide the capability to locate a PO line/PO by the vendor invoice number.

### Technical Instructions

The following roles can access this capability:

- Acquisitions Operator
- Receiving Operator

**To locate a PO line/PO by the vendor invoice number:**

- 1 From the Alma main menu > Acquisitions > Receiving and Invoicing, click **Receive**.
- 2 From the Find/In drop-down list, select **Vendor invoice number** to use this new feature.

The screenshot shows the 'Receive New Material' window. The 'Find PO Lines for Receiving' section has a dropdown menu open, listing search criteria. The 'Vendor invoice number' option is highlighted with a red circle. Below the dropdown, a table lists the search results.

#	Item description	Status	Locations	# Ordered	Items R
POL-5708	01022012 045043 Barnes & Noble Library of Essential Reading .. [S.I.] .. Barnes & Noble.. 2005.. 9780760765455 (Paperback) ISBN	Sent	General (8)	8	

Figure 8 - Vendor Invoice Number Option for Searching in Receiving

## Order Options Added for Electronic Collections

### Description

The purpose of this enhancement is to enable the Purchasing Operator to order an electronic collection database when searching all titles in a staff search. Previously, the only way to create an order for an electronic database was from a locally created database. The following order options have been added:

- Database one-time
- Database subscription

### Technical Instructions

The following roles can access this new capability:

- Purchasing Operator
- Purchasing Manager

#### To order an electronic collection database using the new method:

- From the Alma main menu > Acquisitions > Search and Sets, click **Repository Search**.
- Complete an all titles search.
- For a specific title in the search results, click **Order**.

- 4 To view the new options, display the **Purchase type** drop-down list.

The following new options display under the Other heading in the drop-down list:

- Database – One Time
- Database – Subscription

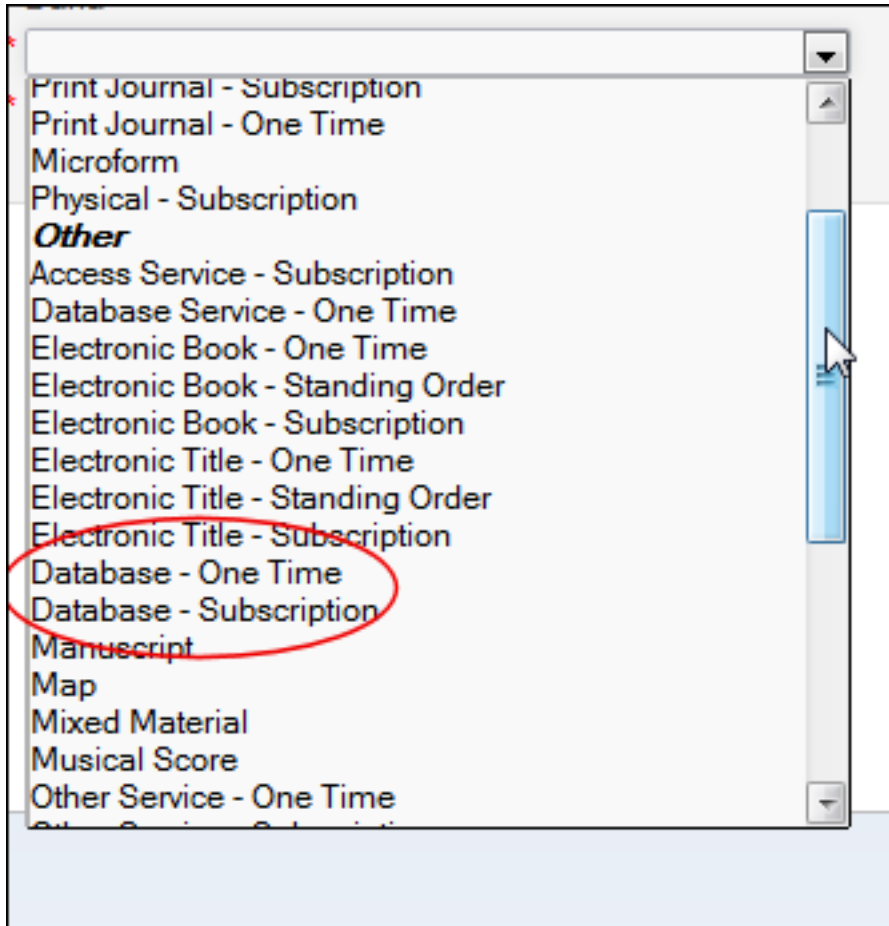


Figure 9 - New Purchase Types

- 5 Select one of these options and click **Create PO Line**.

A full-text, electronic database PO line is created.

In addition, an electronic collection database type resource is created in the inventory, and the resource will be associated with the bibliographic record. If the bibliographic record contains a URL, the URL will be carried over to the inventory resource.

The PO line workflow creates an activation task for this resource. If the resource has a URL and is linked to a bibliographic record, the resource will have an Activate action to process on the Electronic Resource Activation Task List page (accessed by Resource Management > Manage Inventory > Manage Electronic Resource Activation). By default, this resource is suppressed (that is, not published in Primo).



By activating the resource, it becomes available to the end user via Primo. If the resource does not have a URL, the operator can add a URL by editing the resource using Action > Edit Resource.

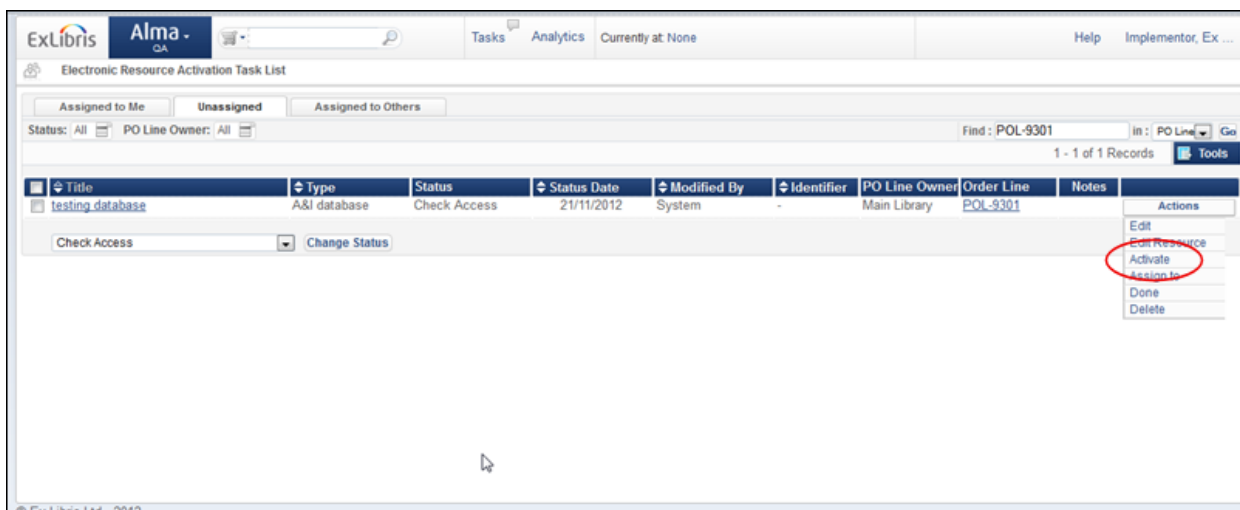


Figure 10 - Activate Action

- 6 Click **Activate** to make this resource available (in Primo).

Once a resource is active, the Actions list displays Deactivate. Selecting Deactivate for a resource suppresses it from displaying (in Primo).

## Option for Releasing Encumbrance Balance

### Description

The purpose of this enhancement is to provide the capability for releasing encumbrances on continuous orders at the time an invoice is created. This applies to situations where all the invoices are received for a continuous order, the total of the invoices is lower than the encumbrance for the PO line, and the remaining amount is left in the fund (at least, until the rollover). When the **Release remaining encumbrance** option is selected, a disencumbrance transaction on all the encumbrances made for the PO line is created.

When the **Release remaining encumbrance** is selected as shown in the figure below, the release of the remaining encumbrance creates a disencumbrance transaction on each and every fund that has an encumbrance amount for the selected order. In this example, a new invoice line was added, a continuous PO line with price of 100 was selected, the invoice line price was changed to 50, the **Release remaining encumbrance** check box was selected, and **Add and Close** was clicked to save and close the **Add Invoice Line** pop-up window.

**Add Invoice Line**

Type: Regular Line Number: 2  
 PO line: POL-154240 [More Information](#)  
 Title: History  
 PO line price: 100.00 USD  
 Check subscription date overlap: ☒  
 Subscription from date: Subscription to date:  
 Additional Information:  
 Price: 50.00 USD Release remaining encumbrance: ☒  
 Total Price: 50.00 USD  
 Quantity: 1 VAT Note: -  
 Reporting Code:  
 Note:  
 Invoice amount: 0.01 USD Total invoice lines amount: 0.01 USD  
 Fund: Percent: Amount: USD [Add Fund](#)

#	Fund Name	Percent	Amount
1	all1(2,259.00 USD)	100.0%	50.00 USD
Total		100.0%	50.00 USD

[Redistribute Lines](#) [Close](#) [Add](#) [Add and Close](#)

**Figure 11 - Invoice Line Example**

To observe the Alma transaction processing (when Release remaining encumbrance is selected):

- The all1 fund option is selected.
- View the Transaction tab and note that the disencumbrance transaction is on all of the encumbrance price (100 USD).

Fund name: all1 Fiscal period: z01/07/2012 - 30/06/2013

Available Balance: 2,309.00 USD Cash Balance: 2,622.25 USD

Summary Transactions Notes Attachments

Filter: All [Add transaction](#)

Time	Type	Related record	Amount
09/01/2013 09:25:37 AM IST	Encumbrance	PO Line POL-154240	100.00 USD
11/11/2012 09:59:52 AM IST	Disencumbrance	PO Line POL-154240 Invoice Line: 00-11589-BCL50 (2)	100.00 USD
11/11/2012 09:59:52 AM IST	Expenditure	PO Line POL-154240 Invoice Line: 00-11589-BCL50 (2)	50.00 USD

**Figure 12 - Transactions Tab (When Release remaining encumbrances Check Box is Selected)**

By comparison, if the Release remaining encumbrance is not selected the disencumbrance transaction is only on the expenditure price.

Fund name all1		Fiscal period z01/07/2012 - 30/06/2013	
Available Balance		2,259.00 USD	Cash Balance 2,622.25 USD
Summary		Transactions	Notes Attachments
Filter: All			
Add transaction			
Time	Type	Related record	Amount
09/01/2013 09:25:37 AM IST	Encumbrance	PO Line:POL-154240	100.00 USD
11/11/2012 09:59:52 AM IST	Disencumbrance	PO Line:POL-154240 Invoice Line: 00-11589-BCL50:(2)	50.00 USD
11/11/2012 09:59:52 AM IST	Expenditure	PO Line:POL-154240 Invoice Line: 00-11589-BCL50:(2)	50.00 USD

Figure 13 - Transactions Tab (When Release remaining encumbrances Check Box is not Selected)

**Note:** Support for releasing encumbrances via EDI will be part of the next release.

## Technical Instructions

The following roles can access this new capability.

- Invoice Operator
- Invoice Manager

**To access the Release remaining encumbrance check box option for a continuous order:**

- 1 From the Alma main menu > Acquisitions > Receiving and Invoicing, click **Review**.  
The In Review Invoices page displays.
- 2 For an invoice row, click **Actions > Edit**.  
The Summary tab on the Invoice Details page displays.
- 3 Click the **Invoice Lines** tab.

Invoice Details

Invoice Number INV-3404Unique Invoice Identifier 22091140000121

SummaryAlertsInvoice LinesNotesAttachments

Status AllType All

Add Invoice Line

Line #	Type	Price	Total Price	VAT Note	Status	Description
1	Regular	300.00 USD	300.00 USD	-	In-Review	The Historian; a journal of history.
999991	Shipment	0.00 USD	0.00 USD	-	In-Review	-
999992	Discount	0.00 USD	0.00 USD	-	In-	-

Figure 14 - Add Invoice Line Button

- 4 Click the **Add Invoice Line** button.

The Add Invoice Line pop-up window displays.

**Add Invoice Line**

Type **Regular** Line Number **2**

PO line  Price  USD

Total Price  USD

Quantity  VAT Note

Reporting Code  Note

Invoice amount  USD Total invoice lines amount

Fund\*  Percent  Amount  USD **Add Fund**

No records were found.

**Close** **Add** **Add and Close**

**Figure 15 - Add Invoice Line**

- 5 Search for a PO line and select one with a continuous order.

The Add Invoice Line pop-up window refreshes to reflect this selection and displays the Release remaining encumbrance check box.

This check box cannot be selected if the invoice line total price is higher than (or equal to) the PO line price. If the invoice line total price is lower than the PO line price, the check box is selectable. Refer to the two examples/figures below.

Add Invoice Line

TypeRegular

Line Number2

PO linePOL-5902

More Information

Title01022012\_042253 Barnes & Noble Library of Essential Reading .

PO line price300.00 USD

Check subscription dateoverlap

Subscription from date

Subscription to date

Additional Information

Price300.00 USD

Release remaining encumbrance

Total Price300.00 USD

Quantity3

VAT Note-

Reporting Code

Note

Invoice amount300.00 USD

Total invoice lines amount300.00 USD

Fund

Percent66.67

Amount200.00 USD

Add Fund

#	Fund Name	Percent	Amount	
1	Accounting and Finance E-resources(-7,144.30 USD)	33.33%	100.00 EUR	Delete
Total	-	33.33%	100.00 EUR	

Redistribute Lines

CloseAddAdd and Close

Figure 16 - Release Remaining Encumbrance Check Box Example 1

**Add Invoice Line**

Type: **Regular** Line Number: **1**

PO line: **619** [More Information](#)

Title: **Advances in protein chemistry.**

PO line price: **95.80 USD**

Check subscription date overlap: ☒

Subscription from date:  Subscription to date:

Additional Information:

Price: **47.00 USD** **Release remaining encumbrance** ☒

Total Price: **47.00 USD**

Quantity: **2** VAT Note: **-**

Reporting Code: **Library and Information Science**

Note:

Invoice amount: **100.00 USD** Total invoice lines amount: **100.00 USD**

Fund:  Percent: **0.0** Amount: **0.00 USD** [Add Fund](#)

#	Fund Name	Percent	Amount	
1	<a href="#">S: Sciences(109,282.73 USD)</a>	221.36%	<input type="text" value="104.04"/> USD	<a href="#">Delete</a>
Total	-	221.36%	104.04 USD	

[Redistribute Lines](#)

[Close](#) [Add](#) [Add and Close](#)

**Figure 17 – Release Remaining Encumbrance Check Box Example 2**

- 6** Complete processing the invoice as usual.

# Resource Management

The following sections describe the functions provided for the Resource Management component in the January 2013 release of Alma.

## New Search Index – Other Classification Number (084 \$\$a)

### Description

The purpose of this enhancement is to provide an additional index option on 084 \$\$a (other classification number) for staff searches.

### Technical Instructions

Any role capable of completing a repository search can access this new index.

#### To search using the new index search option:

- 1 From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
- 2 Enter your criteria for a simple search or an advanced search.

#### Simple search:

- a Select **Other classification number** from the **where** drop-down list.
- b Enter your **contains** criteria.

#### Advanced search:

- a Click **Advanced search**.
- b Click **Add conditions**.
- c From the Advanced Search – Add Conditions pop-up window, select **Other classification number** and click **Add Conditions**.
- d Complete the remainder of the advanced search using your search criteria.

# Physical Item Editor History Tab Added

## Description

The purpose of this enhancement is to provide a history of the changes related to physical items. This tab replaces the Reports and Services tab. The following types of historical reports may be selected and displayed in the History tab:

- Item changes

This report displays the changes made to the item as visible/editable on the General tab of the Physical Item Editor page. This report identifies the name of the operator who made the change, the date the change was made, the field that was changed, and the before and after values.

- Holdings changes

This report displays changes to the library (852 \$\$b), location (852 \$\$c), call number type (852 first indicator), call number (852 h, i, j, k, l, m), and accession number. This report identifies the operator name that made the change, the date the change was made, the field that was changed, and the before and after values.

- Fulfillment activities

This report displays loan/return activity. It identifies the date the change was made, the action type completed (loan/return), the name of the operator/desk name that made the change, the borrower name, and the borrower ID.

To more easily view the changes of interest in the reports on the History tab, you can sort the columns in ascending/descending order and search for specific historical content using the Find/in search options located on the History tab.

↕ Date	↕ Operator	↕ Field name	Old value	New value
04/01/2013 18:50:18 PM IST	exl_support	Holding PID	227750550000121	229769980000121
04/01/2013 18:50:18 PM IST	exl_support	Permanent library	Main Library	Main Library
04/01/2013 18:50:18 PM IST	exl_support	Permanent location	Microforms	General

Figure 18 - History Tab



**Note:** The history that is displayed for holdings changes and item changes is as of December 2012, when the audit trail began.

## Technical Instructions

Any staff role capable of completing a repository search can access the historical information for physical items.

### To access the History tab:

- 1 From the Alma main menu > Resource Management > Search and Sets, click **Repository**.
- 2 From the **Find** drop-down list, select **Physical items** and enter your **contains** search criteria.
- 3 For a specific search results row, click **Items**.

The General tab on the Physical Item Editor page displays.

- 4 To view the historical changes, click the **History** tab.

The History tab details display.

- 5 View other History tab options.

- a Select the **Holdings changes** and **Fulfillment activities** radio buttons to display other report types on the History tab.
- b Select a different ascending/descending sort order using the columns (with the up/down arrows) that provide that capability.
- c Use the **Find/in** search options to narrow the list of rows that display in a report.

Physical Item Editor

Resource description: [Plastics age. Purasuchikkusu Ējisha Ōsaka ; Began in 1955. ID551-0503 0551-0503](#)

Holding: [Main Library: General; HD9661.J3 P56](#) [View all holdings](#)

Barcode: BC4826814 [View all items](#)

Process type: Acquisition

Summary General Information ENUM/CHRON information Notes **History**

Report type: ☒ Item changes ☐ Holding changes ☐ Fulfillment activities

Find:  in:  Field name

↕ Date	↕ Operator	↕ Field name	Old value	New value
04/01/2013 20:52:30 PM IST	exl_support	Alternative call number	-	BC 482 6814
04/01/2013 20:52:30 PM IST	exl_support	Alternative call number type	-	Library of Congress classification
04/01/2013 20:40:20 PM IST	exl_support	Copy ID	1	2
04/01/2013 18:50:18 PM IST	exl_support	Holding PID	227750550000121	229769980000121
04/01/2013 20:40:20 PM IST	exl_support	Item policy	-	Reading Room
04/01/2013 18:50:18 PM IST	exl_support	Permanent library	Main Library	Main Library
04/01/2013 18:50:18 PM IST	exl_support	Permanent location	Microforms	General

Figure 19 - History Tab Item Changes Report

# Call Number Parsing for Label Printing

## Description

The purpose of this enhancement is to provide additional call number label-printing options. This is achieved through alternative configurations for parsing the call number information that is to print on the label.

Configuring one of the new label-printing call number parsing options results in the output XML that is created by the label-printing function (used by both online label printing and offline, bulk label printing) to include the call number broken down into components, as defined by the parsing routine. Subsequently, the label-printing client can print the label using correctly broken down call numbers.

Below are the call-number-parsing options that are part of this release.

### ***Parsing Routine 1***

Parsing option 1 has the following characteristics/logic:

- 5 lines maximum  
If there are more than 5 lines, do not split the last part.
- 8 characters per line maximum
- Split the call number at spaces
- Split the call number at the opening parenthesis (
- Split the call number on a period if the line is longer than 5 characters (except parenthesis)

Refer to the following examples that reflect the logic of parsing option 1:

Call number=QC 300 G662(9.03) F749(.03) +2

Label printed:

QC  
300  
G662  
(9 . 03)  
F749  
( . 03) +2

Call number=CQ 9101 T39.994

Label printed:

**CQ**

**9101**

**T39**

**. 994**

Call number=CM 1000 E61 -3,3,2+2

Label printed:

**CM**

**1000**

**E61**

**-3,3,2+2**

### ***Parsing Routine 2***

Parsing option 2 has the following characteristics/logic:

- 3 lines maximum  
If there are more than 3 lines, do not split the last part.
- Split the call number at spaces

Refer to the following examples that reflect the logic of parsing option 2:

Call number=9.6 RUMÄ Roma

Label printed:

**9 . 6**

**RUMÄ**

**Roma**

Call number=9.2.23.5 FORT

Label printed:

**9 . 2 . 23 . 5**

**FORT**

## Technical Instructions

The SDK Label Printing role can configure the options for call number parsing for label printing.

### To access this facility:

- 1 From the Alma main menu > Resource Management > Resource Configuration, click **Configuration Menu**.
- 2 From the General section, click **Call Number Parsing**.
- 3 Add/edit a mapping table row to use a parsing routine.

The screenshot shows the 'Mapping Table' configuration interface. At the top, it says 'You are configuring: Main Campus' and 'Organization Unit: US1'. Below this, there's a 'Table Information' section with fields for 'Sub System' (INVENTORY), 'Table Name' (CallNumberPar), 'Updated By' (-), and 'Table Description' (Call Number Institution To Parsing Type). There's also a 'Last Updated' field (-). Below this is a 'Mapping Table Rows' section with a message 'No records were found.' At the bottom, there's a 'Create a New Mapping Row' section with a dropdown for 'Call Number Type' (Dewey Decimal classification) and a dropdown for 'Call Number Parsing Type' (Parse routine 1, Parse routine 1, Parse routine 2). The 'Parse routine 1' option is highlighted. There are buttons for 'Add Row', 'Cancel', and 'Customize'.

Figure 20 - Parsing Routine Options

## Repository Search Results Enhanced for Physical Titles to Indicate Linked Title Information

### Description

The purpose of this enhancement is to display the 773 field-linked inventory records in Alma staff search results. When using Alma's repository search and a bibliographic record is found that has no items but, instead, contains a 773 field with linking information to another bibliographic record with items, the linked record's items display in the search results. In Alma's search results, these linked item records are identified by the heading **Availability of related records**.

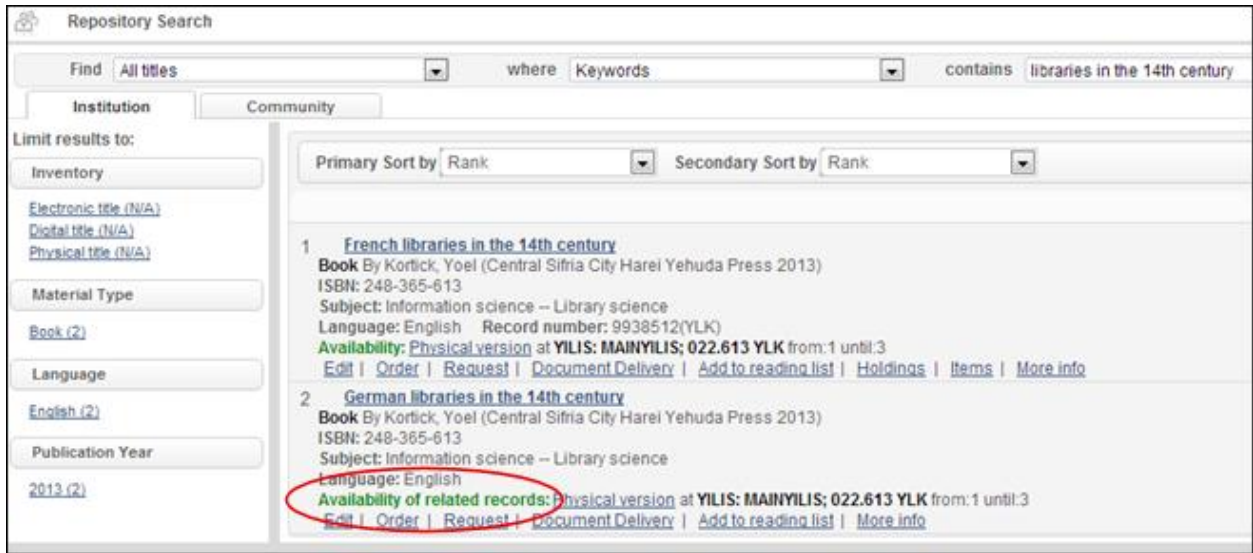


Figure 21 - Availability of Related Records in Alma Search Results

## Cataloging Workflow Enhancements

### Description

The purpose of this enhancement is to provide additional workflow flexibility for catalogers. While working in the MD Editor, catalogers have the following new File menu options:

- Reassign Record to Another Cataloger
- Release Assignment

Newly assigned records are identified with a bold-type font for easier recognition when viewing the list of assignments in the MD Editor.

In the MD Editor Tools menu, a View Notes option has been added to view working copy notes. This option opens a notes list in a service pane on the right side of the MD Editor. Each note can be deleted using the Delete link next to it.

---

**Note:** This is the first phase of development related to this capability. The next release will enable the Catalog Manager to release locks on bibliographic records that are assigned to other catalogers.

---

## Technical Instructions

The Cataloger role can access these enhancements.

### To view the cataloging enhancements:

- 1 From the Alma main menu > Resource Management > Cataloging, click **Open Metadata Editor**.
- 2 View the File menu enhancements.
  - a Open a bibliographic record and view the File menu.

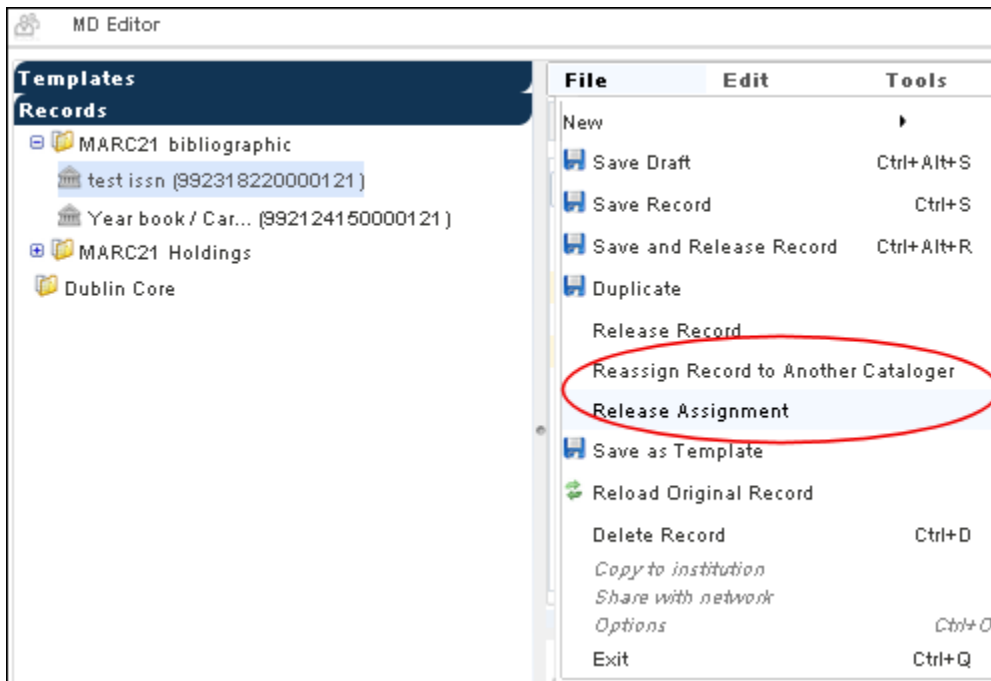


Figure 22 - New File Menu Options

- b Click **Reassign Record to Another Cataloger**.

The Reassign Record to Another Cataloger pop-up window displays.

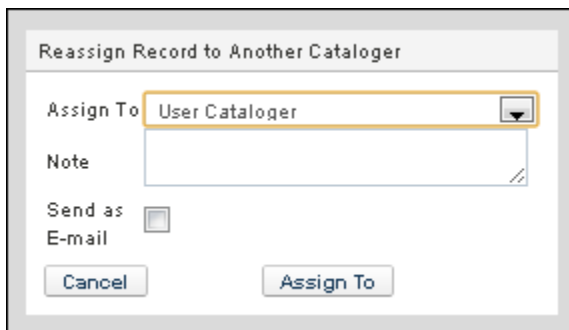


Figure 23 - Reassign Record to Another Cataloger Pop-Up Window

- c Select another cataloger from the **Assign To** drop-down list and optionally add a note and select to send an email to the new cataloger assigned.
- d Click **Assign To**.

3 View any newly assigned records highlighted with a bold font type.

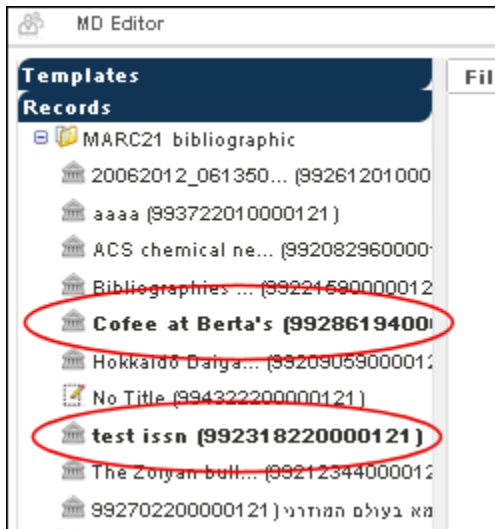


Figure 24 - Newly Assigned Records Identified with a Bold Font

4 View the Tools menu enhancement.

- a Open a record that contains a note.
- b Click **Tools > View Notes**.

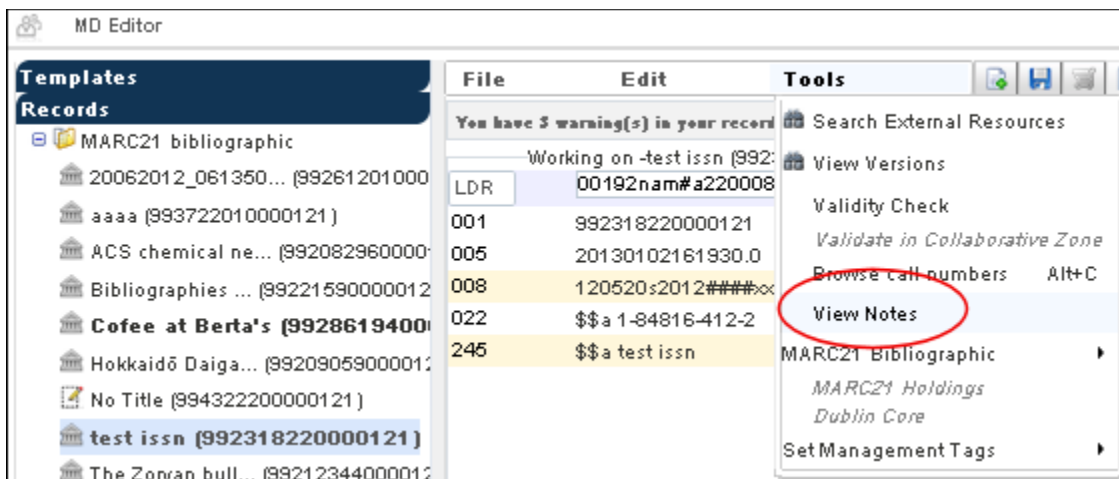


Figure 25 - Tools Menu View Notes Option

The Notes display in the service pane on the right side.

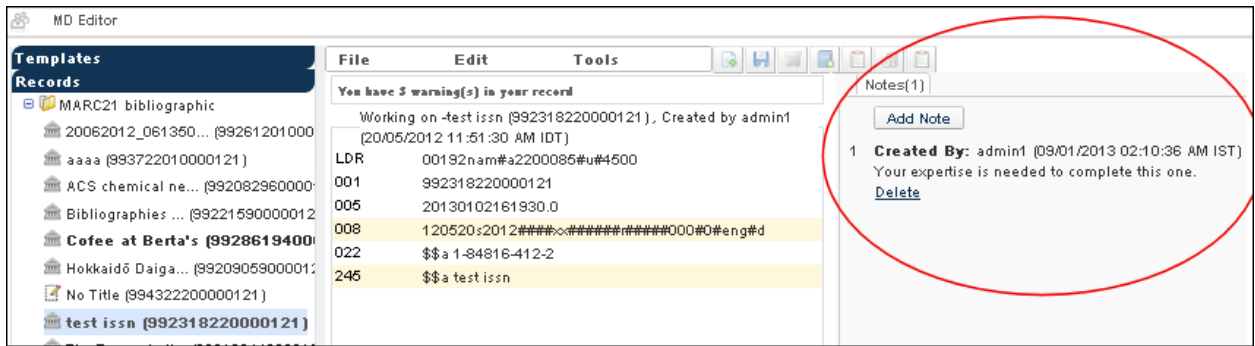


Figure 26 - View Notes Service Pane

- c Click **Add Note**.

The Add Note pop-up window displays.

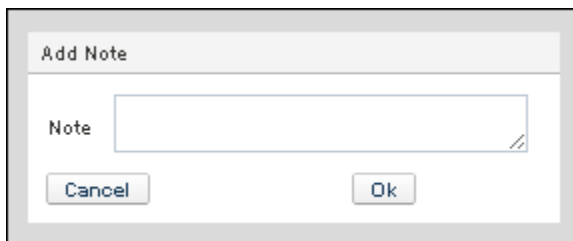


Figure 27 - Add Note Pop-Up Window

- d Enter a note and click **OK**.
- e Click **Delete** to delete a note.



Figure 28 - Delete a Note



## Other Resource Management Enhancements

- The Publishing Export Configuration menu can now be accessed only by Implementation/Support staff.
- The Failed Records column will now remain empty unless the job completed successfully and there were failed records. In such a case, the column will contain an exclamation mark.
- The View license link, for an electronic portfolio search, is now displayed in More info.

# Fulfillment

The following sections describe the functions provided for the Fulfillment component in the January 2013 release of Alma.

## Option to Renew All

### Description

The purpose of this enhancement is to provide a renew all capability for items that a patron currently has on loan.

After completing a renew all request, the system displays an informational message and sends a borrowing report with the updated due dates.

### Technical Instructions

The following roles can access this facility:

- Circulation Desk Operator – Limited
- Circulation Desk Operator
- Circulation Desk Manager
- User Manager

#### To access this new capability:

- 1 From the Alma main menu > Fulfillment > Checkout/Checkin, click **Manage Patron Services**.

The Patron Identification page displays.

- 2 Scan/search for a patron ID and click **Go**.

The Loans tab on the Patron Services page displays. The new Renew All button is located on this tab.



Figure 29 - Renew All Button

### 3 Click **Renew All**.

The system processes your request and displays the following informational message.



Figure 30 - Renew All Informational Message

### 4 Click **Done**.

## Additional Title Information Provided in the Pickup List

### Description

The purpose of this enhancement is to provide additional title information in the pickup list.

In addition to the pickup list that displays in Alma, the additional title information is also available on the pick slips and in the Excel files that can be extracted from the list.

Specifically, the following information displays in the pickup list (when it is available for the requested title):

- ISBN
- ISSN
- Edition
- Imprint (place of publication, publisher, and date of publication)
- Author

## Technical Instructions

The Requests Operator role can view this new capability.

### To view these changes:

- 1 From the Alma main menu > Fulfillment > Resource Requests, click **Pick from Shelf**.  
The Pick Up Requested Resources page displays.
- 2 View the additional title information that is provided for the pickup requests.

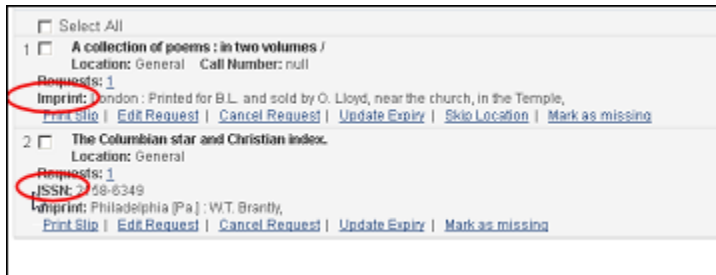


Figure 31 - Additional Pickup List Information Provided for Titles

- 3 Click **Print Slip**.

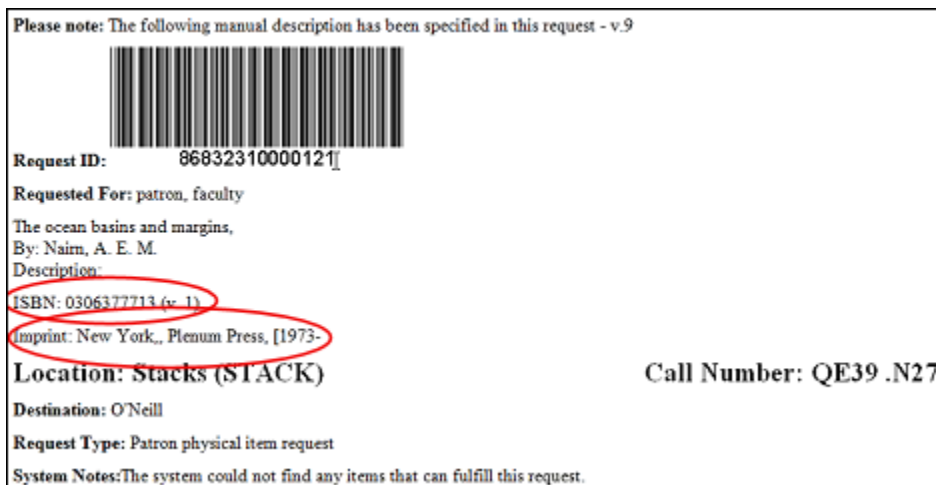


Figure 32 - Print Slip with Additional Information

## Option to Not Recall Loans for Work Orders

### Description

The purpose of this enhancement is to provide the option to configure Alma, for different work order types, to not recall loans.

## Technical Instructions

The following roles can access this facility:

- Fulfillment Administrator
- General System Administrator

### To access this facility:

- 1 From the Alma main menu > General > General Configuration, click **Configuration Menu**.
- 2 From the Work Orders and Departments section, click **Departmental Work Orders**.
- 3 For a specific work order type, click **Actions > Edit**.

The Edit Work Order Type page displays with the new Recalls Loans check box option. When this option is selected (the system default), loans are recalled for the work order type being edited. Remove the selection to prevent the system from placing a recall for the work order type being edited.

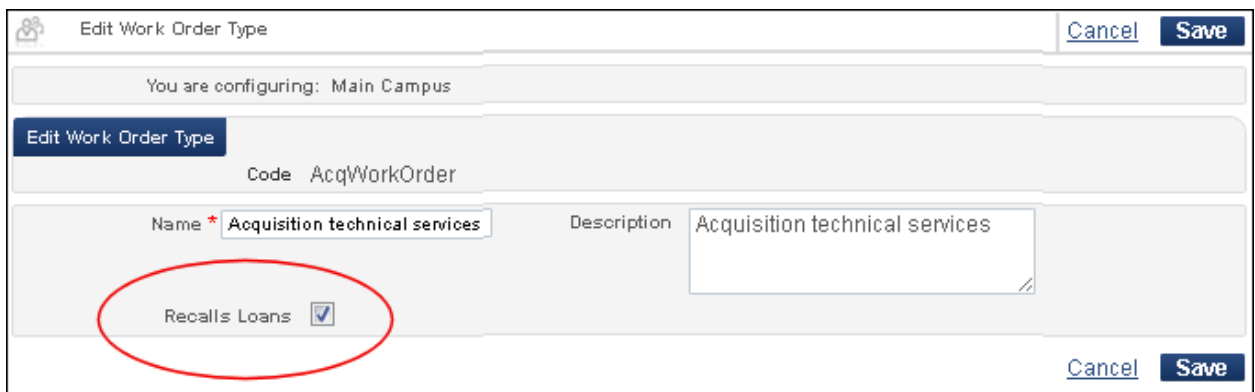


Figure 33 - Recall Loans Check Box

- 4 Click **Save**.

## Pickup from Shelf Circulation Desk Configuration Option

### Description

The purpose of this enhancement is to provide an additional circulation desk configuration option. With the new configuration option, you are able to specify that a circulation desk can reshelve items but not pick up items from the shelf. This provides more granularity for the circulation desk functions.

## Technical Instructions

The following roles can access this facility:

- Fulfillment Administrator
- General System Administrator

### To access the new configuration capability:

- 1 From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.
- 2 Select the library for which you are configuring the circulation desk.

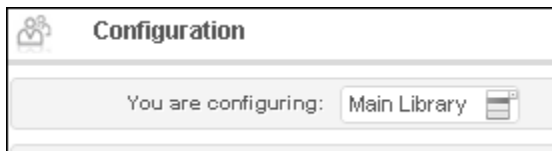


Figure 34 - Select Library You Are Configuring

- 3 From the Library section, click **Circulation Desks**.

The Circulation Desks List page displays.

- 4 For a specific circulation desk, click **Actions > Edit**.

The General Details tab on the Circulation Desk – General Information page displays. The Pick Up from Shelf check box is located in the General Details section of the General Details tab.

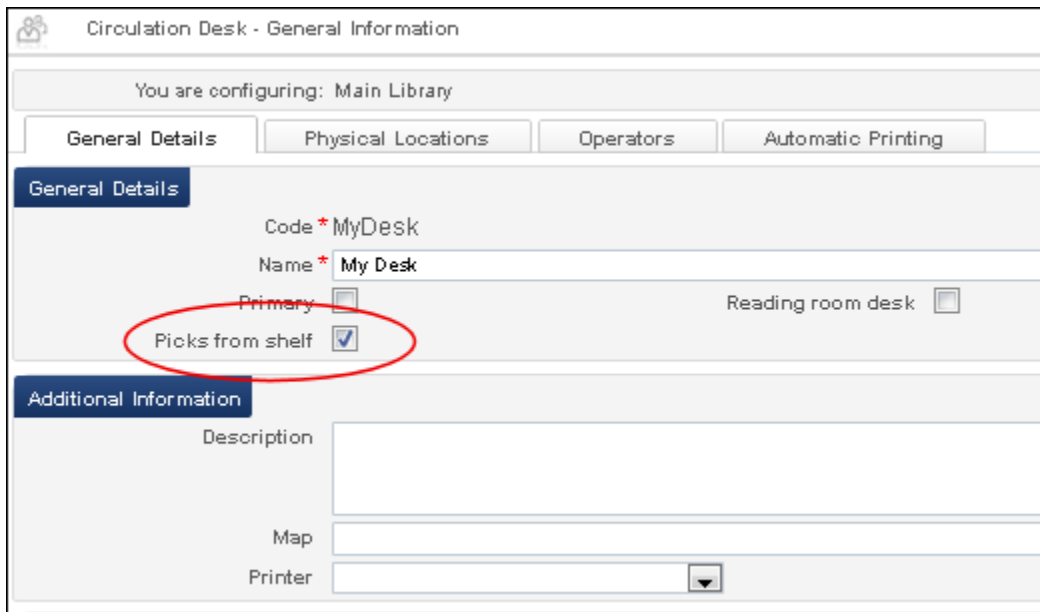
A screenshot of the 'Circulation Desk - General Information' page. The page has a header 'Circulation Desk - General Information' and a sub-header 'You are configuring: Main Library'. Below these are four tabs: 'General Details', 'Physical Locations', 'Operators', and 'Automatic Printing'. The 'General Details' tab is selected and highlighted in blue. Under this tab, there are several fields: 'Code \* MyDesk', 'Name \* My Desk', 'Primary' (checkbox), 'Reading room desk' (checkbox), and 'Picks from shelf' (checkbox). The 'Picks from shelf' checkbox is checked and circled in red. Below the 'General Details' section is an 'Additional Information' section with fields for 'Description', 'Map', and 'Printer'.

Figure 35 - Pick from Shelf Option

- 5 Remove the **Pick Up from Shelf** selection to prevent the circulation desk being configured from processing pick-up-from-shelf requests.

This may be a useful option for unmanned circulation desks that provide return bins for reshelving but do not handle pick-up-from-shelf requests.

- 6 Click **Save**.

## Bulk Due Date Change Enhancement

### Description

The purpose of this enhancement is to provide additional job information regarding bulk due date changes.

### Technical Instructions

The Fulfillment Administrator role can access this new information.

#### To access this facility:

- 1 From the Alma main menu > Fulfillment > Advanced Tools, click **Bulk Change Due Dates**.

The Bulk Change Due Dates page displays. Additional job information is provided at the bottom of this page.

The screenshot shows the 'Bulk Change Due Dates' page. It includes a form with the following fields:

- Library: Art Library
- Material Type: (empty)
- From Due Date: (empty)
- To Due Date: (empty)
- New Due Date: (empty)
- Location: (empty)
- User Group: (empty)
- Three time fields labeled 'HH:MM' (empty)

Below the form is a table with one record. A red oval highlights the table area.

Job Id	Status	Creator	Time Started	Time Ended	Entities Finished	Entities Failed
67441600000121	Completed Successfully	exl_impl	07/01/2013 08:24:49 MST	07/01/2013 08:24:51 MST	0	0

Figure 36 - Additional Information Provided

- 2 Click **View Report**.

The Job Report page displays providing a further level of job detail and the ability to export data to Excel for analysis.

**Job Report**
[Back](#)

Process ID 167441600000121  
Started on 07/01/2013 08:24:49 MST  
Total run time 1 Seconds  
Status Completed Successfully  
Records processed 0

Name Change Bulk Due Date  
Finished on 07/01/2013 08:24:51 MST  
Created by exl\_impl  
Status date 07/01/2013 08:24:51 MST  
Records with exceptions 0

**Job Events**

[Export To Excel](#)

[Failed to change due date since loan status is recall \(0\)](#)  
[Failed to calculate new due date\(0\)](#)  
[Successfully updated due to bulk due date\(0\)](#)

**Report Table**

Parameter	Value
Number of Records Processed Successfully	0
From Due Date	2013-01-01 07:00:00
To Due Date	2013-02-01 06:59:00
New Due Date	2013-02-02 06:59:00
Library	Main Library

[Back](#)

Figure 37 - Additional Information Regarding Bulk Due Date Change Jobs

## Short Loan Reminder

### Description

The purpose of this enhancement is to provide a configurable reminder option for short loans. When loaning out an item for which the due date policy is defined in hours/minutes as the unit of measurement, an email to the borrower is issued at the time of the loan.

**Courtesy Notice**

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

Dear Sir/Madam User

The item Norman Douglas : 5. Symposium, Bregenz und Thüringen, Vlb., 24./25.10.2008 / is due back at 2013-01-01 10:19:01, after which there will be a fine of 1 USD per day

Sincerely  
Circulation Department

Figure 38 - Short Loan Reminder Notice

By default, this reminder is not enabled.



## Technical Instructions

The General System Administrator role can configure this reminder capability.

### To configure the short loan reminder:

- 1 From the Alma main menu > General > General Configuration, click **Configuration Menu**.
- 2 From the General Configuration section, click **Letter Activity**.
- 3 For the full short loan letter (FulShortLoanLetter), click **Customize**.

Mapping Table
Cancel Save

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

**Table Information**

Sub System: INFRA
Table Name: LetterActivity
Updated By: -
Last Updated: -
Table Description: Letter Activity

**Mapping Table Rows**
Tools

Enabled	letter type	channel	Updated By	Last Updated	
<input checked="" type="checkbox"/>	OrderListLetter	EDI	-		<a href="#">Customize</a>
<input checked="" type="checkbox"/>	AnalyticsLetter	EMAIL	-		<a href="#">Customize</a>
<input checked="" type="checkbox"/>	AssignToLetter	EMAIL	-		<a href="#">Customize</a>
<input checked="" type="checkbox"/>	ChangeInOrderLetter	EMAIL	-		<a href="#">Customize</a>
<input checked="" type="checkbox"/>	ConversationLetter	EMAIL	-		<a href="#">Customize</a>
<input checked="" type="checkbox"/>	FineFeePaymentReceiptLetter	EMAIL	-		<a href="#">Customize</a>
<input checked="" type="checkbox"/>	FulBorrowingInfoLetter	EMAIL	-		<a href="#">Customize</a>
<input checked="" type="checkbox"/>	FulCancelRequestLetter	EMAIL	-		<a href="#">Customize</a>
<input checked="" type="checkbox"/>	FulCitationSlipLetter	EMAIL	-		<a href="#">Customize</a>
<input checked="" type="checkbox"/>	FulDigitizationNotificationItemLetter	EMAIL	-		<a href="#">Customize</a>
<input checked="" type="checkbox"/>	FulExpiredHoldShelfTransitLetter	EMAIL	-		<a href="#">Customize</a>
<input checked="" type="checkbox"/>	FulIncomingSlipLetter	EMAIL	-		<a href="#">Customize</a>
<input checked="" type="checkbox"/>	FulItemChangeDueDateLetter	EMAIL	-		<a href="#">Customize</a>
<input checked="" type="checkbox"/>	FulItemLetter	EMAIL	-		<a href="#">Customize</a>
<input checked="" type="checkbox"/>	FulLostLoanLetter	EMAIL	-		<a href="#">Customize</a>
<input checked="" type="checkbox"/>	FulLostRefundFeeLoanLetter	EMAIL	-		<a href="#">Customize</a>
<input checked="" type="checkbox"/>	FulMovePhysicalItemTransitLetter	EMAIL	-		<a href="#">Customize</a>
<input checked="" type="checkbox"/>	FulPickupFromShelfPickupLetter	EMAIL	-		<a href="#">Customize</a>
<input checked="" type="checkbox"/>	FulPlaceOnHoldShelfLetter	EMAIL	-		<a href="#">Customize</a>
<input checked="" type="checkbox"/>	FulResourceRequestSlipLetter	EMAIL	-		<a href="#">Customize</a>
<input checked="" type="checkbox"/>	FulRequestLetter	EMAIL	-		<a href="#">Customize</a>
<input checked="" type="checkbox"/>	FulScannedInItemsListPickupLetter	EMAIL	-		<a href="#">Customize</a>
<input checked="" type="checkbox"/>	FulShortLoanLetter	EMAIL	-		<a href="#">Customize</a>
<input checked="" type="checkbox"/>	FulTransitSlipLetter	EMAIL	-		<a href="#">Customize</a>

Figure 39 - Full Short Loan Letter

- 4 Enable this letter/reminder by clicking the check mark in the **Enabled** column.
- 5 Click **Save**.

## Other Fulfillment Enhancements

- There is now a new column in the Scan In Items interface. The column contains the preferred user identifier as defined in the User Management Configuration. If this field is empty, the user name is displayed. This column will remain empty for requests that are not patron driven.
- By default, when an item is temporarily reshelfed, restoring it to its original location triggers a recall. This can now be configured not to occur (in Fulfillment Configuration > Request Configuration).
- It is now possible to renew an item even if the due date remains unchanged.

# General

The following sections describe the functions provided for the General component in the January 2013 release of Alma.

## Secure TCP Communication Support for 3M SelfCheck (SIP2) Machines

### Description

The purpose of this enhancement is to secure the SIP2 TCP-based communications between Alma and the library self-check machines. This is achieved by making use of a free, third-party tool that bridges between Alma and the self-check machine. The tool stands as an intermediary between Alma and the self-check machine to ensure that the communication between them take place over a secure protocol.

The third-party tool wraps the SIP2 messages that are received from the self-check machine into secure HTTPS messages and passes them to Alma. Subsequently, the messages are received, parsed, and acted upon by Alma. The Alma SIP2 response is also sent over secure HTTPS communications, unwrapped by the third-party tool, and transmitted back to the self-check machine.

Separate from Alma, you need to install a third-party tool such as Apache Stunnel (<https://www.stunnel.org>) on your local PC and configure your self-check machine with the host name and port number information to work with Stunnel. In addition, Stunnel needs to be configured to communicate with the Alma SIP2 server.

### Technical Instructions

The General System Administrator role is needed to configure the Alma options for this capability.

**To configure secure TCP communication support for 3M SelfCheck (SIP2) machines (using, for example, the Stunnel application as the third-party tool):**

- 1 Install the Apache Stunnel software on your local PC, run the application, and configure your self-check machine to work with Stunnel.
- 2 Download the certificate file from Alma and copy it to the stunnel directory.
  - a From the Alma main menu > General > General Configuration, click **Configuration**.
  - b From the External Systems section, click **External Interfaces**.

The External System List page displays.

- c Click **Add External System**, to add a self-check external system, and click Save.
- d Open the saved self-check external system configuration that you created, click the **Actions** tab, and click **Download Certificate**.

Each self-check external system has its own certificate. The certificate of one self-check external system cannot be used for another self-check external system.

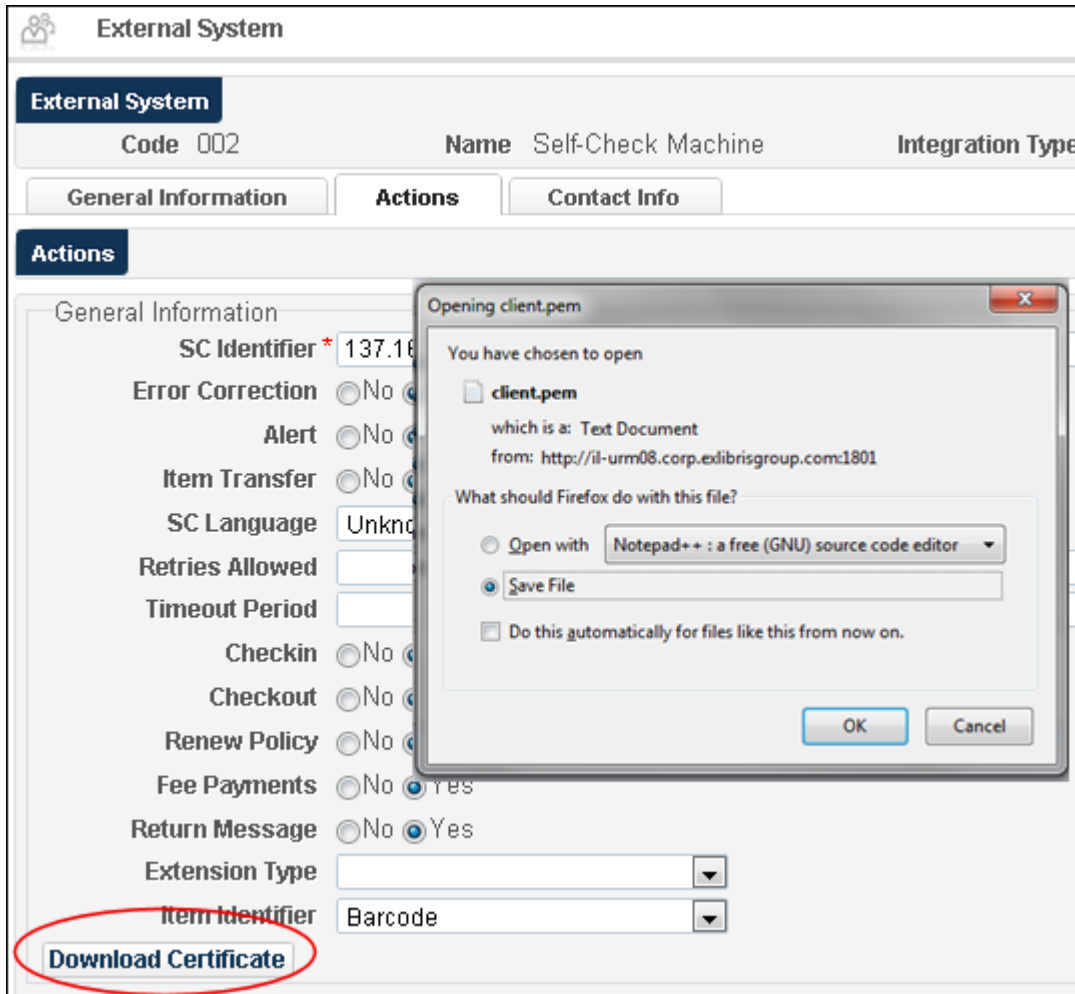


Figure 40 - Download Certificate (for the Self-Check External System)

- e As part of the download certificate process, open the .pem file and save it/copy it to the stunnel directory.
- 3 Using the Stunnel configuration menu, configure Stunnel to use the certificate file (\*.pem) by specifying the self-check system as the input and Alma as the output.

```
[My SIP2 machine]
key = client1.pem
cert = client1.pem
client = yes
accept = 1234
```

```
connect = alma.exlibrisgroup.com:6443
TIMEOUTclose = 0
TIMEOUTconnect = 200
```

Parameter	Description
Key/ cert	The certificate file name as saved in the stunnel directory.
Accept	The port on which Stunnel will be listening. This is the port to which the self-check machines should be directed.
Connect	The Alma host and SIP2 port.

Multiple self-check external systems may be configured to work with the same Stunnel application. This may be done by:

- Configuring multiple sections in the Stunnel configuration file, as described above
- Linking each section with a different certificate file (associated with an Alma external system)
- Linking each section with a different host and port in the Accept Stunnel configuration
- Directing different self-check machines to the different sections' Accept ports

This results in:

- Stunnel receiving messages from different machines on different ports
- Associating the different machines' messages with different certificates
- Having Alma receive different certificates, and being able to identify which external system the message is to be directed to, based on its certificate

- 4 Reload the Stunnel configuration and check for a message similar to the one below.

```
Service [My SIP2 machine] (FD=376) bound to 127.0.0.1:1234
```

## xsl:include Support for Letters

### Description

The purpose of this enhancement is to provide XSLT support for `xsl:include` that points to external files for letters customization in Alma.

## Technical Instructions

The Letter Administrator role can customize letters and use the new `<xsl:include>` support.

### To access this capability in Alma:

- 1 From the Alma main menu > General > General Configuration, click **Configuration Menu**.
- 2 From the General Configuration section, click **Customize Letters**.
- 3 For a specific letter, click **Customize**.

The letter configuration displays.

- 4 Edit the content to specify the name of the external file to include in the letter using the `<xsl:include>` parameter. For example:

```
<xsl:include href="http://www/mydomain/my.xls" />
```

- 5 Click **Customize** to save your changes.

If, at a later time, the content in the external file is changed, you will need to resave the Alma letter file for the Alma system to include the updated external file content.

## Primo Widget for Alma Home Page

### Description

The purpose of this enhancement is to provide the capability to search for items at an institution's Primo while working in Alma. This provides high-level information regarding the last publish-to-Primo job from the Alma home page.

### Technical Instructions

Roles with the Administration privilege can configure this new capability.

### To configure the new widget capability:

- 1 From the Alma main menu > General > General Configuration, click **Configuration Menu**.
- 2 From the Widgets section, click/use the following new widget options:

- a Primo Widget Search Fields

Specify/enable the Primo widget search fields and click **Customize**.

Code Table Cancel Customize

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

**Table Information**

Sub System: INFRA Table Name: Primo Widget Search Fields  
Updated By: - Updated on: -  
Table Description: Primo Widget Search Fields

**Primo Widget Search Fields** Tools

Enabled	Display	Order	Code	Description	Default Value	Updated By	Last Updated	
<input checked="" type="checkbox"/>			any	Anywhere	<input checked="" type="radio"/>	-	-	<a href="#">Delete</a>
<input checked="" type="checkbox"/>	<input type="text"/>		title	Title	<input type="radio"/>	-	-	<a href="#">Delete</a>
<input checked="" type="checkbox"/>	<input type="text"/>		creator	Author	<input type="radio"/>	-	-	<a href="#">Delete</a>
<input checked="" type="checkbox"/>	<input type="text"/>		sub	Subject	<input type="radio"/>	-	-	<a href="#">Delete</a>

**Create a New Code Table Row**

Code:  Description:   
Default Value:  Add Row Cancel Customize

Figure 41 - Primo Widget Search Fields

**b** Primo Widget Search Precision

Specify/enable the Primo widget search precision and click **Customize**.

Code Table Cancel Customize

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

**Table Information**

Sub System: INFRA Table Name: Primo Widget Search Precision  
Updated By: - Updated on: -  
Table Description: Primo Widget Search Precision

**Primo Widget Search Precision** Tools

Enabled	Display	Order	Code	Description	Default Value	Updated By	Last Updated	
<input checked="" type="checkbox"/>			contains	Contains	<input checked="" type="radio"/>	-	-	<a href="#">Delete</a>
<input checked="" type="checkbox"/>	<input type="text"/>		exact	Exact	<input type="radio"/>	-	-	<a href="#">Delete</a>

**Create a New Code Table Row**

Code:  Description:   
Default Value:  Add Row Cancel Customize

Figure 42 - Primo Widget Search Precision

**c** Primo Widget Configuration

Specify/enable the Primo widget configuration and click **Customize**.

Code Table Cancel Customize

You are configuring: Main Campus Organization Unit Us

**Table Information**

Sub System: INFRA Table Name: Primo Widget Configuration  
Updated By: - Updated on: -  
Table Description: Primo Widget Configuration

**Primo Widget Configuration** Tools

Enabled	Display	Order	Code	Description	Default Value	Updated By	Last Updated
			primo_search_box_title	Primo Search		-	-
			primo_search_box_url	http://		-	-

Cancel Customize

**Figure 43 - Primo Widget Configuration**

The primo\_search\_box\_url setting is required in order for the Primo widget search capability to be available from the Alma home page. The value for this setting needs to be a valid URL. For instructions regarding how to format the URL, refer to:

- <http://exlibrisgroup.org/display/PrimoOI/Brief+Search>
- [http://exlibrisgroup.org/display/PrimoOI/Brief+Search+\(Deep+Link\)](http://exlibrisgroup.org/display/PrimoOI/Brief+Search+(Deep+Link))
- <http://exlibrisgroup.org/display/PrimoOI/Brief+Search#BriefSearch-Inputparametersdescription>

Format the URL in the following manner:

```
http://<host[:port]>/primo_library/libweb/action/dlSearch.do?
<parametersList>
```

The following is an example of a valid URL:

```
http://il-primo17:1702/primo_library/libweb/action/dlSearch.do?
institution=PRIMO&vid=Auto1&onCampus=false&indx=1&bulkSize=5&dym=true&
highlight=true&lang=eng&group=GUEST&displayField=creator
```

Note:

- There are mandatory parameters such as institution, vid, onCampus, indx, and bulkSize that must be configured.
- The query parameter should not be configured in the URL. Alma adds the query parameter when searching using the widget. The components of the parameter are taken from the search value and the drop-down values.

As a result of completing this configuration, you are able to easily access Primo search capabilities and obtain high-level publish-to-Primo job status information from the convenience of the Alma home page.



# More Information Pop-Up Windows Added

## Description

The purpose of this enhancement is to add More Information pop-windows to audit fields throughout Alma that provide more detailed information about users who have created or modified records. To display the pop-up window, click the icon next to the field. See below for an example.

The screenshot displays the 'Invoice Details' form in Alma. The form includes fields for Invoice Number (PO-1001), Unique Invoice Identifier (34951950000121), Vendor (A0172), Invoice Date (11/07/2012), Total amount (1000.00 GBP), Total invoice lines amount (1,000.00 GBP), Vendor Account (Default Account), Vendor Contact Person, Invoice Reference #, Payment method (Accounting Department), Created By (admin1 (22/10/2012)), Last Updated By (admin1 (22/10/2012)), and Approved By (-). A red circle highlights the 'Created By' field, and a red circle highlights the 'Last Updated By' field. A red oval highlights a pop-up window that appears when clicking the icon next to the 'Created By' field. The pop-up window displays the following information:

Name	User, Super
User Name	admin1
Email Address	<a href="mailto:moshe.shechter@exlibrisgroup.com">moshe.shechter@exlibrisgroup.com</a>
Phone Number	719-555-1234

Figure 44 - More Information Pop-Up Window for Audit Fields

# Alma Developers

The following sections highlight the updates to Alma Developers for January 2013.

## Alma Developers – Course Management Web Services

### Description

The purpose of this enhancement is to provide course management Web services. With this enhancement, Alma enables you to better integrate Alma courses and reading lists with the course management system. The Web service may be used to search for course information, create a new course, update course information, delete a course and its related subfields, create a reading list, update a reading list, delete a reading list, create a new citation, update citation information, and delete a citation.

For related API information, refer to the Course Information section in Alma Developers (Alma main menu > General > General Configuration > Alma Developers and select Web Services > Fulfillment).

## Alma Developers – Analytics/OBI (Oracle Business Intelligence) Web Services

### Description

The purpose of this enhancement is to provide Alma Analytics/OBI (Oracle Business Intelligence) Web services.

For related API information, refer to Alma Developers (Alma main menu > General > General Configuration > Alma Developers and select Web Services > Others).

## Alma Developers – User Cash Management Web Services

### Description

The purpose of this enhancement is to provide user cash management Web services for amounts owed by users and a list of transactions. The Web service enables fetching:

- Sums owed by a patron
- List of the charges and their related transactions

For related API information, refer to the User Cash Information (Fines/Fees) section in Alma Developers (Alma main menu > General > General Configuration > Alma Developers and select Web Services > User Management).

# Primo

The following sections describe the functions provided for Primo in the January 2013 release of Alma.

## MMS Relations – Item Level Filters

### Description

The purpose of this enhancement is to prefilter the display of the inventory of linked records in the Get It tab when a bibliographic record does not contain inventory and has a 773 field that includes a year, volume, and/or barcode in the 773 \$\$g.

In the Get It tab, the system displays the following message above the items that belong to the linked record:

Inventory of related "<title>" is listed below

For example, the following record displays linked items that are prefiltered by a specific year:

Barcode	Type	Policy	Description	Status	Options
551617-530		this is for 14 days	v.41:no.3(2010:spring)	Item in place	<a href="#">Request</a>   <a href="#">Digitization</a>

Figure 45 – Display Linked Inventory in Get It Tab

In order for the Get It tab to use of item level links, the 773 \$\$g needs to be cataloged as follows:

- For year information: \$g yr:
- For volume information: \$g no:
- For part information: \$g pt:
- For issue information: \$g iss:
- For pages information: \$g p:

If the system cannot match a specific item, it displays the information for the linked title without filtering.

# Title 773 Relations Included in the Republish Set of Records to Primo Process

## Description

The purpose of this enhancement is to publish to Primo the 773 field relationship information between bibliographic records. The Alma publishing processes have been updated to handle publishing the 773 relationship information. This enables Primo to display the inventory of a related record when a search in Primo locates a bibliographic record without inventory that contains linking 773 information. The linked bibliographic record's inventory is displayed.

## Technical Instructions

The following roles can access the Primo Republish Set of Titles processing capability:

- General System Administrator
- Repository Administrator
- Catalog Administrator

To update Primo with these links' information, the Republish Set of Titles process needs to be run for the titles that contain the 773 link.

### To run the Primo Republish Set of Titles process:

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

The create process wizard opens to the Create Process – Select Process to Run page.

- 2 Select the **Primo Republish Set of Titles** process and click **Next**.

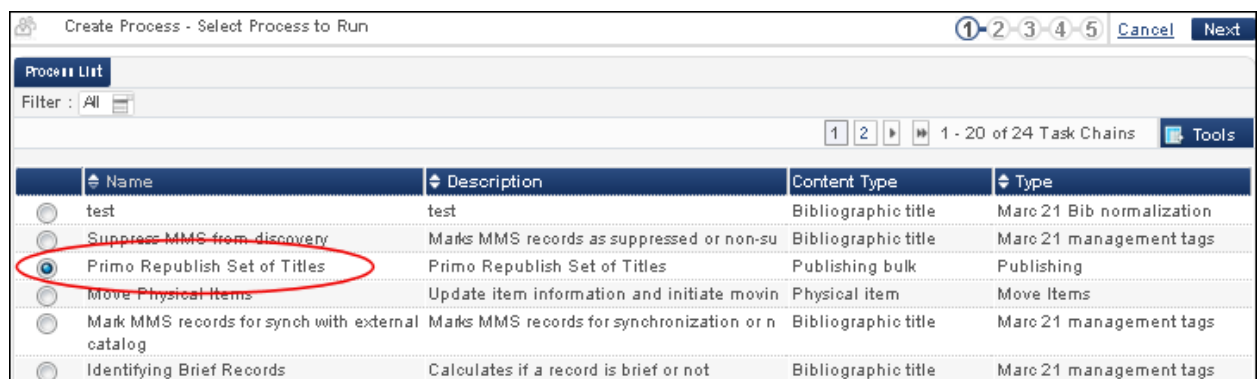


Figure 46 - Primo Republish Set of Titles

- 3 Select the set of records to be republished (previously identified as a set) and click **Next**.

The set contains the records that contain the 773 field link.

- 4 Click **Next** (no configuration of parameters is required for this task).

- 5 Enter a process name, select the **As soon as possible** option, and click **Next**.
- 6 Click **Save**.
- 7 View the **Completed** tab on the Monitor Processes page (Resource Management > Processes > Monitor Processes) for the completed job information.

**Note:** The 773 relationship information can also be published to Primo using scheduled publishing jobs that can be configured in Resource Management > Resource Configuration > Configuration Menu, clicking Export Profiles from the Export section of the Configuration page, and selecting Actions > Edit for Publish bib records to Primo.

## Option to Display Alternative Call Number in Primo

### Description

The purpose of this enhancement is to provide the configurable option in Alma to display the alternative call number information on the Get It tab in Primo. Additionally, you may customize the text/label that precedes the alternative call number information on the Get It tab in the Description column.

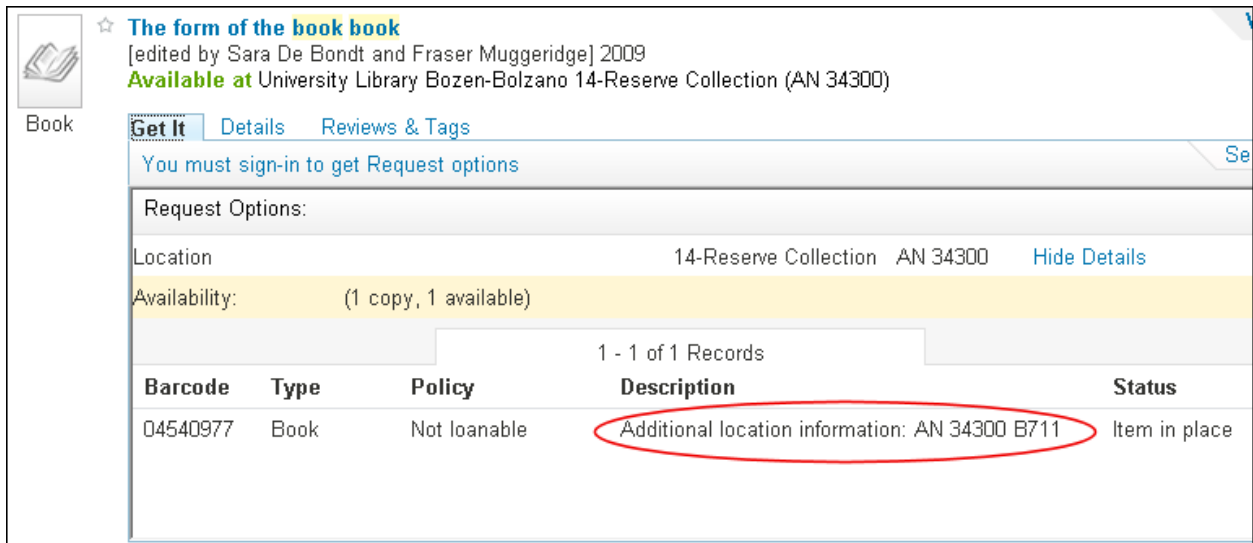


Figure 47 - Alternative Call Number Displayed in Primo

### Technical Instructions

The following roles can access the Alma configuration options for the alternative call number display in Primo:

- General System Administrator
- Fulfillment Administrator

## To configure Alma to display the alternative call number information in Primo:

- 1 From the Alma main menu > General > General Configuration, click **Configuration Menu**.
- 2 From the General Configuration section , click **Other Settings**.
- 3 For `display_alternative_call_number_in_getit`, click **Customize**.

Enabled	parameter key	parameter module	parameter value	free text description	Updated By	Last Updated	Tools
	authentication_method	general	LDAP	user is updatable	admin1	06/09/2012	Restore
	display_alternative_call_number	general	false	Display alternative call number	-	-	Customize
	display_viewit_target_in_new_window	general	true	Display viewit target in new window	-	-	Customize
	email_contact	general	library@exlibris.co.il		-	-	Customize

Figure 48 - Display Alternative Call Number Configuration

- 4 Enter `true` for the parameter value if you want to display alternative call number information in Primo.
- 5 Click **Save**.

## To customize the text/label that precedes the alternative call number information in Primo:

- 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 `c.uresolver.getit2.item_list.alt_call_number`, click **Customize**.

c.uresolver.getit2.item_list.circulatin	Loanable
c.uresolver.getit2.item_list.alt_call_number	Additional location information:
c.uresolver.getit2.item_list.status.111	Item not in place

Figure 49 - Customize the Text/Label for the Alternative Call Number Display in Primo

- 4 Enter the text you prefer in the Description column.
- 5 Click **Customize** to save your text/label description change.

The screenshot shows a web-based configuration interface titled 'Code Table'. At the top right, there are two buttons: 'Cancel' and 'Customize'. The 'Customize' button is highlighted with a red circle. Below the buttons, a status bar indicates 'You are configuring: Main Campus' and a link for 'Organization Unit Use'. The main section is titled 'Table Information' and contains a table with the following data:

Sub System	DISCOVERY_INTERFACE_LABELS	Table Name	Discovery Interface Labels
Updated By	-	Updated on	-
Table Description	Discovery Interface Labels		

**Figure 50 - Save Text/Label Description Customization**

## Other Primo Enhancement

- A system job that handles periodic cleanup of the ongoing publishing to Primo files has been added in this release. This system job is run automatically.



# Resource Sharing

The following sections describe the functions provided for Resource Sharing in the January 2013 release of Alma.

## Loan Renewal for Borrowed Items through Resource Sharing

### Description

The purpose of this enhancement is to provide the capability to process a renewal request for an item borrowed from a resource sharing partner (that supports renewal requests). Renewing a resource sharing request is done in two stages:

- 1 Requesting the renewal from the lender
- 2 Receiving a renew approved indication from the lender and committing the renewal action to the request.

### Technical Instructions

The following roles can access the resource sharing loan renewal capability:

- Fulfillment Services Operator
- Fulfillment Services Manager

**To process a loan renewal request from a patron for an item borrowed from a resource sharing partner:**

- 1 From the Alma main menu > Fulfillment > Resource Sharing, click **Borrowing Requests**.  
The Resource Sharing Borrowing Requests page displays.

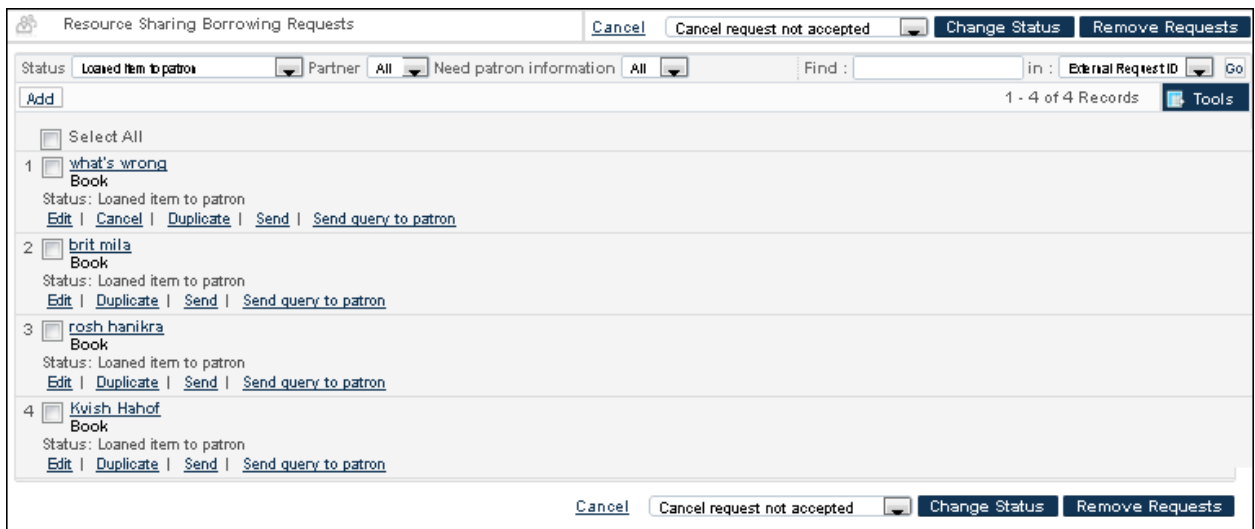


Figure 51 - Resource Sharing Borrowing Requests Page

- 2 Mark requests as pending renewal approval.
  - a Select one or more items.
  - b From the actions drop-down list, click **Renew requested**.

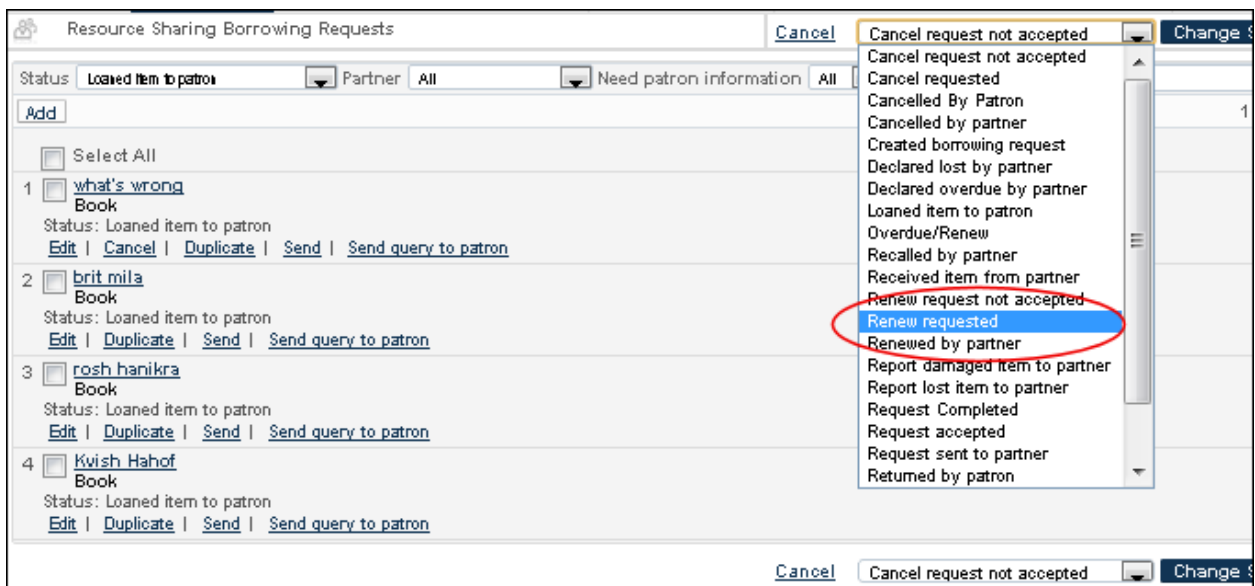


Figure 52 - Renew Requested

- c Click Change Status.
- 3 To commit the request due date renewal:
  - a From the Status drop-down list, click **Renew requested** to view the requests that are pending renewal.

Resource Sharing Borrowing Requests

Status: **Renew requested** Partner: All Need patron information: All

Add

☐ Select All

1	<input type="checkbox"/> <a href="#">Breakfast</a> Book By Zvika	Status: Renew requested <a href="#">Edit</a>   <a href="#">Cancel</a>   <a href="#">Duplicate</a>   <a href="#">Send</a>   <a href="#">Send query to patron</a>
2	<input type="checkbox"/> <a href="#">Next</a> Book	Status: Renew requested <a href="#">Edit</a>   <a href="#">Cancel</a>   <a href="#">Duplicate</a>   <a href="#">Send</a>   <a href="#">Send query to patron</a>
3	<input checked="" type="checkbox"/> <a href="#">brit mila</a> Book	Status: Renew requested <a href="#">Edit</a>   <a href="#">Duplicate</a>   <a href="#">Send</a>   <a href="#">Send query to patron</a>   <a href="#">Renew Accepted</a>

Figure 53 - Renew Requested Status Change

- b** Click **Renew Accepted** for the request that has been renewed.

Resource Sharing Borrowing Requests

Status: Renew requested Partner: All Need patron information: All

Add

☐ Select All

1	<input type="checkbox"/> <a href="#">Breakfast</a> Book By Zvika	Status: Renew requested <a href="#">Edit</a>   <a href="#">Cancel</a>   <a href="#">Duplicate</a>   <a href="#">Send</a>   <a href="#">Send query to patron</a>
2	<input type="checkbox"/> <a href="#">Next</a> Book	Status: Renew requested <a href="#">Edit</a>   <a href="#">Cancel</a>   <a href="#">Duplicate</a>   <a href="#">Send</a>   <a href="#">Send query to patron</a>
3	<input checked="" type="checkbox"/> <a href="#">brit mila</a> Book	Status: Renew requested <a href="#">Edit</a>   <a href="#">Duplicate</a>   <a href="#">Send</a>   <a href="#">Send query to patron</a>   <a href="#">Renew Accepted</a>

Figure 54 - Renew Accepted

The Renew Accepted pop-up window displays showing the system-provided default due date information. If the loan rule specifies **No due date** for the due date value, no system-calculated due date is supplied in the pop-up window.

**Renew Accepted**

Existing loan due date 27/01/2013

New date according to \*

TOU

[Cancel](#) **Update due date**

Figure 55 - Renew Accepted Pop-Up Window

- c Accept or change the new due date and click **Update due date**.

The Status of the request changes to **Renewed by partner** and a notification is sent to the patron regarding the renewal.



Figure 56 - Renewal Notification to the Patron