



Alma April 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 April 2012 Release Highlights](#)
- [Access to April 2012 Features](#)
- Feature/enhancement descriptions for the respective components
 - [Acquisitions](#)
 - [Resource Management](#)
 - [Fulfillment](#)
 - [General](#)
- [Known Issues](#)

Alma April 2012 Release Highlights

In this release, Ex Libris has added functionalities spanning many of Alma's workflows.

The new functionalities were driven by both requests and feedback from our development partners as well as the Alma roadmap.

- **Metadata Bulk Changes Enhancement**

This new functionality offers catalogers a very powerful tool for effecting global changes to bibliographic records. Users can create their own rules (macros) for efficient and easy update of metadata records. In the initial phase, the rules infrastructure and online preview is enabled.

- **Receiving Items**

Several enhancements have been added for receiving items mainly related to receiving serial items. The Receiving page now has two tabs labeled One Time and Continuous. The item display for serials receiving includes vendor information and a link to navigate to the associated holdings record.

- **New E-Activation Task Workflow**

This new option streamlines the management of e-resource activation making it task, workflow oriented. Included in this new functionality is the option for assigning the e-resource activation to named users, alerts related to the task, and the option to manually test access for a specified title.

- **New Digital Object for a Title**

The purpose of this enhancement is to provide the facility to add a new digital object to a title as part of the end-to-end workflow for a staff user.

- **Enhanced User-Management Roles**

A new Selector role has been added to manage all aspects of the selection process. In addition Fulfillment and Acquisition roles have been enhanced with view inventory details privileges.

- **Enhancement to Add Local Portfolio**

The form for adding a local portfolio has been enhanced to allow for quick cataloging such as the option to create a new title, or search the repository for an existing title; alternative titles, e-ISSN, ISSN, e-ISBN, or ISBN. A note field has also been added to the form.

- **New RSS Feed Support**

A new publishing profile has been defined to enable support for RSS feeds. The profile allows for a number of parameter definitions related to various elements of Alma such as funds, call numbers, and material types. This is a customer-request development.

- Automated Lost Loan Handling

A new daily job processes overdue loans into lost items. This is rule-based by item type, patron group, and number of days overdue.

- Reading Lists Enhancements

The process has been further streamlined by adding the ability, during scan-in, to mark items as moved to reading lists as well as the ability to print pick slips from reading lists.

- Assign Call Numbers from the Shelf List

This new functionality allows for building an index of normalized call numbers from holdings records. In addition, it is possible to browse a list of call numbers from the metadata editor.

Access to April 2012 Features

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

Module / Feature	No Activation/ Setup Required	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: Receiving Enhancements				
Resource Management: Electronic Resource Activation Task List				
Resource Management: New Digital Object for a Title				
Resource Management: RSS/New Item Publishing				

Module / Feature	No Activation/ Setup Required	Activation/ Setup Required	Visible to Administrator Only	Contact Ex Libris to Activate This Feature
	(Note: Automatically Visible to All Users with the Appropriate User Role/ Permission)			
Resource Management: Metadata Global Change/Bulk Processing				
Resource Management: Local Portfolio Enhancements				
Resource Management: Assign Call Numbers from the Shelf List Part 1				
Fulfillment: Lost Loan Handling				
Fulfillment: Course Reserve Reading List Enhancement				
Fulfillment: Search Results Process Enhanced for a Non- Repository Citation with Multiple Equivalent Matches				
General: View Inventory Privileges Added to Fulfillment and Acquisition Roles				
General: Read-Only Selector Role Added				

Acquisitions

The following section describes the features provided for the Acquisitions component in the April 2012 release of Alma.

Receiving Enhancements

Description

The purpose for this Acquisitions change is to provide the following enhancements to the receiving function for screen navigation determined by purchase type (serial versus nonserial):

- For serial PO lines ...
 - The Receive button is removed
 - The selection check boxes are removed
 - The Receive action is added for a row
 - The user is navigated to the Receive New Item page when Receive Items is clicked
- When viewing the serials receiving new item screen ...
 - The enums/chrons for the new item are empty
- For serials, the new item action options are ...
 - Receive (creates the item with a status of Received and navigates/returns to the workbench)
 - Receive and manage items (creates the item with a status of Received and navigates to the Items List)
 - Set barcodes for received items
 - Navigate to the holdings record
 - Provide vendor account information
- For the Items List page ...
 - The vendor/account information displays near the PO line/links (at the top of the display)
 - The temporary location follows the location column
 - The Create New Items button has been renamed Receive New Items

- The copy status has been removed (since the status is always Received)
- Vendor account information is provided
- For the PO lines list ...
 - The item description link navigates to the metadata record (instead of the PO line summary)
 - The Items Received status has been removed

In addition, the following enhancements have been provided:

- Mode type ...
 - One time and continuous used instead of serial and monograph
- New item form ...
 - Updated to generate description
- Previous items ...
 - Show more than one item if others exist
- New item ...
 - The fields are no longer prepopulated with information
- Mode maintains the default keep in department/send to shelf status
- Ability to indicate notes has been added

Technical Instructions

The following roles may access these enhancements:

- Receiving Operator
- Receiving Manager

In order to view the Acquisitions receiving enhancements, click Acquisitions > Receiving and Invoicing > Receive from the Alma main menu and navigate through the various options.

Receive New Material Departm

Find PO lines for Receiving

Status Waiting for Locate Order Lines Vendor

Shelf Ready ☐

Receiving Settings

Received Date 15/04/2012

Keep in Department ☐

One Time Continuous

Waiting for Receiving PO lines list

Figure 1 - Receiving Enhancements Example 1

Status: Waiting for Renewal (2012-02-02) Order line type: Printed Journal Subscription Ordering for: Main Library [Account description](#)

Receiving Settings

Received Date 15/04/2012

Keep in Department ☐

Last received item Details

Enumeration A - Chronology I -
 Enumeration B - Chronology J -
 Enumeration C - Chronology K -
 Description -

New items details

Enumeration A Chronology I
 Enumeration B Chronology J
 Enumeration C Chronology K
 Call Number Call Number Type Library of Congress classifi
 Description Generate Clear

Items arrived

Quantity	Ordering for	Location
3	Main Library	General

Figure 2 - Receiving Enhancements Example 2

Resource Management

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

Electronic Resource Activation Task List

Description

The electronic resources activation task list is intended to manage activities related to electronic resources before they are published to end users. Activities are managed by assigning statuses to the electronic resources. The statuses provided with Alma are:

- Check Access
- Access Confirmed
- Not yet Online

Different statuses can be defined by your institution.

The activation task list also provides several supporting actions for managing the electronic resource such as:

- Edit resource
This provides a link that opens the relevant electronic resource editor.
- Activate
This option activates the electronic resource and makes it available to end users.
- Test access
This option tests the access to an electronic resource.
- Assign to
This option assigns the handling of an electronic resource to a different user.

Technical Instructions

The following roles may access these enhancements:

- Electronic Inventory Operator
- Repository Manager

To view these enhancements:

- 1 From the Alma main menu > Resource Management > Manage Inventory, click **Manage Electronic Resource Activation** or the task list option (see below) on the Alma home page.

Tasks

- Order lines assigned to you for review (119)
- Order lines without assignment for Review (1827)
- Order lines ready for packaging (173)
- Orders awaiting Approval (98)
- You have order lines with claims (81)
- Digitization requests waiting for approval (22)
- Items waiting for work order department handling (219)
- Order Lines requested for evaluation (1)
- Order Lines before evaluation for edit (3)
- Electronic items assigned to you for activation (8)** ←

Figure 3 – Home Page Task List Option

The Electronic Resource Activation Task List page displays.

Electronic Resource Activation Task List

Desk

Assigned to Me Unassigned Assigned to Others

Filter: Opened Tasks Find: in: All Go

1 - 7 of 7 Records Tools

Title	Type	Status	Status Date	Modified By	Identifier	Order Line	Actions
07022012_114823	Portfolio	Check Access	05/04/2012	Ex Libris	9780760765455 (Paperback)	-	Actions
ABC-CLIO History Reference Online Complete	Selective package	Check Access	29/03/2012	Ex Libris	-	-	Actions
Astrophysics Data System	Selective package	Check Access	27/03/2012	Ex Libris	-	POL-709	Actions
Current history	Journal	Not Yet Online	27/03/2012	Ex Libris	0011-3530 0011-3530	POL-15522	Edit Edit Resource Test Access Activate Assign to Release assignment Done
Early English Books Online (EEBO)	Selective package	Not Yet Online	27/03/2012	Ex Libris	-	POL-14924	
EBSCOhost Health Business FullTEXT Elite	Selective package	Check Access	27/03/2012	Ex Libris	-	POL-7003	
Synergy Blackwell Journals	Selective package	Check Access	27/03/2012	Ex Libris	-	POL-3106	

1 - 7 of 7 Records Tools

Check Access Access Confirmed Check Access Not Yet Online Change Status

Figure 4 - Electronic Resource Activation Task List Page

See Table 1 for a description of the Electronic Resource Activation Task List form.

Table 1 –Electronic Resource Activation Task List Form

Component	Description
Check Box	Select one or more check boxes to identify the task(s) for a status change
Title	Identifies the electronic resource and provides a link to the relevant resource editor
Type	Identifies the electronic resource (selective/aggregator package, book, or journal)
Status	Identifies the activation task status
Status Date	Displays the task status date The date is originally taken from the PO line and subsequently updated as the task date changes.
Modified By	Displays the name of the last user to make a change
Identifier	Displays the identifier of the electronic resource for the book or journal if it exists
Order Line	Provides a link to the PO line if one exists

Actions	Displays a list of processing options (below) for the electronic resource Edit – Use this action to edit the task entity Edit Resource – Use this action to open the relevant resource editor for the row's electronic resource Test Access – Use this action to check the access for the electronic resource; this uses U-Resolver in debug mode Activate – Use this action to activate the electronic resource; a confirmation message displays or the activation wizard opens (for resource packages that do not have any portfolios/services) Assign To – Use this action to assign a user Release Assignment – Use this action to remove a user assignment for the electronic resource Done – Use this action to mark the task as complete; this checks to see if the service is active (displays a confirmation message if it is not active) and updates the PO line workflow where applicable Note: If the resource is a database, the Activate and Test Access actions are not displayed.
Change Status	Modifies the status of the selected tasks (check box selection) to the status (Check Access, Access Confirmed, or Not Yet Online) selected in the drop-down list

- 2 Use the action options to process an activation or an access test for one or more electronic resources.

New Digital Object for a Title

Description

The purpose of this enhancement is to provide the facility to add a new digital object to a title as part of the end-to-end workflow for a staff user.

Technical Instructions

The Digital Inventory Operator can access this new facility.

To add digital objects:

- 1 From the Alma main menu > Resource Management > Create Inventory, click **Add Digital Representation**.

The Representation Details page displays.



Representation Details	
General Information	
Description -	Created By admin1 Updated By admin1
Title Selection	
Select Title *	
Representation Details	
Label	
Preservation Type	Derivative Copy
Usage Type *	View
Submission Reason	
	Representation Code

Figure 5 - Representation Details Page

- 2 Select a title (bibliographic record), enter representation details, and click **Next**.

The wizard displays the Upload Files page.

- 3 Using the applet, select one or more files and click **Send**.

Upload Files

General Information

Description IET Computers & Digital Techniques
 Created By admin1
 Updated By admin1

☒ Load files using the applet
 ☐ Load files manually

Select File

Oracle

assistants

bin

dcommon

doc

images

install

oemcg

pdfdocs

racin

relnotes

support

Check All

Uncheck All

Send

☐ doccd.htm

☒ start_here.htm

Selected Files

File Name	Label	Note	Source	Size
MP_20101123.pdf	-	-	/exlibris/...	305155

Figure 6 - Upload Files Page

- When you are finished, click **Done**.

RSS/New Item Publishing

Description

The purpose of this enhancement is to provide an RSS feed for new items added to the library collection.

Technical Instructions

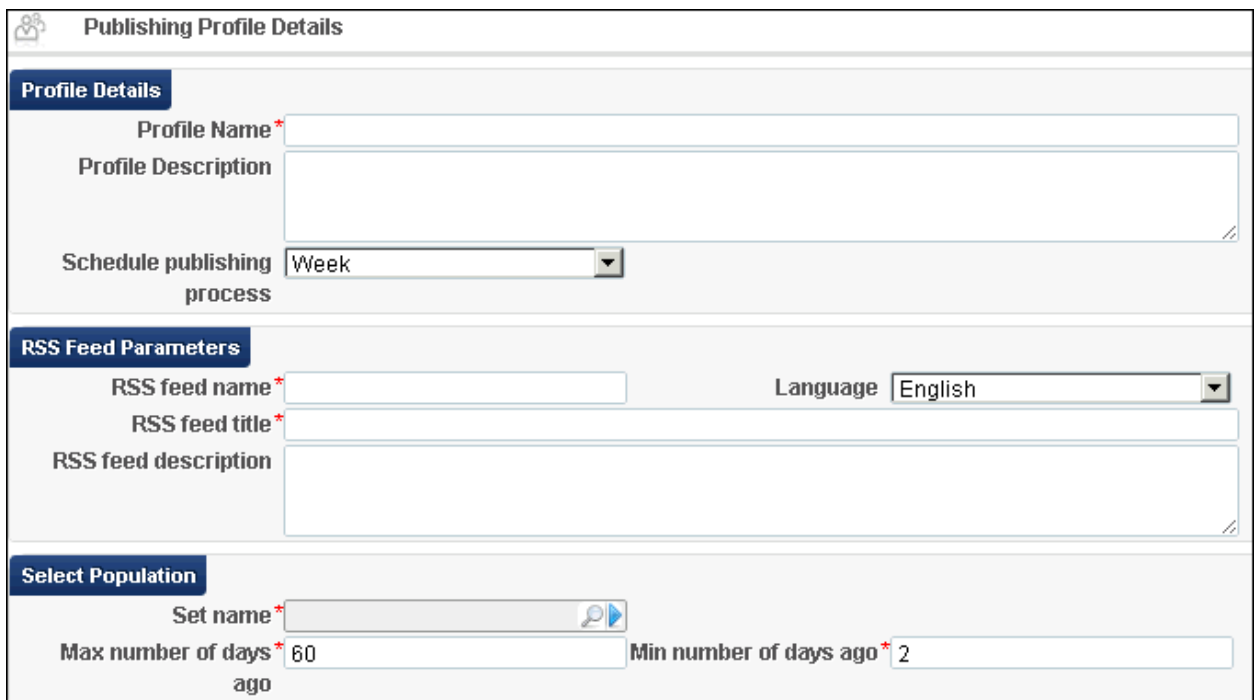
The following roles may access this capability:

- Repository Administrator
- Catalog Administrator
- General System Administrator

To create an RSS feed profile:

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

The Publishing Profile Details page displays.



Publishing Profile Details

Profile Details

Profile Name *

Profile Description

Schedule publishing process Week

RSS Feed Parameters

RSS feed name *

RSS feed title *

RSS feed description

Language English

Select Population

Set name *

Max number of days ago 60

Min number of days ago 2

Figure 7 - Publishing Profile Details Page

- 4 Complete the details on the Publishing Profile Details page and click **Add**.

The content to be published is identified by the set name you select (previously created/saved through Resource Management > Search and Sets > Manage Sets).

Use the Max number of days ago (up to 90 days) and Min number of days ago options to set the range for how many days previous to the current date to check for new items.

Metadata Global Change/Bulk Processing

Description

The purpose of this enhancement is to provide a global change/bulk processing facility of MARC 21 bibliographic metadata in a phased implementation. In the initial phase, the rules infrastructure and online preview is enabled as described below.

Rules Infrastructure

With the April release, users are able to:

- Create rule files (configuration files) containing rules for making changes to the records
- Edit the rule files (add and remove rules)
- Save rule files as configuration files

Rules are defined by using DROOLS (<http://www.jboss.org/drools>).

Preview Functionality Infrastructure

With the April release, users are able to:

- Preview rules and metadata records from the Metadata Editor
- View the rules and metadata records side by side
- Preview the outcome of a rule when run on a metadata record
- Toggle between the rules file and the preview changes
- Edit rules and test immediately

With this capability users can edit, test, and activate normalization routines on MARC 21 records.

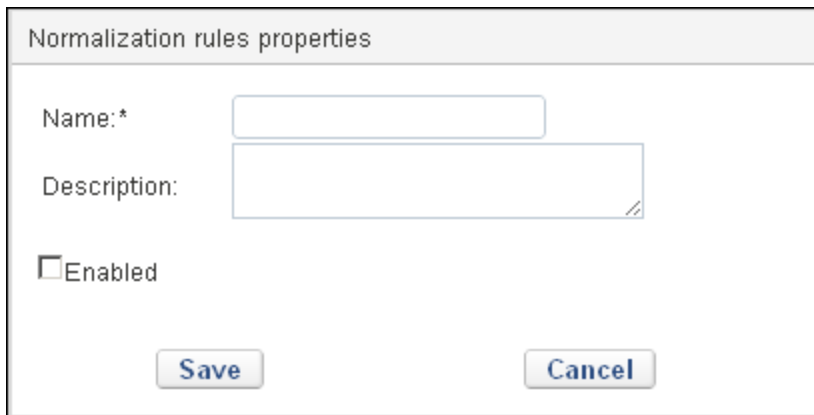
Technical Instructions

The following roles may access this enhancement:

- Cataloger
- Catalog Administrator

To create a rule:

- 1 From the Alma main menu > Resource Management > Cataloging, click **Open Metadata Editor**.
- 2 Click **File > New Record > Normalization Rules**.
- 3 Enter a rule name and description for the normalization rule that you are creating and click **Enabled**.

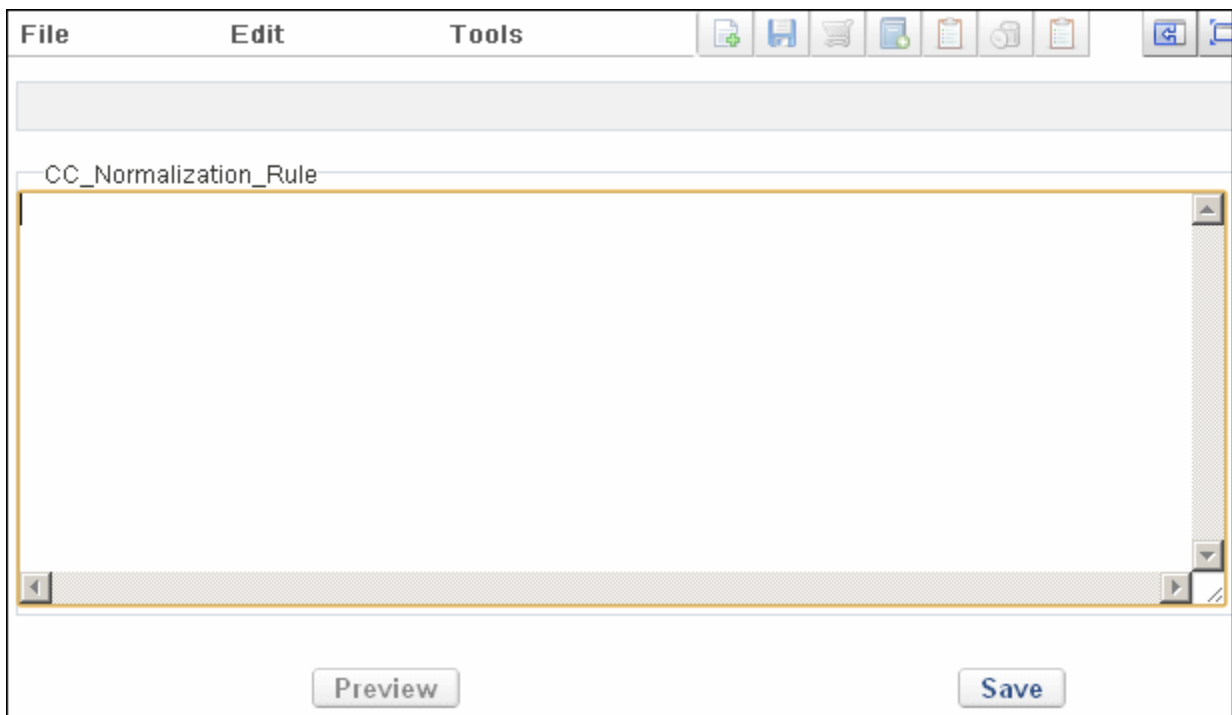


A dialog box titled "Normalization rules properties". It contains three input fields: "Name:*" with a single-line text box, "Description:" with a multi-line text box, and a checkbox labeled "Enabled". At the bottom, there are two buttons: "Save" and "Cancel".

Figure 8 - Normalization Rule Name/Description

4 Click **Save**.

The rule area displays.



A window titled "Normalization Rule Area" with a menu bar containing "File", "Edit", and "Tools". Below the menu bar is a toolbar with icons for file operations. The main area is a large text editor with a tab labeled "CC_Normalization_Rule". At the bottom, there are two buttons: "Preview" and "Save".

Figure 9 - Normalization Rule Area

5 Enter the rule and click **Save**.

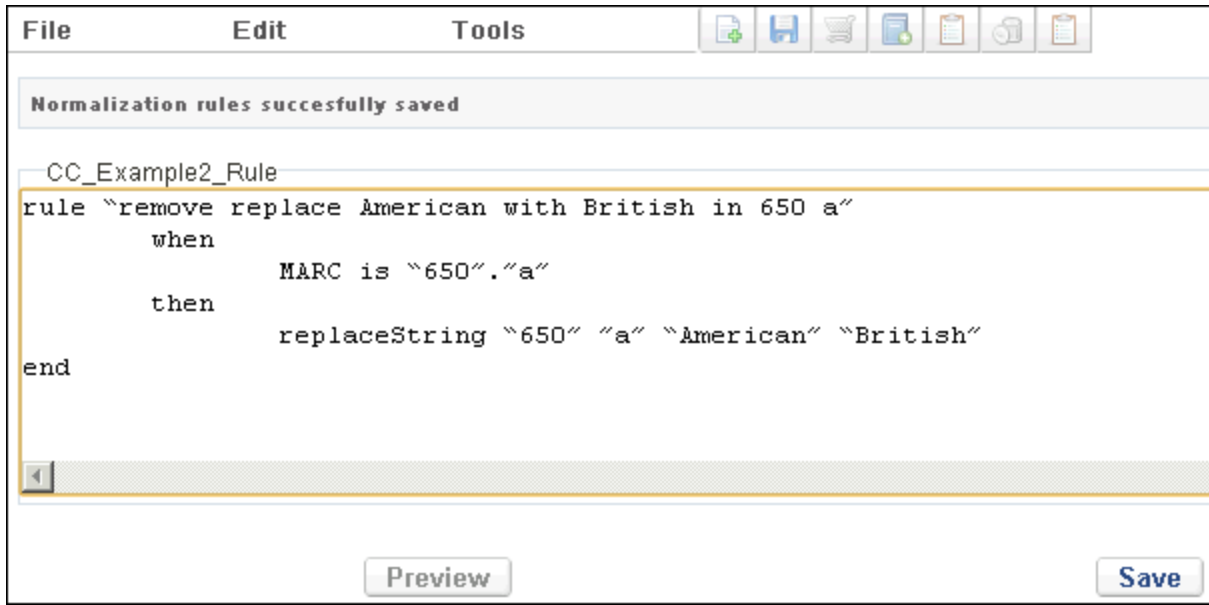


Figure 10 - Rule Example

To work with previously created rules:

- 1 From the Alma main menu > Resource Management > Cataloging, click **Open Metadata Editor**.
- 2 Click the **Normalization Rules** tab to open the Normalization Rules stack.

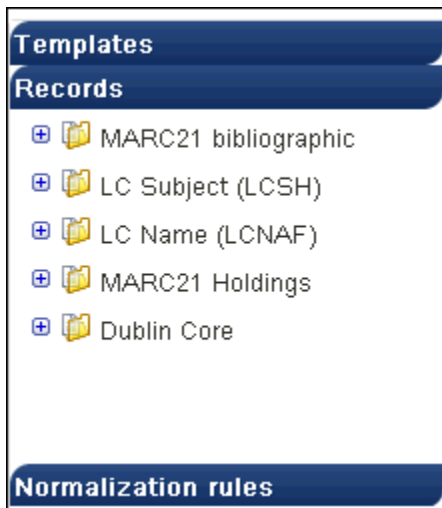


Figure 11 - Normalization Rules Tab

- 3 Expand the MARC 21 bibliographic list to display the saved rules.
- 4 Click the rule with which you want to work.
A list of processing options (Edit, Delete, Duplicate, and Properties) display.
- 5 Click **Edit**, for example, to edit the rule.

To preview a rule:

- 1 Search for/open a bibliographic record.

From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**, search/locate the bibliographic record with which you want to work, and click the **Edit** link.

The Metadata Editor opens and displays the bibliographic record.

- 2 Click **Edit > Split Editor**.
- 3 Click the blank side.

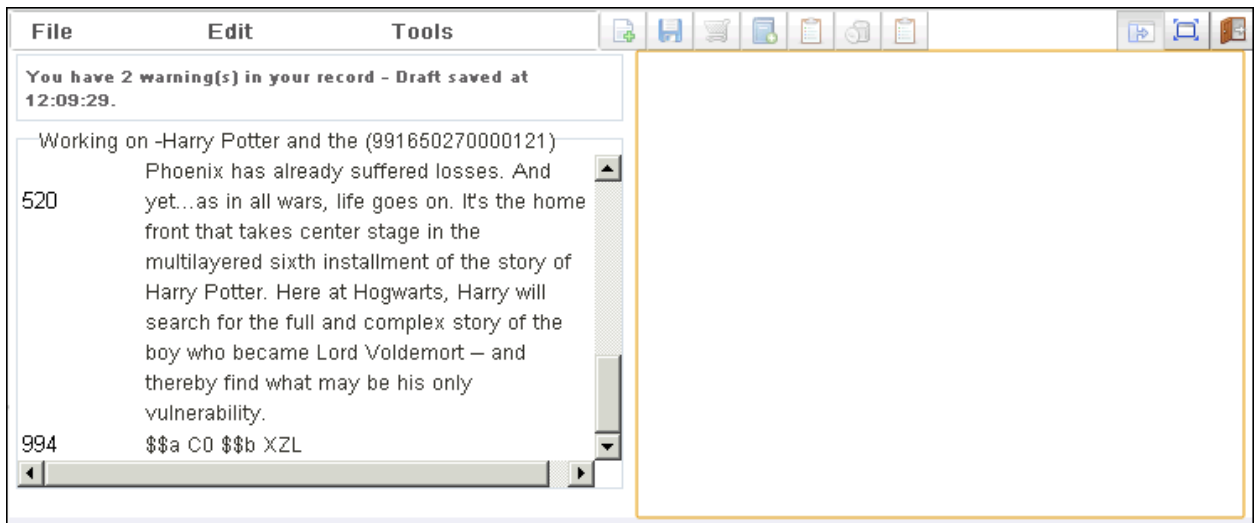


Figure 12 - Blank Side in Split Mode

- 4 Open the normalization rule from the Normalization Rules stack.
 - a Click the **Normalization Rules** tab to open the Normalization Rules stack.
 - b Expand the MARC 21 bibliographic list to display the saved rules.
 - c Click the rule with which you want to work.

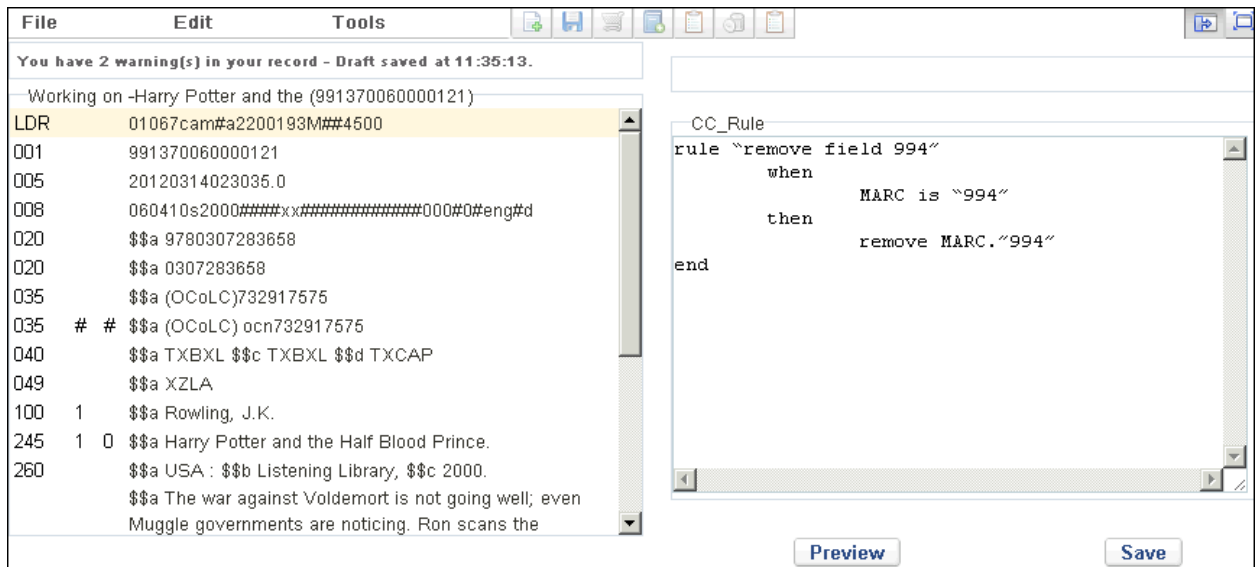


Figure 13 – Normalization Rule Preview Example

5 Click the **Preview** button.

Local Portfolio Enhancements

Description

Previously, creation of a local portfolio was possible only for existing bibliographic records describing electronic titles. With this enhancement, it is possible to create a brief bibliographic record describing the electronic resource upon creation of a local electronic portfolio.

To support this and more, the following changes were added to the New Portfolio page (create local portfolio form):

- Title
- Alternative title 1
- Alternative title 2
- ISSN
- e-ISSN
- ISBN
- e-ISBN
- Note field
- URL identified as a nonmandatory field
- Availability default set to Inactive

- Save and Continue button removed
- Clicking Save navigates the user back to the electronic title search result for the record just created

Technical Instructions

The Electronic Inventory Operator role may access this form change.

To view the new local portfolio form changes:

- 1 From the Alma main menu > Resource Management > Create Inventory, click **Add Local Portfolio**.

The New Portfolio page displays.


New portfolio

Descriptive Information

Creation Type
☒ Create new title
 ☐ Use existing title

Choose Title

Title

Alternative Title 1

Alternative Title 2

ISSN

e-ISSN

ISBN

e-ISBN

General Information

Portfolio Type
☒ Standalone
 ☐ Part of a Package

Package

Service

Provider

Coverage Information

Date Information

From Year

Until Year

From Volume

Until Volume

From Issue

Until Issue

Embargo/Rolling Year

Operator

Number of Years

Number of Months

Inventory Information

Linking Information

Parser

Parser Parameters

URL

Availability status
☒ Inactive
 ☐ Active

Notes

Notes

General note

Figure 14 - New Portfolio Page

2 View the new portfolio options such as:

- Title
- Alternative Title 1
- Alternative Title 2
- ISSN
- ISBN
- e-ISSN
- e-ISBN

- General Note
- Availability status defaults to Inactive

Assign Call Numbers from the Shelf List Part 1

Description

The purpose of this enhancement is to provide shelf list browsing for the purpose of call number lookup. Shelf list browsing can be launched from:

- A MARC bibliographic record (call number fields)
- A holdings record (call number fields)
- Tools > Browse Call Numbers

Technical Instructions

The following roles may access this enhancement:

- Cataloger
- Catalog Administrator

To view the call number browse enhancement:

- 1 From the Alma main menu > Resource Management > Cataloging, click **Open Metadata Editor**.
- 2 Click **Tools > Browse Call Numbers**.

The Browse Call Number options display.

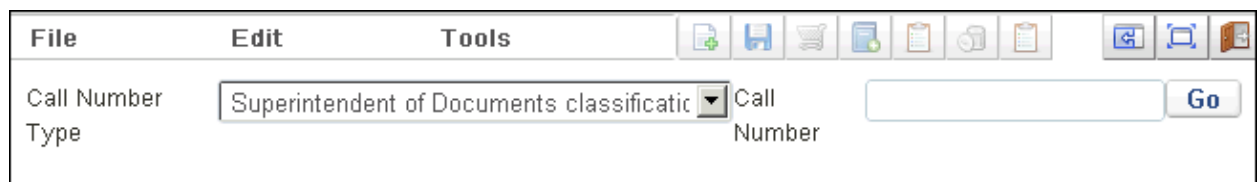


Figure 15 – Browse Call Number Options

- 3 Select the Call Number Type from the drop-down list of options, enter the call number, and click Go.

The call number browse list displays.

Fulfillment

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

Lost Loan Handling

Description

The purpose of this enhancement is to provide an automated/recurring daily batch job facility for processing lost loans.

A Fulfillment Administrator may now set the profiles by which overdue loans are considered lost. The Administrator can set when and which overdue loans are changed to be considered lost automatically. Alma automatically uses these profiles to change the loans to a lost status on a daily basis.

Note: Remigration of your items after the March release is required for lost loan handling to process as designed.

Technical Instructions

The Fulfillment Administrator may access this capability.

To create a profile to process loans as lost:

- 1 From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.
- 2 From the Physical Fulfillment section, click **Lost Loan Profile**.

The Lost Loan Profile List page displays.



Enabled	Name	Description
	students	-

Figure 16 - Lost Loan Profile List Page

3 Click Add Lost Loan Profile.

The Lost Loan Profile Record page displays.

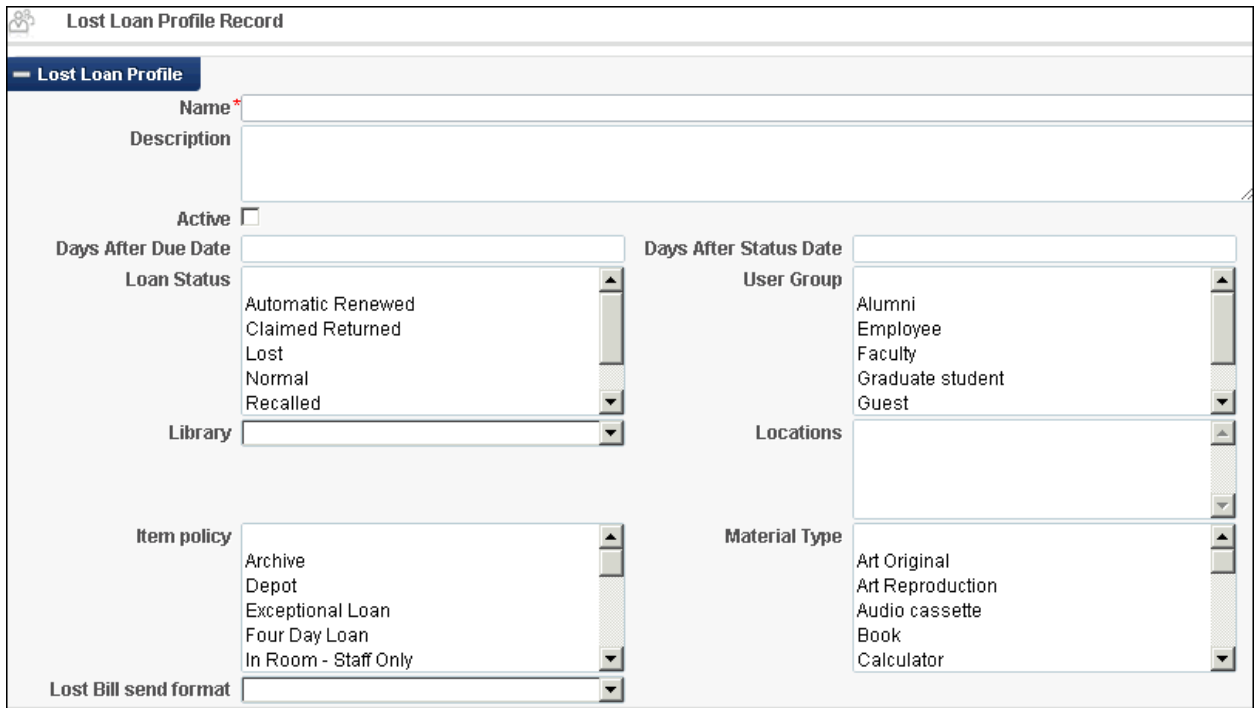
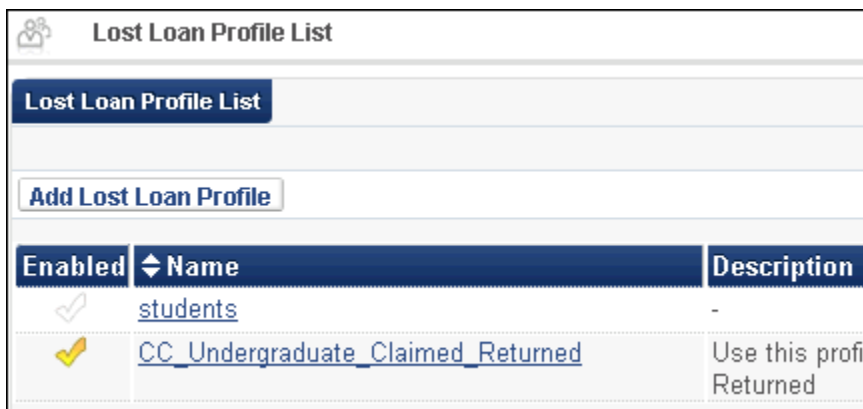


Figure 17 - Lost Loan Profile Record Page

4 Enter the lost loan profile name, specify the characteristics for this profile, and click **Save**.

Selecting the Active check box enables the profile. Once enabled, the lost loan batch job runs daily. You may also enable/disable lost loan profiles using the check mark located on the Lost Loan Profile List page.



Enabled	Name	Description
☒	students	-
☒	CC_Undergraduate_Claimed_Returned	Use this profi Returned

Figure 18 - Enable Check Mark

To view lost loan results from the profile batch processing:

- 1 From the Alma main menu > Fulfillment > Advanced Tools, click **View Lost Loan Jobs**.
- 2 Select a job from the List of Change Loan to Lost Job page to view the results.

Course Reserve Reading List Enhancement

Description

The purpose of this enhancement is to enable the Alma Scan In Interface to do the following in order for the user to quickly and productively create reading list citations:

- Identify/ mark an item as moved for a reading list
- Mark the matching citation as complete
- Create a citation if no link already exists

Managing a reading list is many times done by retrieving the requested item without first attaching the citation to the reading list. With this new feature, the fulfillment operator is able to attach a citation to the reading list by directly wand in the barcode of an item already at hand.

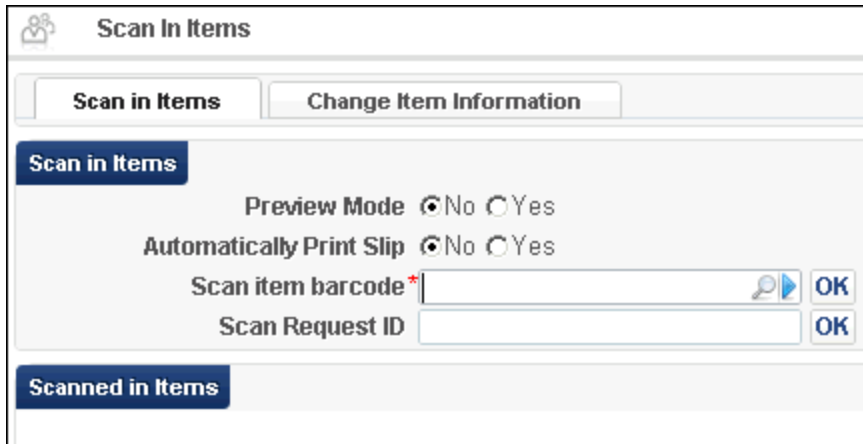
Technical Instructions

The following roles may use this facility:

- Course Reserves Operator
- Course Reserves Manager
- Requests Operator

To access this capability:

- 1 From the Alma main menu > Fulfillment > Resource Requests, click **Scan In Items**.
The Scan In Items page displays.



Scan In Items

Scan in Items | **Change Item Information**

Scan in Items

Preview Mode ☒ No ☐ Yes

Automatically Print Slip ☒ No ☐ Yes

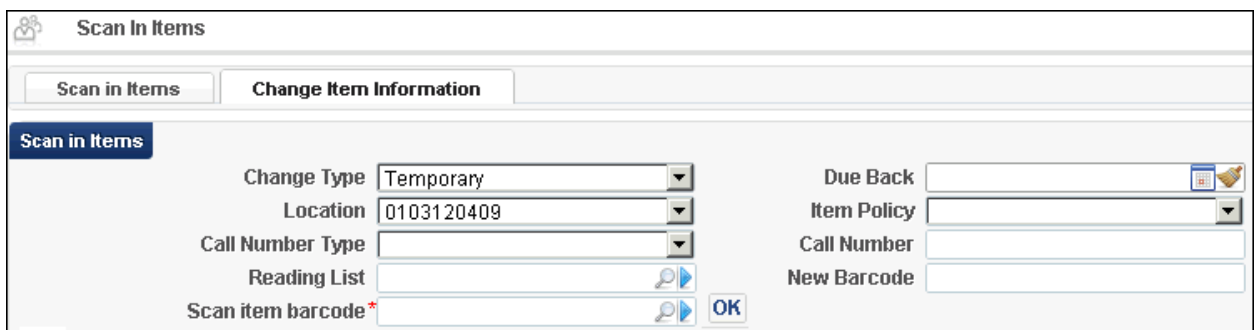
Scan item barcode*  **OK**

Scan Request ID **OK**

Scanned in Items

Figure 19 - Scan In Items Page

- 2 Click the **Change Item Information** tab.
- 3 Scan/enter the item's barcode for the reading list and complete the remaining information needed.



Scan In Items

Scan in Items | **Change Item Information**

Scan in Items

Change Type

Location

Call Number Type

Reading List 

Scan item barcode*  **OK**

Due Back 

Item Policy

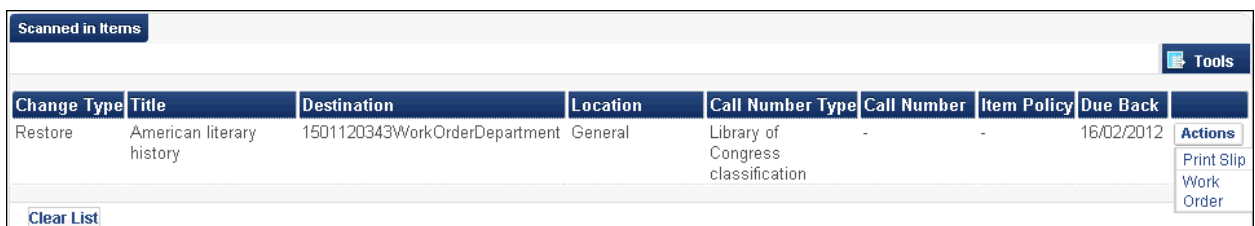
Call Number

New Barcode

Figure 20 - Scan Item Barcode for Reading List Citation

Note: For additional productivity, the reading list can also be selected at the time of scanning the item.

- 4 Repeat the process for each item to be scanned/added to the reading list.
- The scanned items display in a list in the Scanned in Items section of the tab.



Scanned in Items								Tools
Change Type	Title	Destination	Location	Call Number Type	Call Number	Item Policy	Due Back	Actions
Restore	American literary history	1501120343WorkOrderDepartment	General	Library of Congress classification	-	-	16/02/2012	Print Slip Work Order

[Clear List](#)

Figure 21 - Scanned In Items Section

Search Results Process Enhanced for a Non-Repository Citation with Multiple Equivalent Matches

Description

The purpose of this feature is to enhance the results Alma provides for a non-repository reading list citation when there are multiple equivalent matches.

The process of matching search results when using the Resource Locate link for a given reading list citation has been enhanced. If the search finds more than one potential result, the list of possible results are displayed from which the operator may choose. If a number of equivalent results are found (that is, results that are considered identical by Alma's match algorithm), the citation is linked to one of them; and the aggregated list of services is suggested for the citation based on all matched titles.

Technical Instructions

The following roles may access these citation results:

- Fulfillment Services Operator
- Fulfillment Services Manager

To view the suggested search results as described above, create a new non-repository citation that matches on more than one repository title, and click **Locate Resource**.


Repository Search

Current Search: All Titles where All titles (Title contains keywords "Pocket Anesthesia")

Primary Sort by Rank **Secondary Sort by** Rank

1	☐ Obstetric, thoracic and cardiac anesthesia / Book (Philadelphia, PA : Saunders/Elsevier, c2009.) ISBN: 1416059970 and others Subject: Thorax. -- Heart. -- Anesthesia, Obstetrical. and others Availability: Physical version at ONL: STACK; RG732.0277 2009 (1 copy, 1 available)
2	☐ Anesthesia and co-existing disease / Book (Cambridge ; Cambridge University Press, 2007.) ISBN: 0521709385 (pbk.) and others Subject: Perioperative Care methods. -- Anesthesia adverse effects. -- Anesthesia methods. a Availability: Physical version at ONL: STACK; RD82.A6594 2007 (1 copy, 1 available)
3	☐ Obstetric anesthesia / Book (Cambridge ; Cambridge University Press, 2007.) ISBN: 0521709393 (pbk.) and others Subject: Pharmaceutical Preparations Handbooks. -- Anesthesia, Obstetrical methods Handb Availability: Physical version at ONL: STACK; RG732.02634 2007 (1 copy, 1 available)
4	☐ Manual of anesthesia practice / Book (Cambridge ; Cambridge University Press, 2007.) ISBN: 0521709350 (pbk.) and others Subject: Anesthetics Handbooks. -- Anesthesia Handbooks. -- Anesthesia Handbooks, manu Availability: Physical version at ONL: STACK; RD82.2.M352 2007 (1 copy, 1 available)

Figure 22 - Repository Search Page for Resource Locate

To view how Alma considers identical records as a single match, you need:

- To have two different bibliographic records for the same title with different items
- To add a non-repository citation to a reading list with the same title as the two previously identified bibliographic records
- To use the Resource Locate link for the citation

When this option is used, the Repository Search page displays allowing the staff user to select the appropriate bibliographic record.

☐ **Pocket Anesthesia**
Book By Richard D. Urman
 (Williams & Wilkins 2011)
Citation Status: Being Prep
Resource Locate Status: N
[Edit](#) [Resource Locate](#) [Set](#)

Figure 23 - Resource Locate Link

General

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

View Inventory Privileges Added to Fulfillment and Acquisition Roles

Description

The purpose of this enhancement is to add view inventory privileges to the Fulfillment and Acquisition roles.

In order to complete their work, Fulfillment and Acquisition roles often need to be able to access full information for a given inventory item. These users' roles have been expanded to enable access to this information where relevant.

Technical Instructions

Access to view inventory is automatically added to the Fulfillment and Acquisition roles with the April release of Alma. This capability is available for existing users as well as new users created through the Alma main menu > General > User Management, Find and Manage Users option. The roles for creating/managing users in Alma remain the same.

Read-Only Selector Role Added

Description

The purpose of this enhancement is to provide a read-only Selector role.

The new Selector role is able to log into Alma with access to various information such as vendor, inventory, purchase orders and budgets. This access is provided in view mode only. In addition, the Analytics Designer may assign reports to be viewed by this new role.

Technical Instructions

The following roles may select the new role for users:

- User Manager
- User Administrator

To create a new user with the Selector role:

- 1 From the Alma main menu > General > User Management, click **Find and Manage Users**.
- 2 Click **Add User > Staff**.
- 3 Enter the user details, click **Save and Continue**, and click **Add Role**.
- 4 From the Acquisitions section, select the check box for the Selector role.

Acquisitions		
☐	Role	Description
☐	Acquisitions Administrator	Manages Acquisitions configurations such as Ac
☐	Fiscal Period Manager	Manages copy ledger, rollover job and edit fiscal p
☐	Fund Manager	Manages all fund related actions
☐	Invoice Manager	Manages invoice creation, review and approval ac
☐	Invoice Operator	Manages invoice creation and review actions
☐	Ledger Manager	Manages ledgers for set up and allocations
☐	License Manager	Manages licenses and license amendments
☐	Purchase Operator Extended	Cancel purchase order lines
☐	Purchasing Manager	Manages authoritative purchasing operations such
☐	Purchasing Operator	Manages all purchasing operations, including cre
☐	Receiving Operator	Manages arrival of purchased items
☒	Selector	Manages all aspects of the selection process
☐	Trial Manager	Manage Electronic trials and evaluation as a prep
☐	Trial Operator	Manage Electronic trials and evaluation as a prep
☐	Trial Participant	Permitted to participate in a trial process
☐	Vendor Manager	Manages all aspects of the institution's vendors fi

Figure 24 - Selector Role Check Box

Note: The Selector role may also be added for existing users.

- 5 Click **Add Role** and click **Save**.

Known Issues

The table below describes the known issues and their status.

Table 2 – Known Issues

Description	Change	Status
The e-resource task list coming back from the e-resource editor does not work.	The e-resource task list should work coming back from the e-resource editor.	Open
For FTP import, only one re-occurrence of a metadata import job can be defined.	Multiple re-occurrences are to be configurable.	Open
The standalone portfolio does not have the interface name in it.	It should have the interface name instead of the provider.	Fixed