



Alma August 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 August 2012 Release Highlights](#)
- [Access to August 2012 Features](#)
- Feature/enhancement descriptions for the respective Alma components and functional areas
 - [Acquisitions](#)
 - [Resource Management](#)
 - [Fulfillment](#)
 - [Resource Sharing](#)
 - [Course Reserves](#)
 - [General](#)
 - [Analytics](#)
 - [Primo](#)
 - [Security](#)
- [Known Issues](#)

Alma August 2012 Release Highlights

Acquisitions

- Enhancements to the EOD Mapping Profile

In the June 2012 release, we reported about the new tab that was added to the PO line that allows for the listing of interested users to be notified when the order is complete (for example, items received or resource activated). This functionality has now been extended to the EOD mapping profile. This further streamlines the process by allowing users to be notified of new material arrival even when the process is via EOD.

- Invoices in Tasks List

Invoices assigned to the user (or without assignment) for review or approval now display in the task list on the user's desktop.

- Enhanced Search in Acquisitions

All PO line search screens (for example, Review, Receive, Package, and so forth) now have an enhanced search capability: the option to search by Title – Starts With.

- Receive Payments from ERP System

Alma can now be configured to receive a payment confirmation file from an ERP system that updates the relevant invoices.

Resource Management

- New Rules Language

In order to simplify the creation of user-defined rules in the MD Editor, a more user-friendly language has been implemented. In addition, there is also an option to view rule snippets that can help the user in creating new rules.

- Metadata Import Enhancements

The purpose of this enhancement is to provide the ability to handle and download unsuccessful records from the metadata import process. Two files can be downloaded:

- Records that did not load because of validations issues
- Records that did not load because of match/merge issues

- **Enriched Functionality in Set Management**

It is now possible to convert from one search set type to another search set type (for example, creating a set of physical items and then converting the resulting set to an all titles set).

- **New Delete Items Process**

A new process allows for the option of withdrawing or deleting sets of physical items (after validating that the deletion can be done -- that is, that the items are not on loan).

- **Notes Tab on E-Records**

All levels of e-inventory records now have a generic Notes tab. Authorized users are able to add, edit, and delete notes.

- **Create an SI from Alma**

When searching the Community Zone, it is now possible to report an issue related to packages and portfolios to Ex Libris. This is achieved by clicking the **Send to Ex Libris** link that opens the UI to create an SI that you can send to the CRM system.

Fulfillment

- **Override Request Configuration Rules**

A new option allows staff users (with a new override privilege) to override request configuration rules (for example, pickup locations when placing a request for a patron).

- **Support for Sending SMS**

Alma now supports the option of sending an SMS to a patron when a requested item is placed on the hold shelf.

Resource Sharing

- **Tracking and Changing Resource Sharing Request Status**

The purpose of this enhancement is to enhance the borrowing request workflow, to provide the ability to monitor the statuses of borrowing requests and to update the statuses based on input from the user and/or resource sharing partner.

- **Sending Requests by ARTEmail**

It is now possible to send requests by ARTEmail. An additional enhancement also allows for sending messages to an alternative delivery address using ARTEmail.

The Primo Resource Sharing Request form has been enhanced to include an optional email address for delivery and an optional shipping address.

Course Reserves

- Enhancements to Reading List Functionality

As part of the management of reading lists, it was possible to create brief metadata records for a book or article. This functionality has been enhanced so that it is now also possible to create brief records for an e-book or e-article.

Alma Analytics

- DDC Reporting Options

A hierarchical Dewey Decimal Classification scheme has been added to Alma Analytics for reporting purposes.

- Resource Sharing

Alma Analytics now supports the option of creating reports related to Resource Sharing, both for borrowing and lending requests.

It is also possible to create BL (British Library) keyword reports reporting on the keywords that were sent in requests to the BL. Separate reports regarding successful and unsuccessful requests can be generated.

User Management

- Enhanced Security of Users' Personal Data

In order to ensure enhanced security of users' personal data in Alma, some security infrastructure changes have been implemented. These changes are mainly related to search options in relation to user information. For example, it is no longer possible to search by address. To search email requires entering the full email address and so forth.

Primo

- Authentication and Public Notes Now Display in Primo

- FTP Transfer of Files to Primo

New options related to publishing to Primo allow for defining whether the published files should be transferred to Primo or remain on the Alma server.

- Enrich Primo Publishing with Headings

A new parameter in the export profile for publishing records to Primo provides the ability to publish records to Primo with enriched headings information from the Community Zone.

Access to August 2012 Features

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

Component / 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: PO Line Interested User				
Acquisitions: Invoicing with Vendor- Provided Numbers				
Acquisitions: Purchasing/Receiving Standing Order – Nonmonographic Type Supported				
Acquisitions: Receive Payments from ERP System				
Acquisitions: Title – Starts with Search in Acquisitions				
Acquisitions: Task List/Widget Access for Invoicing				

Component / 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: EOD Mapping of the Reporting Code Element Restructured				
Resource Management: New Rules Language				
Resource Management: Metadata Import Process Enhancements				
Resource Management: New Delete Items Process				
Resource Management: Enhanced Process/Sets Options				
Resource Management: Opening Support Incidents within Alma				
Resource Management: Metadata Editor Enhancement				
Fulfillment: On Shelf Request Policy				
Fulfillment: Enhanced Patron Notice Configuration				
Fulfillment: SMS Communications Enabled				

Component / 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: Tracking and Changing Borrowing Request Statuses				
Resource Sharing: Using ARTEmail to Send Communications for Existing Requests				
Resource Sharing: Sending Requests to an Alternative Delivery Address				
Course Reserves: Adding Electronic Citations to Course Reserves				
General: Enhanced Security of Users' Personal Data				
General: Enhanced S/FTP Definition Lists/Forms				
Analytics: Reporting Lending Requests for Shared Resources				
Analytics: Reporting Borrowing Requests for Shared Resources				
Analytics: Reporting Dewey Decimal Classification				

Component / Feature	No Activation/ Setup Required	Activation/ Setup Required	Visible to Administrator Only	Contact Ex Libris to Activate This Feature
	(Note: Automatically Visible to All Users with the Appropriate User Role/ Permission)			
Primo: Updated Notes Implementation				
Primo: Using FTP File Transfer for Primo Publishing				
Primo: Enriching Primo Publishing with Headings				
Security: Additional User Name/Password Security				

Acquisitions

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

PO Line Interested User

Description

The purpose of this enhancement is to provide the ability, using EOD/import, to add interested users to the PO line. This is accomplished through the Acquisitions import profile.

The EOD profile should indicate which MARC field /subfield contains the interested users information. In order to support multiple interested users, the interested users' MARC field should either include multiple subfields for each interested user or have one subfield that uses a colon delimiter between interested users.

With this capability, you are able to create a more complete PO line.

Technical Instructions

The Acquisitions Administrator role can create the import profile for this capability.

To update an existing import profile to add interested users:

- 1 From the Alma main menu > Acquisitions > Acquisitions Configuration, click **Configuration Menu**.
- 2 From the Purchase Orders section, click **Import Profiles**.
- 3 Select **Actions > Edit** for the profile you want to update.
- 4 Click the **PO Line Information** tab.
- 5 Specify the EOD mapping (interested users and subfield) in the Interested Users/subfield provided.

Note: Use a comma-delimited format in the import file when specifying multiple interested users.

EOD mapping		
PO Line field	949	subfield b
Vendor Reference Number field		subfield
List Price field	949	subfield s
Vendor Title Number field		subfield
Volume Part Number field		subfield
Po Number field	949	subfield c
PO Line Owner field		subfield
Default PO Line Owner	Main Library	
Map Owner	☐	
Fund Distribution field	949	subfield u
Default Fund		
Map Funds	☐	
Reporting code		subfield
Interested Users		subfield
vendor Invoice Number field		subfield

Figure 1 - EOD Mapping for Interested Users

Invoicing with Vendor-Provided Numbers

Description

The purpose of this enhancement is to enable packaging orders into one PO based on the vendor invoice number by loading the vendor invoice number as part of the EOD.

- The vendor-provided invoice number can be stored in an EOD file to be imported
- The imported invoice number is added to the PO line record
- A PO can be created for the EOD records that contain the same invoice number

When an invoice is created from a PO:

- The vendor-provided invoice number is used as the new invoice number by default
- The PO is searchable by the vendor invoice number

Technical Instructions

The Acquisitions Administrator role can create the import profile for this capability.

To configure the import profile for using the vendor invoice number:

- 1 From the Alma main menu > Acquisitions > Acquisitions Configuration, click **Configuration Menu**.
- 2 From the Purchase Orders section, click **Import Profiles**.
- 3 Select **Actions > Edit** for the profile you want to update.
- 4 Click the **PO Line Information** tab.
- 5 Specify the EOD mapping for the Vendor Invoice Number field.

The screenshot shows the 'EOD mapping' configuration window. It contains a table with two columns: 'Field' and 'subfield'. The 'Field' column lists various PO line fields, and the 'subfield' column shows the corresponding EOD mapping values. A large black arrow points to the 'Vendor Invoice Number field' row, which is currently empty in both columns.

Field	subfield
PO Line field	949
Vendor Reference Number field	
List Price field	949
Vendor Title Number field	
Volume Part Number field	
Po Number field	949
PO Line Owner field	
Default PO Line Owner	Main Library
Map Owner	☐
Fund Distribution field	949
Default Fund	
Map Funds	☐
Reporting code	
Interested Users	
Vendor Invoice Number field	

Figure 2 - EOD Mapping for Vendor Invoice Numbers

To view the vendor invoice number in the order details of the PO:

- 1 From the Alma main menu > Acquisitions > Purchase Order, click **Review**.
 - 2 Select **Actions > Edit** for a PO.
- The PO Summary page displays.

The screenshot shows a web interface for a Purchase Order (PO) Summary. At the top, it displays the PO number 010712063824 and the status 'In Review (20)'. Below this are tabs for 'Summary', 'PO line list', 'Attachments', and 'Notes'. The 'Order Details' section is expanded, showing 'PO Information' with fields for 'PO number' (010712063824) and 'Created by' (System (01/07/2012)). The 'Vendor' section includes fields for 'Vendor/Account' (0-123/), 'Vendor contact' (a dropdown menu), 'Vendor invoice number' (a field with a hyphen), and 'Note to vendor' (a text area).

Figure 3 - Vendor Invoice Number Displays in Order Details for the PO

Purchasing/Receiving Standing Order – Nonmonographic Type Supported

Description

The purpose of this enhancement is to provide support for a new purchase type that enables purchasing and receiving of nonmonographic standing orders. The purchase order type that was added is Physical Standing Order Nonmonograph.

Technical Instructions

The following roles can access this feature:

- Purchasing Operator
- Purchasing Manager

To view this capability:

- 1 From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
- 2 Search for an item.
- 3 Click **Order**.
The PO Line Owner and Type page displays.
- 4 View the drop-down list of options for **Purchase Type**.

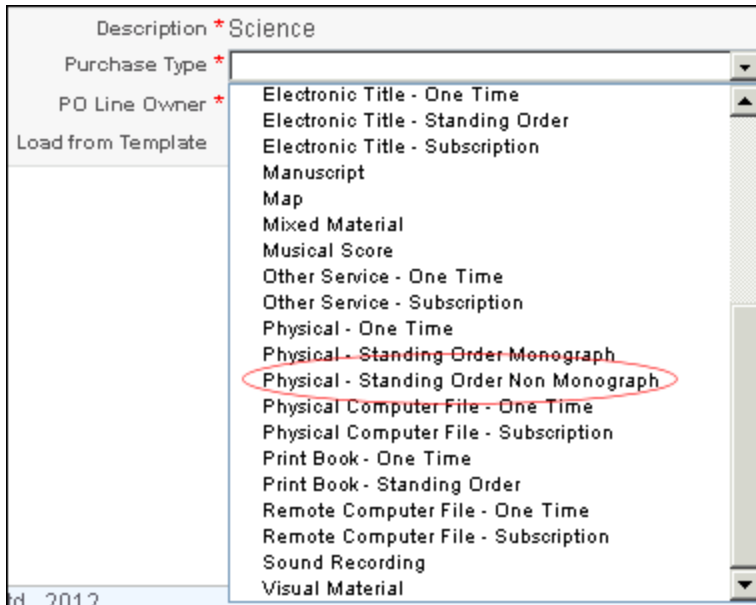


Figure 4 - Physical Standing Order Nonmonograph

Receive Payments from ERP System

Description

The purpose of this enhancement is to provide the capability to receive payments from an external ERP system into Alma. With this capability, Alma can be configured to receive a payment confirmation file from an ERP system and update the relevant invoices.

Technical Instructions

The General System Administrator role is needed to complete the configuration for this feature.

To configure this capability:

- 1 From the Alma main menu > General > General Configuration, click **Configuration Menu**.
- 2 From the External Systems section, click **External Interfaces**.
- 3 Click the **Add External System** button.
- 4 Create an external system and select **Payment** for the Integration Type.

The screenshot shows a web form titled "External System". It has several fields: "Code" with an asterisk, "Integration Type" with an asterisk and a dropdown menu, "Description", and "Created By". The "Integration Type" dropdown is open, showing a list of options: Augmentation Definition, Bursar, Discovery Interface, Exchange Rate, LDAP, OCLC Client, **Payment** (highlighted), Proxy Definition, Remote Storage, Self Check, Sms, User, and Z3950.

Figure 5 - Payment Integration Type

- 5 Click Next.
- 6 In the Import section, select **Active**.
- 7 Enter the **Input File Path**, select the **Schedule**, and click **Save**.

The screenshot shows the "External System" configuration form with a table at the top. The table has columns: Code, Name, and Integration Type. The first row shows "CC_ERP_Payment", "CC_ERP_Payment", and "Payment". Below the table is an "Actions" section with two tabs: "Import" and "Export". The "Import" tab is active, showing fields for "Active" (radio buttons for Active and Non Active, with Active selected), "Plugin" (dropdown), "Input File Path" (text field with "ERP_Payments"), and "Schedule" (dropdown with "Daily"). The "Export" tab is also visible, showing fields for "Active" (radio buttons for Active and Non Active, with Non Active selected), "Plugin" (dropdown), "Output File Path" (text field), and "Schedule" (dropdown with "As soon as possible").

Figure 6 - External System Import Actions

Note: With this release, there is a new customer parameter for export invoice that affects this payment feature. The new parameter is `handle_invoice_payment` that is set to True by default. If this parameter is set to False, the export process (for payments) closes the invoices instead of sending them to Waiting for Payment.

Title – Starts with Search in Acquisitions

Description

The purpose of this enhancement is to provide enhanced search capability when using Acquisitions > Receiving and Invoicing > Receive. Left-anchored search is critical for properly identifying PO lines that need to be worked on, mainly at the Receiving Workbench. With this feature, the **Title – Starts with** search makes this type of search possible. The Title – Starts with search option is also available for PO Lines in Review, Claims, Renew, Review Deferred, Package, and Locate.

Note: With this option, a full re-index of the PO lines is performed with the release installation.

Technical Instructions

The following roles can access this facility:

- Purchase Order Operator
- Purchase Order Manager
- Receiving Operator
- Receiving Manager

To view this capability:

- 1 From the Alma main menu > Acquisitions > Receiving and Invoicing, click **Receive**.
- 2 View the drop-down list of options for the **In** field.

The screenshot shows the 'Find PO Lines for Receiving' window. At the top, there are fields for Status (Sent), Locate (Order Lines), Vendor, Find, and In. The 'In' field has a dropdown menu open, showing options: Additional PO Line Ref, All, Common fields, Author name, Standard number, Invoice number, PO Line, PO reference number, Title, Title - Starts with (highlighted), and Vendor account code. Below the search fields, there are 'Receiving Settings' including Received Date (02/08/2012), Keep in Department (checked), Next Step (Physical Processing), and buttons for One Time and Continuous. At the bottom, it says 'Waiting for Receiving PO Lines List'.

Figure 7 - Starts With Search

Task List/Widget Access for Invoicing

Description

The purpose of this enhancement is to provide access to invoicing activities from task lists/widgets on the Alma home page.

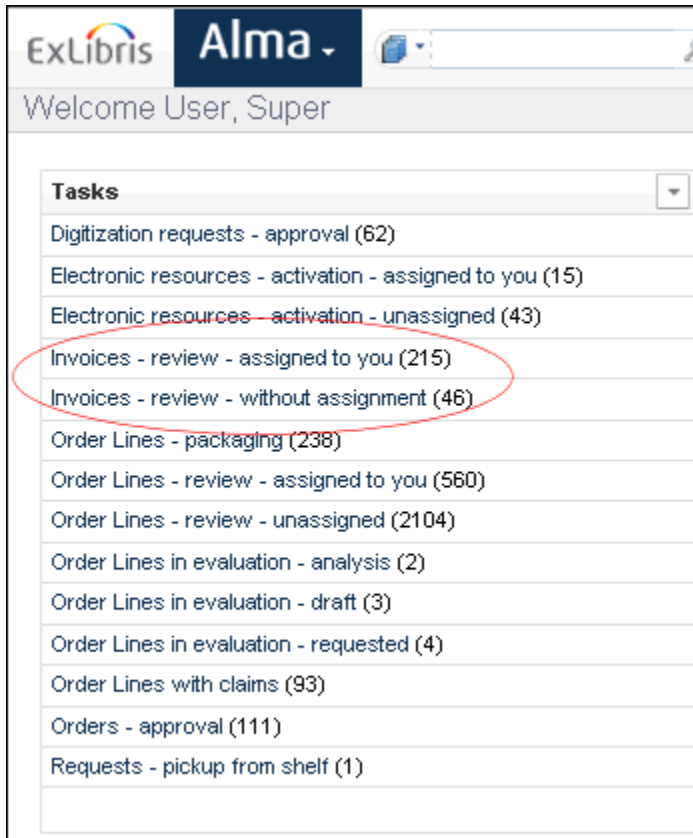


Figure 8 - Invoicing in Tasks List

Technical Instructions

The following roles can access invoicing activities from the tasks list/widgets:

- Invoice Operator (for review activities)
- Invoice Manager (for approval activities)

EOD Mapping of the Reporting Code Element Restructured

Description

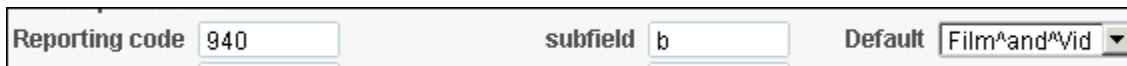
The purpose of this enhancement is to restructure EOD mapping of the reporting code element. With this change, you can now map the reporting code separately (not depending on the fund).

Technical Instructions

The Acquisitions Administrator role can access this capability.

To view this change:

- 1 From the Alma main menu > Acquisitions > Acquisitions Configuration, click **Configuration Menu**.
- 2 From the Purchase Orders section, click **Import Profiles**.
- 3 Select **Actions > Edit** for an order with a New Order profile type.
- 4 Click the **PO Line Information** tab.
- 5 Enter the reporting code fields and click **Save**.



The screenshot shows a form with three input fields. The first field is labeled 'Reporting code' and contains the value '940'. The second field is labeled 'subfield' and contains the value 'b'. The third field is labeled 'Default' and contains the value 'Film^and^Vid' with a dropdown arrow on the right.

Figure 9 - Reporting Code Example

- 6 Import a record to view/confirm the reporting code mapping.

Other Acquisitions Enhancements

The list below highlights recent enhancements in Acquisitions:

- When creating an invoice from a PO, the **Vendor invoice number** can now be used in the **Search PO** field.
- The EDI invoice load for serials now imports the subscription start/end dates to the **Subscription from date** and **Subscription to date** fields in the Invoice Lines tab.
- When saving a public template under a name that already exists, a confirmation message pops up, allowing you to override the existing template.
- The Acquisitions Administrator can now configure PO line deferral reasons in Acquisitions Configuration.

Resource Management

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

New Rules Language

Description

The purpose of this enhancement is to provide a new rules language.

Technical Instructions

The following roles can access the new rules language:

- Cataloger
- Catalog Administrator

To access the new rules language:

- 1 From the Alma main menu > Resource Management > Cataloging, click **Open Metadata Editor**.
- 2 Click **File > New > Normalization rules** (or click the **Normalization rules** tab to work with existing rules).

The Normalization rules properties dialog box displays.

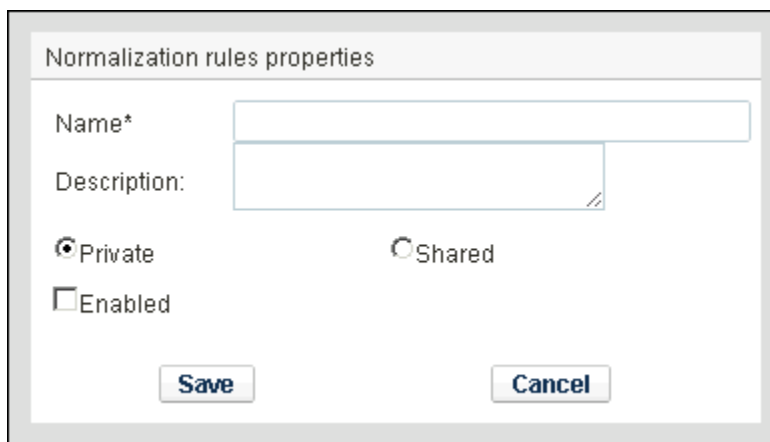
The image shows a dialog box titled "Normalization rules properties". It contains several input fields and checkboxes. The "Name*" field is a single-line text box. The "Description:" field is a multi-line text box with a small icon in the bottom right corner. Below these fields are two radio buttons: "Private" (which is selected) and "Shared". Below the radio buttons is a checkbox labeled "Enabled", which is currently unchecked. At the bottom of the dialog box are two buttons: "Save" and "Cancel".

Figure 10 - Normalization Rules Properties Dialog Box

- 3 Enter the normalization rules properties and click **Save**.

The rules editing area opens.

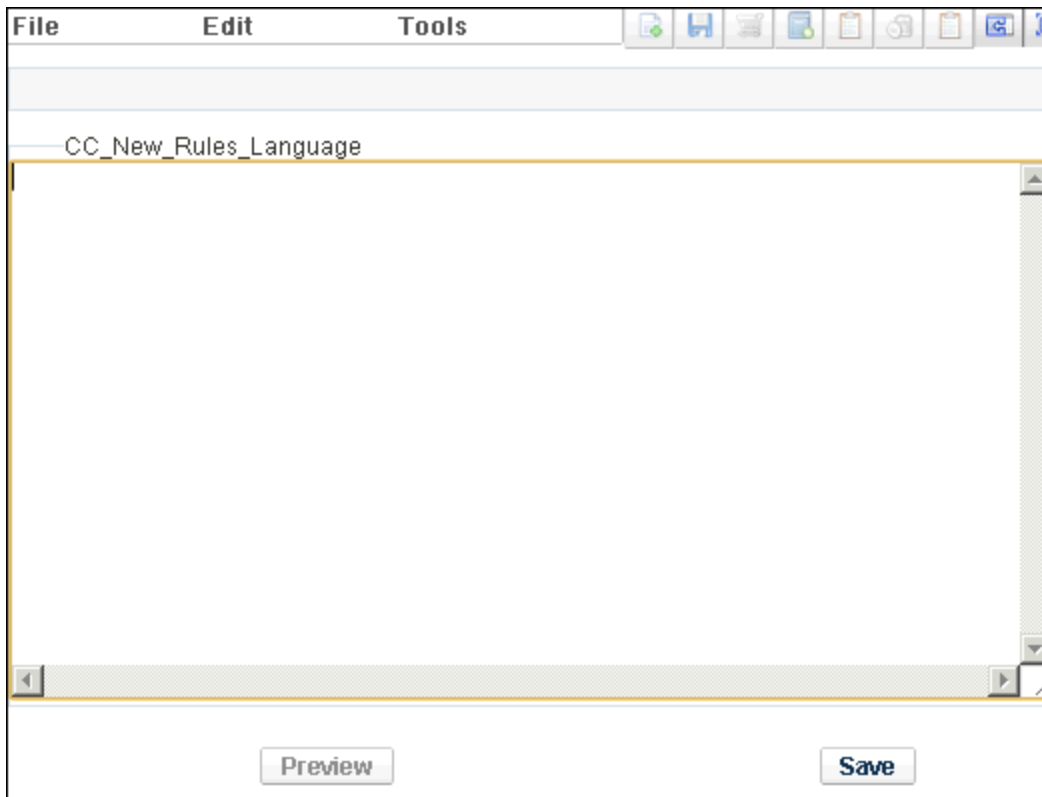


Figure 11 - Rules Editing Area

4 Click **Edit > Add Rule** to display the new rule language snippets.

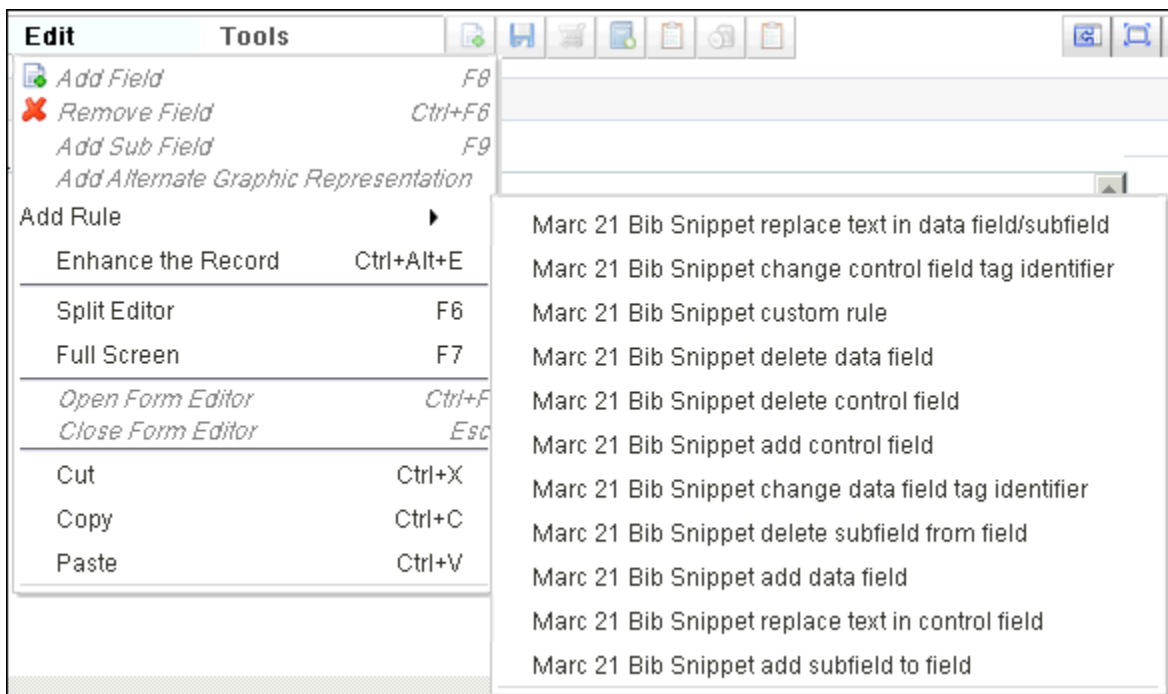


Figure 12 - New Rule Language Snippets

- 5 Select/click one of the snippets in the list to quickly and easily create a new rule.

The rule language syntax displays for the action (snippet) that you selected.

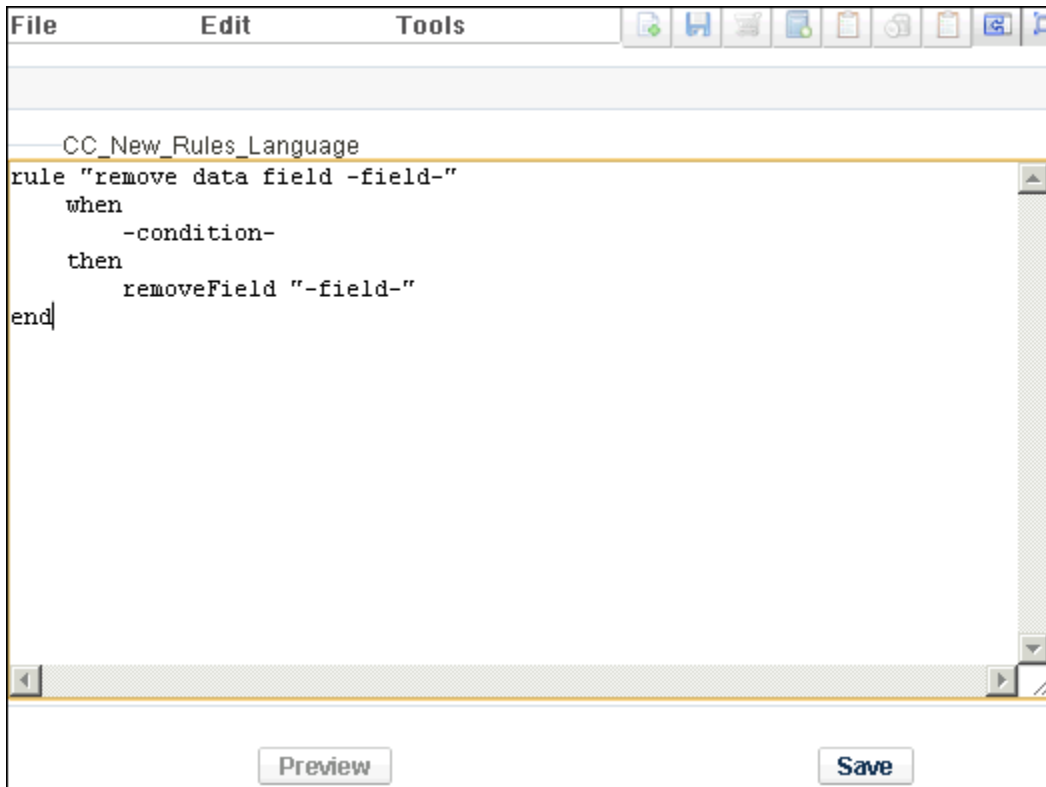


Figure 13 - Delete Data Field Snippet Example

- 6 Replace the placeholder text in the snippet.

In the above example, replace `-field-` with the actual field that you intend to delete (remove).

- 7 Click **Save**.

For additional information regarding the rules language, refer to the Metadata Management section of the *Resource Management Guide* and/or online help.

Metadata Import Process Enhancements

Description

The purpose of this enhancement is to provide the ability to handle and download unsuccessful records from the metadata import process. This capability gives you the option to handle the unimported records outside the system and, subsequently, try to load them again as needed.

Note: Validation issues always need to be solved manually, while match issues can be solved automatically when it is determined that the record is not to be added.

Technical Instructions

The following roles can access this capability:

- Catalog Administrator
- Repository Administrator
- Catalog Manager
- Cataloger

To view an example of these changes:

- 1 From the Alma main menu > Resource Management > Import, click **Monitor and View Imports**.
- 2 Select **Actions > Report**.

When there are unimported records due to matching and/or validation issues, there are two links provided to download these records.

Note: You may also access this new capability using Alma main menu > Resource Management > Import > Resolve Import Issues.

New Delete Items Process

Description

The purpose of this enhancement is to provide a process for deleting a set of items.

With this new process, you can predefine an items set and delete the items with a batch operation.

Technical Instructions

The Repository Administrator role can access this new capability.

To view this enhancement:

- 1 From the Alma main menu > Resource Management > Processes, click **Run Process**.
- 2 Select the option to **Withdraw** items and click **Next**.

The wizard prompts you through the remaining steps.

- 3 Select the set for deletion and click **Next**.
- 4 Continue entering the information required for the wizard.
- 5 Enter a **Process Name** and click **Next**.
- 6 Review/confirm your process request and click **Save**.

Enhanced Process/Sets Options

Description

The purpose of this enhancement is to allow set selection from multiple types of sets in process automation. This enables the processes to receive inputs of several types such as jobs that process titles that can use MMS/Physical/Electronic/Digital titles sets.

Part of this enhancement is handled through a user interface change to the Process List filter (see the Technical Instructions below). When selecting a set, the user interface has not changed. Depending on the selected process, sets of all the allowed business entities are presented. For example, if the process works on titles, sets of all titles (physical, digital, and electronic) are presented.

Technical Instructions

Any role that can run processes can access this enhancement.

To view the Process List filter change:

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

The filter now displays by process type. Previously, it displayed by business entity.

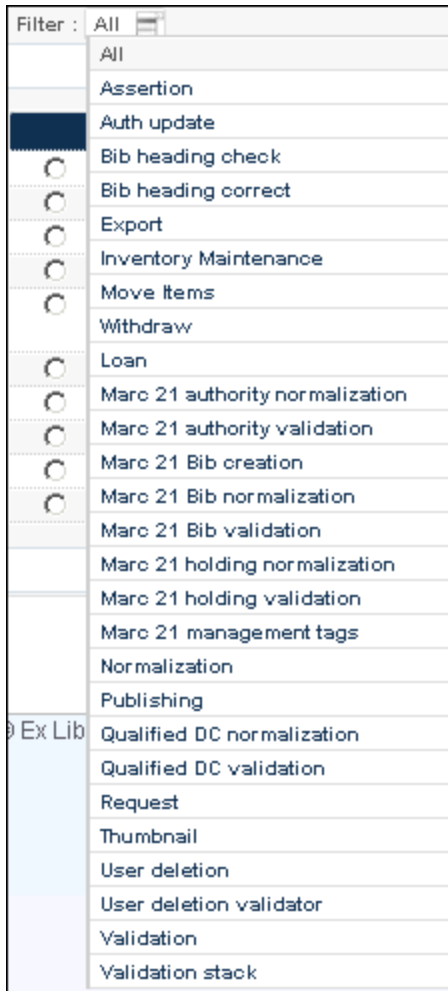


Figure 14 - Process Filter

Opening Support Incidents within Alma

Description

The purpose of this enhancement is to provide the ability to open an SI from within Alma.

Note: This capability is only available in the Community Zone with Electronic Collection or Electronic Portfolio searches.

Technical Instructions

The following roles can access this facility:

- Repository Administrator
- Catalog Administrator
- General System Administrator

To open an SI from the Repository Search page:

- 1 On the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.

The Repository Search page displays.

- 2 Enter search criteria for an Electronic Collection or Electronic Portfolio search and execute the search.

The search results display.

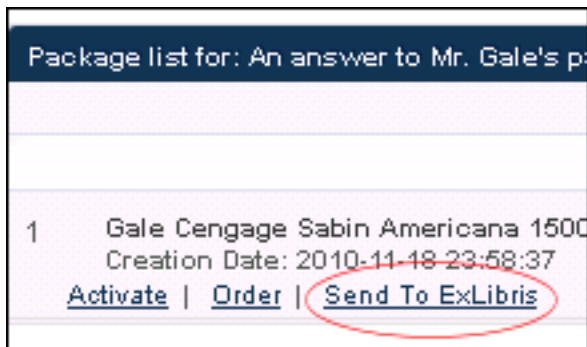


Figure 15 – Repository Search Results

- 3 Click **Send to Ex Libris** to create an SI for an item in the list.

The Send to Ex Libris page displays.

- 4 Enter the SI information and click **Send**.

Note: The contact names are defined on the Alma Main Menu > General Configuration > Configuration Menu > General Configuration > CRM Contacts page.

Metadata Editor Enhancement

Description

The purpose of this enhancement is to expand the Metadata Editor to include an Electronic Database tab.

Technical Instructions

Anyone with access to the Metadata Editor can access this feature.

To view this feature:

- 1 On the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
- 2 Search for an electronic title.
- 3 Click **Edit** from the search results.

The Metadata Editor opens.

- 4 Click **Tools > MARC21 Bibliographic > View Inventory**.

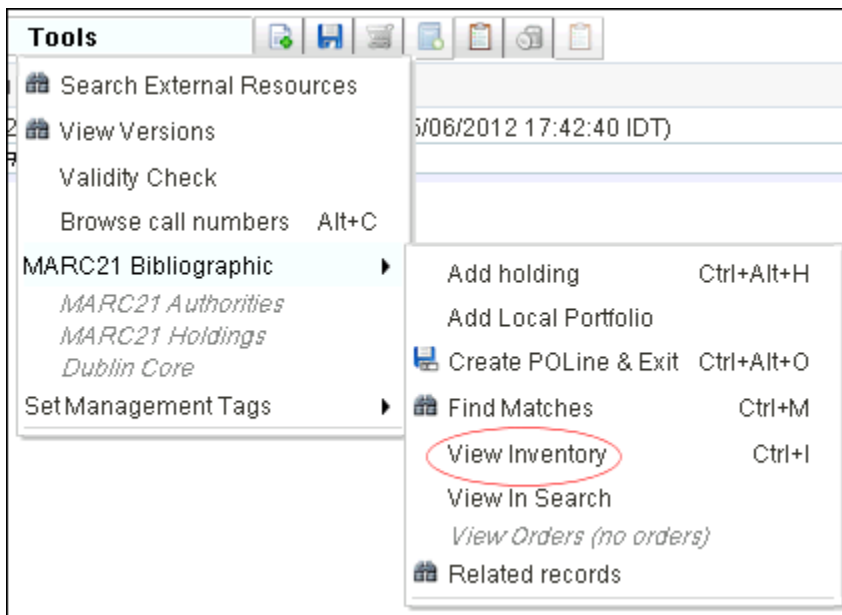


Figure 16 - View Inventory Option

The Metadata Editor refreshes to display the Holdings, Portfolio, Representation, and Electronic Database tabs.

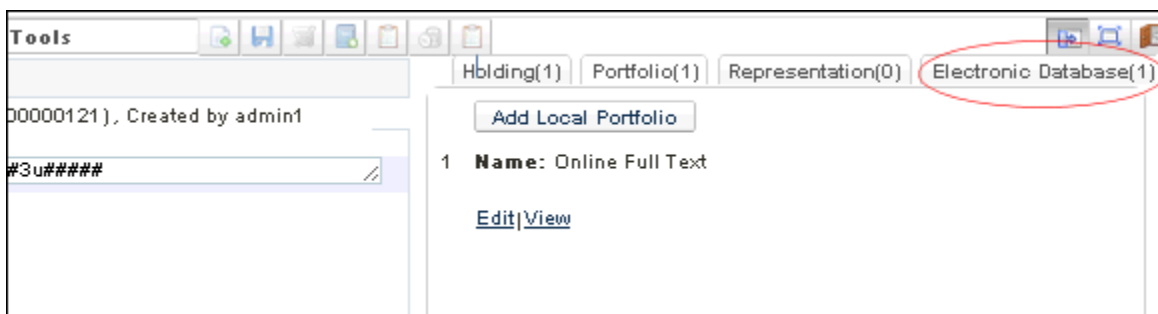


Figure 17 - Electronic Database Tab

Other Resource Management Enhancements

The list below highlights recent enhancements in Resource Management:

- Call numbers are now included in holdings records created using import profiles.
- The order of **Actions** options on the External Search Profile List page has been changed to: **Edit, Duplicate, Delete**.
- An overlay option was added to the OCLC Connexion import.
- The portfolio results page and e-title portfolio list page are now identical.
- The subfield separator can now be changed from \$\$ to ‡.
- It is now possible to perform a search using partial call numbers.

Fulfillment

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

On Shelf Request Policy

Description

The purpose of this enhancement is to provide the capability to override paging policies that prevent requests to items or locations.

Technical Instructions

The Fulfillment Services Operator role can perform this operation.

To override paging policies:

- 1 From the Alma main menu > Fulfillment > Resource Requests, click **Monitor Requests**.

The Resource Request Monitoring page displays.



Figure 18 – Resource Request Monitoring

- 2 In the Limit Results to > Request Type section, click **Patron physical item request**.

The filtered results display.

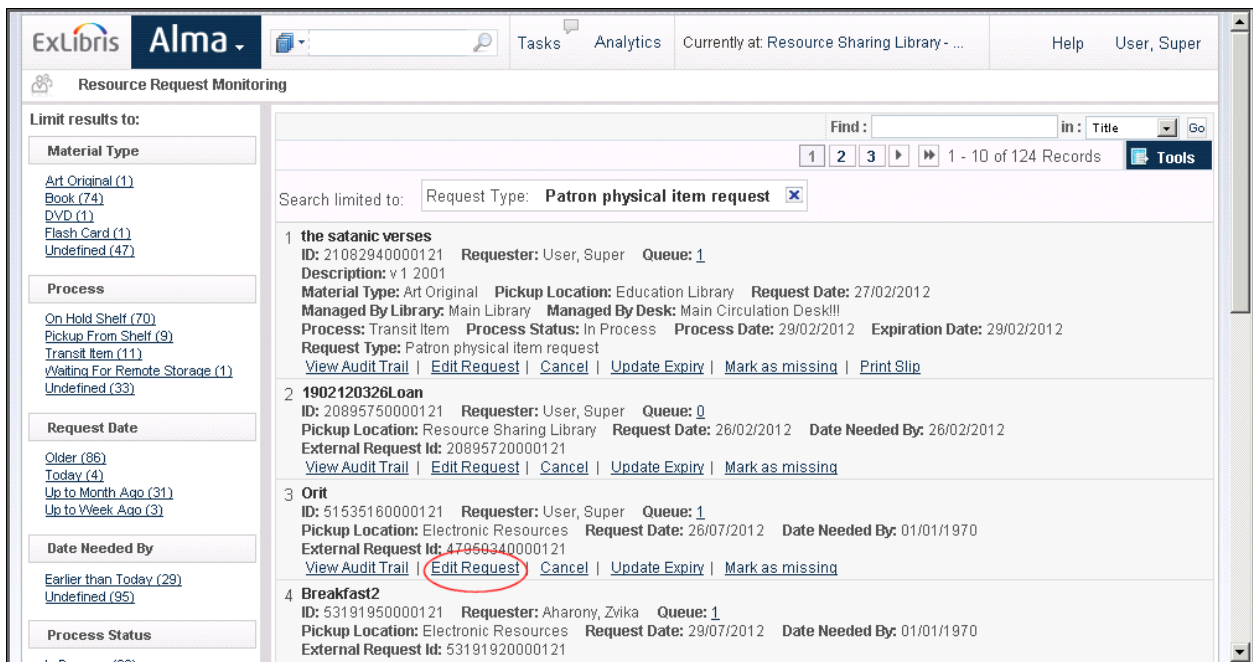


Figure 19 – Filtered Results

- 3 For the item that you want to override, click **Edit Request**.

The Create Request page displays.

Figure 20 – Create Request

- 4 Click **Override On Shelf Request Policy**.
- 5 Click **Submit**.

The list of pickup locations now also includes pickup locations that have been omitted due to the on shelf pickup policy.

Enhanced Patron Notice Configuration

Description

The purpose of this enhancement is to provide options for adding additional information for some of the patron notices. With this new feature, the following patron notices may be enhanced with additional configurable information:

- Courtesy Notification (sent a couple of days before the patron has items that are due)
- Due Today Notification (sent on the day the patron has items that are due)
- Lost Loan Notification (sent when a loan status is set to Lost)

The additional information can be added with open text fields that you can configure for each of the above listed forms. These texts are added at the bottom of each of the notices for which you configure them.

Also, URLs may be added to many of the notifications for contacting the library or for linking back to Primo.

Technical Instructions

The General System Administrator role can configure this capability.

To configure the new additional information options, `additional_info_1` and/or `additional_info_2`:

- 1 From the Alma main menu > General > General Configuration, click **Configuration Menu**.
The Configuration page displays.
- 2 From the General Configuration section, click **Letter emails**.
- 3 Select **Actions** > **Customize** for Courtesy Letter (or one of the other letters containing the new options).

The Code Table page displays.

Code Table

You are configuring: Main Campus

Table Information

Sub System: LETTER

Updated By: -

Table Description: Courtesy Notice

Courtesy Notice

Language: English

Import

Enabled	Code	Description
✓	author	Author
✓	call_number	Call Number
✓	department	Circulation Department
✓	letterName	Courtesy Letter
✓	subject	Courtesy Notice
✓	description	Description
✓	due_date	Due Date
✓	additional_info_2	EMPTY_STRING
✓	additional_info_1	EMPTY_STRING
✓	library	Library
✓	loans	Loans
✓	location	Location
✓	sincerely	Sincerely
✓	title	Title
✓	message	We would like to remind you that the following items
✓	addressFrom	Your.Department@organization.com

Figure 21 - Code Table Page for Courtesy Letter

- 4 Click **Customize** and enter the required information for the additional_info_1 and additional_info_2 fields. If you have already made changes to the fields, you do not have to click **Customize**. The fields are already editable.
- 5 When you are finished, click the **Customize** button for the Code Table page.

To view my_account and/or contact_us, for letters:

- 1 From the Alma main menu > General > General Configuration, click **Configuration Menu**.
The Configuration page displays.
- 2 From the General Configuration section, click **Letter emails**.
- 3 Select **Actions > Customize** for footer.xsl Letter.
The Code Table page displays.

 Code Table

You are configuring: Main Campus

Table Information

Sub System: LETTER

Updated By: -

Table Description: footer.xml Letter

footer.xml Letter

Language: English 

Enabled	Display	Order	Code	Description
			my_account	My Account
			contact_us	Contact Us

Figure 22 - Code Table Page for footer.xml Letter

- 4 Enter the information to match your requirements for my_account and/or contact_us.
- 5 When you are finished, click the **Customize** button for the Code Table page.

To configure the new options, my_account and/or contact_us:

- 1 From the Alma main menu > General > General Configuration, click **Configuration Menu**.
The Configuration page displays.
- 2 From the General Configuration section, click **Other Settings**.
- 3 Click **Customize** and enter the required information for the email_my_account and email_contact_us fields. If you have already made changes to the fields, you do not have to click **Customize**. The fields are already editable.

parameter key	parameter module	parameter value
authentication_method	general	LOCAL
display_viewit_target_in_new	general	true
email_contact	general	library@exlibris.co.il
email_contact_us	general	http://
email_deposit_contact	general	library@exlibris.co.il
email_deposit_sender	general	Management Department
email_my_account	general	http://

Figure 23 - Options for Specifying Contact Us and My Account URLs

SMS Communications Enabled

Description

The purpose of this enhancement is to enable SMS communications with patrons.

Some library notifications are, in essence, alerts to the patrons on which they are expected to act. A typical example is the Item on Hold Shelf Notification that notifies a patron when a requested item has become available and is waiting at the hold shelf for collection. With this new feature, the library is able to send this type of notification as an SMS message to the patron's mobile phone for immediate attention.

Alma's support for SMS messaging is based on an external SMS service provider making the actual SMS message delivery. Alma's role is specific to identifying the need to text the patron, formulating the message, and pulling up the phone number to which the SMS provider sends the message. Alma places the required information at a configured FTP location for the service provider to collect and subsequently deliver to the patron.

Technical Instructions

The General System Administrator role can configure this new capability.

To use this feature, you need to:

- 1 Create an S/FTP definition.
- 2 Create an Allowed S/FTP Connection.
- 3 Create an External Interface (Alma main menu > General > General Configuration > Configuration Menu > External Systems section) with an SMS Integration Type.

Note: You can only create one SMS External Interface per institution.

- 4 Activate the SMS channel for the letters to be sent.

To view the SMS channel:

- 1 From the Alma main menu > General > General Configuration, click **Configuration Menu**.
- 2 From the General Configuration section, click **Letter Activity**.

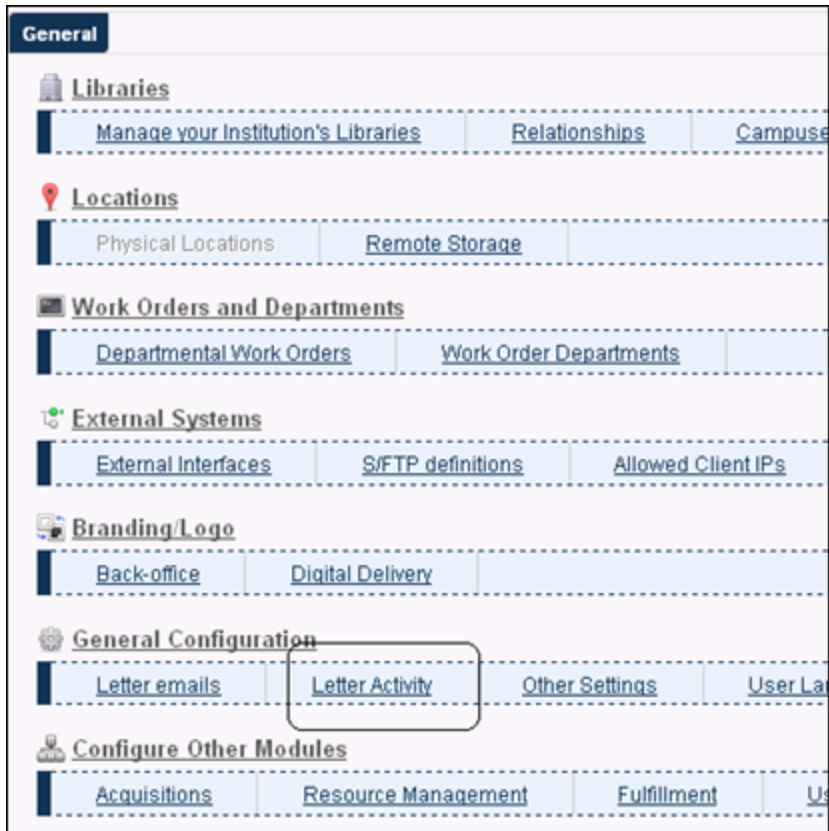


Figure 24 - Letter Activity General Configuration Option

- 3 Use the **Customize** button for the SMS On Hold Shelf Letter to activate/deactivate the link for the SMS channel.

You are configuring: Mail Campus

Table Information

Sub System: INFRA Table Name: LetterActivity

Updated By: Last Updated: -

Table Description: Letter Activity

Mapping Table Rows

Enabled	Letter type	Channel	Updated By	Last Updated	
☒	OrderLinkLetter	ECR	-	-	Restore
☒	AnalyticsLetter	EMAIL	-	-	Customize
☒	AssignToLetter	EMAIL	admin1	01/08/2012	Restore
☒	ChangeOrderLetter	EMAIL	-	-	Customize
☒	ConversationLetter	EMAIL	-	-	Customize
☒	FinalFeePaymentReceiptLetter	EMAIL	-	-	Customize
☒	FulCancelRequestLetter	EMAIL	-	-	Customize
☒	FulCancelShipLetter	EMAIL	-	-	Customize

Figure 25 - Activate/Deactivate the Link for the SMS Channel

Note: SMS messages are currently available only for hold shelf notices.

Resource Sharing

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

Tracking and Changing Borrowing Request Statuses

Description

The purpose of this enhancement is to enhance the borrowing request workflow and to provide the ability to monitor the statuses of borrowing requests and to update the statuses based on input from the user and resource sharing partner.

In order to enhance the workflow for borrowing requests, optional steps can be added to the workflow. The valid options for these workflow steps are listed in the **Request Status** field on the Edit Resource Sharing Borrowing Request (General Information tab) page.

The following status changes require validation or necessitate changes in the fulfillment entities that are pointing to the resource sharing borrowing request:

Changed to Status	Description
Returned item to partner	Performs the following actions: • Return the loan if it exists. • Complete the request if it exists. • Delete the stub item. • Change the status to Request completed.
Request completed or Shipped digitally	Performs the following actions: • Complete the request if it exists. • Delete the stub item. • Change the status to Request completed.

Changed to Status	Description
Cancelled by partner	Performs the following actions: • Ask the user if the request should be completed. • If yes: ○ Complete the request. ○ Delete the stub item. ○ Change the status to Request completed. • If no, only change the status in case the user wants to request the item from another partner.

It is important to track resource sharing requests in order to respond to status requests from a partner. For example, if a partner inquires about a resource that has not been returned, the operator must be able to find the request and determine when it was sent back.

In addition, an option to mark a request that needs patron information has been added so that the request can be found and handled by the operator. To track these types requests, the **Request Status** field and the **Needs patron information** check box have been added to the Edit Resource Sharing Borrowing Request (General Information tab).

Technical Instructions

When scoped at the resource sharing library level, the Fulfillment Services Operator and Fulfillment Services Manager roles can perform this action.

To change the status of a borrowing request:

- 1 From the Alma main menu > Fulfillment > Resource Sharing, click **Borrowing Requests**.
The Resource Sharing Borrowing Request page displays.
- 2 Specify the following filters in order to find specific requests, such as requests that need patron information:
 - **Status** – Select a status or one of the following new tracking statuses:
 - **All active** – Displays only active requests. This is the default.
 - **All including completed** – Displays all active and completed requests.
 - **Partner** – Select a partner or **All**.
 - **Need patron information** – Select **All**, **No**, or **Yes**. The default is **All**.

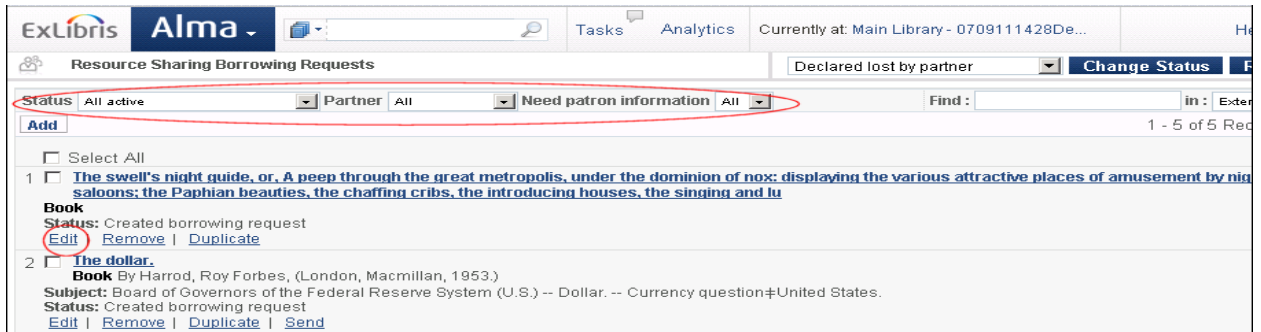


Figure 26 – Filtering Borrowing Requests

- 3 For the request that you want to update, click **Edit**.

The Edit Resource Sharing Borrowing Request page displays.

- 4 In the General Information tab, update the **Request Status** field and the **Needs patron information** check box if necessary.

ExLibris
Alma
Tasks
Analytics

Resource Sharing Borrowing Request

General Information
Parameters
Notes
Attachments

Resource Information

Title * The swell's night guide, or, A peep through the great metropolis, under
Author
Publisher
Year
Edition
ISBN
Place of Publication
Additional Person Name
Call Number
Note
Chapter
Pages

Request Attribute

Title The swell's night guide, or, A peep through the great metropolis, under the dominion of nox: displaying the various attractive places of amusement by night: the saloons; the Paphian beauties, the chaffing cribs, the introducing houses, the singing and lu
Requester * User, Super
Partner
Request Status Created borrowing request
Format Physical
Needed By
Pickup At Resource Sharing Library
Agree to Copyright terms * ☒
Needs patron information ☐
Request Note

Figure 27 – Filtering Borrowing Requests

Note: You can also update a group of requests by selecting a status in the drop-down list and clicking **Change Status** on the Resource Sharing Borrowing Request page. Requests that do not support the selected status are not updated.

The list of possible statuses is made up of a number of mandatory steps and additional steps that are configured by using the Fulfillment Configuration Menu.

- From the Resource Sharing > Workflow Profiles menu, configure Workflow Profiles, which are a list of valid statuses.

- From the Resource Sharing > Partners menu, attach a Borrowing Workflow Profile to the Resource Sharing Partner.

Using ARTEmail to Send Communications for Existing Requests

Description

The purpose of this enhancement is to provide the capability to send messages using ARTEmail for borrowing requests.

When ARTEmail is used to send a message to a partner, the system will look for either of the following query codes in the current message:

- **Request to cancel an order on a waiting list** – The system automatically changes the resource sharing request to **Cancel requested**.
- **Request to renew a loan** – The system automatically changes the resource sharing request to **Renew requested**.

The above statuses have been added to the list of optional statuses that can be selected in the workflow profiles.

Technical Instructions

When scoped at the resource sharing library level, the Fulfillment Services Operator and Fulfillment Services Manager roles can perform this configuration.

To send a communication via ARTEmail to a partner:

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

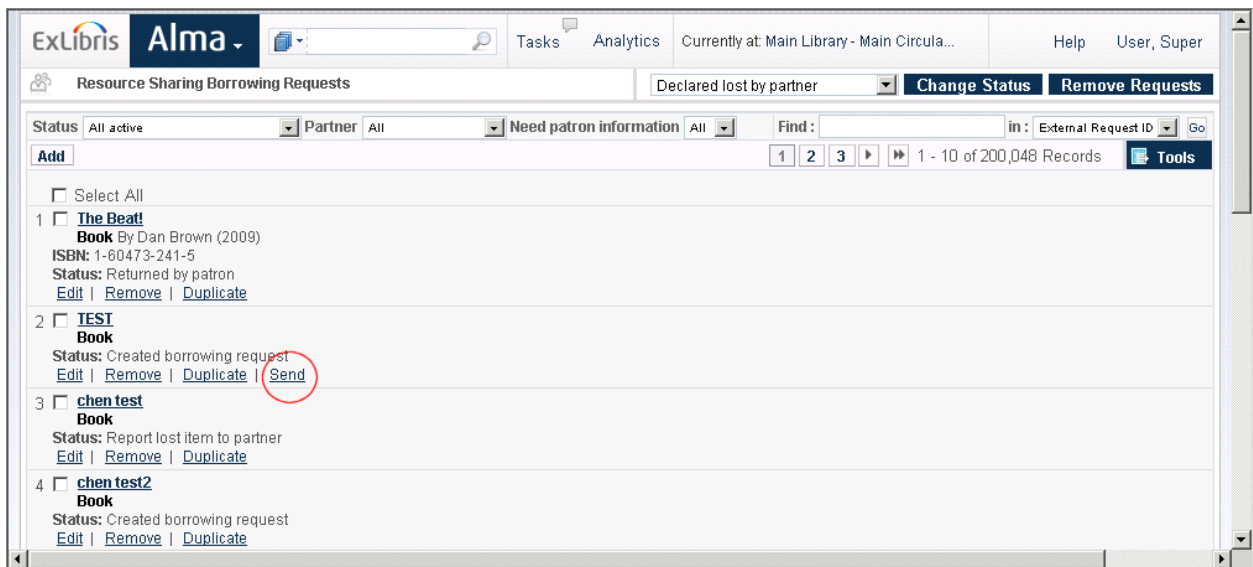


Figure 28 – Resource Sharing Borrowing Requests Page

- 2 For the request that you want to send a communication, click **Send**.

The Resource Sharing Borrowing Parameters Tab displays.

Figure 29 –Resource Sharing Borrowing Parameters Tab

- 3 Update the parameters and any fields on the other tabs if needed and then click **Send**.

The new message is sent to the partner and saved in the attachments.

Sending Requests to an Alternative Delivery Address

Description

The purpose of this enhancement is to provide the capability to send messages to an alternative delivery address using ARTEmail.

When a request is allowed to use an alternative address, the request may be enhanced to include an alternate physical location or an email address.

Technical Instructions

The Fulfillment Administrator role can perform this configuration.

To enable the alternate delivery address functionality:

- 1 On the Fulfillment Configuration page (Fulfillment > Fulfillment Configuration > Configuration Menu), click **Partners** under Resource Sharing

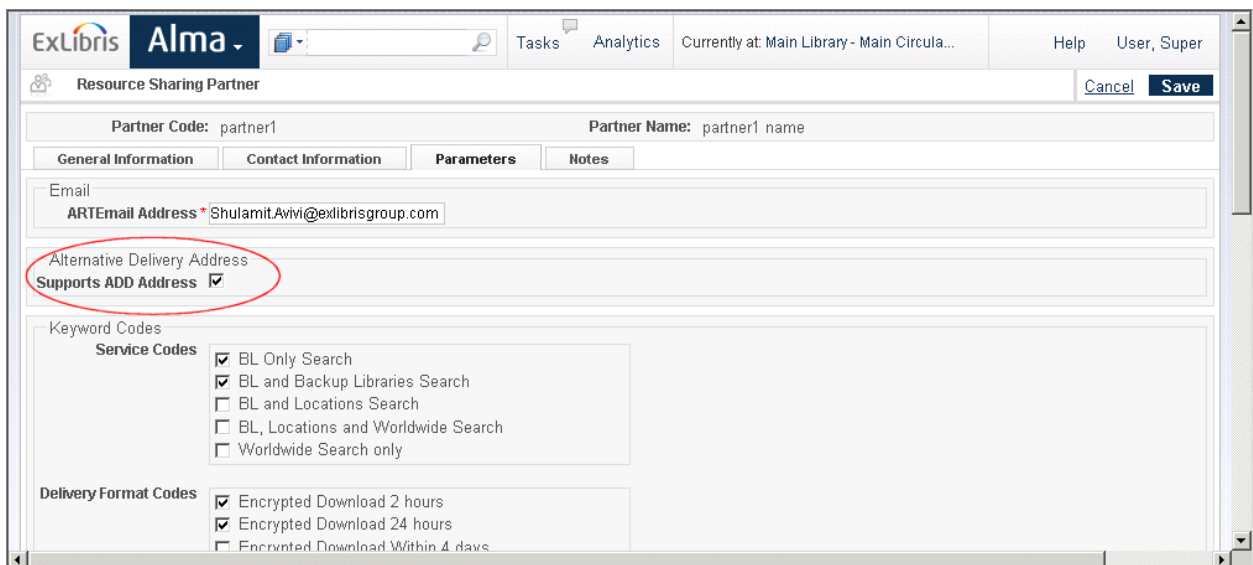
The Resource Sharing Partner List page opens.

- 2 For the partner that you want to update, click **Edit**.

The Resource Sharing Partner page displays.

- 3 Click the **Parameters** tab.

The Resource Sharing Partners Parameters tab displays.



The screenshot shows the 'Resource Sharing Partner' configuration page in the Alma system. The 'Parameters' tab is active. The 'Alternative Delivery Address' section is highlighted with a red circle, showing the 'Supports ADD Address' checkbox checked. Below this are sections for 'Service Codes' and 'Delivery Format Codes' with various search and download options.

Section	Option	Status
Service Codes	BL Only Search	Checked
	BL and Backup Libraries Search	Checked
	BL and Locations Search	Unchecked
	BL, Locations and Worldwide Search	Unchecked
	Worldwide Search only	Unchecked
Delivery Format Codes	Encrypted Download 2 hours	Checked
	Encrypted Download 24 hours	Checked
	Encrypted Download Within 4 days	Unchecked

Figure 30 –Resource Sharing Partner Parameters Tab

- 4 In the Alternate Delivery Address section, select **Supports ADD address** and then click **Save**.

When scoped at the resource sharing library level, the Fulfillment Services Operator and Fulfillment Services Manager roles can perform this operation.

To send a communication to an alternate delivery address:

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

The Resource Sharing Borrowing Request page displays.

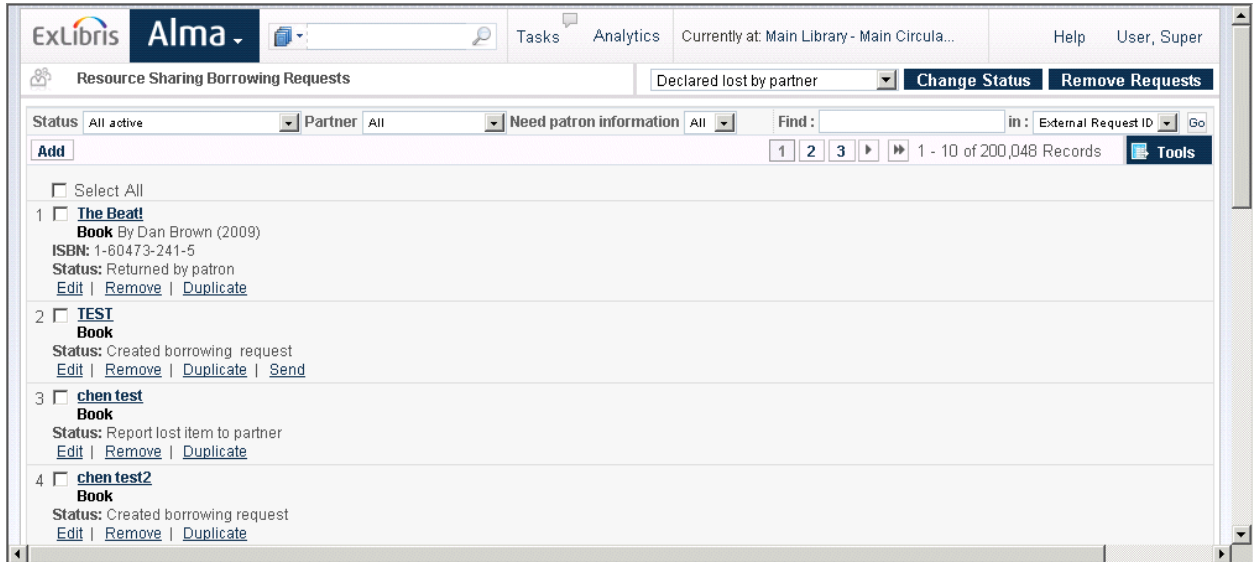


Figure 31 – Resource Sharing Borrowing Requests Page

- 2 For the request that you want to send a communication, click **Send**.

The Resource Sharing Borrowing Parameters Tab displays.

- 3 Click the **General Information** tab.

The Resource Sharing Borrowing Request page displays.

Request Attribute

Title TEST

Requester* Sommese, Andrew Johnx

Partner partner1 name

Request Status Created borrowing request

External Identifier kuku

Format Physical

Needed By

Delivery Location ☒ Alternative address ☐ Deliver to library

Alternative Address Use different address

Postal Address 1865 Campeau Street South Bend IN
Room 370 Computing Center Notre Dame IN
Use different address

Agree to Copyright terms* ☒

Needs patron information ☐

Request Note

Cancel Save

Figure 32 –Resource Sharing Borrowing Request (General Information Tab)

4 In the **Request Attribute** section, specify the following fields:

- **Delivery Location** – Select the **Alternative address** radio button to display the Alternative Address field.
- **Alternative Address** – Select an alternative address from the drop-down list or provide a different address by selecting either of the following options, which are dependent upon the format of the address:
 - For physical formats, select **Use different address** to display the Postal Address field.
 - For digital formats, select **Use different email** to display the Email Address field.
- **Postal Address** – Enter the physical address. Only displays for physical formats.
- **Email Address** – Enter the email address. Only displays for digital formats.

5 Click **Save**.

To use Primo to send a communication to an alternate delivery address:

The Primo Resource Sharing Request form has been enhanced to include an optional email address for delivery and an optional shipping address that includes the same drop-down values as the Alma UI.

Resource Sharing Request:

Resource Information:

Citation type: ☒ Book ☐ Article

Author(s) (Last name, first name):

Title of Book/Journal:

Chapter/Article title:

Place of publication:

Year:

ISBN:

Publisher:

Pages to photocopy:

Delivery Information:

Format: ☒ Physical ☐ Digital

Pickup/delivery location:

Alternative address

Alternative E-mail address

Not Needed After:

Comment:

Maximum fee:(USD)

Figure 33 – Resource Sharing Request from Primo

Other Resource Sharing Enhancements

The list below highlights a recent enhancement for Resource Sharing:

- The link to iLLiad now includes additional information, such as genre, publisher, place of publication, date of publication, and edition.

Course Reserves

The following sections describe the functions provided for course reserves in the August 2012 release of Alma.

Adding Electronic Citations to Course Reserves

Description

The purpose of this enhancement is to provide the capability to add an electronic citation to a course reserve.

Technical Instructions

The Course Reserves Operator, Course Reserves Manager, Fulfillment Services Operator, and Fulfillment Services Manager roles can perform this configuration.

To add an electronic citation to a course reserve:

- 1 From the Alma main menu > Fulfillment > Course Reading, click **Reading Lists**.
The Reading Lists Task List page displays.
- 2 Scroll to the reading list that you want to manage and select **Actions > Work On**.
The Edit Reading List page displays.
- 3 Click **Add Brief**.
The Citation Type shadow box displays.

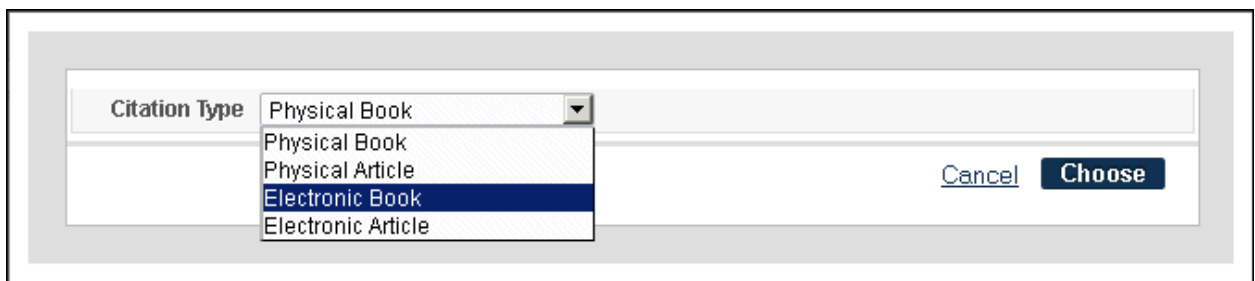


Figure 34 – Citation Type Shadow Box

- 4 Select **Electronic Book** or **Electronic Article** in the **Citation Type** drop-down list and click **Choose**.

The Quick Cataloging page opens.

- 5 Enter the resource and item information and click **Save**.

Other Course Reserves Enhancements

The list below highlights a recent enhancement for Course Reserves:

- The list of courses can now be sorted by the following, in addition to **Code**: **Start Date**, **End Date**, **Creation Date**, **Creator**, **Department**, **Name**.

General

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

Enhanced Security of Users' Personal Data

Description

The purpose of this enhancement is to further enhance the security of personal data. As a result of this enhancement, the following components in the UI have been updated:

- Searching on the Find and Manage Users page:
 - The Address search option has been removed.
 - The All search option will no longer search for email addresses, physical addresses, and identifiers.
 - The Email search option only works for the whole email address (case sensitive).
 - The Identifiers search option only works for the entire identifier value (case sensitive).
- Alma search bar (on the top of the main page):
 - The users search options will no longer find email addresses, physical addresses, and identifiers.
- User Details -> Contact information:
 - Impossible to sort by Address, Phone or Email.
- The auto-complete option throughout Alma's UI. When starting to type a user identifier value in order to find a user, the user will be part of the auto-complete list only when the whole identifier value has been typed.

Examples:

- Under Fulfillment Configuration > Configuration Menu > Circulation Desks > Operators > add/edit operator
- Under Fulfillment Configuration > Configuration Menu > Digitization/processing departments > add/edit department -> Operators tab -> add/edit operator.
- Manage Patron Services page

- Monitor Requests page:
 - The Identifier search will work only for the whole Identifier value (case sensitive).
 - The All search option will no longer find identifiers.

Enhanced S/FTP Definition Lists/Forms

Description

The purpose of this enhancement is to update the S/FTP definition lists and forms. With these changes, there are some small display changes but no functional changes.

Other General Enhancements

The list below highlights recent enhancements in General:

- Sort options were added to the process monitoring lists.
- A refresh button was added to the **Completed** and **Running** tabs of the process monitoring lists.

Analytics

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

Reporting Lending Requests for Shared Resources

Description

The purpose of this enhancement is to expose Resource Sharing data in order for Analytics Designers to create Analytics reports that include lending requests.

Technical Instructions

The View and Design Analytics role can create Analytics reports.

To access the Lending Requests design capability:

- 1 From the Alma main menu > General > Analytics, click **Design Analytics**.

The personal dashboard opens.

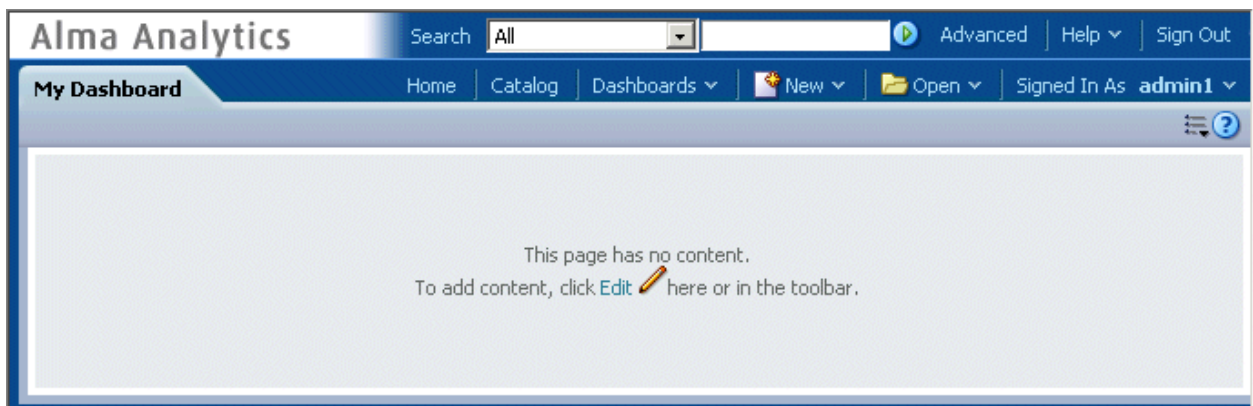


Figure 35 – Personal Dashboard

- 2 On the global header, click **New > Analysis**.

The Select Subject Area dialog box opens.



Figure 36 – Select Subject Area Dialog Box

3 Click Lending Requests.

The editor opens and displays the Lending Requests criteria.

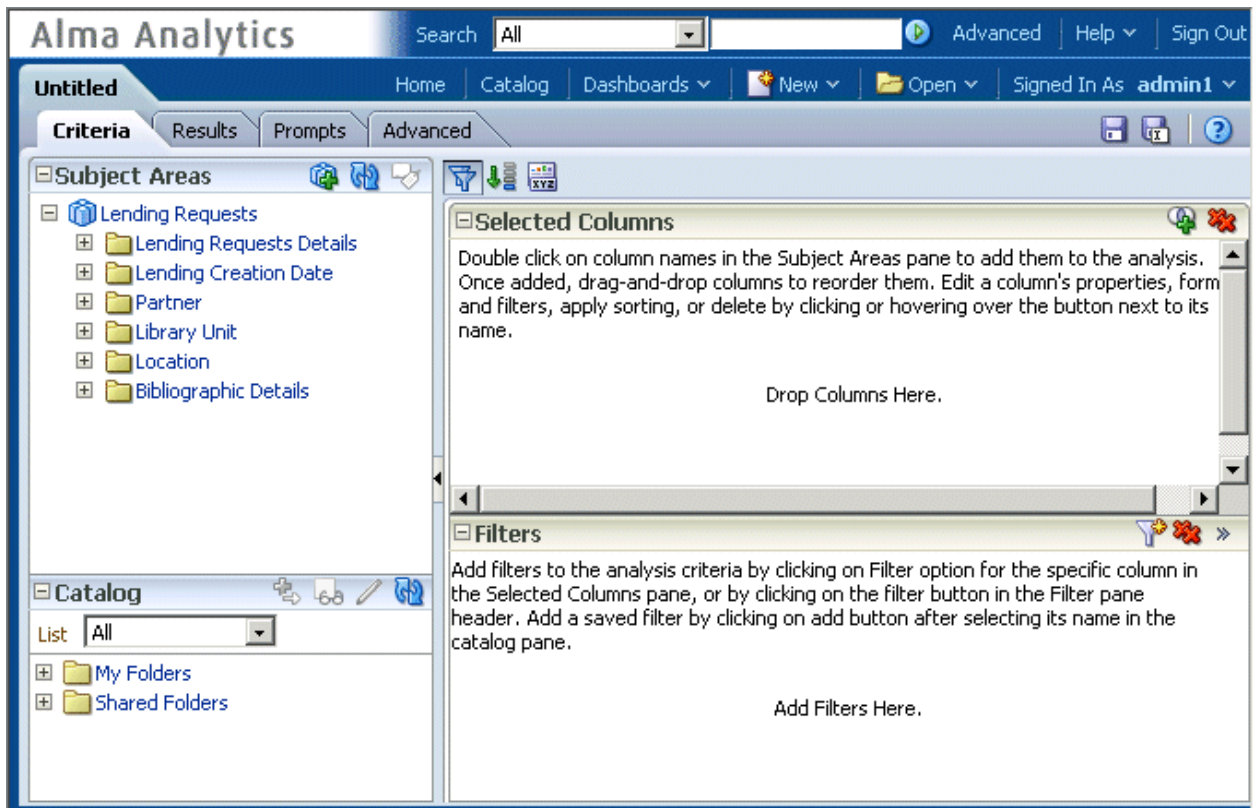


Figure 37 – Lending Requests Criteria

Reporting Borrowing Requests for Shared Resources

Description

The purpose of this enhancement is to expose resource sharing data in order for Analytics Designers to create Analytics reports that include borrowing requests.

Technical Instructions

The View and Design Analytics role can create Analytics reports.

To access the Borrowing Requests design capability:

- 1 From the Alma main menu > General > Analytics, click **Design Analytics**.

The personal dashboard opens.

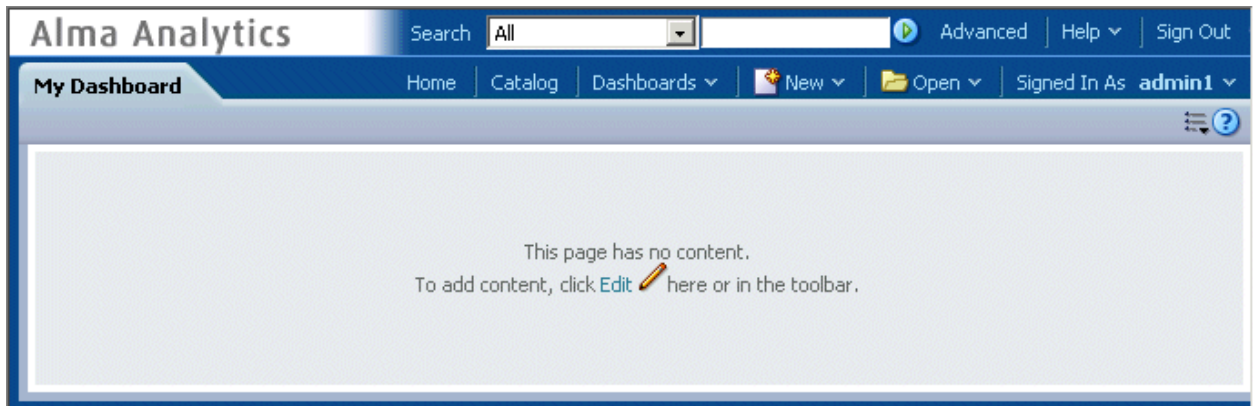


Figure 38 – Personal Dashboard

- 2 On the global header, click **New > Analysis**.

The Select Subject Area dialog box opens.



Figure 39 – Select Subject Area Dialog Box

3 Click **Borrowing Requests**.

The editor opens and displays the Borrowing Requests criteria.

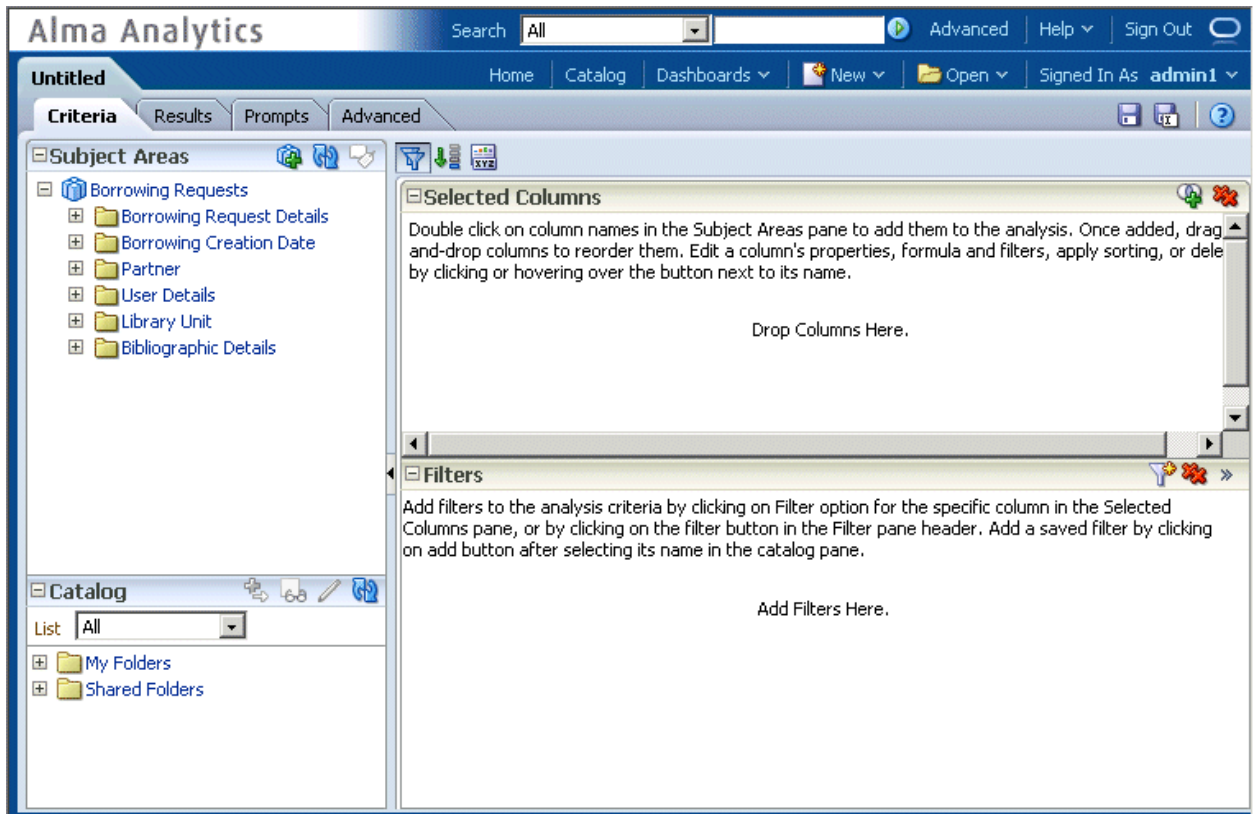


Figure 40 – Borrowing Requests Criteria

Reporting Dewey Decimal Classification

Description

The purpose of this enhancement is to enable Analytics Designers to create Analytics reports that show how physical items, fund transactions, and loan items are classified according to the Dewey Decimal System.

Technical Instructions

The View and Design Analytics role can create Analytics reports.

To access the Lending Requests design capability:

- 1 From the Alma main menu > General > Analytics, click **Design Analytics**.

The personal dashboard opens.

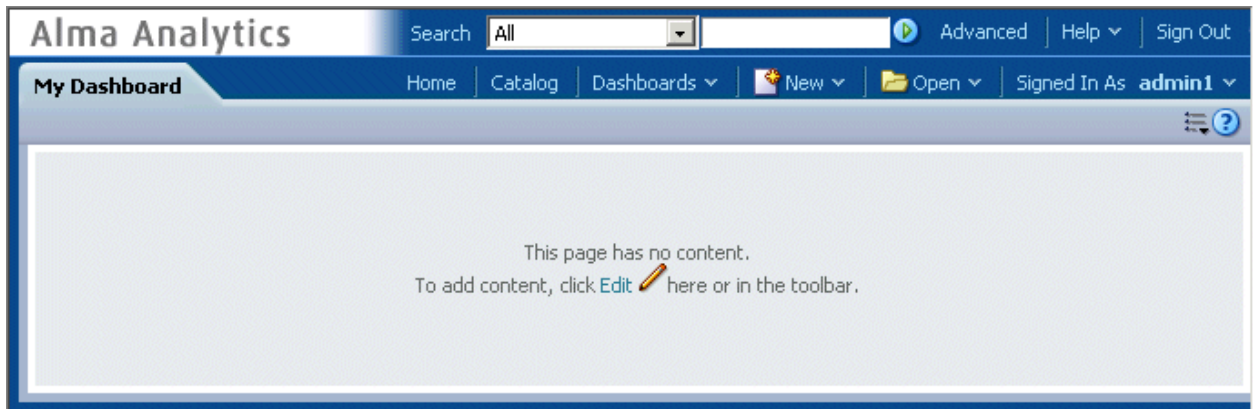


Figure 41 – Personal Dashboard

- 2 On the global header, click **New > Analysis**.

The Select Subject Area dialog box opens.



Figure 42 – Select Subject Area Dialog Box

- 3 Click one of the following subjects: **Fulfillment**, **Funds Expenditure**, or **Physical Items**.

The editor opens and displays the Dewey Classifications criteria for the selected subject.

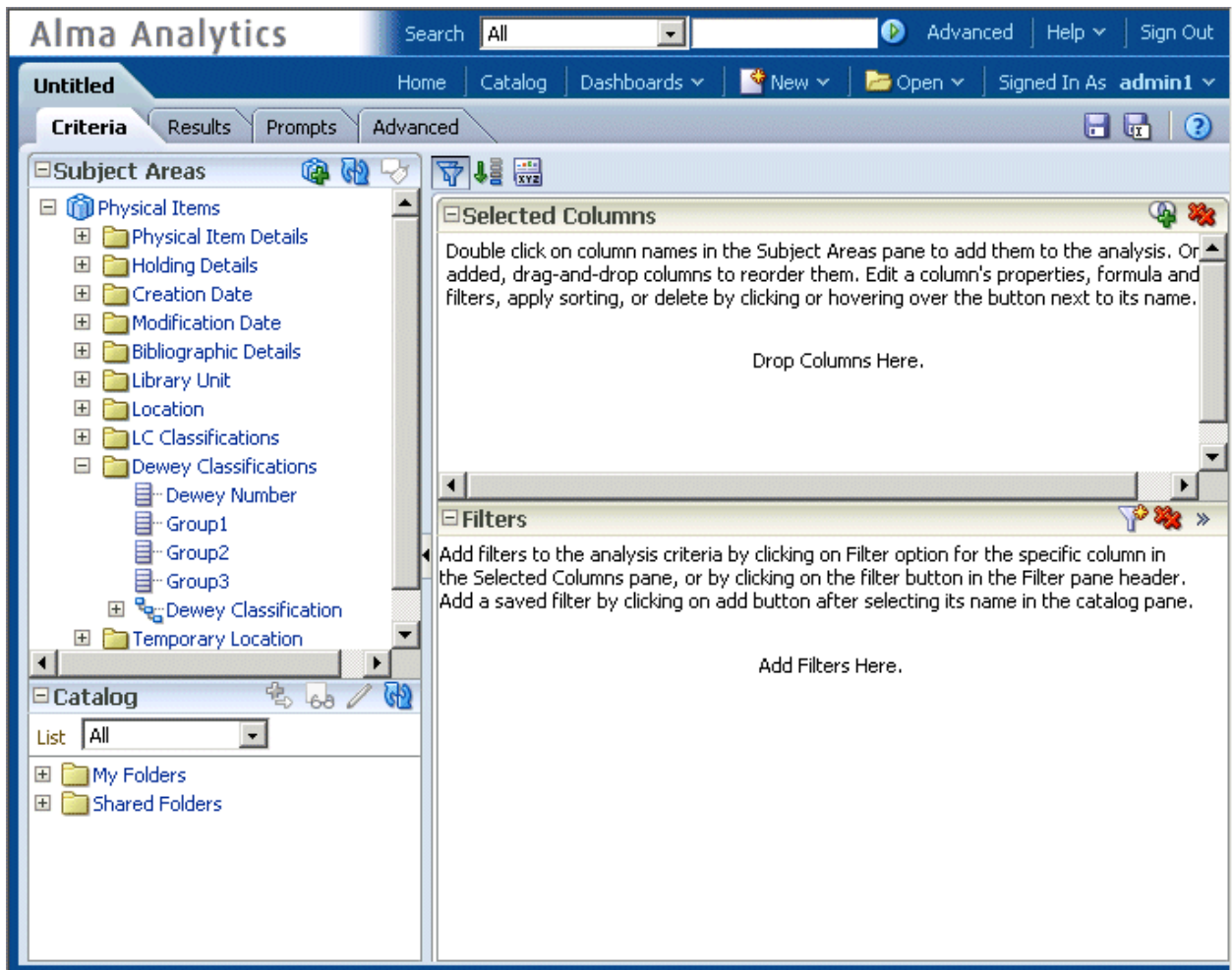


Figure 43 – Dewey Decimal System Classifications

Primo

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

Updated Notes Implementation

Description

The purpose of this enhancement is to add generic notes to the resource editors and show authentication or public notes in View It. These changes apply to all resource editors, Package, Service, and Portfolio.

Public and Authentication notes have been moved to the General Information tab in the resource editors, and the Notes tab now contains the generic note infrastructure.

Technical Instructions

The Inventory Operator role can access these changes.

To view an example of these changes:

- 1 From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
- 2 Enter an Electronic Collection search and click **Go**.
- 3 Click **Edit**.

1	CC Public Name Example
	Type: Full text database
	Creation Date: 2012-08-07 02:47:22 Modification Date: 2012-08-07 02:47:22
	Edit Delete View Order Create E-Activation Task More info

Figure 44 - Edit Electronic Collection Example

The Authentication note and Public note fields display in the General Information tab.

Electronic Collection Description	General Information	Additional Information	Notes
Summary and Inventory Information			
Electronic Collection type		Full text database	
Interface Name		Services	-
Process type	-		
Access rights			
Created by	admin1 (07/08/2012)		Updated by admin1 (07/08/2012)
Acquisitions and License Information			
PO Line		PO line details	-
Activation date		Expected activation date	
Active license		View license details	-
Authentication note	Example authentication note		
Public note	Example public note		

Figure 45 - Authentication Note and Public Note Fields on the General Tab

4 Click the **Notes** tab.

The Notes tab displays the generic notes format.

Electronic Collection Description	General Information	Additional Information	Notes
Find : in : Created by			
No records were found.			
Note			
Clear	Add		

Figure 46 - Notes Tab for Generic Notes

Using FTP File Transfer for Primo Publishing

Description

The purpose of this enhancement is to provide the ability to use FTP to transfer bibliographic records to a local Primo target.

Technical Instructions

The following roles can access this facility:

- Repository Administrator
- Catalog Administrator
- General System Administrator

To use FTP to transfer files to a Primo target:

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

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

The Publishing Profiles page displays.

3 In the row containing the **Publish bib records to Primo** publishing profile, select **Actions > Edit**.

The Publishing Profile Details page displays.

The screenshot shows the 'Publishing Profile Details' page in the Alma system. The page has a header with the ExLibris logo, the Alma name, and navigation links for Tasks, Analytics, and Help. The main content area is titled 'Publishing Profile Details' and includes a 'Cancel' and 'Save' button. The 'Profile Details' section contains a 'Profile name' field with the value 'Publish bib records to Primo' and a 'Profile description' field with the text 'Setup the parameters for publishing bibliographic records to Primo - this is a test'. Below this is a 'Run full publishing' checkbox. The 'Status' section shows 'Active' selected. The 'Scheduling' dropdown is set to 'Daily'. The 'Submission Format' section is highlighted with a red oval and contains an 'FTP configuration' dropdown and a 'Sub-directory' text field. The 'Content Options' section includes checkboxes for 'Electronic', 'Physical', 'Digital' (which is checked), 'Course information enrichment', and 'Headings enrichment'. At the bottom right, there are 'Cancel' and 'Save' buttons.

Figure 47 – Publishing Profile Details – Submission Format

4 In the Submission Format area, specify the FTP configuration and subdirectory and then click **Save**.

Enriching Primo Publishing with Headings

Description

The purpose of this enhancement is to provide the ability to publish records to Primo with headings information, making titles also searchable by their headings.

Technical Instructions

The following roles can access this facility:

- Repository Administrator
- Catalog Administrator
- General System Administrator

To include headings information in Primo records:

- 1 On the Alma main menu > Resource Management > Resource Configuration, click **Configuration Menu**.
- 2 In the Record Export section, click **Export Profiles**.
The Publishing Profiles page displays.
- 3 In the row containing the **Publish bib records to Primo** publishing profile, select **Actions > Edit**.

The Publishing Profile Details page displays.

The screenshot shows the 'Publishing Profile Details' page in the ExLibris Alma interface. The page is divided into several sections:

- Profile Details:**
 - Profile name:** Publish bib records to Primo
 - Profile description:** Setup the parameters for publishing bibliographic records to Primo - this is a test
- Run full publishing:** ☐
- Status:** ☒ Active ☐ Inactive
- Scheduling:** Daily
- Submission Format:**
 - FTP configuration:** [Dropdown menu]
 - Sub-directory:** [Text field]
- Content Options:**
 - Electronic:** ☐
 - Physical:** ☐
 - Digital:** ☒
 - Course information:** ☐
 - enrichment:** ☐
 - Headings enrichment:** ☐ (This checkbox is circled in red in the original image)

At the bottom right, there are 'Cancel' and 'Save' buttons.

Figure 48 – Publishing Profile Details – Headings Enrichment

- 4 Select the **Headings Enrichment** check box and then click **Save**.

Other Primo Enhancements

The list below highlights a recent enhancement for Primo:

- The name of the publishing profile **Publish electronic records to Primo Central** was changed to **Publish electronic availability**, since it is used not only for Primo Central.

Security

The following sections describe the functions provided for security in the August 2012 release of Alma.

Additional User Name/Password Security

Description

The purpose of this enhancement is to provide additional security for Alma user names and passwords.

With this security enhancement user names and passwords are prevented from being saved in the browser.

Known Issues

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

- The **View license** link is not displayed in **More info** for an **Electronic Portfolio** search.