



Alma February 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:

- [What's New in Alma February 2012](#)
- [Access to February 2012 Features](#)
- Feature/enhancement descriptions for the respective components
 - [Acquisitions](#)
 - [Resource Management](#)
 - [Fulfillment](#)
 - [General](#)
 - [Online Help/Documentation](#)
- [Known Issues](#)

What's New in Alma February 2012

In the February release, Ex Libris has added new features and enhancements around most of Alma's workflows. Also being provided with this release of Alma is the online help/documentation feature. Many of the new features are requests made by development partners and some are part of Alma's roadmap.

Access to February 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: Patron-Drive Acquisition				
Acquisitions: Invoices – Payment Methods				
Acquisitions: Invoices – Staff Assignments/Reassign ments				
Acquisitions: Shelf-Ready Receiving				
Acquisitions: Cancel Privileges for PO Line Records				
Acquisitions: Vendor Interface Support				

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: PO Line Ordering and Receiving				
Acquisitions: PO Line User Interface Changes				
Resource Management: Exporting Physical Items				
Resource Management: Search Result More Information Pop-up Window and Request Status Display				
Resource Management: Create/Search Local Database				
Resource Management: Item-Level Shelving Sublocation				
Resource Management: Authority Validation On Demand and Special Validation for New/Nonauthorized Headings				
Resource Management: Metadata Editor Improvements				
Fulfillment: Updating a Request/Resource Queue				

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)			
Fulfillment: Quick Item Creation				
Fulfillment: Loan/Return Alerts				
Fulfillment: Shelving Location for Pickup Slips				
Fulfillment: Display Logic Support				
General: User Fines/Fees Reporting				
General: LDAP Support				

Acquisitions

The following sections describe the functions provided for the Acquisitions component in the February 2012 release of Alma.

Patron-Drive Acquisition

Description

The purpose of this enhancement is to provide Part 1 of the Patron Driven Acquisition (PDA) support for the process to enable vendor-sent e-resources. This represents the first stage of development for PDA, and further developments will be added in future releases.

Alma now supports a PDA process in which a vendor sends e-resources that might be of interest to the institution.

- These are sent as a repository file that is imported into Alma.
- The e-resources are published to the discovery layer to be accessed by patrons
- Access is monitored by the vendor; and when a threshold is exceeded, the vendor sets the resource to Ordered.
- The vendor gathers all the resources with the status of Threshold Exceeded and sends an Order EOD to Alma for these resources.
- Orders are loaded into Alma (marked as PDA) without creating the inventory item.
- The vendor sends invoices (for example, via EDI or EOD) for the purchased titles and for those that were accessed but not purchased.
- At the end of the PDA period, Alma provides the facility to clean up all the resources that belong to the PDA process but were not purchased.

Technical Instructions

The following roles may use the patron-driven acquisition facility:

- Purchasing Operator
- Purchasing Manager

To work with the patron-driven acquisitions facility:

- 1 From the Alma main menu > Acquisitions > Advanced Tools, click **Patron Driven Acquisitions (PDA)**.

The PDA list displays.

 Patron Driven Acquisition (PDA) list

Filter : All 

[Add PDA](#)

 Name	 Code	Status	Vendor
Danny1	Danny1	Active	Swets E
NEewPAD	asdpoasdkop	Active	Wylie pu
PDA1	PDA1	Cancelled	EEUW E
PDA12	PDA12	Active	Blackwe

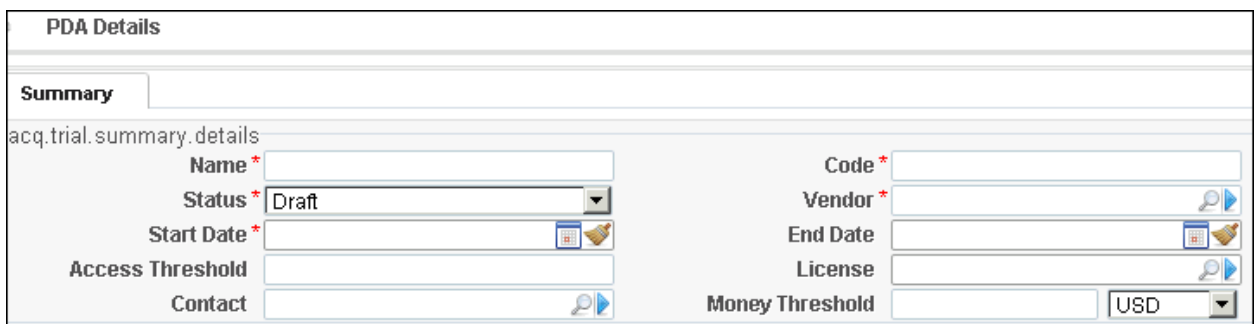
Figure 1 - Patron-Driven Acquisition (PDA) List

The Actions button for each row provides the following options:

- Edit
- Manage PDA Profiles
- Import Orders
- Duplicate
- Terminate
- Cleanup
- Cancel

- 2 Click **Add PDA**.

The PDA Details page displays.



PDA Details

Summary

acq.trial.summary.details

Name *		Code *	
Status *	Draft	Vendor *	
Start Date *		End Date	
Access Threshold		License	
Contact		Money Threshold	USD

Figure 2 - PDA Details Page

- 3 Enter the patron-driven acquisition details and click **Save**.

Invoices – Payment Methods

Description

The purpose of this enhancement is to provide support for different payment methods for an invoice.

Alma now supports different payment methods in the invoice. Staff are able to select one of the following payment methods when creating the invoice.

- Accounting Department (invoice payment method)
- Credit Card
- Deposit Account
- Cash
- Bank Transfer

Note: Prepaid invoices are not sent to the ERP.

Technical Instructions

The following roles may use this facility:

- Invoice Operator
- Invoice Manager

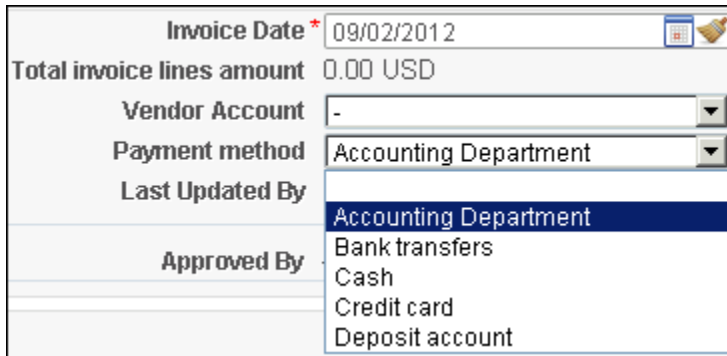
To view the different payment methods:

- 1 From the Alma main menu > Acquisitions > Receiving and Invoicing, click **Review** for this example of viewing different payment methods.

Note: The different payment methods are also available when you create an invoice.

- 2 Click **Actions > Edit** for one of the rows displayed on the In Review Invoices page.
The Invoice Details page displays.

- 3 Click the arrow for the **Payment method** field to display the drop-down list of payment method options.



The screenshot shows a form with the following fields and values:

Invoice Date *	09/02/2012
Total invoice lines amount	0.00 USD
Vendor Account	-
Payment method	Accounting Department
Last Updated By	Accounting Department
Approved By	Bank transfers
	Cash
	Credit card
	Deposit account

Figure 3 - Invoice Payment Methods

Note: The Prepaid check box on the Invoice Details page (Payment section) is enabled when a payment method other than Accounting Department has been selected.

Invoices – Staff Assignments/Reassignments

Description

The purpose of this enhancement is to provide invoice functionality for staff assignments and reassignments.

Similar to PO lines In Review, the In Review invoice screen provides tabs for:

- Assigned to Me
- Unassigned
- Assigned to Others

Through these tabs, you have the following staff assignment options:

- Assign
- Reassign
- Release

Technical Instructions

The following roles may use this facility:

- Invoice Operator
- Invoice Manager

To view the staff assignment functionality:

- 1 From the Alma main menu > Acquisitions > Receiving and Invoicing, click **Review** for this example of viewing the staff assignment functionality.

Note: The staff assignment/reassignment functions are also available when you select **Approve** or **Waiting for Payment**.

- 2 Click **Actions > Release assignment** for one of the rows displayed on the In Review Invoices page.

The invoice subsequently displays in the Unassigned tab on the In Review Invoices page.

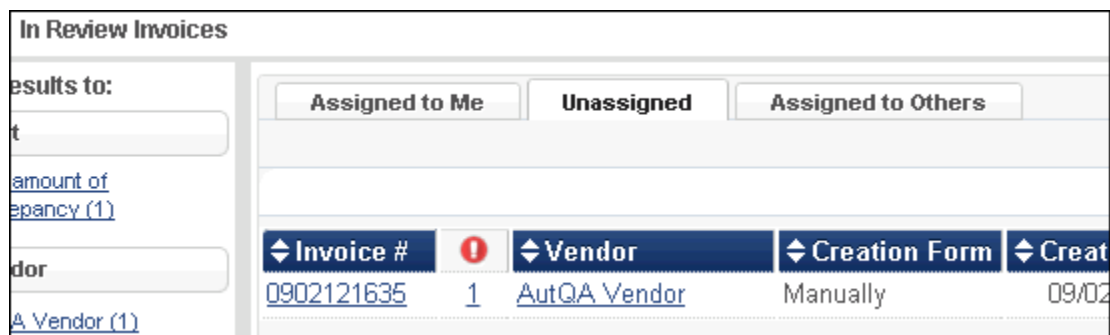


Figure 4 - Invoice Released/Unassigned Tab

- 3 To reassign the invoice, click **Actions > Assign to** in the row of the invoice that you want to reassign from the Unassigned tab.

The reassignment pop-up window opens.



Figure 5 - Reassignment Pop-up Window

- 4 Select someone to assign to from the drop-down list in the Assign To field and click the **Assign To** button.

The invoice subsequently displays in the Assigned to Others tab on the In Review Invoices page.

Shelf-Ready Receiving

Description

The purpose of this enhancement is to provide the receiving facility with the ability to scan shelf-ready items using barcodes.

As part of the receiving function, you can scan, using barcodes, shelf-ready items. Staff can send scanned items to be shelved or continue working on them in the department as needed.

Technical Instructions

The Receiving Operator role may use this facility.

To scan shelf-ready items:

- 1 From the Alma main menu > Acquisitions > Receiving and Invoicing, click **Receive**.
The Receive New Material page displays.
- 2 Click the **Shelf Ready** check box.
The Scan item barcode field displays.

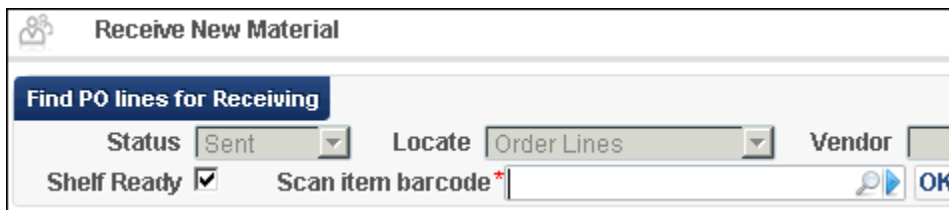
The screenshot shows a web interface titled "Receive New Material". Below the title is a button labeled "Find PO lines for Receiving". Underneath this button are three dropdown menus: "Status" with "Sent" selected, "Locate" with "Order Lines" selected, and "Vendor" which is currently empty. Below these dropdowns, there is a "Shelf Ready" checkbox which is checked, and a "Scan item barcode*" text input field. To the right of the input field are two small icons (a magnifying glass and a document) and an "OK" button.

Figure 6 - Shelf Ready Check Box

- 3 Scan the barcode of the item and click **OK**.
- 4 When you are finished, click the **Receive** button for the Receive New Material page.

Cancel Privileges for PO Line Records

Description

The purpose of this enhancement is to provide separate cancel privileges for PO line records.

With this release, the user privileges for cancelling PO line records can be specified through options available in User Management. This provides more granularity for managing PO line activities.

Technical Instructions

To create or change this role option (to cancel PO line records) for a user, you require one of the following roles:

- User Administrator
- User Manager

To view the PO Line Cancel role option:

- 1 From the Alma main menu > General > User Management, click **Find and Manage Users**.
- 2 Click **Add User > Staff**.
- 3 Complete the information on the User Details page and click **Save and Continue**.
The User Roles section of the User Details page displays.
- 4 Click **Add Role**.

In the Acquisitions section on the Add New Roles page, the PO Line Cancel options displays.



Acquisitions	
☐	Role
☐	Acquisitions Administrator
☐	Fiscal Period Manager
☐	Fund Manager
☐	Invoice Manager
☐	Invoice Operator
☐	Ledger Manager
☐	License Manager
☒	PO Line Cancel

Figure 7 - PO Line Cancel Option (User Management)

Vendor Interface Support

Description

The purpose of this enhancement is to provide vendor interface support.

With the vendor interface support, Alma provides the ability to create, edit, and delete interfaces for each vendor. You can manage access, administrative, and statistics information. Electronic e-resources can be associated to an interface so that you can know what database/package is available from a particular interface.

Each interface created provides a place to maintain the following types of information:

- Security Attributes
 - User ID
 - Password
- URL Attributes
 - URI/URI type
 - IP address registration
- Usage statistics
- Inventory/packages

Each vendor in the Alma database can have multiple interfaces defined in order to manage every resource that your institution may use from an individual vendor.

Technical Instructions

The Vendor Manager role may use this facility.

To view the options available with the vendor interface support:

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

The Search Vendors page displays.

Active	Vendor Code	Name	Libraries	
✓	Q-123	Ebsco	Main Campus(Including)	Actions
✓	Q-150	Blackwell	Main Campus(Including)	Actions
✓	Q415-WYLIE	Wylie publishers	Main Campus(Including)	Actions
✓	18E EEUW	EEUW Booksellers	Main Campus(Only) ,USCI(Only)	Actions
✓	A0172	John Jones Publishing Ltd.	Main Campus(Including)	Actions
✓	A0714	Harbourne, David	Main Campus(Including)	Actions

Figure 8 - Search Vendors Page

- 2 Click **Actions > Edit** for one of the vendor rows.

The Vendor Details page displays with the Interfaces section.

Vendor name Ebsco Vendor code 0-123

Summary Contact Information Contact People EDI Information

Vendor General Details

Institution Main Campus

Name* Ebsco

Code* 0-123

ERP code dddd

Status Active

Libraries Main Campus(Including)

Currencies ALL

Language English

Material ☒ Access Provider ☒ Licenses

Supplier/Subscription Agent

Alert note

Created by John Smith (28/06/2011) Last updated by User,

Accounts

Add

Active	Account Code	Description
☒	0-123-123	Ebsco - Main Library
☒	0-123-124	Ebsco - Education Library

Interfaces

Add

Active	Interface Name	Description
☒	Academic Search Premier	Indexing/Abstracts for Journals
☒	MEDLINE with Full Text	Medical Journals

Figure 9 - Vendor Details Page with Interfaces Section

Note: For vendor interface support, the vendor must be defined as an Access Provider in the Vendor General Details section of the Summary tab.

- Click the interface name or **Actions** > **Edit** for the row you want to view or edit (or click **Add** to create a new interface).

The Vendor Interface Details page displays with the following tabs:

- Summary
- Contact Information

- Administrative Information
- Access Information
- Statistics Information
- Inventory

Vendor Interface Details

Vendor name: Ebsco Vendor code: 0-123

Interface Description: Indexing/Abstracts for Journals Interface Name: Academic Search Premier

Summary Contact Information Administrative Information Access Information Statistics Information Inventory

General Attributes

Interface Name* Academic Search Premier

Interface Description* Indexing/Abstracts for Journals Status: Active

Note

Created by: User, Super (16/02/2012) Last updated by: Ex Libris (16/02/2012)

Figure 10 - Vendor Interface Details Page

- 4 View each of the tabs to see the information that can be managed with the vendor interface support for this feature.

PO Line Ordering and Receiving

Description

The purpose of this feature is to provide enhancements to the PO line owner ordering and receiving options. Refinements have been added to the Acquisitions workflow with regard to parameters related to ownership, library level, and institution level.

These enhancements address:

- Institution-level handling
 - Ordering

E-resource and physical-resource PO lines are handled by the library only.
 - Receiving

The receiving department is always owned by a library.
 - Fund

Institution Only has been removed from the Available for list.
- Scope of the Purchasing Operator role

The PO line owner is dependent on the scope that the user has for the Purchasing Operator role.

- If the scope is Institution, all the libraries are displayed.
- If the scope is Library, only those libraries for which the user is a Purchasing Operator are displayed.
- If the scope is only for one library, only that library is displayed. No drop-down list is displayed.
- Receiving department view
The user is able to view PO lines that are owned by that library and PO lines that have items ordered for that library.
- Resource Editor PO Line pickup
All the active PO lines that are the same material type are available regardless of the Owner and Acquire for specifications.
- E-resource ordering
E-resources are ordered only in the library level.

In addition, central order and receiving can be implemented by:

- Creating a library specifically for this purpose (a name of your choosing such as Central Processing)
- Creating the relevant Acquire for relationship of All.
- Creating the Purchasing Operator role with the scope of the library you created above.
- Creating a receiving department owned by the library that you created above.
As a result, the user sees all the PO lines since they are owned by this special library that you created for this purpose.

Technical Instructions

The following roles may use this facility:

- Receiving Operator
- Purchasing Operator

To view the PO line owner receiving and ordering option/display changes:

- 1 From the Alma main menu > Acquisitions > Receiving and Invoicing, click **Receive** (or create an order).
- 2 Follow the usual steps to process receiving records or to create an order and view the option changes described above.

PO Line User Interface Changes

Description

The purpose of this enhancement is to provide user interface changes for the PO line form. Changes have been made throughout the PO line form to enhance its usability. View the updated form to see these changes.

Technical Instructions

The following roles may use this facility:

- Purchasing Operator
- Purchasing Manager

To view the PO line form changes:

- 1 From the Alma main menu > Acquisitions > Purchase Order Lines, click **Review**.
- 2 Observe data entry enhancements.

The screenshot displays the PO Line Form interface with the following sections and fields:

- Tabs:** Summary, Description, Alerts, Attachments, Invoice Lines, Notes, Communications, Associated PO Line.
- Ordered resource:** License (text field), View license (link), Go to inventory (link).
- Vendor information:** Material Supplier (text field), Access Provider (text field), Expected Activation after Ordering (Days) (text field), Or Expected Activation Date (date field).
- Pricing:** List Price (text field), USD (currency dropdown), Discount (%) (text field), Net price (0.00 USD).
- Funding:** Fund (text field), Percent (100.0), Amount (0.00 USD), Add Fund (button). Below this, it states "No records were found."
- PO Line details:** Acquisition method (Purchase), Invoice status (No invoice), Rush (checkbox), Vendor reference number type (text field), Note to vendor (text field), Material type (dropdown), Reporting Code (dropdown), Vendor reference number (text field).

Figure 11 - PO Line Form

Resource Management

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

Exporting Physical Items

Description

The purpose of this enhancement is to provide a data extraction facility for exporting physical item data.

With this release of Alma, you have greater flexibility for working with your bibliographic and holdings data for physical items. The export feature provides support for export in Excel and options to include usage information from loans.

Technical Instructions

The following roles may use this export facility:

- Digital Inventory Operator
- Cataloger
- Electronic Inventory Operator
- Physical Inventory Operator
- General Systems Administrator
- Requests Operator

Before running the Export Physical Items process, confirm that the necessary staff search query/saved set has been completed. You can create a new set with Repository Search under Search and Sets from the Alma main menu.

Note: The set must be the result of a physical item search. Only such sets can be viewed as part of the Export Physical Items process.

For your planning purposes, large query sets take longer to process and the output files are split into 50,000 records each.

To export physical items:

- 1 From the Alma main menu > Resource Management > Processes, click **Run Process**.
- 2 Select the **Export Physical Items** process and click **Next**.

- 3 Select a staff search query set and click **Next**.

Note: A staff search query set must be saved prior to running the Export Physical Items process.

- 4 Specify the task parameters for exporting physical items.
 - Output format (select from the drop-down list of available options)
 - Export into folder (select from the drop-down list of available options)
- 5 Click **Next**.
- 6 Specify a process name (required) for your export request, select your scheduling preference from the list of available scheduling choices, and click **Next**.
- 7 Verify the export process information that you created and click **Save**.

The status (running/completed) of your export process can be viewed by clicking **Monitor Processes** from the Alma main menu > Resource Management > Processes.

It is possible to see export details from the **Alma Menu > Resource Management > Search and Sets > Manage Exports**.

Search Result More Information Pop-up Window and Request Status Display

Description

The purpose of these enhancements is to provide a link to more information that displays in a pop-up window with additional navigation for each result type that is relevant to title-level and item-level requests and, through the navigation links, displays additional details such as request status information. The more information option is not only for requests but also for order information.

Technical Instructions

The user needs to be configured with the role of Cataloger to use this facility.

To view more information and the status of a request:

- 1 From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
- 2 Enter a search request.
- 3 From the search results list, click **More info**.

1 **Pottery decoration.**
Book By Gibson (A & C Black, London : 1991.)
ISBN: 0713628057
Availability: [Physical version](#) at **ULINC: GEN** (3 copies, 3 available)
[MMS Debug Screen](#) | [Get It](#) | [Edit](#) | [Order](#) | [Request](#) | [Add to reading list](#) | [View holdings](#) | [View items](#) | [More info](#)

Figure 12 - More Info Link

The pop-up window displays.



Title Pottery decoration.

Related [No Related Records](#)

Records

Orders [No Orders](#)

Requests [1](#)

Figure 13 - More Info Pop-up Window

- 4 Click the **Requests** link, for example, to view the request details.

The details include status information. For this example, the Process Status is New.

1 **Pottery decoration.**
Requester: User, Super **Request ID:** 20275360000121 **Queue:** [1](#)
Pickup Location: Main Reading Room Circ Desk **Request Date:** 06/02/2012
Managed By Library: Main Library **Managed By Desk:** Reading Room 1
Process: Pickup From Shelf **Process Status:** New **Process Date:** 06/02/2012 **Expiration date:** 13/02/2012
Request Type: Patron physical item request
[View Audit Trail](#) | [Edit Request](#) | [Cancel](#) | [Update Expiry](#) | [Mark as missing](#)

Figure 14 - Request Details (Including Status)

Create/Search Local Database

Description

The purpose of this enhancement is to provide Part 1 of the database entity package that enables creation and search of electronic collections.

With this release of Alma, you can create the basic components of an electronic database to include:

- Summary and inventory information
 - Electronic collection type
 - Access rights

- Acquisitions and license information
 - PO line
 - Active license information

After database is created, the following options can be selected when working with the electronic collections database:

- Edit
- Delete
- View
- Order
- Inventory Debug Screen
- More Info

Technical Instructions

The user needs to be configured with the role of Cataloger to use this facility.

Note: This represents Part 1 of this feature in Alma.

To create an electronic collections database:

- 1 From the Alma main menu > Resource Management > Inventory, click **Add Local DB**.
- 2 Enter the **Public name** for the database and other related information.

The screenshot shows the 'Electronic Collection Editor' interface. It includes the following fields and options:

- Public name** (required, marked with a red asterisk): Example Database
- Public name (override)**: (empty field)
- Description**: (empty field)
- Internal description**: (empty text area)
- Collection type**: A dropdown menu with the following options:
 - Full text data
 - A&I database
 - Citation database
 - Full text database** (selected)
 - Partial full text database

Figure 15 - Enter New Local DB Public Name and Related Information

3 Click **Save and Continue**.

This creates the local package.

The screenshot shows a web interface with a success message at the top: "Local package created successfully" with an information icon. Below this is a form titled "Electronic Collection Example" with a sub-header "name". The form has four tabs: "Electronic Collection Description", "General Information", "Additional Information", and "Notes". The "General Information" tab is active, showing a section titled "Summary and Inventory Information". This section contains fields for "Electronic Collection type" (set to "A&I database"), "Interface Name", "Process type", and "Access rights". It also displays "Created by admin1 (20/02/2012)" and "Updated by admin1 (20/02/2012)". Below this is a section titled "Acquisitions and License Information" with fields for "PO Line" and "Active license", and links for "PO line details" and "View license details".

Figure 16 - Local Package Created Successfully

4 To finish, complete the information on the General Information tab and click **Save**.

The database name is indexed and can be searched and found in the repository.

Item-Level Shelving Sublocation

Description

The purpose of this enhancement is to provide the ability to enter item-level shelving sublocations.

There are some circumstances in which individual items need a sublocation identification such as for a shelf ID, a box ID, or container ID. To provide more granularity for location information, Alma has enabled the Storage Location ID field for maintaining additional location information.

Technical Instructions

The user needs to be configured with the role of Physical Inventory Operator to use this facility.

To enter a sublocation ID such as shelf ID, box ID, or container ID:

- 1 Search for a physical item.
- 2 Click the **Edit** link for the item in order to open the Physical Item Editor page.

The Storage Location ID field that displays on this page is used for entering the sublocation information.

The screenshot shows the 'Physical Item Editor' interface. At the top, there's a header with a user icon and the title 'Physical Item Editor'. Below this is a section for 'Resource description' with a text field containing '0401120343 Symeonidis, Andreas L. Springer, / New York : 2005. I9780387257570 (electronic)'. To the right of this field are two links: 'View all holdings' and 'View all items'. Below the resource description is a 'Holding' section with 'Main Library: General; QA76.9.D343S935 2005' and a 'Barcode' field with '0401120343'. Below the holding section is a 'Process type' field with 'Managed by Department'. The main content area is divided into several tabs: 'Summary', 'General Information', 'Serials Subscription Information', 'Notes', and 'Reports and Services'. The 'General Information' tab is active, showing fields for 'Barcode' (0401120343), 'Material type' (Art Original), 'Enumeration A', 'Inventory date', 'PO line', 'Copy ID', 'Override policy', 'Enumeration B', 'Provenance', and 'Is Magnetic'. Below this is a section for 'Location Information' with a sub-section 'Permanent Location Information' containing 'Permanent library' (Main Library) and 'Permanent location' (General). There are also fields for 'Alternative call number type', 'Inventory number', 'Pages', 'Alternative call number', 'Storage Location ID', and 'Pieces'. At the bottom, there's a section for 'Additional Information'.

Figure 17 - Physical Item Editor Page

- 3 Enter the item-level, shelving sublocation information in the Storage Location ID field and click **Save**.

Authority Validation On Demand and Special Validation for New/Nonauthorized Headings

Description

The purpose of these enhancements is to provide special validation for new and nonauthorized headings when saving records with the Metadata Editor or on demand (without saving the record).

With this release, Alma takes advantage of the Community Zone authority database to provide an authority validation service. With this option you can improve the accuracy of your database information and improve the efficiency with which you manage this information.

Technical Instructions

The user needs to be configured with the role of Cataloger to use this facility.

In order for validations to be processed, you need to have access to the Community Zone (CZ).

To validate fields under authority control (such as 1xx, 7xx, and 6xx) on demand:

- 1 From the Alma main menu > Resource Management > Cataloging, click **Open Metadata Editor**.
- 2 Select an existing bibliographic record to edit as necessary or create a new bibliographic record (**File > New Record**).
- 3 Click **Tools > Validity Check** to validate the record against the CZ.

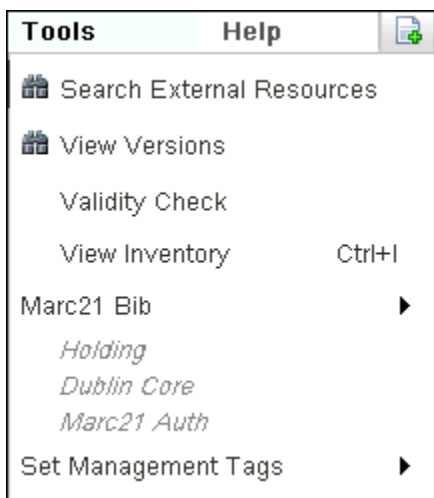


Figure 18 - Validity Check On Demand

To validate with Save Record:

- 1 From the Alma main menu > Resource Management > Cataloging, click **Open Metadata Editor**.
- 2 Select an existing bibliographic record to edit as necessary or create a new bibliographic record (**File > New Record**).
- 3 Click **File > Save Record** (or **Ctrl+S**) to validate the record against the CZ.

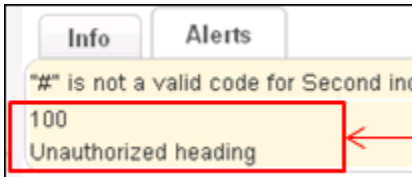


Figure 19 - Validation Error Example

This message displays when the record contains an authorized field that doesn't have a match in the CZ. This indicates that the bibliographic heading is not linked to any authority heading in the CZ.

Metadata Editor Improvements

Description

The purpose of this enhancement is to provide Metadata Editor improvements for authority-type labels and the order of the folders displayed.

With these changes, you can more easily manage your metadata content and workflow.

Technical Instructions

The user needs to be configured with the role of Cataloger to use this facility.

To view Metadata Editor improvements:

- 1 From the Alma main menu > Resource Management > Cataloging, click **Open Metadata Editor**.
- 2 View the new folder component, reorganization, and changed icons and labels.

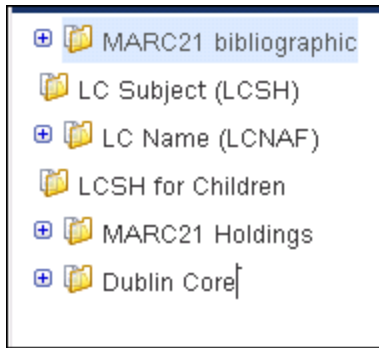


Figure 20 - Updated/Reorganized Metadata Editor Display

Fulfillment

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

Updating a Request/Resource Queue

Description

The purpose of this enhancement is to enable a staff user to update a request and have the queue recalculate as needed.

With this change, a staff user can update a request's delivery information. As a result of changes to a request, the resource queue is updated to reflect these changes.

Alma displays the request status of an item in the search results. The request status also displays with the item details.

Technical Instructions

The user needs to be configured for handling requests such as one of the following roles:

- Request Operator
- Fulfillment Services Manager
- Work Order Operator

To update a request using the Edit Request link:

- 1 From the Alma main menu > Fulfillment > Resource Requests, click **Monitor Requests**.
- 2 Click the **Edit Request** link for the request that you want to update.

Note: The Edit Request link displays for requests in other places.



Figure 21 - Edit Request Link

- 3 Edit the request page with your changes.

Create Request

Create Request

Title Civilization against cancer / |c by Clarence Cook Little.

Institution Main Campus

Request Type * Patron physical item request

Requester * User, Super

Note

Pickup At * Main Library

Additional Request Attributes

No records were found.

Add Request Attributes

Material Type Refresh Values > Art Original Add Request Attribute

Figure 22 - Request Page

4 Click **Submit**.

Quick Item Creation

Description

The purpose of this enhancement is to provide a Circulation Operator the ability to quickly create an item.

Quick item creation may include brief bibliographic and holdings records. Alma flags these records for additional cataloging to be processed when the item is returned.

Technical Instructions

To use this feature in all places that it can be accessed, the user needs to be configured with one of the following roles:

- Circulation Desk Operator
- Circulation Desk Manager
- Physical Inventory Operator

To process an item request for an item that does not exist in the repository via the quick item creation option:

- 1 From the Alma main menu > Fulfillment > Checkout/Checkin, click **Manage Patron Services**.
- 2 Enter the patron ID and click **Go**.
- 3 For this example, to simulate a nonexistent item in the repository, enter a barcode that does not exist in your institution's inventory/repository for the **Scan item barcode** field and click **OK**.

The pop-up window displays providing the Create Item button option for quick item creation.

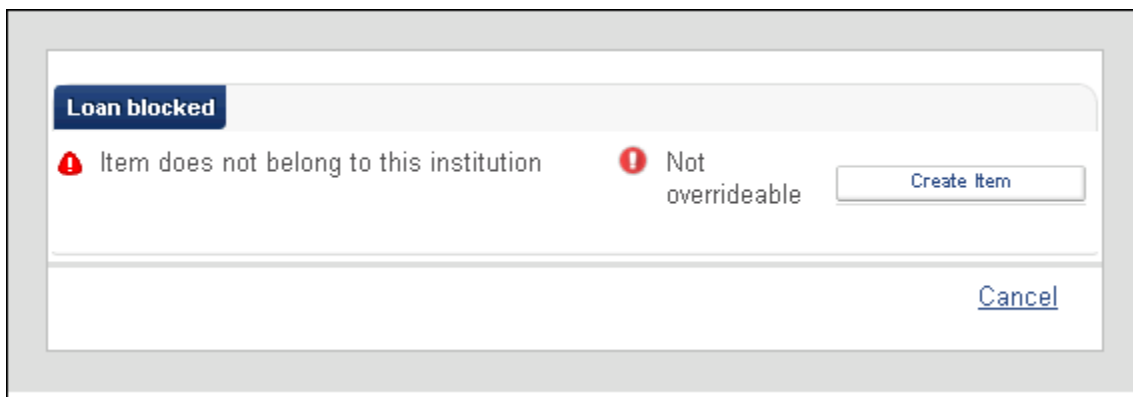


Figure 23 - Create Item Button

- 4 Click **Create Item**.
- 5 Select **Book**, for this example, from the Citation Type drop-down list and click **Choose**.

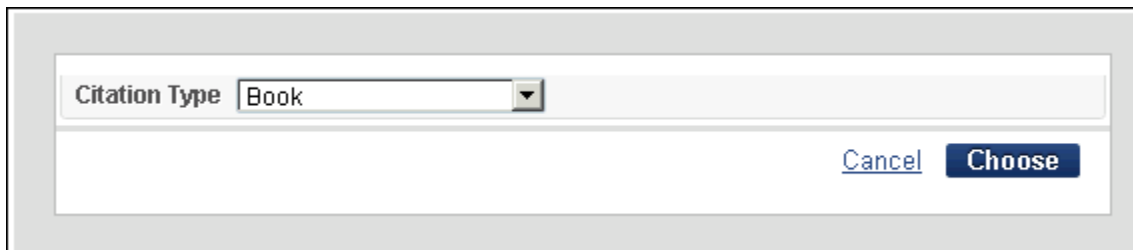


Figure 24 - Select Book for Citation Type (Example)

The Quick Cataloging page displays.

Resource Information	
Title *	A history of the Aztecs
Author	
Publisher	
Year	
Edition	
ISBN	

Item Information	
Library *	Main Library   
Location *	General   
Material Type	 
Item policy	 

Figure 25 - Quick Cataloging Page

- 6 Enter the Cataloging information and click **Save**.
- 7 Now that the item exists in the repository, continue with processing the item request using normal procedures.

Note: The creation of the item record can also include the creation of a brief bibliographic and holdings record. Alma automatically assigns a work order to the item; and on its return, it is flagged for further processing.

Loan/Return Alerts

Description

The purpose of this enhancement is to enable alerts that block further processing of a loan/return until a required action is performed.

When items are returned, other actions may need to be processed for those items. With this enhancement, an alert facilitates making the circulation user aware of other actions that need to happen related to the items being returned.

Technical Instructions

The user needs to be configured for one of the following roles:

- Circulation Desk Operator
- Circulation Desk Manager

To view an alert that blocks further processing:

- 1 Follow your normal procedure to place an item on loan.
- 2 Place another request for the same item that is on loan.
- 3 Click **Return Items** (Checkout/Checkin).
- 4 Enter the barcode in the **Scan item barcode** field for the item on loan (that also has an outstanding open request) and click **OK**.

The alert displays to block further processing due to the open request for the same item.



Figure 26 - Blocking Alert Message Example

Shelving Location for Pickup Slips

Description

The purpose of this enhancement is to provide the shelving location on pickup slips.

With the additional location information being maintained in the database for Storage Location ID, this information is also being made available on the pickup slips.

Technical Instructions

The user needs to be configured for the Request Operator role.

The following are the prerequisites for viewing the shelving location information on a pickup slip:

- The item needs to have a storage ID specified in the inventory
- A pending request needs to be queued/created for pickup
- A printer needs to be configured on which the pickup slip can print

To view the shelving location information added to a pickup slip:

- 1 From the Alma main menu > Fulfillment > Resource Requests, click **Pick From Shelf**.
- 2 Click the **Print Slip** link for the record in which you want to change the shelving location.
- 3 Review the printed slip to see the included shelving location information.

Display Logic Support

Description

The purpose of this enhancement is to enable display logic support for your discovery interface.

With this release, you can define the rules that affect the display logic for your discovery interface. The rule options include:

- User group identification
- Hide service selections/specifications

With the Sections Order component, you can specify the display order of the data in your discovery interface. You can also specify the labels to be used in the discovery interface.

Technical Instructions

The user needs to be configured for the Fulfillment Administrator role.

To configure the display logic for your discovery interface:

- 1 From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.
- 2 Under Discovery Interface Display Logic, click each of the following to enter your specific information and save or add your changes/customization for your discovery interface:

Note: This feature enables configuration for the Primo ViewIt and GetIt tabs display.

- Display Logic Rules
- Sections Order
- Labels

Option	Description
Display Logic Rules	Identify the rules that determine what the users view/access through the discovery interface (see Figure 27).
Sections Order	Import the sections for the discovery interface (via Excel spreadsheet) and specify the display order (see Figure 28).
Labels	Import the labels for the discovery interface (via Excel spreadsheet), specify the display order of the labels, and select the language (see Figure 29).

Add Rule

Rule type * Intra service rule

For user from groups Testi
Faculty
Employee
Staff
Graduate Student
Visitory
Alumni
Undergraduate Student

hide service * Resource Sharing Request

with Resource Sharing System

with value * All

if exists the same service with value

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

Figure 27 - Display Logic Rule Creation

Import				
Enabled	Display	Order	Code	Description
☒		v	AVAILABLE_ON_SHELF	Available on Shelf
☒	▲	v	AVAILABLE_REQUEST	Request Item in Place
☒	▲	v	UNAVAILABLE_REQUEST	Request Item Currently Out
☒	▲	v	ALL_HOLDINGS	All Library Holdings
☒	▲		OTHER	Other

Figure 28 - Discovery Interface Sections

Language Russian ≡				
Import				
Enabled	Display	Order	Code	Description
☒		v	c.uresolver.notForLo	Non-circulating
☒	▲	v	c.uresolver.resolution	Resolution
☒	▲	v	c.uresolver.request.	Not Needed After:
☒	▲	v	c.uresolver.title	Title:
☒	▲	v	c.uresolver.selectIss	Select Issue
☒	▲	v	c.uresolver.request.	Material Type:
☒	▲	v	c.uresolver.request.	Description

Figure 29 - Discovery Interface Labels

General

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

User Fines/Fees Reporting

Description

The purpose of this enhancement is to expose user fines/fees for reporting through Alma Analytics.

Analysis is key to the operations of the library, and with this enhancement, fines and fees information is being made available for your analysis requirements through Alma Analytics.

Technical Instructions

The user needs to be configured with the role of View and Design Analytics to use this facility.

To work with user fines/fees for reporting:

- 1 From the Alma main menu > General > Analytics, click **Design Analytics**.
- 2 Click **Home** from the Global Header.
- 3 Click **New > Analysis**.

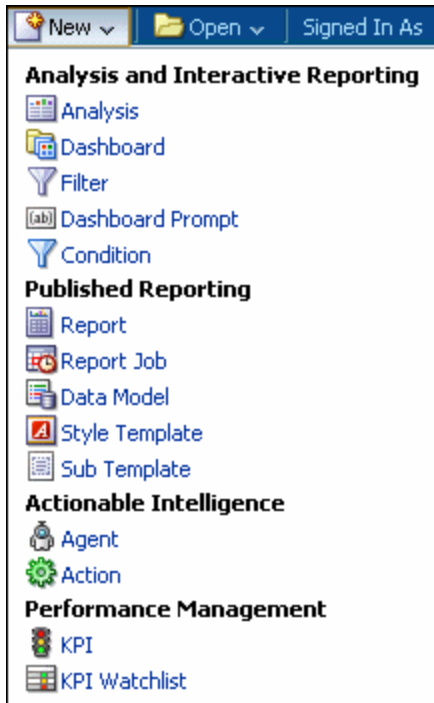


Figure 30 - New Analysis

- 4 For Select Subject Area, click **Users**.

The Fines and Fees subject area displays in the Criteria tab.

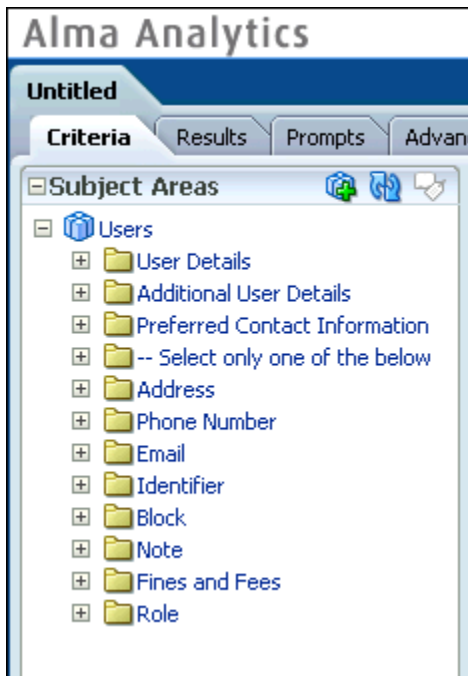


Figure 31 - Fines and Fees Subject Area

- 5 Work with Fines and Fees to add this analytic to your report.

LDAP Support

Description

The purpose of this enhancement is to provide LDAP (Lightweight Directory Access Protocol) support.

Alma continues to expand the security options provided with the addition of LDAP support in this release. Alma LDAP support shares similar characteristics with other Ex Libris LDAP-supported products while providing user name mapping specific to Alma.

Technical Instructions

LDAP (Lightweight Directory Access Protocol) support requires:

- Alma staff-level permissions to access/configure
- An active and available LDAP server that is open for the Alma client. Otherwise, authentication of external users fails.

To access/configure LDAP support:

- 1 From the Alma main menu > General > General Configuration, click **Configuration Menu**.
The Configuration page displays.

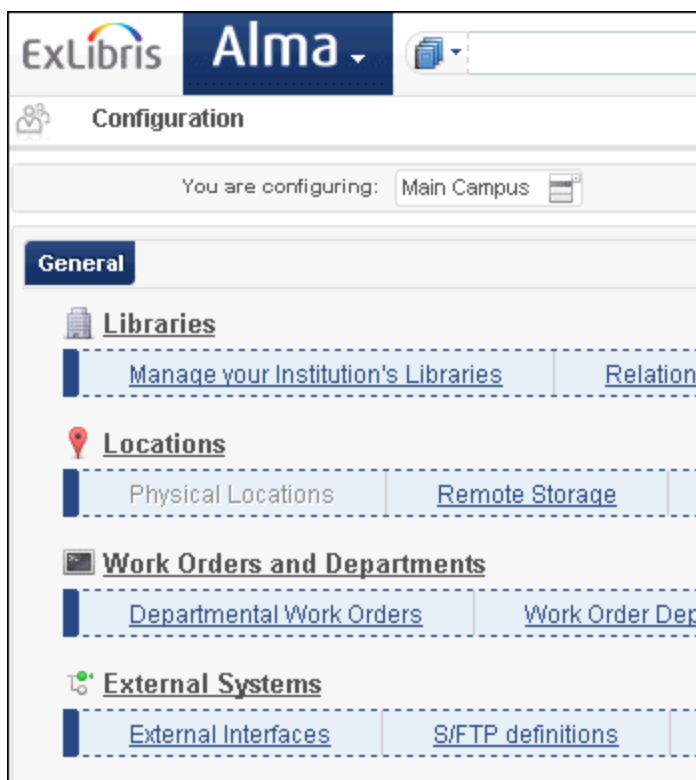


Figure 32 - External Interfaces Link

- 2 From the External Systems configuration section, click **External Interfaces**.
- 3 Click the **Add External System** button.
- 4 Enter
 - Code
 - Name
 - Integration Type (=LDAP)
 - Description (optional)
- 5 Click **Next** and enter the LDAP authentication configuration parameters specific to your institution (see Table 1) for the LDAP server interaction.

Table 1 - LDAP External System Configuration Parameters

Parameter	Description
Active	Select this option to indicate that LDAP is active and available for use.
Host	Enter the host name of the remote LDAP server through which LDAP is accessible.

Parameter	Description
Port	Enter the port for the remote LDAP server.
Use Secure Connection	Select the check box to activate this parameter to use the SSL protocol to communicate with the LDAP server.
Use TLS	Select the check box to activate this parameter. Selecting this option converts the existing connection to use Transport Layer Security (TLS) which provides an encrypted connection. Note: This requires LDAP version 3 or later.
Connection Timeout	Specify your preference for the timeout value in milliseconds. The default value is 60000. This represents one minute for the connection timeout.
Initial Bind DN	Enter the full DN (distinguished name) for the initial bind.
Initial Bind Password	Enter the password for the DN for the initial bind.
DN for binding before each search	Use this parameter to specify the DN when you want to use dynamic password binding instead of a hard-coded password for the initial bind.
Convert Password from UTF to Charset	Leave this field empty.
Response Encoding	Enter UTF8 if response encoding is needed. This setting is used to encode the LDAP response before sending it back to the calling application. The only possible value is UTF8.

Parameter	Description
Search base 1 (through Search base 5)	Enter the full path search in the LDAP directory tree to the user. The system searches the LDAP tree to find the user's record determined by the Search base and Search Filter. Note: The Search base and Search filter parameters can be repeated to search in more than one tree. If the results of the Search base/Search Filter are not unique (or a zero-size result), the search step is repeated for the next provided Search base/Search Filter.
Search Filter 1 (through Search Filter 5)	Enter the parameter to filter the results to return only one object. The system searches the LDAP tree to find the user's record determined by the Search base and Search Filter. Note: The Search base and Search filter parameters can be repeated to search in more than one tree. If the results of the Search base/Search Filter are not unique (or a zero-size result), the search step is repeated for the next provided Search base/Search Filter.
Map User Name	Enter the name of an LDAP attribute such as CN. This attribute is mapped by Alma to be the user name. Note: The Alma user name must match one of the LDAP identifiers such as CN. If it does not, the authentication succeeds but the user is not allocated any permissions/roles.

6 Click **Save**.

Online Help/Documentation

The following sections describe the online help/documentation function provided with Alma in the February 2012 release.

Online Help/Documentation Support

Description

The Help > Help Contents link provides access to information about the following Alma components:

- Acquisitions
- Resource Management
- Fulfillment
- General

The table of contents, index, and search features enable easy access to the information. You may choose to view and/or print the information in PDF format. Hyperlinks throughout the content provide quick and easy access to the information in which you are interested. Optionally, you may select the Help > About This Page link to navigate directly to help information for the Alma page with which you are working.

Online help is available for most of the Alma workflows and functionality areas as part of the February release. The following topics will be available as part of the March release:

- Inventory
- Search and Sets
- Renewal
- Fulfillment Configuration
- Acquisition Configuration

Technical Instructions

The Help link can be accessed by all users from the Alma home page.

To use the online help/documentation support facility:

- 1 From the Alma home page, click the **Help > Help Contents**.

Note: To view information for a specific page, click Help > About This Page.



Figure 33 - Help Link

The online help displays.

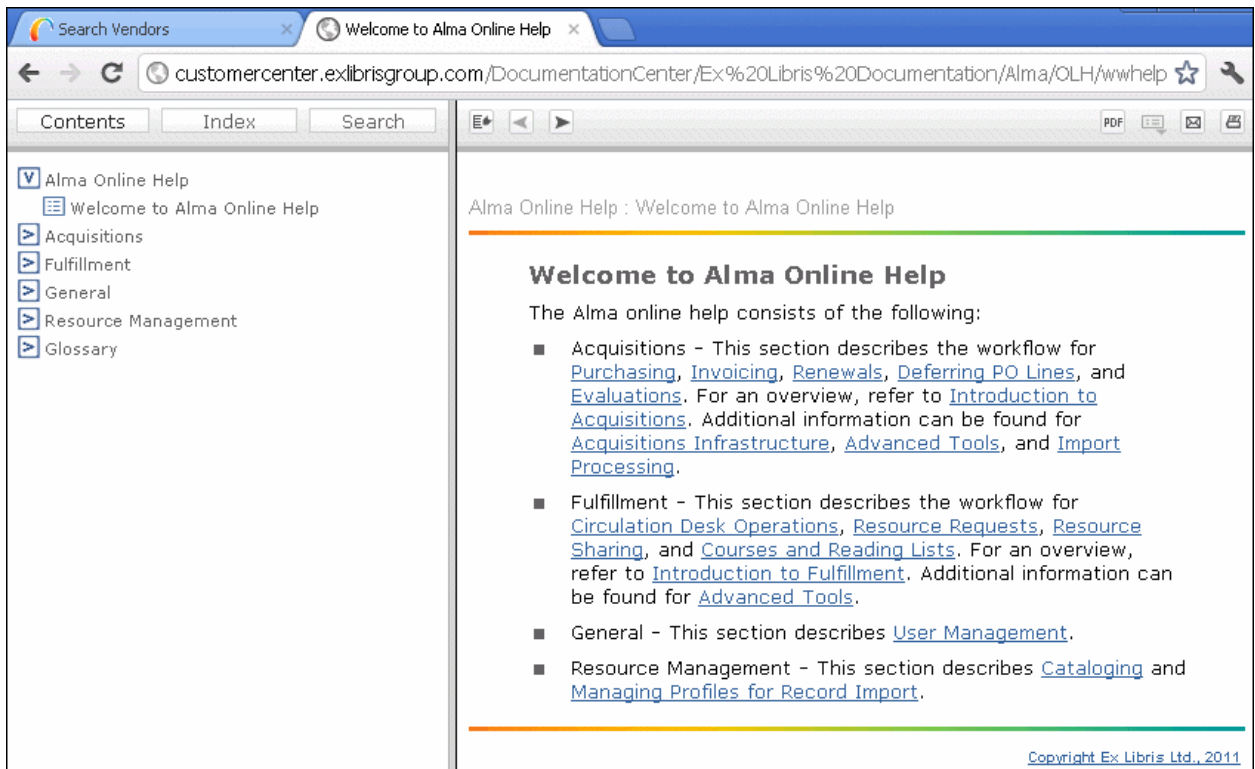


Figure 34 - Help Default Page

2 Navigate to the information that you want to view using:

- Contents (the Table of Contents currently displayed)
- Index
- Search

Note: Hyperlinks throughout the Help content enable you to quickly navigate to different pieces of information.

- 3 View the toolbar for additional options for:
 - PDF-formatted materials
 - View related topics
 - Email
 - Print
- 4 Click Exit (X) from the Help tab to close the Help page.

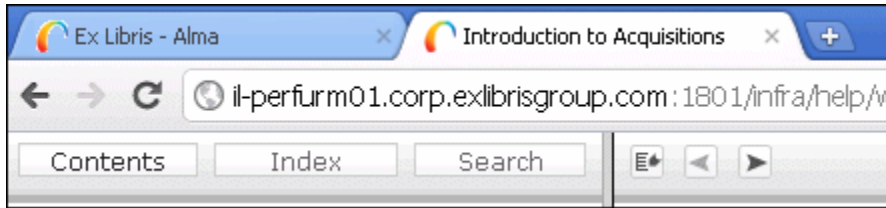


Figure 35 - Help Tab Exit

About Alma

Description

The Help > About Alma link provides the following information about Alma:

- Version
- Build Date

Technical Instructions

The Help link can be accessed by all users from the Alma home page.

To use the About Alma facility:

- 1 From the Alma home page, click the **Help > About Alma**.
The About Alma page displays.



Figure 36 - About Alma Page

- 2 Click **Close** to exit this page.

Known Issues

The table below describes the known issues for vendor interface support ([Vendor Interface Support](#)).

These will be addressed in the next release.

Table 2 – Known Issues – Vendor Interface Support

Description	Change
The standalone portfolio does not have the interface name in it.	It should have the interface name instead of the provider.
The interface name that does not belong to any vendor should not have a link to the vendor.	It returns an empty vendor.
The interface name in the package editor should allow the user’s manual insertion.	The user should be able to insert a nonexistent interface instead of picking it up from the list.