



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

Alma November 2012 Release Highlights

Primo

- Enhanced Request Options for Holdings Records

This enhancement provides options that allow a patron to request a specific volume/issue of a journal even if this information is only listed as part of the summary holdings statement (and not at the volume/issue level).

- Display of Linked Items

This new feature displays the inventory of linked records in the Get It tab when a bibliographic record does not contain inventory and has a 773 field that links to another bibliographic record that has inventory.

- Enhanced Item Status Information

More detailed status information about an item (such as on loan, in transit, and on hold shelf) together with the relevant date information now displays.

Acquisitions

- Export Portfolios

It is now possible to export portfolios belonging to a specific package service in a portfolio loader format. The staff can then manage the list of portfolios in Excel (adding, updating portfolios, or removing portfolios). The file can then be reloaded to Alma thus updating the relevant package service.

- Receiving or Arrival Print Slips

This new option allows for printing slips for items that have been received.

- VAT/GST Handling

Alma now provides support for VAT/GST handling. The VAT and GST is handled at the invoice level. This invoice section is an optional section.

- Funds in Invoice Lines and PO Lines

Funds in invoice lines and PO lines are now linkable, allowing the staff user to navigate from the invoice or the PO line to the relevant fund.

Resource Management

- Additional Information in the More Info Popup

More information with regard to physical item usage (number of loans and number of in-house uses) now displays in the More Info pop up window.

Fulfillment

- In-House Usage

This new feature provides the capability to collect in-house loan/usage information.

- Item-Level Replacement Cost

A new field in the item record allows for defining a replacement cost for an item. The cost of a lost item will be based on the value in this field. Information in the Replacement cost field overrides other charge policies.

- Item Level Requests

Staff users in Alma may make item-level, rather than title-level requests.

Resource Sharing

- Send Query to Patron

This enhancement provides an option to send an email query related to a resource sharing borrowing request.

User Management

- User Management Statistics

A new Statistics tab in the user record allows for recording user statistical information that can be used in Alma Analytics for reporting purposes. Linked to this new functionality is the option to define statistical categories.

Alma Analytics

- In-House Usage

Information related to in-house usage is exposed to Alma Analytics for reporting purposes.

- User Management Statistics

This new option is available for reporting from Alma Analytics.

- Funds Burn Down

A new, standard report has been created that shows how a budget has been used during the fiscal year.

General

- Enhancements to Job Scheduling Display

More detail is now provided regarding scheduling information.

- Page Refresh Improvements

This new enhancement ensures that processing is complete before any additional user action is taken. Alma now displays a new loading indicator/image when partial page refreshing occurs and blocks user access until the refresh is complete.

Access to November 2012 Features

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

Feature	No Activation/ Setup Required	Activation/ Setup Required	Visible to Administrator Only	Contact Ex Libris to Activate This Feature
	(Note: Automatically Visible to All Users with the Appropriate User Role/ Permission)			
Acquisitions: Receiving (Arrival) Print Slip				

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: VAT/GST Handling				
Acquisitions: Link Fund in Invoice Line and PO Line				
Resource Management: Show Physical Item Usage Counts in More Info Popup				
Resource Management: Enrich z39.50 MARC Response with Holdings Information				
Resource Management: Export Portfolios				
Fulfillment: In-House Loan/Usage				

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: Item-Level Replacement Cost				
Fulfillment: Item-Level Request for Staff Users				
Fulfillment: Print Call Slip Once Per Resource Request				
Fulfillment: Changing Policies for Existing Loans				
User Management: User Statistical Categories				
General: Enhancements to Job Scheduling Display				
General: Suppress Holdings for z39.50				

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)			
Analytics: In-House Loan Indicator Field Exposed				
Analytics: User Statistics Fields Exposed				
Analytics: Funds Burn Down – Standard Report				
Primo: Enhanced Request Options for Holdings Records				
Primo: MMS Relations – Displaying Linked Items				
Primo: Enhance Item Status Information				
Resource Sharing: Send Query to Patron				

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: Send Query to Patron				
System Processing Enhancements: Page Refresh Improvements				

Data Services

The Alma November Central KnowledgeBase and Community Zone package has been applied to the Alma production environment.

New Electronic Packages Added to the Alma CKB

The following packages were added to the Alma CZ during the period 15-October-2012 through 11-November-2012:

- American Mathematical Society Books
- EBSCOhost Entrepreneur Source
- EBSCOhost Legal Info Reference Center
- EBSCOhost MAS Complete
- Highwire Academy of Management
- Newsbank American Historical Newspapers 8
- Newsbank American Historical Newspapers 9
- Newsbank World Newspaper Archive Latin America Series 2
- OCUL eBook Collection Wiley
- Project Muse Book Archive
- ProQuest Gannett Newsstand
- Taylor & Francis eBooks English Language and Linguistics
- Taylor & Francis eBooks Health Studies
- Taylor& Francis eBooks Archeology
- Taylor& Francis eBooks Asian Studies
- Taylor& Francis eBooks Law
- Taylor& Francis eBooks Media & Communication
- Taylor& Francis eBooks Middle East
- Taylor& Francis eBooks Psychology
- Taylor& Francis eBooks Security
- Taylor& Francis eBooks Social Work
- Taylor& Francis eBooks Sport

New External Resources That Are Open for Searching

- NLM LocatorPlus

Alma Show Me How

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

Alma Show Me How – November

Description

Alma Show Me How provides a menu-driven interface to prompt you through the steps of new or common tasks, or to point out new options such as a check box and direct you to the documentation that describes it in further detail.

Technical Instructions

Each Show Me How scenario may address different areas of Alma. The authorizations required to access the Show Me How scenarios are specific to the functional areas of the scenario.

To access Show Me How:

- 1 From the Alma home page, click the **Show Me How** button.
The How Can We Assist You? pop-up window displays.
- 2 Select one of the processes in order to start the prompted step-by-step instructions.
For the November release, the following Show Me How scenarios are available:
 - Hide/View Show Me How
 - Manage VAT/GST in Invoice
 - Add Statistical Category to User Details
 - Cancelled Recall Due Date Policy
 - New Match Method in Import Profile
 - New Field in External Search

Acquisitions

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

Receiving (Arrival) Print Slip

Description

The purpose of this enhancement is to enable the receiving operator or manager to print a slip containing information about the received item, such as the bibliographic record ID, title, arrival date, barcode, and so forth.

Technical Instructions

The following roles can access this facility:

- Receiving Operator
- Receiving Manager

The **Actions > Print Slip** option is available at the item level and, therefore, is accessible whenever you are viewing an item-level display such as:

- When receiving new material and handling an order, the **Print Slip** action is available for items received.
- In the Receiving Department Item list, the **Actions > Print Slip** option is available for every item row.

Note: If the item is not received, the Print Slip option is not available.

The print slip is printed on the department's printer.

To access the Actions > Print Slip option while receiving new material for one-time orders:

- 1 From the Alma main menu > Acquisitions > Receiving and Invoicing, click **Receive**.
- 2 Select the **One Time** tab.
- 3 Select **Actions > Manage Items**.
- 4 For one of the Received items, select **Actions > Print Slip**.

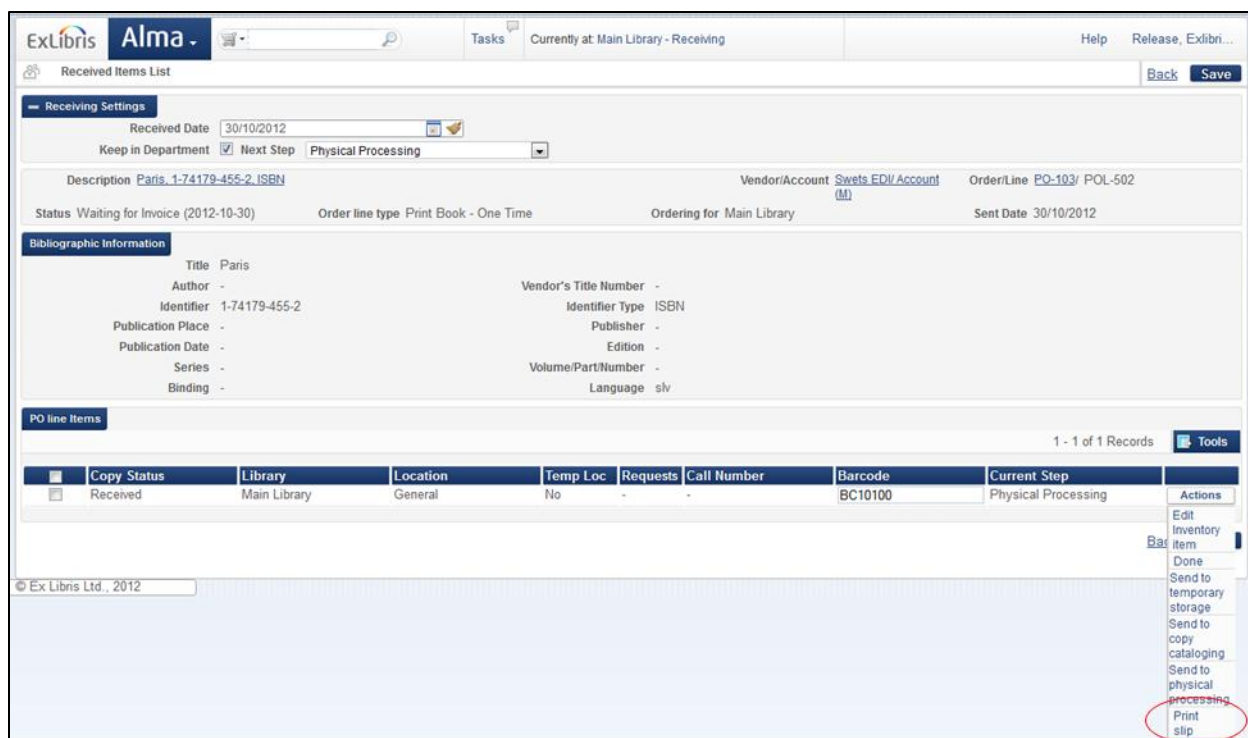


Figure 1 - Print Slip Action – One Time

Note: If no item is received, the Print Slip action is not available.

To access the Actions > Print Slip option while receiving new material for continuous orders:

- 1 From the Alma main menu > Acquisitions > Receiving and Invoicing, click **Receive**.
- 2 Select the **Continuous** tab.
- 3 Select **Actions > Manage Items**.
- 4 Select **Keep in Department**.
- 5 Click **Receive**.
- 6 Select **Actions > Create and Manage Items**.
- 7 Select **Actions > Print Slip**.

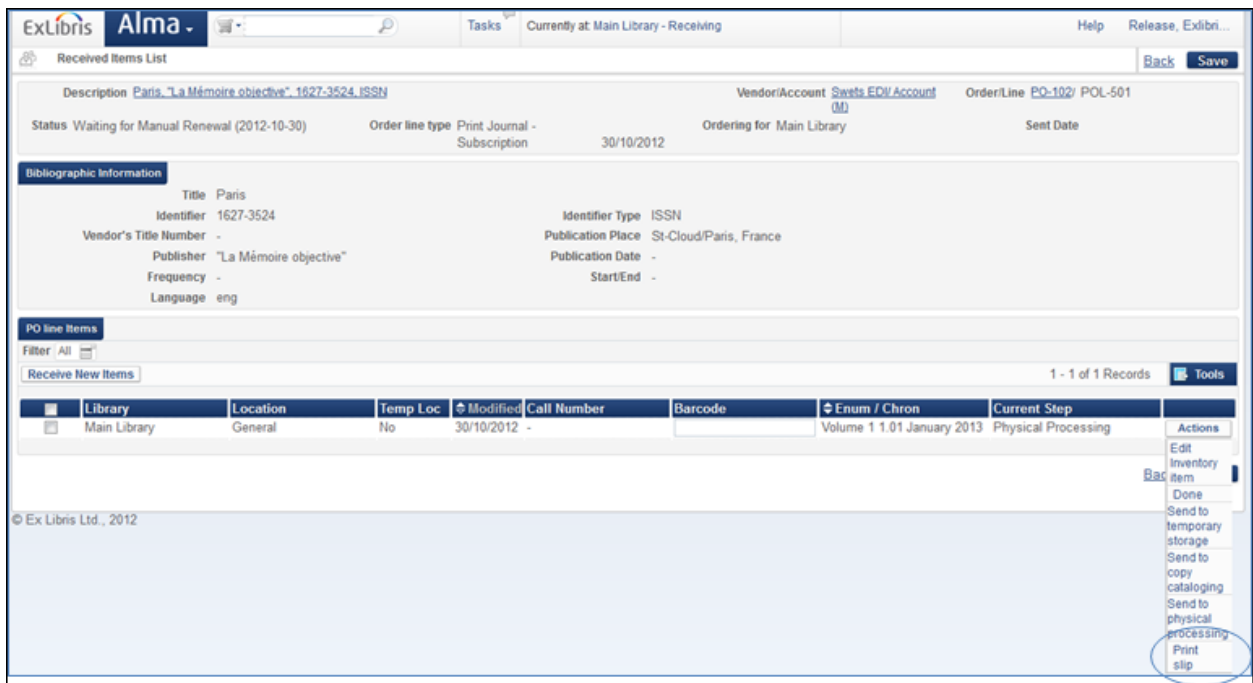


Figure 2 - Print Slip Action - Continuous

To access the **Actions > Print Slip** option in the receiving department's item list:

- 1 From the Alma main menu > Acquisitions > Post-Receiving Processing, click **Receiving Department Items**.
- 2 Select **Actions > Print Slip**.

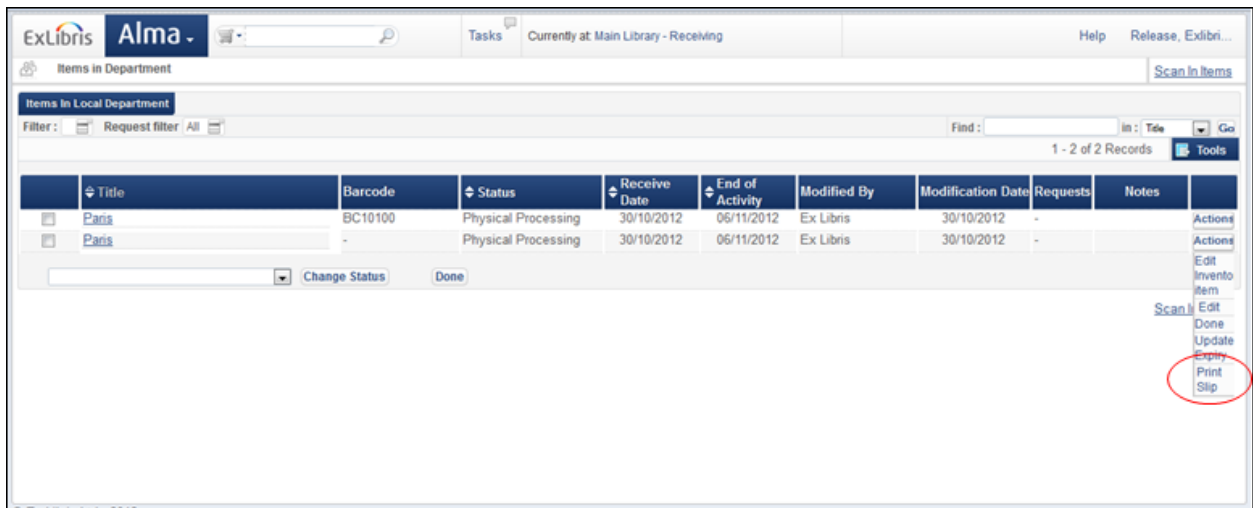


Figure 3 - Print Slip Action - Department

The arrival print slip is printed when this action is selected. It is sent to the printer that is defined for the receiving department.

Note: If no printer is defined, nothing is sent.

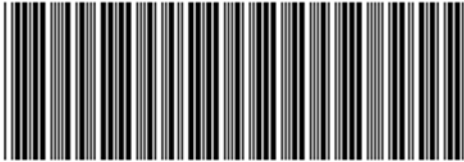
Arrival Date: 12/09/2012 MMS ID: 229316250001021 Item Barcode:  39031031331374 Title: The street art book : 60 artists in their own words Description: Jan 2012, volume 23 Vendor: HARR Order Number: POL-1234 Library: O'Neill Location: Stacks (STACK) Call Number: PR5322 .W4 1995 vol. 18B
Main Library

Figure 4 - Arrival Print Slip Example

VAT/GST Handling

Description

The purpose of this enhancement is to handle VAT (Value-Added Tax) and GST (Goods and Services Tax) in invoices.

The VAT section has been added to the invoice summary and contains the VAT information.

The following are the fields and their use in the calculation of the VAT:

- VAT % - The VAT percentage is a user input field that represents the VAT percentage of the invoice total amount (inclusive or exclusive). This field can be calculated if the Amount field is entered instead.
- Amount - The VAT amount is a user input field that contains the amount of the VAT (inclusive or exclusive). This field can be calculated if the VAT % field is entered instead.
- Inclusive - This check box identifies if the invoice total amount includes VAT or if the VAT is added above the total amount.
- Expended from fund - This check box identifies if the VAT will be expended from the Invoice line fund or if it should be excluded from the fund (such as an adjustment invoice line created to hold the VAT).
- Vendor tax in local currency - This is the text field that is used in cases where the invoice is in a foreign currency and the vendor charged the tax in local currency (as used by some institutions).

Example:

For this example, assume that the invoice has a total amount of \$100 and that the VAT is 10%. This example is also comprised of two invoice lines of \$40 and \$60.

- If the total amount includes the VAT (Inclusive is selected):

The VAT amount is:

$$100 - 100/1.1 = \$9.09$$

Each line has the following information:

$$\text{Price} = \$40 - 36.37 + 3.63 \text{ (VAT):}$$

- If the VAT should be expended from the fund, all \$40 is expended from the invoice line's fund and the VAT Note displays 3.63 included in the line's total price.
 - If the VAT should not be expended from the line's fund, the line's total price is \$36.37 with the note 3.63 included in the VAT/GST adjustment line. (There is an adjustment line of \$9.09 taken from both lines.)
 - If the total amount excludes the VAT (Inclusive is not selected):
- The VAT amount is:
- $$100 \times 1.1 - 100 = \$10$$
- Each line has the following information:
- $$\text{Price} = \$40 - \text{total price } 40 + 4 \text{ (VAT)} = \$44:$$
- If the VAT should be expended from the fund, all \$44 is expended from the invoice line's fund and the VAT Note displays 4.00 included in the line's total price.

- If the VAT should not be expended from the line's fund, the line's total price would be \$40 with the note 4.00 included in the VAT/GST adjustment line. (There is an adjustment line of \$10.00 taken from both lines.)

Technical Instructions

The following roles can access this feature:

- Invoice Operator
- Invoice Manager

To access the VAT in the invoice:

- 1 From the Alma main menu > Acquisitions > Receiving and Invoicing, click **Create Invoice**.
- 2 Select **Manually** or **From PO** and click **Next**.

The VAT is a new section on the Invoice Details page.

The screenshot displays the 'Invoice Details' page in the ExLibris Alma system. The page is divided into several sections: 'Invoice Details' at the top, 'Additional Charges' in the middle, and 'Payment' at the bottom. The 'VAT' section is highlighted with a red box. It contains fields for 'VAT %' (0.0), 'Amount' (0.0), and 'Vendor tax (local currency)'. There are also checkboxes for 'Inclusive' (checked) and 'Expended from fund' (checked). The 'Payment' section has checkboxes for 'Prepaid' and 'Internal Copy'. The page includes navigation buttons like 'Back', 'Cancel', and 'Save and Create Invoice Lines'.

Figure 5 - Invoice Details Page VAT Section

The VAT is editable at the invoice level and displayed in the invoice line details.

The screenshot shows the 'Add Invoice Line' form. At the top, there's a blue button labeled 'Add Invoice Line'. Below it, the form is divided into several sections. The first section contains fields for 'Type' (set to 'Regular'), 'Line Number' (set to '1'), 'PO line' (set to 'POL-102'), 'Title' (set to 'The Brain'), 'PO line price' (set to '30.00 USD'), 'Price' (set to '30.00 USD'), 'Total Price' (set to '30.00 USD'), and 'Quantity' (set to '3'). There's also a 'Fully Invoiced' dropdown set to 'Yes' and a 'More Information' link. A red box highlights a 'VAT Note' field with the text '3.00 Included in line Total Price.'. Below this, there's a 'Reporting Code' dropdown and a 'Note' text area. At the bottom of the form, it shows 'Invoice amount' as '100.00 USD' and 'Total invoice lines amount' as '-'. There's a 'Fund' dropdown, 'Percent' set to '0.0', and 'Amount' set to '0.00 USD', with an 'Add Fund' button. Below this is a table with columns: '#', 'Fund Name', 'Percent', 'Amount', and a 'Delete' button. The table has one row with '# 1', 'Accounting and Finance E-resources(4.970.00 USD)', '100.0%', and '30.00 USD'. A 'Total' row shows '- 100.0%' and '30.00 USD'. At the bottom, there's a 'Redistribute Lines' button and three buttons: 'Close', 'Add', and 'Add and Close'.

Add Invoice Line

Type: Regular Line Number: 1
PO line: POL-102
Title: The Brain
PO line price: 30.00 USD
Price: 30.00 USD
Total Price: 30.00 USD
Quantity: 3
Fully Invoiced: Yes
More Information

VAT Note: 3.00 Included in line Total Price.

Reporting Code:
Note:
Invoice amount: 100.00 USD
Total invoice lines amount: -

Fund:
Percent: 0.0
Amount: 0.00 USD
Add Fund

#	Fund Name	Percent	Amount	
1	Accounting and Finance E-resources(4.970.00 USD)	100.0%	30.00 USD	Delete
Total	-	100.0%	30.00 USD	

Redistribute Lines

Close Add Add and Close

Figure 6 - VAT Displayed in Invoice Line Details

The VAT information displays in the invoice lines list.

Line #	Type	Price	Total Price	VAT Note	Status	Description	Funds	Note	PO Line #
1	Regular	30.00 USD	27.00 USD	3.00 Included in VAT/GST adjustment line	Ready	The Brain	Accounting and Finance E-resources (100.0%)		POL-102 (in Review)
2	Adjustment	0.00 USD	10.00 USD		Ready				

Figure 7 - VAT Displayed in the Invoice Lines List

If **Expended from fund** is not selected, an adjustment line is added to include the VAT.

Note: VAT information is also available as part of the Fund Transaction Details.

Link Fund in Invoice Line and PO Line

Description

The purpose of this enhancement is to provide better navigation from invoice lines and PO lines to funds by making the fund name linkable.

From the PO line details, it is now possible to navigate to the fund details.

From the invoice lines lists, it is now possible to navigate to the fund details.

#	Fund Name	Percent	Amount	USD	Delete
1	Architecture Monographs(29,386.50 USD)	50.0%	13.50	USD	Delete
2	Accounting and Finance E-resources(4,386.50 USD)	50.0%	13.50	USD	Delete
Total		100.0%	27.00	USD	

Figure 8 - Linkable Funds

Other Acquisitions Enhancements

- On the Items in Department page, items can be filtered by the Requests attribute.
- When creating a transaction, fund validation now occurs before the transaction is saved.

Resource Management

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

Show Physical Item Usage Counts in More Info Popup

Description

The purpose of this enhancement is to expand the information provided in the More Info popup to include physical item usage counts.

A screenshot of a 'More Info' popup window. The window has a red border and a red 'X' in the top right corner. It contains the following information:

Title	Ella Hepworth Dixon : the story of a modern woman / Valerie Fehlbaum.
Related records	No Related Records
Orders	1
Requests	No Requests
Number of loans	0
Date of last loan	-
Number of in-house uses	1
Date of in-house use	15/11/2012

Figure 9 - MoreInfo Popup/In-house Usage

For additional information related to in-house usage counts, see [In-House Loan/Usage](#) and [In-House Loan Indicator Field Exposed](#).

Enrich z39.50 MARC Response with Holdings Information

Description

The purpose of this enhancement is to provide holdings information with a z39.50 request response.

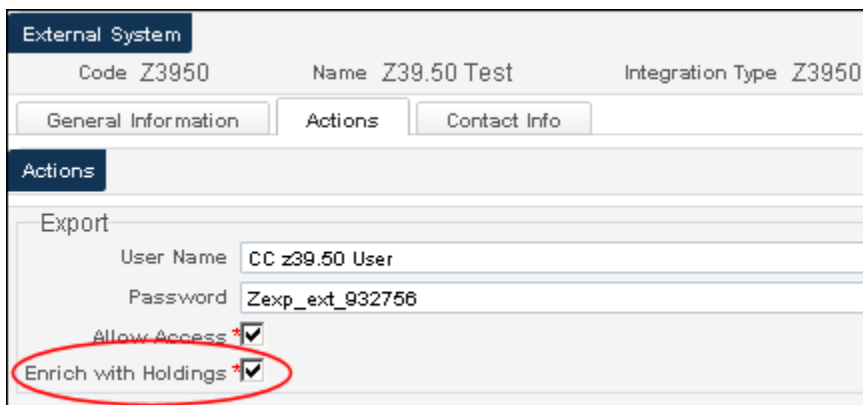
Technical Instructions

The following roles can access this feature:

- Catalog Administrator
- Repository Administrator

To access this feature:

- 1 From the Alma main menu > General > General Configuration, click **Configuration Menu**.
- 2 From the External Systems section, click **External Interfaces**.
- 3 From the Integration Type drop-down list, select **Z3950**.
- 4 Select **Actions > Edit**.
- 5 Select the **Actions** tab.
- 6 Select **Enrich with Holdings**.



The screenshot shows the 'External System' configuration page for 'Z3950'. The 'Name' is 'Z39.50 Test' and the 'Integration Type' is 'Z3950'. The 'Actions' tab is selected, and the 'Export' section is expanded. The 'User Name' is 'CC z39.50 User' and the 'Password' is 'Zexp_ext_932756'. The 'Allow Access' checkbox is checked, and the 'Enrich with Holdings' checkbox is also checked and circled in red.

Figure 10 - Enrich With Holdings Check Box

- 7 Click **Save**.

Export Portfolios

Description

The purpose of this enhancement is to provide the capability to export portfolios belonging to a specific package service in the portfolio loader format enabling the operator to manage the list of portfolios in Excel (adding new portfolios, updating existing portfolios, or removing portfolios). The operator can then reload them back to Alma, updating the package service with an updated list of portfolios based on the Excel content.

Technical Instructions

Any role can access this capability.

To access this feature:

- 1 From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
- 2 Enter a search for an electronic collection.
- 3 From the results list, click **Edit** for a specific package.
- 4 Select the **Additional Information** tab.
- 5 From the Available Services section, select **Actions > Portfolio List** for a package.
- 6 Click **Export Portfolios List**.



Figure 11 - Export Portfolios List Button

The portfolio list is downloaded.

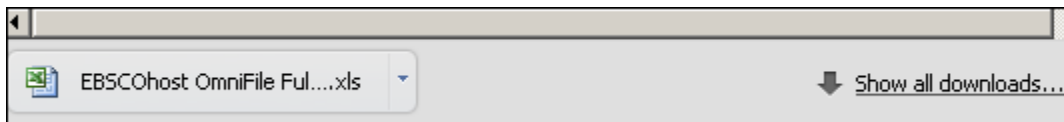


Figure 12 - Portfolio Download

Other Resource Management Enhancements

- Links to the Exclude Process Types from Publishing and Institution External Symbol mapping tables were placed on the Resource Management Configuration menu.

Fulfillment

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

In-House Loan/Usage

Description

The purpose of this enhancement is to provide the capability to collect in-house loan/usage information. This information is collected when an item has been used within the library and staff scan its barcode using the following:

- Fulfillment > Checkout/Checkin > Return Items
- Fulfillment > Resource Requests > Scan In Items.

Once this information has been collected, it is available for reporting in Analytics and also displays in the More Info popup for an item. See [In-House Loan Indicator Field Exposed](#) and [Show Physical Item Usage Counts in More Info Popup](#) in these release notes for additional information related to this feature.

Technical Instructions

The following roles can access this feature:

- Requests Operator
- Circulation Desk Operator – Limited
- Work Order Operator

To collect in-house usage information:

- 1 From the Alma main menu > Fulfillment > Checkout/Checkin > click **Return Items** or from the Alma main menu > Fulfillment > Resource Requests > click **Scan In Items**
- 2 Scan/enter the barcode for the item and complete the usual workflow for the function selected in the previous step.

Item-Level Replacement Cost

Description

The purpose of this enhancement is to provide the capability to enter a replacement cost specific to an item. If the specific item is lost, the charge to the patron is pulled from the item-level replacement cost that has been specified.

Technical Instructions

The roles needed to implement this feature are:

- Any roles that can edit physical item information
- Any roles that can process a lost item in Fulfillment

The replacement cost for a specific item is entered in the new **Replacement cost** field in the **General** tab on the Physical Item Editor page.

The screenshot shows the 'Physical Item Editor' interface. At the top, there's a 'Resource description' field with the text 'Politics / Politics (Manchester, England) Po (Apr. 1981)- [0263-3957 0263-3957]'. Below it, the 'Holding' field shows 'Main Library: General: JA8 .P73' and the 'Barcode' field shows '000237146030000121'. The 'Process type' is set to 'Acquisition'. There are three tabs: 'Summary', 'General Information', and 'ENUM/CHRON information'. The 'General Information' tab is active. It contains several fields: 'Barcode' (000237146030000121), 'Material type' (Book), 'Inventory date' (empty), 'PO line' (POL-25631), 'Receiving date' (-), 'Enumeration A' (empty), 'Chronology I' (empty), 'Description' (empty), and 'Replacement cost' (empty). The 'Replacement cost' field is circled in red.

Figure 13 - Replacement Cost Field

Separately, when this item has been charged and subsequently identified as lost, use the standard procedure in Alma to identify the item with a status of lost. The system then calculates the lost item cost charged to the patron using the **Replacement cost** field. The replacement cost overrides any other charge policies in place.

Item-Level Request for Staff Users

Description

The purpose of this enhancement is to provide the option for staff users to specify a patron request that is prebound to a specific item so that no one else can request the item and take priority in the queue for that item.

Technical Instructions

In order to work with this feature, you need to have a role that permits access to creating a request for an item.

To access this feature:

- 1 From the results list of a Physical Item search in the Repository Search, click **Request** for a specific item.

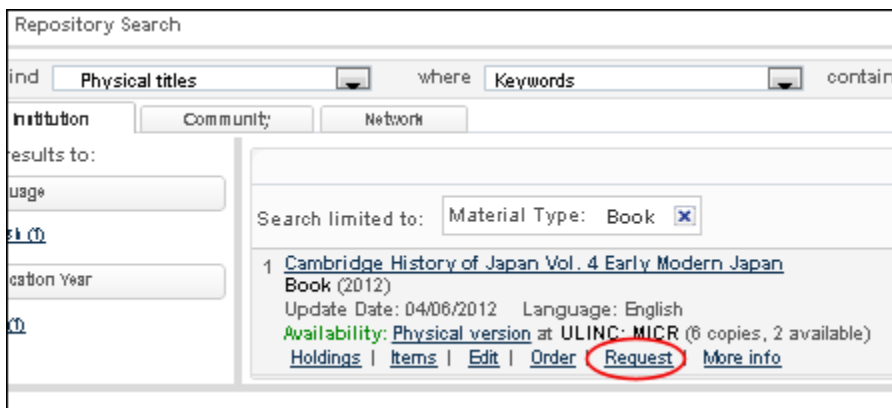


Figure 14 - Item Request

- 2 Depending on the type of the request, select to place either a **Patron Physical Request** or a **Patron Digitization Request**.
- 3 Click **Submit**.
- 4 Complete the remainder of the request following your usual procedure.

Note: The patron request (Patron Digitization Request or Patron Physical Request) is connected to the requested item. If the title has multiple items and a different item becomes available, the patron will continue to wait for the specific item identified in the request.

Print Call Slip Once Per Resource Request

Description

The purpose of this feature is to enhance the Alma processing of call slips for resource requests so that only one call slip is automatically printed per request, regardless of the method used to print the original call slip (automatic printing, printed from a pickup list, or manually) or the stage in the workflow in which it was printed (when picking up from the shelf or when placing on the hold shelf). If a call slip has not been printed prior to placing the item on the hold shelf, a call slip will automatically be printed at that time, enabling the operator to attach the slip to the item on the hold shelf. However, if a slip has already been printed when the item was picked up from the shelf, no new slip will automatically be printed. Manual printing is still possible at this stage.

Changing Policies for Existing Loans

Description

The purpose of this feature is to provide the capability to change the policies for existing loans.

Technical Instructions

The Fulfillment Administrator role can access this capability.

To access this feature:

- 1 From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.
- 2 From the Physical Fulfillment section, click **Terms of Use and Policies**.
- 3 For the terms of use you want to change, select **Actions > Edit**.
- 4 For the policy to change, select **Actions > Edit policy via update**.
- 5 Make your policy change, select the **Should policy change be applied retroactively?** check box, and click **Save**.

To avoid having your change affect existing loans, do not select the **Should policy change be applied retroactively?** check box.

- 6 Click **Next**, confirm your changes, and click **Save**.

Other Fulfillment Enhancements

- A Circulation Desk Operator now has the ability to override the On Shelf Request policy when creating a general hold request.
- The following columns were removed from the Courses page: **Creator**, **Creation Date**, **Note**, **Year**.

User Management

The following sections describe the functions provided for User Management in the November 2012 release of Alma.

User Statistical Categories

Description

The purpose of this enhancement is to provide options for attaching additional statistical information to the user record. The statistical information can then be used in Analytics reports (see [User Statistics Fields Exposed](#)).

The Statistical Category can be attached to the user record in the new Statistics tab on the User Details page.

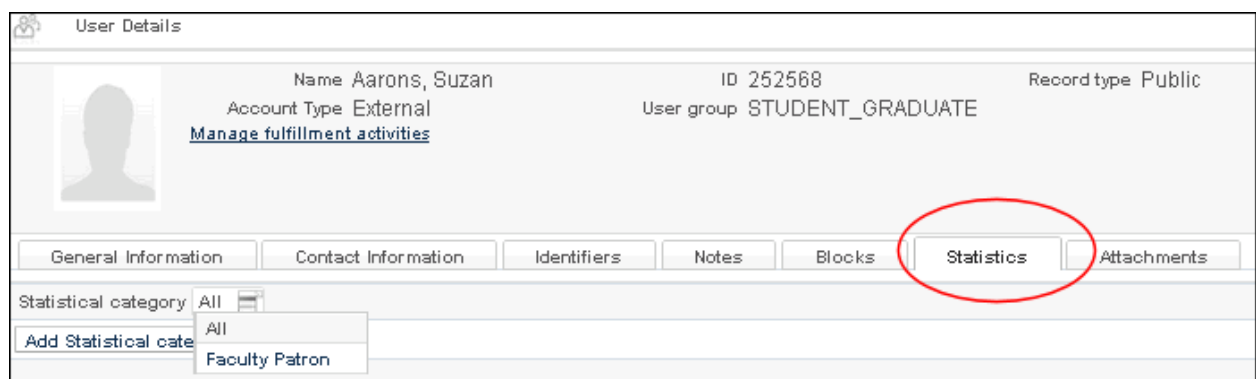
The screenshot shows the 'User Details' page for a user named 'Aarons, Suzan'. The page includes fields for 'Name', 'ID', 'Record type', 'Account Type', and 'User group'. Below these fields is a horizontal tab bar with tabs for 'General Information', 'Contact Information', 'Identifiers', 'Notes', 'Blocks', 'Statistics', and 'Attachments'. The 'Statistics' tab is highlighted with a red circle. Below the tab bar, there is a 'Statistical category' dropdown menu set to 'All', and an 'Add Statistical category' button. A dropdown menu is open below the button, showing 'All' and 'Faculty Patron' as options.

Figure 15 - Statistics Tab

Technical Instructions

The User Administrator role can access and configure a Statistical Category.

To configure the User Statistical Categories code table:

- 1 From the Alma main menu > General> User Management Configuration, click **Configuration Menu**.
- 2 From the User Details section, click **Statistical Categories**.



Figure 16 - User Details Section - Statistical Categories

The User Statistical Categories code table page displays.

- 3 Create a new code table row.
 - a. Enter a **Code** and a **Description**.
 - b. Click **Add Row**.

The screenshot shows the 'Code Table' page for 'User Statistical Categories'. The page includes a 'Table Information' section with fields for 'Sub System' (USER_MANAGEMENT), 'Table Name' (User Statistical Categories), 'Updated By', and 'Updated on'. Below this is a table with columns: 'Enabled', 'Display', 'Order', 'Code', 'Description', 'Default Value', 'Updated By', 'Last Updated', and 'Tools'. A single row is visible with 'Faculty' as the code and 'Faculty Patron' as the description. At the bottom, there is a 'Create a New Code Table Row' section with input fields for 'Code', 'Description', and 'Default Value' (set to 'No'), and an 'Add Row' button.

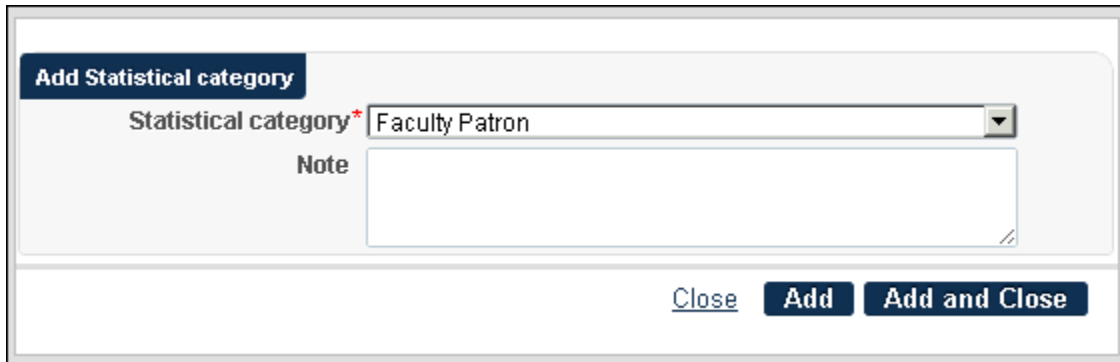
Figure 17 - User Statistical Categories Code Table Page (Details)

- 4 Click **Save**.

To add a Statistical Category to the Statistics tab on a user's User Details page:

- 1 From the Alma main menu > General> User Management, click **Find and Manage Users**.
- 2 For a specific user, select **Actions > Edit**.
- 3 Click the **Statistics** tab.
- 4 Click **Add Statistical Category**.

- 5 From the Add Statistical Category pop-up window, select the **Statistical Category** to add.



The screenshot shows a pop-up window titled "Add Statistical category". It contains a form with a "Statistical category*" dropdown menu currently set to "Faculty Patron". Below the dropdown is a "Note" label and a large text input area. At the bottom right of the window, there are three buttons: "Close", "Add", and "Add and Close".

Figure 18 - Select Statistical Category

- 6 Click **Add** or **Add and Close**.

Other User Management Enhancements

- Role types and scopes are now added/updated properly during the user synchronization process.

General

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

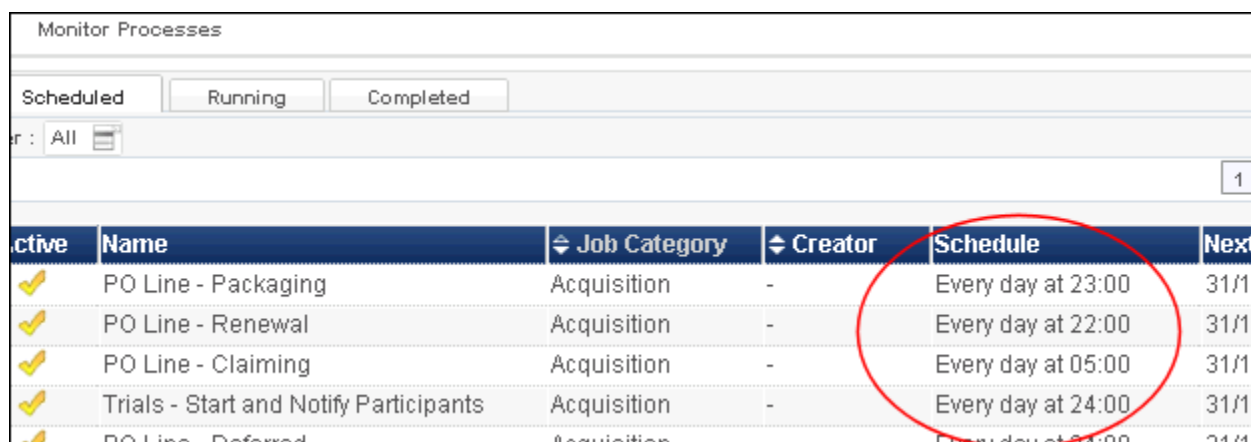
Enhancements to Job Scheduling Display

Description

The purpose of this feature is to provide enhancements to the job scheduling display. Additional detail is provided to more specifically identify the scheduling information. For example:

- Instead of **Daily**, the system displays **Every day at <hour>** such as **Every day at 23:00**.
- Instead of **Weekly**, the system displays **Every <day of the week> at <hour>** such as **Every Sunday at 22:00**.

This change has been implemented throughout the Alma system wherever job scheduling information is displayed. For example, see Resource Management > Processes > Monitor Process > Scheduled tab.



The screenshot shows the 'Monitor Processes' window with the 'Scheduled' tab selected. Below the tabs is a filter set to 'All' and a page indicator '1'. The table below lists several processes, with the 'Schedule' column circled in red.

Active	Name	Job Category	Creator	Schedule	Next
✓	PO Line - Packaging	Acquisition	-	Every day at 23:00	31/1
✓	PO Line - Renewal	Acquisition	-	Every day at 22:00	31/1
✓	PO Line - Claiming	Acquisition	-	Every day at 05:00	31/1
✓	Trials - Start and Notify Participants	Acquisition	-	Every day at 24:00	31/1
✓	PO Line - Deferred	Acquisition	-	Every day at 23:00	31/1

Figure 19 - Job Scheduling Display Example

Suppress Holdings for z39.50

Description

The purpose of this enhancement is to extend the capability of suppressing holdings records so that it affects z39.50 responses as well. Holdings records that have been suppressed are

excluded from relevant z39.50 responses. Refer to the *Suppressing Records from Discovery* section of the Alma September 2012 Release notes for the steps regarding configuration.

Analytics

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

In-House Loan Indicator Field Exposed

Description

The purpose of this enhancement is to expose the In House Loan Indicator field in the Fulfillment Subject Area under the Loan Details.

For additional information related to in-house usage, see [In-House Loan/Usage](#) and [Show Physical Item Usage Counts in More Info Popup](#).

Technical Instructions

The Design Analytics role can access this capability.

To access this enhancement:

- 1 From the Alma main menu > General > Analytics, click **Design Analytics**.
- 2 Click **New > Analysis > Fulfillment**.

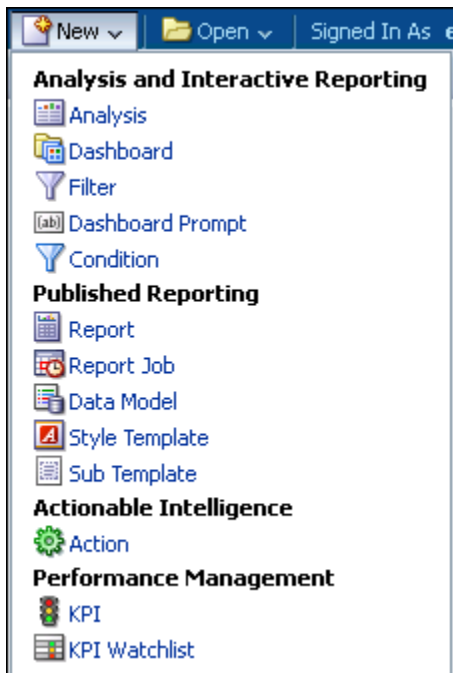


Figure 20 - Design Analytics > New > Analysis Option

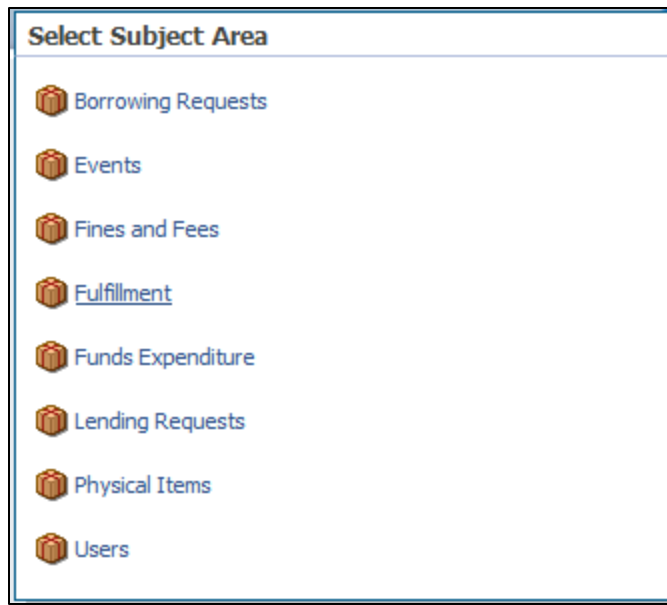


Figure 21 - Design Analytics > New > Analysis Option > Fulfillment

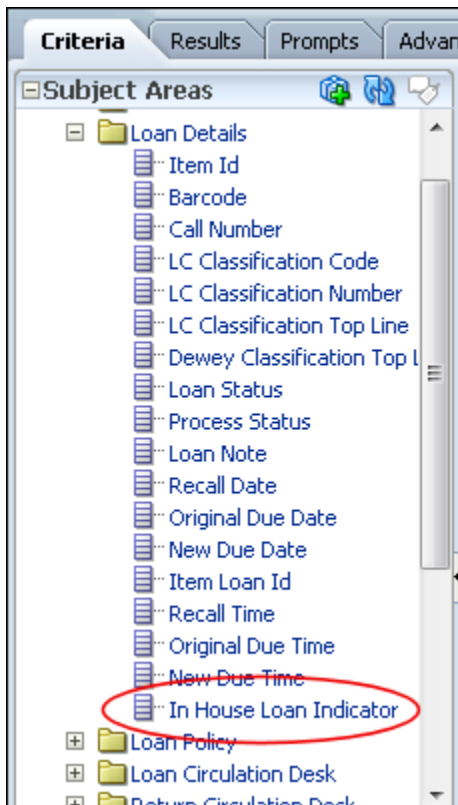


Figure 22 – In House Loan Indicator

User Statistics Fields Exposed

Description

The purpose of this enhancement is to expose the User Statistics in the Users Subject Area under Statistics.

Technical Instructions

The Design Analytics role can access this capability.

To access this enhancement:

- 1 From the Alma main menu > General > Analytics, click **Design Analytics**.
- 2 Click **New > Analysis > Users**.

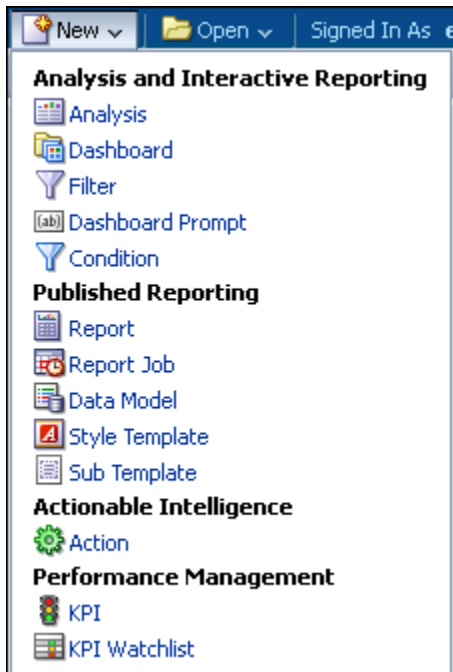


Figure 23 - Design Analytics > New > Analysis Option

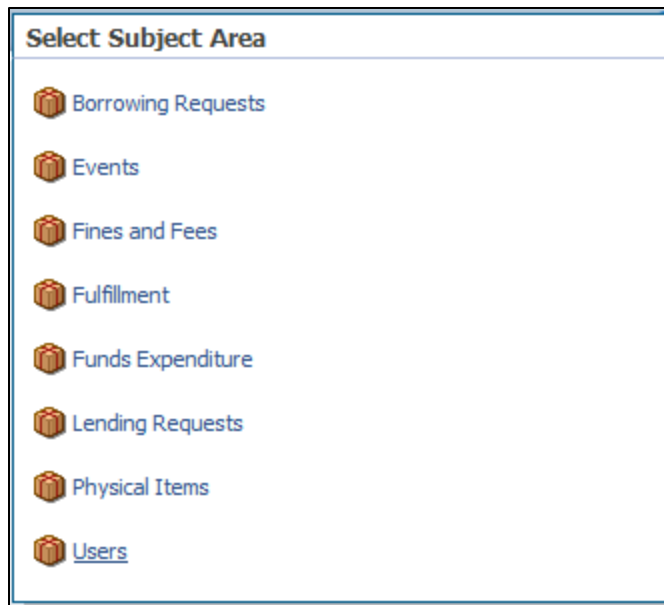


Figure 24 - Design Analytics > New > Analysis Option > Users

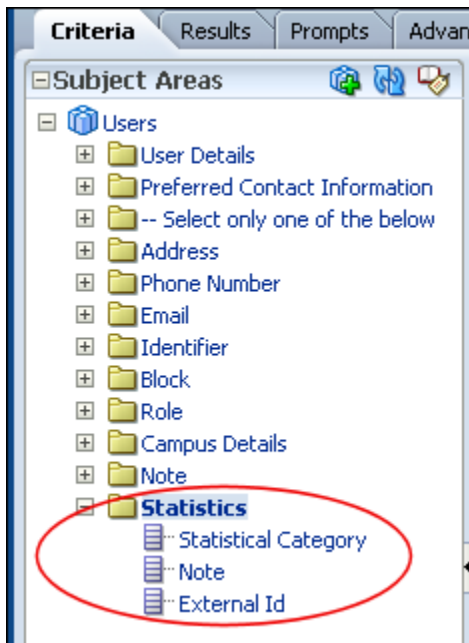


Figure 25 - Users Statistics Exposed in Analytics

Funds Burn Down – Standard Report

Description

The purpose of this enhancement is to create a standard report that displays, for a specific fund and fiscal year, how the budget is used during the year.

The graph shows the remaining allocation in each month of the fiscal year:

Remaining Allocation = Allocation – (Expenditure + Encumbrance)

Technical Instructions

The Design Analytics role can access this capability.

To access this enhancement:

- 1 From the Alma main menu > General > Analytics, click **Design Analytics**.
- 2 Click **Catalog** and browse to the Funds Burn Down Dashboard and open the dashboard.

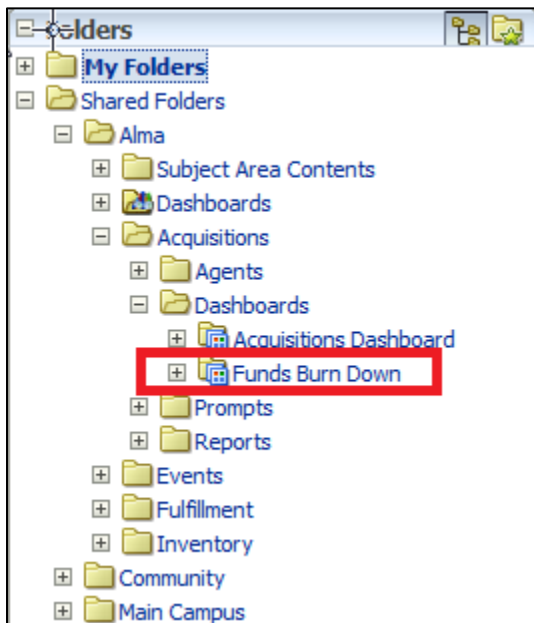


Figure 26 - Design Analytics > New > Analysis Option

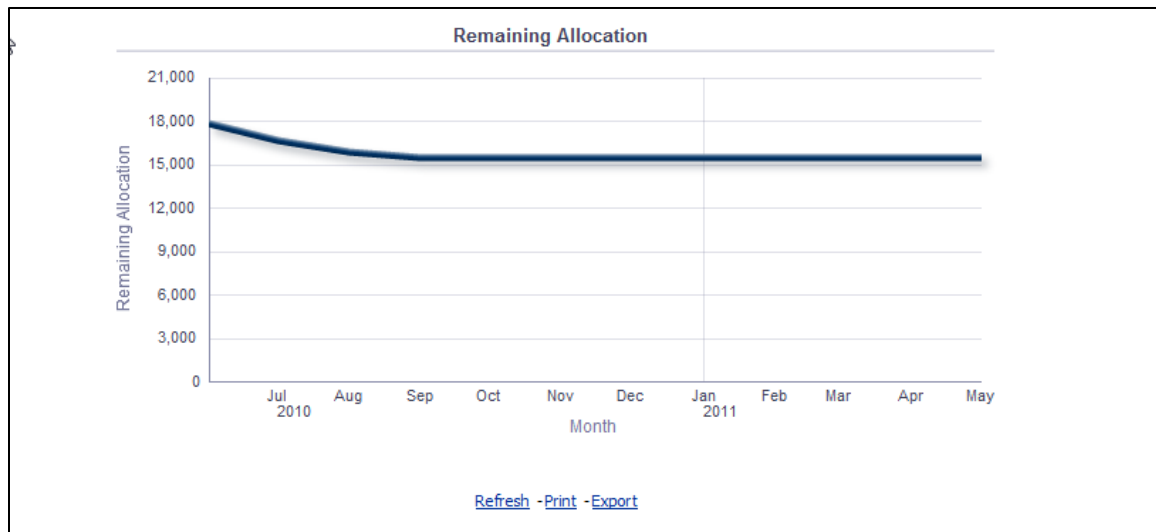


Figure 27 - Funds Burn Down Dashboard

Primo

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

Enhanced Request Options for Holdings Records

Description

The purpose of this enhancement is to allow placing requests for specific issues even when they have not been cataloged in the institution's repository. This enhancement provides options that address the situation in which a patron wants to request a specific volume/issue of a journal and the summary holdings statement indicates that the institution has the issue, but when viewing the items list, the correct description is not found.

Technical Instructions

This capability can be accessed by a patron using Primo Get It or by any Alma role that can create a request from the Repository Search.

Primo Workflow

The following describes the Primo workflow for using this enhancement:

- 1 Perform a search in Primo for a bibliographic entry of a serial title.
The bibliographic results display.
- 2 Click **Get It** for a specific entry.
- 3 Select a specific holdings.

If the bibliographic entry has one or more holdings with a summary holdings statement or items that have issue-level data, selecting a specific holdings is required in order to place a request.

Morbidity and mortality weekly report. Recommendations and reports.
Centers for Disease Control (U.S.); Epidemiology Program Office; Centers for Disease Control (U.S.); United States. Centers for Disease Control; United States. Public Health Service. Centers for Disease Control; CDC (Centers for Disease Control (U.S.)); Centros de Control de Enfermedades 1969- primo bc primo bc
Online access

View It **Get It** Locations Details Reviews & Tags Send to ▾

Select specific item [Load \(1 week\)](#) [Place hold request for a different issue](#) [Place digitization request for a different issue](#) [Back](#)

Location	Main Library Stacks RA407 A1 M6 Locate	Hide Details
Holdings:	v.44-v.47 no.20(1995-1998) (Issues before Jan. 1995 bound together with Morbidity and mortality weekly report.) v.48 no.1(1999) v.48 no.3-v.48 no.8(1999) v.48 no.10-v.48 no.13(1999) v.49 no.RR/1-no.RR/16(2000 Mar 24-2000 Dec 22)	
Year	All	Volume All Description All Filter
1 - 1 of 1 Records		

Barcode	Type	Policy	Description	Status	Options
59031027968864	Slide	Default value - No Due date (0 Week)	v.49 no.RR-1 - RR-12 (2000 Mar 24-Nov.10) incomplete	Item in place	Request Digitization

Figure 28 - Get It Tab/Holdings

- On the Items List page that displays, click **Place hold request for a different issue** (a new link) on the items list page or click **Place digitization request for a different issue**.

The request page displays.

[Display in a new window](#)

Details of title you requested:

Manual Description*

Pickup Location - Earliest Availability*

Not Needed After:

Comment:

Figure 29 - Primo Request Page

- Using the new Manual Description field, enter the specific issue needed.

Also enter the pickup location, date, and comment information.

- Click **Request**.

This creates a request in Alma in the Pickup from Shelf step for the holdings that has been selected.

Note: On the Alma side, a special note is added at the top of the printed pickup slip for this request indicating that it has a Manual Description. The description is printed with the item information.

Alma-Initiated Requests

For Alma-initiated requests when a Patron Physical Item request or a Patron Digitization request is selected (and when the bibliographic entry has one or more holdings with a summary

holdings statement or items that have issue-level data), you can select the holdings from which the item should come and enter the Manual Description.

The screenshot shows the 'Create Request' form in the Alma system. The form is titled 'Create Request' in a blue button at the top left. It contains several input fields: 'Title' (The Journal of Library Science), 'Institution' (Main Campus), 'Request Type' (Patron physical item request), 'Requester' (with a search icon), 'Year' (with a dropdown arrow), 'Volume' (with a dropdown arrow), 'Description' (with a dropdown arrow), 'Holding' (with a search icon), 'Manual Description' (a large text area), 'Note' (a text area), and 'Pickup At' (with a dropdown arrow). There is a checkbox labeled 'Override On Shelf Request Policy'. Below the form is a section titled 'Additional Request Attributes' which shows 'No records were found.' and a button to 'Add Request Attribute'. At the bottom right are 'Cancel' and 'Submit' buttons.

Figure 30 - Create Request Section

This results in a request with a manual description that is handled by the Requests Operator as described below.

Managing the Request on the Alma Side

This capability can be accessed by the Requests Operator role at a circulation desk.

- 1 After using the Pickup from Shelf List or using the automatically printed slips to retrieve the requested issue, scan in the retrieved item at the **Scan In interface** (if the issue already exists in Alma as a cataloged item), or create a new item (if the issue does not already exist as a cataloged item) using the **Create Item** button that is found in the **Scan In interface**.
- 2 Click **OK**.

The system detects that an item has been scanned in and that a request with a Manual Description exists for the same holdings. It therefore supplies an option to link the scanned in item (which has been recently created, or which previously existed) to the manually described request.
- 3 Select **Actions > Attach to Request** and insert the relevant request.

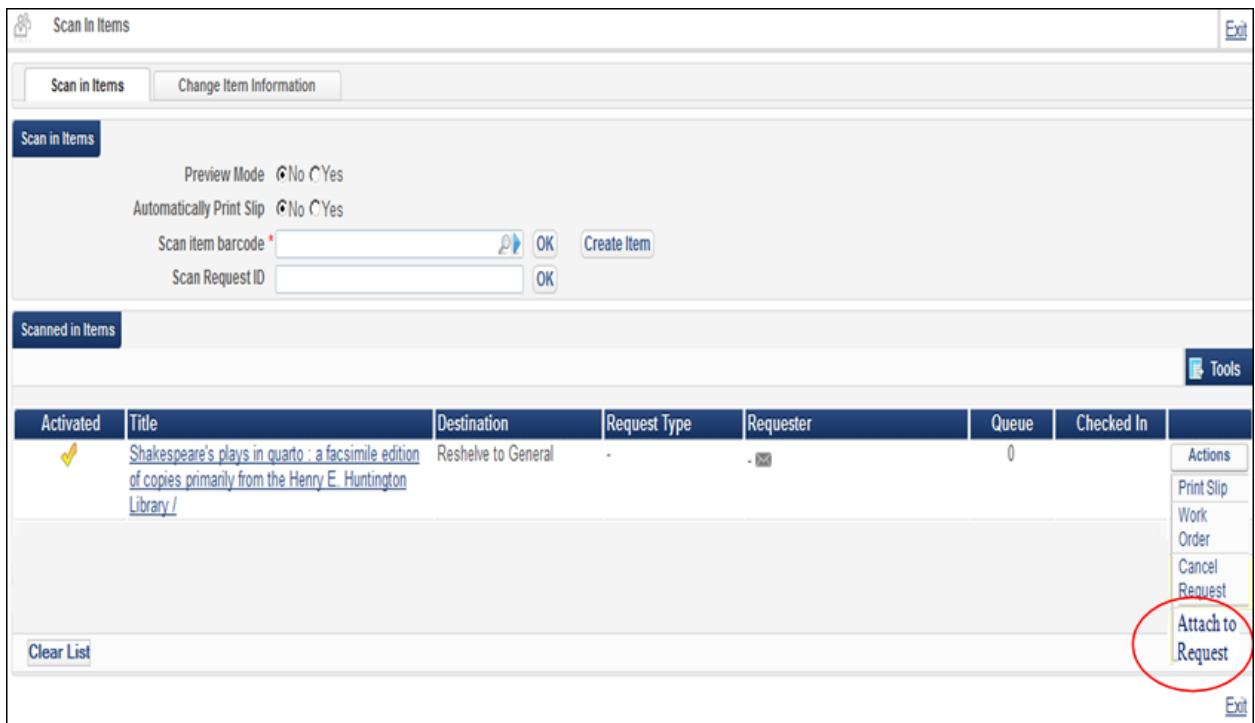


Figure 31 - Attach to Request

After the item is attached to a request, the request is automatically modified and the description from the item replaces the Manual Description in the request. A new slip may be printed with the amended request information.

- 4 Complete the request management workflow as usual.

MMS Relations – Displaying Linked Items

Description

The purpose of this enhancement is to display the inventory of linked records in the Get It tab when a bibliographic record does not contain inventory and has a 773 field that links to another bibliographic record that has inventory.

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

Inventory of related "<title>" is listed

Example:

Request Options: Illiad (1 month) Relais D2D (2 weeks) Resource sharing request		
Inventory of related "The red networks; a "who's who" and handbook of radicalism for patriots." is listed		
Location	Availability	Location Map
Offsite Library(NEDL) Stacks HX83 .D5	(1 copy, 0 available)	
O'Neill Stacks (STACK) HX83 .D5	(1 copy, 0 available)	Locate

Figure 32 – Display Linked Inventory in Get It Tab

Previously, the system did not display any inventory.

Enhance Item Status Information

Description

The purpose of this enhancement is to display more detailed status information in the Get It tab. For the following statuses, the system now displays the date/time information after the status:

- **On loan** – until <due date> <time>
- **On hold shelf** – until <end of hold shelf period>
- **In transit** – until <end of transit time>
- **At work** – until <date> <by work order department work time (if set up)>
- **In acquisition** – until <expected arrival date>

In addition, the system allows you to modify the labels that the system uses to build the statuses that display in the Get It tab.

To update labels in the Get It tab:

- 1 From the Alma main menu > Fulfillment Configuration, click **Configuration Menu**.
The Fulfillment Configuration page opens.
- 2 In the Discovery Interface Display Logic section, click **Labels**.
The Discovery Interface Labels code table opens.

Table Information

Sub System

DISCOVERY_INTERFACE_LABELS

Table Name

Discovery Interface Labels

Updated By

-

Updated on

-

Table Description

Discovery Interface Labels

Discovery Interface Labels

LanguageEnglish

Enabled	Code	Description	Updated By	Last Update
	c.uresolver.locat	Locate	-	-
	c.uresolver.reque	Request	-	-
	c.uresolver.getit2	Item not in place	-	-
	c.uresolver.getit2	Item in place	-	-
	c.uresolver.getit2	Inactive	-	-
	c.uresolver.getit2	Active	-	-
	c.uresolver.getit2	In acquisition	-	-
	c.uresolver.getit2	On loan	-	-
	c.uresolver.getit2	On hold shelf	-	-
	c.uresolver.getit2	In transit	-	-
	c.uresolver.getit2	On Shelf	-	-
	c.uresolver.getit2	At work	-	-
	c.uresolver.getit2	Missing	-	-
	c.uresolver.getit2	ILL	-	-
	c.uresolver.getit2	Technical	-	-
	c.uresolver.getit2	until	-	-
	c.uresolver.reque	Manual Description:	-	-
	c.uresolver.reque	Request	-	-
	c.uresolver.reque	Cancel	-	-

Figure 33 – Create Process – Republish Processes

- 3 In the row that contains the label that you want to modify, click **Customize**.
- 4 Update the value in the **Description** column.
- 5 At the bottom of the table, click **Customize** to save all changes you made to the code table.

Resource Sharing

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

Send Query to Patron

Description

The purpose of this enhancement is to provide an option to send an email query related to a resource sharing borrowing request.

Technical Instructions

The following roles can access this feature:

- Fulfillment Services Operator
- Fulfillment Services Manager

To send an email query related to a resource sharing borrowing request:

- 1 From the Alma main menu > Fulfillment > Resource Sharing, click **Borrowing Requests**.
The Resource Sharing Borrowing Requests page displays.
- 2 For a specific request, click **Send query to patron**.
The E-Mail Message pop-up window displays.
- 3 Enter/confirm the **From** and **To** email addresses and enter a **Subject** and **Body** text as needed.
- 4 Click **Send E-Mail**.
The request information is updated with a row that specifies:
Needs patron information: <date email query sent>

Multiple Resource Sharing Libraries

Description

The purpose of this enhancement is to provide the ability to create resource sharing libraries other than the default out-of-the-box resource sharing library.

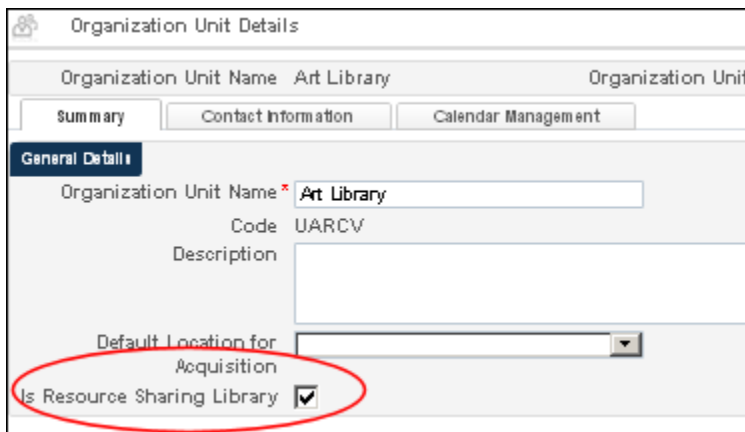
Technical Instructions

The following roles can access this feature:

- Fulfillment Services Operator
- Fulfillment Services Manager
- General System Administrator
- Fulfillment Administrator

To identify a library as a resource sharing library:

- 1 From the Alma main menu > General > General Configuration, click **Configuration Menu**.
- 2 From the Libraries section, click **Manage Your Institution's Libraries**.
- 3 Click the **Libraries** tab.
- 4 For a specific library, select **Actions > Edit**.
- 5 Select the **Is Resource Sharing Library** option.



The screenshot shows the 'Organization Unit Details' form for 'Art Library'. The form has tabs for 'Summary', 'Contact Information', and 'Calendar Management'. The 'General Details' tab is active. Fields include 'Organization Unit Name' (Art Library), 'Code' (UARCV), 'Description', and 'Default Location for Acquisition'. The 'Is Resource Sharing Library' checkbox is checked and circled in red.

Figure 34 – Is Resource Sharing Library Option

- 6 Click **Save**.

Item Location

Resource sharing requests get assigned to a resource sharing library where they are managed. The operator is able to manage only requests that are assigned to libraries in which he has a valid Fulfillment Services Operator role.

Different methods exist for assigning the request to a library, depending on how the request is created in the system:

- Primo

With this method, a patron creates a resource sharing request and is not connected to any library. The default behavior is to create the request and the temporary item in the library and location defined in the following customer parameters (accessible in the General Settings option of the Fulfillment Configuration menu):

- ill_item_creation_lib_code

The initial value provided for this option in Alma is RES_SHARE (for the resource sharing library).

- ill_item_creation_loc_code

The initial value provided for this option in Alma is OUT_RS_REQ (for the borrowing location).

Mapping Table

You are configuring: Main Campus

Table Information

Sub System

INFRA

Table Name

CustomerParameters

Updated By

-

Last Updated

-

Table Description

Customer Parameters

Mapping Table Rows

Enabled	parameter key	parameter module	parameter value	free text description
	auto_renew_loan_days	fulfillment	7	The days period to auto renew item_lo
	ill_item_creation_lib_code	fulfillment	ULINC	
	ill_item_creation_loc_code	fulfillment	GEN	
	prefer_doc_delivery_from_e-resources	fulfillment	false	when both P to D and E to D digitizati

Figure 35 - Primo Method – Customer Parameters

The request library and the location of the created item may later be changed by the Fulfillment Services Operator using the Edit option in the Borrowing Requests list.

- Automatic NCIP

NCIP messages coming from external systems such as OCLC Navigator contain a partner code that matches against a partner code in Alma. The partner's Parameters tab (see below) defines:

- The resource sharing library to which the partner's requests will belong. This is the Default Library Owner parameter, see below.
 - The location in which the temporary item will be created. This is the Default Location parameter in the Accept Item section, see below.

Resource Sharing Partner

Partner Code: NAV Partner Name: Navigator

General Information | Contact Information | **Parameters** | Notes

General Information

User identifier type * 1111

Request pushing method * ☐ Open URL ☒ Link

URL template

Enable service for guest user ☒ No ☐ Yes

Loan period 4 months

Default library owner * Resource Sharing Library

Request Item

Bibliographic record ID type other_system_number

Check-Out Item

Default location * Lending Resource Sharing R

Default item policy * 1 Day Loan

Accept Item

Default location * Borrowing Resource Sharing

Default pickup library Art Library

Look Up User

Require Authentication ☒ No ☐ Yes

Figure 36 - Resource Sharing Partner Parameters Tab

- **Manually Created Requests**

The Fulfillment Services Operator creates the request from the Resource Sharing Borrowing Requests list (click **Edit**) and chooses an NCIP partner. Like the NCIP message described above, the NCIP Partner Parameters set the library and location to which the request will be associated.

Resource Sharing Borrowing Requests	
Status	All
Partner	All
Add	
☐ Select All	
1	☐ <u>The Beat!</u> Book By Dan Brown (2009) ISBN: 1-60473-241-5 Status: Returned by patron Needs patron information: 29/10/2012 Edit Cancel Duplicate Send query to patron
2	☐ <u>WWII, Economic Views</u> Book (2001) Status: Request sent to partner Edit Duplicate Send Send query to patron

Figure 37 - Resource Sharing Borrowing Requests List

Request Attribute	
Title	The Beat!
Requester *	User, Super
Owner *	Resource Sharing Library
Partner	Navigator
Request Status	Created borrowing request
External Identifier	
Format	Physical
Needed By	
Pickup At	INT
Agree to Copyright terms *	☐
Needs patron information	☒

Figure 38 - Select NCIP Partner (Manual NCIP Method)

- Manual ARTEmail

Since ARTEmail does not have library and location Partner Parameters, a location drop-down list displays on the request form if an ARTEmail partner has been assigned to the request.

Request Attribute	
Title	The Beat!
Requester *	User, Super
Owner *	Resource Sharing Library
Item Creation Location	Borrowing Resource Sharing Requests
Partner	BL
Request Status	Created borrowing request
External Identifier	
Format	Physical
Needed By	
Delivery Location	☒ Deliver to library ☐ Alternative address
Pickup At	INT

Figure 39 - ARTEmail Partner

- Manual with no partner selected

A request can be created without a partner and assigned later by editing the request.

System Processing Enhancements

The following sections describe Alma system processing enhancements provided in the November 2012 release.

Page Refresh Improvements

Description

The purpose of this enhancement is to ensure processing is complete before any additional user action is taken. With the November release, the Alma system displays a new loading indicator/image (see below) when partial page refreshing occurs and blocks the user access until the refresh is complete. This improvement prevents users, for example, from beginning to type and then having their input deleted as the refresh completes.



Figure 40 - Loading Indicator

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.