



## Alma April 2013 Release

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# About the Alma Release Notes

Alma release notes provide you with information regarding what you need to get up and running with the new features and enhancements in the latest Alma release.

These release notes include:

- [Alma April 2013 Release Highlights](#)
- [Access to April 2013 Features](#)
- Feature/enhancement descriptions for the respective Alma components and functional areas
  - [Data Services](#)
  - [Alma Show Me How](#)
  - [Acquisitions](#)
  - [Resource Management](#)
  - [Fulfillment](#)
  - [Course Reserves](#)
  - [Primo](#)
  - [Resource Sharing](#)
  - [Analytics](#)
  - [System Enhancements](#)
  - [Other Enhancements](#)

# Alma April 2013 Release Highlights

## Alma Analytics

- Usage (UStat) Data Exposed in Analytics/More Info

Some great new options related to tracking e-resource usage are now available in Alma. usage data available from UStat can be accessed from Alma Analytics and the More Info search results link. Usage data has been added as a subject area in Alma Analytics. In Search Repository results (for electronic titles or portfolios), the More Info link now has a line for Usage specifying the number of times the e-resource was accessed in the last 12 months. Clicking the **Usage** hypertext link opens a pop-up window with a graphical presentation of the usage data.

- Cost-per-Use Reports

Another great enhancement provides cost-per-use data for electronic subscriptions. Alma Analytics now combines UStat and Acquisitions data to provide a tool that can be incorporated into the decision-making process for future subscriptions. This data is fed into graphs and charts that make it easy to interpret and analyze subscription usage. To support this functionality, a new subject area, Cost Usage, has been added to Alma Analytics

## Community Zone Services

- MeSH Records Loaded into the Community Zone

The Community Zone has been loaded with MeSH (Medical Subject Headings) records from the U. S. National Library of Medicine.

- Ebook Library Records Loaded into the Community Zone

Full e-book bibliographic records from EBL (Ebook Library) have been loaded into the Alma Community Zone.

## Acquisitions

- Receive Payment Confirmation with Exchange Rates

This enhancement provides the capability to import into Alma the specific exchange rates that are used when a payment is made by the ERP accounting office. The rate used by the accounting office can be imported into Alma, and the related, relevant transactions are updated with the data that is imported.

- Delete PO

It is now possible to delete an entire purchase order (by staff with the relevant role) if it does not have any PO lines that are received, activated, or linked to an invoice.

- PO Lines / Inventory Improvements and Related Enhancements

There are a number of enhancements related to PO lines and inventory. In the PO line, the quantity for pricing has been separated from the inventory. Inventory details are displayed for physical and electronic items and can be edited. There is a new receiving note field (for physical items) which, if populated, displays when receiving items. On holdings records, a new row action allows for associating holdings with a PO line.

## Resource Management

- Release All Cataloging Records for a Specific User

This great new feature expands the flexibility of managing cataloging record assignments. A catalog manager can now release all or specific bibliographic and holdings records locked by another cataloger. The released records become unassigned and are available to other catalogers for processing.

- Electronic Portfolio Global Changes

This enhancement allows you to make global changes to all portfolios. Previously, this was possible for packages. It is now also possible for standalone portfolios.

- Unlink Linked E-Records on Import to the Institution Zone

E-resource records that are activated from the Community Zone can now, during an import process to the Institution Zone, be unlinked and overlayed (or merged) with full MARC records. The portfolios remain linked to the CZ and can benefit from any future Central KnowledgeBase (CKB) updates.

- Additional UResolver Tools

This enhancement provides additional UResolver tools for analyzing the search results displayed in the discovery interface (Primo), enabling operators to perform basic troubleshooting.

## Fulfillment

- Additional Renewal Request Block Option

New functionality allows for more flexibility for handling (blocking) renewal requests related to recalled items. There are new configuration options that enable preventing the renewal of additional copies of a title (that were not recalled).

## Course Reserves

- Automatic Handling of Courses' Status and Republishing of Citation Titles

Alma now automatically handles the status of courses and the republishing of records linked to the courses' reading lists. The status change and republishing is done based on the courses' start- and end-date information as provided in the courses' Course Information tab.

## Resource Sharing

- Enhanced Support for Shipping Resources in Digital Format

The purpose of this enhancement is to enable shipping requested resources as a document delivery service regardless of whether the requested resource already exists as digital content.

## Primo

- Citation Linker in Primo 4.3

This enhancement allows users to receive services for a specific citation of different types: article, book, and journal. The citation linker functionality is similar to the Citation Linker provided with SFX and also enables the patrons to use the citation link in order to request resource sharing services for a specific citation.

# Access to April 2013 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/<br>Setup Required                                                                     | Activation/<br>Setup Required | Visible to<br>Administrator<br>Only | Contact<br>Ex Libris to<br>Activate This<br>Feature |
|-----------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|-------------------------------|-------------------------------------|-----------------------------------------------------|
|                                                                                                     | (Note:<br>Automatically<br>Visible to All Users<br>with the Appropriate<br>User Role/<br>Permission) |                               |                                     |                                                     |
| Acquisitions:<br><a href="#">Receive Payment Confirmation with Exchange Rates</a>                   |                     |                               |                                     |                                                     |
| Acquisitions:<br><a href="#">Delete PO Option Added</a>                                             |                    |                               |                                     |                                                     |
| Acquisitions:<br><a href="#">PO Lines / Inventory Improvements and Related Enhancements</a>         |                   |                               |                                     |                                                     |
| Resource Management:<br><a href="#">Electronic Portfolio Global Changes</a>                         |                   |                               |                                     |                                                     |
| Resource Management:<br><a href="#">Release All Cataloging Records for a Specific User</a>          |                   |                               |                                     |                                                     |
| Resource Management:<br><a href="#">Unlink Linked E-Records Upon Import to the Institution Zone</a> |                   |                               |                                     |                                                     |
| Resource Management:<br><a href="#">Additional UResolver Tools</a>                                  |                   |                               |                                     |                                                     |

| Feature                                                                                                                              | No Activation/<br>Setup Required                                                                     | Activation/<br>Setup Required | Visible to<br>Administrator<br>Only | Contact<br>Ex Libris to<br>Activate This<br>Feature |
|--------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|-------------------------------|-------------------------------------|-----------------------------------------------------|
|                                                                                                                                      | (Note:<br>Automatically<br>Visible to All Users<br>with the Appropriate<br>User Role/<br>Permission) |                               |                                     |                                                     |
| Fulfillment:<br><a href="#">Item Barcode Field<br/>Updated to be Case<br/>Insensitive</a>                                            |                     |                               |                                     |                                                     |
| Fulfillment:<br><a href="#">Additional Renewal<br/>Request Block Option</a>                                                          |                     |                               |                                     |                                                     |
| Course Reserves:<br><a href="#">Automatic Handling of<br/>Courses' Status and<br/>Republishing of Citation<br/>Titles</a>            |                     |                               |                                     |                                                     |
| Primo:<br><a href="#">Primo 4.3 Includes<br/>Citation Linker</a>                                                                     |                   |                               |                                     |                                                     |
| Resource Sharing:<br><a href="#">Lost Loan Enhanc<br/>ementEnhanced<br/>Support for Shipping<br/>Resources in Digital<br/>Format</a> |                   |                               |                                     |                                                     |
| Analytics:<br><a href="#">Usage (UStat) Data<br/>Exposed in<br/>Analytics/More Info</a>                                              |                   |                               |                                     |                                                     |
| Analytics:<br><a href="#">Cost-Per-Use Reports</a>                                                                                   |                   |                               |                                     |                                                     |
| System Enhancements:<br><a href="#">Direct Entry of a Date in<br/>the Date Fields</a>                                                |                   |                               |                                     |                                                     |

# Data Services

The Alma April 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 14-March-2013 through 12-April-2013:

- Springer Link Book Archive
- Ovid Lippincott Williams & Wilkins Total Access Collection 2013
- Ovid LWW Medical Book Collection - No textbooks (2010)
- Lyell Collection Books
- SpringerLink Books Energy
- Future Medicine Books
- Sage Deep Backfile Package 2013
- Hein Online Association of American Law Schools
- CSIRO Books 2012
- CSIRO Books Archive
- Oxford Handbooks Online Psychology
- Oxford Handbooks Online Psychology
- Hein Online Spinelli's Law Library Reference Shelf
- Dalloz Bibliothèque
- Europresse
- SAGE Deep Backfile Upgrade Package 2013
- Taylor & Francis CRKN Social Science and Humanities
- Taylor & Francis CRKN Science and Technology
- Highwire Press Sam P Giordano
- Walter de Gruyter Birkhauser eBooks Architecture and Design

## Ebook Library Records Loaded into the Community Zone

The purpose of this enhancement is to provide full e-book bibliographic records in the Alma Community Zone (CZ). With the April release, the CZ has been loaded with records from EBL (Ebook Library).

## MeSH Records Loaded into the Community Zone

The purpose of this enhancement is to provide medical subject heading records in the Community Zone. With the April release, the CZ has been loaded with MeSH (Medical Subject Headings) records from the U. S. National Library of Medicine.

## Other Data Services Enhancements

- CKB records for journals have been updated to describe the electronic journal version rather than the physical journal version (and carry the OCLC record number that corresponds to the record for the electronic journal record in OCLC).

# Alma Show Me How

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

## Alma Show Me How – April

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

- Prevent Renewal of a Requested Item
- Delete a Purchase Order
- Add a Note to a Bibliographic Record
- Parsing Call Numbers for Spine Labels
- Reassign a Record or Release Assignment
- Schedule Patron Activity Report
- Direct Entering of Dates (displays only as a pop-window, not in the Show Me How menu)
- Edit Service Action for Electronic Collections (displays only as a pop-up window, not in the Show Me How menu)

# Acquisitions

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

## Receive Payment Confirmation with Exchange Rates

### Description

The purpose of this enhancement is to provide the capability to import the specific exchange rates that are used when a payment is made by the ERP accounting office.

For example, you may specify in Alma Acquisitions an explicit ratio/rate for an invoice (see [Figure 1](#)) and, subsequently, the central accounting office may be able to pay the invoice using a better rate.



| Foreign Currency | Explicit Ratio |
|------------------|----------------|
| EUR              | 1.50           |

**Figure 1 - Explicit Ratio Specified Prior to the Payment by the Central Accounting Office**

With the April release, the rate used by the accounting office can be imported into Alma, and the related, relevant transactions are updated per the data that is imported. Specifically, this applies to invoices that are closed, waiting for payment, have a currency that is different than the funds used, and the central accounting office uses a different exchange rate than the one initially specified in Alma for payment.

In addition, the XSD for the invoice payment that is used in the import process has been updated. The XSD and XML examples are available in General Configuration > Alma Developers > Integrations > Acquisitions. Also available in General Configuration > Alma Developers > Integrations > Acquisitions is the documentation regarding how to import invoice information.

# Delete PO Option Added

## Description

The purpose of this enhancement is to provide the capability to delete an entire PO when you have the proper role/privilege to request this action, and the PO does not have any PO lines that are received, activated, or linked to an invoice. Previously, you were able to delete PO lines that met the appropriate criteria. This capability has now been expanded to include the PO and all of its associated PO lines.

The Delete PO option is implemented as a job that is submitted to run. When the job is complete, a report is available that provides job statistics. The statistics specify whether there were any PO line issues or documents that the process was completed successfully. When you delete a PO, there are no remaining references in Alma to the PO other than the resulting job report.

## Technical Instructions

The following roles can access this capability:

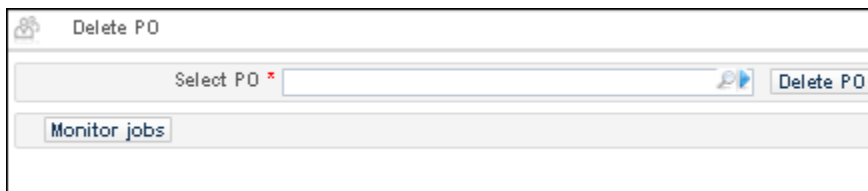
- Purchase Operator Extended
- Purchasing Manager

### To delete a PO:

- 1 From the Alma main menu > Acquisitions > Purchase Order, click **Delete PO**.

The Delete PO page displays.

(Additionally, you may access the Delete PO option from Acquisitions > Purchase Order > Review and select the Delete PO row action for a specific PO.)

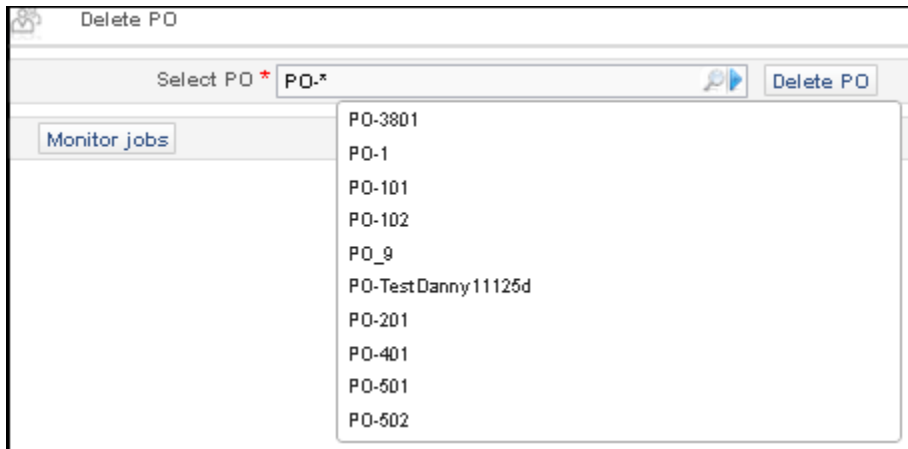


The screenshot shows the 'Delete PO' page interface. At the top, there is a header bar with the text 'Delete PO' and a gear icon. Below this, there is a search bar with the placeholder text 'Select PO \*' and a magnifying glass icon. To the right of the search bar is a button labeled 'Delete PO'. Below the search bar, there is a button labeled 'Monitor jobs'.

Figure 2 - Delete PO Page

2 Enter a PO number.

Hint: Use the autocomplete feature to display a list of POs and easily enter the PO number.



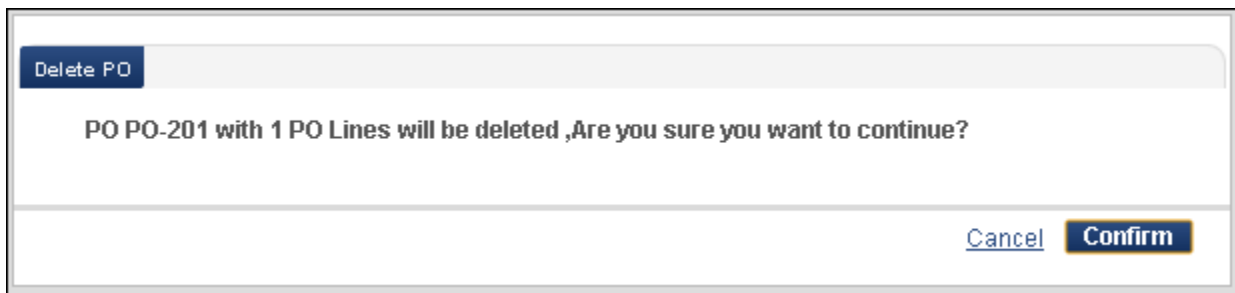
The screenshot shows a web application window titled "Delete PO". At the top, there is a search bar labeled "Select PO \*" with the text "PO-\*" entered. To the right of the search bar is a magnifying glass icon and a button labeled "Delete PO". Below the search bar, a dropdown menu is open, displaying a list of PO numbers: PO-3801, PO-1, PO-101, PO-102, PO\_9, PO-TestDanny11125d, PO-201, PO-401, PO-501, and PO-502. On the left side of the dialog, there is a button labeled "Monitor jobs".

Figure 3 - Autocomplete PO Number

3 Click **Delete PO**.

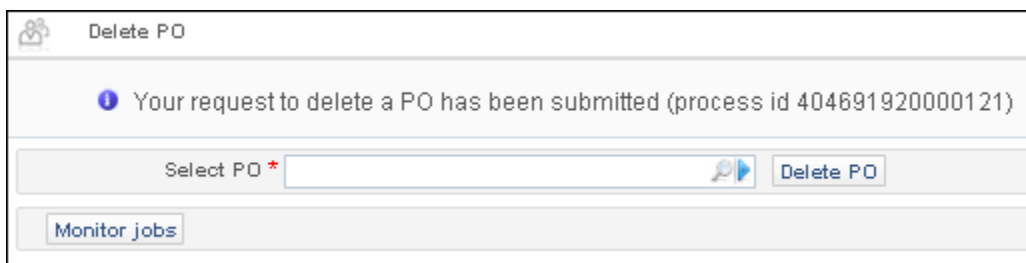
You are prompted to confirm your delete request.

When you confirm your request, a delete job is created to run this request.



The screenshot shows a confirmation dialog box titled "Delete PO". The main text inside the dialog reads: "PO PO-201 with 1 PO Lines will be deleted ,Are you sure you want to continue?". At the bottom right of the dialog, there are two buttons: "Cancel" and "Confirm".

Figure 4 - Delete PO Confirmation



The screenshot shows the "Delete PO" dialog box after the job has been submitted. At the top, there is a message icon (an 'i' in a blue circle) followed by the text: "Your request to delete a PO has been submitted (process id 404691920000121)". Below this message, there is a search bar labeled "Select PO \*" which is currently empty. To the right of the search bar is a magnifying glass icon and a button labeled "Delete PO". At the bottom left of the dialog, there is a button labeled "Monitor jobs".

Figure 5 - Delete PO Job Submitted

4 Click **Monitor Jobs** to view the results.

The Monitor Processes page displays.

**Note:** An email confirmation/job notification is sent to the user that submitted the delete PO request when the delete job is complete. Refer to the example below.



5 Use the **Filter** and/or **Find** to locate your Delete PO job.

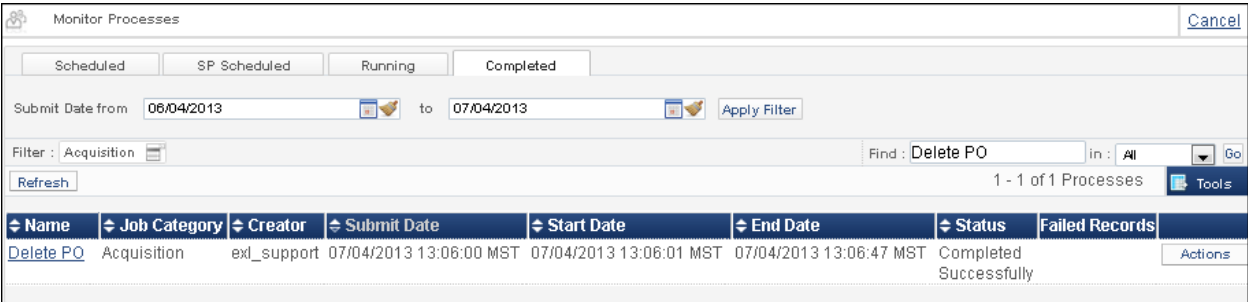


Figure 6 - Delete PO Job

6 Click **Actions > Report**.

The Delete PO job results display.

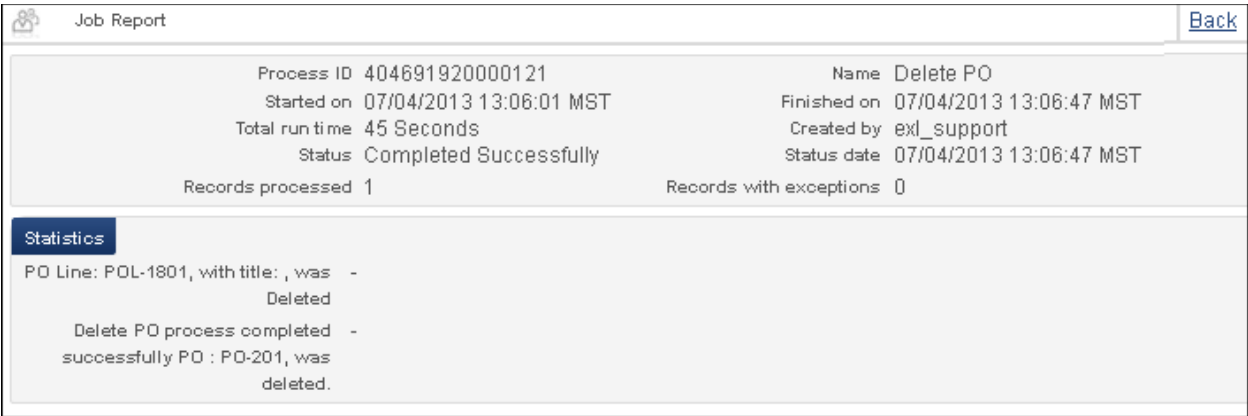


Figure 7 - Delete PO Job Results

# PO Lines / Inventory Improvements and Related Enhancements

## Description

The purpose of this enhancement is to clarify the relationship between the PO line and the inventory. When you view a PO line, you see the associated inventory resources without being required to perform additional navigation to view this information. This enhancement also provides easier access for you to make changes to the inventory, such as adding items.

To enable these improvements, PO line quantity for pricing has been separated from the inventory. As a result of this change, other enhancements have been enabled that include the following:

- Inventory details are displayed for physical and electronic items
- Inventory row actions are available to edit/delete items
- A receiving note field has been added
- A new row action has been enabled allowing you to associate holdings with a PO line (when an item is not already associated with the PO line)

---

**Note:** The PO line can only be associated with either an item or holdings record, but not both at the same time.

---

## Technical Instructions

The roles in acquisitions and inventory for accessing the updated/ affected functions remain the same.

**To view the new PO line quantity for pricing (separated from inventory) and the new inventory details format/receiving note:**

- 1 From the Alma main menu > Acquisitions > Purchase Order Lines, click **Review**.

The Purchase Order Lines in Review page displays.

- 2 Click **Edit** for one of the PO lines.

- 3 Scroll to the **Pricing** section.

The **Quantity for pricing** option has been added.

The quantity for pricing multiplied by the list price results in the total price for the PO line.

| Pricing                |        |     |              |            |
|------------------------|--------|-----|--------------|------------|
| List Price *           | 100.11 | USD | Net price    | 500.55 USD |
| Quantity for pricing * | 5      |     | Discount (%) | 0.0        |

| Funding |                         |         |        |            |
|---------|-------------------------|---------|--------|------------|
| Fund    |                         | Percent | Amount | USD        |
| #       | Fund Name               | Percent | Amount |            |
| 1       | cad-fund(99,290.94 CAD) | 100.0%  | 500.55 | USD        |
| Total   | -                       | 100.0%  |        | 500.55 USD |

**Figure 8 - Quantity for Pricing Calculation**

**Note:** The **Quantity for pricing** and the **Number of items to create** may be different numbers for instances in which you have obtained discounted pricing, such as “buy two items and get a third item at no additional charge.”

| Ordered items               |             |
|-----------------------------|-------------|
| Number of items to create * | 3           |
| Library/Location            | ULINC/REF   |
| Receiving note              | CC : LW - 3 |
| No records were found.      |             |

| Vendor information                     |                            |
|----------------------------------------|----------------------------|
| Material Supplier *                    | AutQAVendor/AutQAVendorAcc |
| Claiming grace period (days)           | 0                          |
| Expected receipt after ordering (days) | 0                          |

| Pricing                |            |
|------------------------|------------|
| List Price *           | 100.00 USD |
| Quantity for pricing * | 2          |
| Net price              | 200.00 USD |
| Discount (%)           | 0.0        |

**To view new inventory details and directly access the edit/delete row actions for an item:**

- 1 From the Alma main menu > Acquisitions > Purchase Order Lines, click **Review**.  
The Purchase Order Lines in Review page displays.
- 2 Click **Edit** for one of the PO lines.
- 3 From the Ordered Items section, click **Actions > Edit** (or **Delete**) for a specific item row.  
The specific editor for the item type displays for that item.

Ordered items

Number of items to create \* 1 Library/Location  Add

Receiving note

| Ordering for | Location            | Barcode | Receiving date |                |
|--------------|---------------------|---------|----------------|----------------|
| LAW          | UNASSIGNED location | bc12502 | -              | Actions        |
| Main Library | General             | -       | 20/11/2012     | Actions        |
| Main Library | General             | -       | 20/11/2012     | Actions        |
| LAW          | UNASSIGNED location | bc12501 | -              | Edit<br>Delete |

Figure 9 - Actions > Edit (or Delete) for Inventory Row (Physical Item)

Description 1895 (CAIRN General), L'Association, 0769-0959, ISSN

Order line type Electronic Journal - Subscription Ordering for Main Library

Summary Description Alerts Invoice Lines Associated PO Lines Communications

Ordered items

License  View license

| Name                                          | Type    | Activation status | Activation date |      |
|-----------------------------------------------|---------|-------------------|-----------------|------|
| 1895 : bulletin de l'Association française de | Journal | Not Active        | -               | Edit |

Figure 10 - Actions > Edit for Inventory Row (Electronic Item)

### To create new items and view new inventory details:

- 1 From the Alma main menu > Acquisitions > Purchase Order Lines, click **Review**.  
The Purchase Order Lines in Review page displays.
- 2 Click **Edit** for one of the PO lines.
- 3 Enter the number of items to create and select a library/location.

Ordered items

Number of items to create \* 3 Library/Location ULINC/MUSIC Add

Receiving note

| Ordering for | Location            | Barcode | Receiving date |         |
|--------------|---------------------|---------|----------------|---------|
| LAW          | UNASSIGNED location | bc12502 | -              | Actions |
| Main Library | General             | -       | 20/11/2012     | Actions |
| Main Library | General             | -       | 20/11/2012     | Actions |
| LAW          | UNASSIGNED location | bc12501 | -              | Actions |

Figure 11 - Create New Items

- 4 Click **Add**.

The items are created and associated with the PO line and the inventory list is updated (see below).

Ordered items

Number of items to create \* 
Library/Location

Receiving note

| Ordering for | Location            | Barcode | Receiving date |                                        |
|--------------|---------------------|---------|----------------|----------------------------------------|
| Main Library | Music               | bc15901 | -              | <input type="button" value="Actions"/> |
| LAW          | UNASSIGNED location | bc12502 | -              | <input type="button" value="Actions"/> |
| Main Library | General             | -       | 20/11/2012     | <input type="button" value="Actions"/> |
| Main Library | General             | -       | 20/11/2012     | <input type="button" value="Actions"/> |
| Main Library | Music               | bc15902 | -              | <input type="button" value="Actions"/> |
| LAW          | UNASSIGNED location | bc12501 | -              | <input type="button" value="Actions"/> |
| Main Library | Music               | bc15903 | -              | <input type="button" value="Actions"/> |

Figure 12 - Items Created and List Updated

**Note:** During migration, some PO lines may be migrated with no inventory (due to various reasons). When receiving items related to this type of PO line, the receiving operator should edit the PO line and add the inventory associated with the PO line using the PO line options shown above.

## Receiving Note

A receiving note has been added to enable the purchasing operator to include a specific note to the receiving operator (see below). This receiving note may be especially useful for standing serial orders in which no inventory items are created upon order. The receiving note field is a place where the purchasing operator can share information regarding the intended location of the items received with the receiving operator.

Items arrived

Receiving note

| Quantity                       | Ordering for | Location       |
|--------------------------------|--------------|----------------|
| <input type="text" value="3"/> |              | Stacks (STACK) |

Figure 13 - Receiving Note Viewed by the Receiving Operator

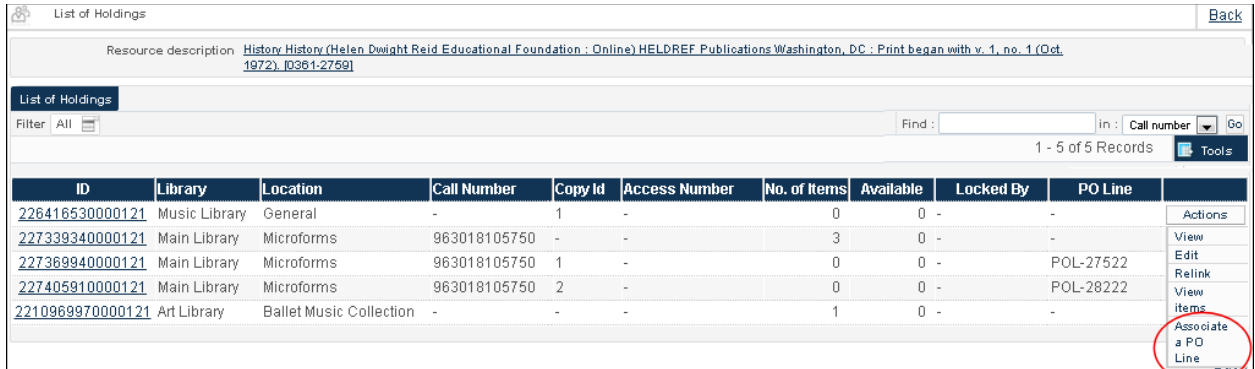
**Note:** The **Receiving note** field also has a specific purpose related to migration activities. During migration, for PO lines without inventory, the **Receiving note** field will contain the library/location information in which the inventory should reside. Previously, the library/location information resided in the PO lines copies section.

### To associate holdings with a PO line:

- 1 Search for physical items.
- 2 Click the **Holdings** link.

The List of Holdings page displays.

- 3 Click **Actions > Associate a PO Line**.



Resource description: [History: History \(Helen Dwight Reid Educational Foundation : Online\) HELDREF Publications Washington, DC : Print began with v. 1, no. 1 \(Oct. 1972\). J0361-2759](#)

List of Holdings

Filter: All  Find:  in: Call number  Go

1 - 5 of 5 Records  Tools

| ID                               | Library       | Location                | Call Number  | Copy Id | Access Number | No. of Items | Available | Locked By | PO Line   |            |
|----------------------------------|---------------|-------------------------|--------------|---------|---------------|--------------|-----------|-----------|-----------|------------|
| <a href="#">226416530000121</a>  | Music Library | General                 | -            | 1       | -             | 0            | 0 -       | -         | -         | Actions    |
| <a href="#">227339340000121</a>  | Main Library  | Microforms              | 963018105750 | -       | -             | 3            | 0 -       | -         | -         | View       |
| <a href="#">227369940000121</a>  | Main Library  | Microforms              | 963018105750 | 1       | -             | 0            | 0 -       | -         | POL-27522 | Edit       |
| <a href="#">227405910000121</a>  | Main Library  | Microforms              | 963018105750 | 2       | -             | 0            | 0 -       | -         | POL-28222 | Relink     |
| <a href="#">2210969970000121</a> | Art Library   | Ballet Music Collection | -            | -       | -             | 1            | 0 -       | -         | -         | View items |

Associate a PO Line

Figure 14 - Holdings Associate a PO Line Row Action

## Other Acquisitions Enhancements

- Previously, disencumbrance transactions were created linked to invoice lines and expenditures. With the April release, there is now only one disencumbrance per encumbrance; and it is linked to the PO line.
- ERP integration – A new **Integration system type field** was added to the Payment integration type profile for ERP integrations. The following values are available: Agresso, Banner, Kuali, Oracle, SAP, and Other. (Note: This field is documented here for informational purposes and is intended for future use.)

# Resource Management

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

## Electronic Portfolio Global Changes

### Description

The purpose of this enhancement is to provide the options to make global changes to all portfolios. Previously, global changes could be made using the portfolio loader for packages. With the April release of Alma, you can also apply global changes to standalone portfolios. With these global change options, you can:

- Remove local coverage
- Set a proxy
- Update URLs (such as removing the EZproxy prefix, for example)
- Associate portfolios with a license
- Activate/deactivate portfolios

### Technical Instructions

The following roles can access this capability:

- Electronic Inventory Operator
- Electronic Inventory Operator Extended

#### To process electronic portfolio global changes:

- 1 From the Alma main menu > Resource Management > Processes, click **Run Process**.  
The Create Process – Select Process to Run page displays.
- 2 Select the **Information Update** filter from the drop-down list.
- 3 Select the **Change Electronic Portfolio Information** process.  
This initiates the process wizard.

1 2 3 4 5 Cancel Next

Process List

Filter : Information Update

1 - 2 of 2 Task Chains Tools

|                       | Name                                    | Description                                                     | Content Type  | Type               |
|-----------------------|-----------------------------------------|-----------------------------------------------------------------|---------------|--------------------|
| <input type="radio"/> | Change Physical Item                    | Update item information for a set of physical items.            | Physical item | Information Update |
| <input type="radio"/> | Change electronic Portfolio information | Update portfolio information for a set of electronic portfolios | Portfolio     | Information Update |

Cancel Next

Figure 15 - Select Process to Run

4 Click **Next** and select the set to process.

1 2 3 4 5 Back Cancel Next

21 - 28 of 28 Sets Tools

|                       | Name    | Type     | Content Type      | Create Date                |
|-----------------------|---------|----------|-------------------|----------------------------|
| <input type="radio"/> | sfg     | Itemized | Electronic titles | 17/03/2013 12:11:13 PM IST |
| <input type="radio"/> | Shajest | Logical  | All Titles        | 02/04/2013 12:57:20 PM IST |

Figure 16 - Select a Set

5 Click **Next** and enter the task parameters.

1 2 3 4 5 Back Cancel Next

Task Parameters: Change electronic Portfolio Information

|                          |                         |                                                                        |                    |
|--------------------------|-------------------------|------------------------------------------------------------------------|--------------------|
| <input type="checkbox"/> | Set Interface Name      |                                                                        | Unconditionally    |
| <input type="checkbox"/> | Set Owner               | ARCH                                                                   | Unconditionally    |
| <input type="checkbox"/> | Remove all Coverage     |                                                                        | If field empty     |
| <input type="checkbox"/> | Set License             |                                                                        | If field not empty |
| <input type="checkbox"/> | Remove URL's Prefix     |                                                                        | Unconditionally    |
| <input type="checkbox"/> | Enable proxy            | No                                                                     | Unconditionally    |
| <input type="checkbox"/> | Set proxy               |                                                                        | Unconditionally    |
| <input type="checkbox"/> | Set availability status | <input checked="" type="radio"/> Active <input type="radio"/> Inactive | Unconditionally    |
| <input type="checkbox"/> | Override general note   |                                                                        | Unconditionally    |

Back Cancel Next

Figure 17 - Enter Task Parameters

6 Select the parameters (check box) to match your criteria. See the table below for a description of the parameter options.

For each parameter, you may specify one of the following conditions:

- Unconditionally
- If field empty
- If field not empty

| Parameter                 | Description                                                                                      |
|---------------------------|--------------------------------------------------------------------------------------------------|
| Set Interface Name        | Select the vendor interface name from the drop-down list.                                        |
| Set Owner                 | Select the owning library from the drop-down list.                                               |
| Remove Local Coverage     | Select this option to remove all types (date information/embargo) of local coverage.             |
| Set License               | Select the license from the drop-down list.                                                      |
| Remove URL's Prefix       | Specify the prefix to remove.                                                                    |
| Enable Proxy              | Select Yes or No from the drop-down list.                                                        |
| Set Proxy                 | If you specify Yes for Enable Proxy, select the proxy profile from the Set Proxy drop-down list. |
| Set Available Status      | Specify Active or Inactive                                                                       |
| Override/Set General Note | Enter a free-form text note.                                                                     |

- 7 Click **Next**, specify the process name, and select the schedule for the process.

The screenshot shows a web form titled "Create Process - Process Details and Schedule". At the top right, there are numbered tabs 1 through 5, with tab 4 being the active one. Below the tabs are "Back", "Cancel", and "Next" buttons. The form has two main sections: "General Information" and "Schedule Process". In the "General Information" section, the "Process Name" field is populated with "CC Global Portfolio Change 1". The "Schedule Process" section has a "Tools" button and a radio button selected for "As soon as possible". At the bottom right of the form, there are "Back", "Cancel", and "Next" buttons.

Figure 18 - Enter Process Name and Schedule

- 8 Click **Next**, review the process, and click **Save** if everything is specified correctly.

Create Process - Review and Confirm

1 2 3 4 5 Back Cancel Save

**General Information**

Process Name CC Global Portfolio Change 1

**Task Parameters: Change electronic Portfolio Information**

|       |                                       |                 |
|-------|---------------------------------------|-----------------|
| false | Set Interface Name                    | Unconditionally |
| false | Set Owner ARCH                        | Unconditionally |
| false | Remove all Coverage -                 | -               |
| false | Set License                           | Unconditionally |
| false | Remove URL's Prefix -                 | -               |
| false | Enable proxy No                       | Unconditionally |
| false | Set proxy                             | Unconditionally |
| false | Set availability status Active        | -               |
| true  | Override general note CC general note | Unconditionally |

**Set Information**

Set ID 401542050000121

Name sfg

**Scheduling**

Schedule As soon as possible

Back Cancel Save

Figure 19 - Review Process Settings and Save

## Release All Cataloging Records for a Specific User

### Description

The purpose of this enhancement is to expand the flexibility of managing cataloging record assignments. Specifically, with this release, a catalog manager can release all of the bibliographic and holdings records assigned to a specific user. In addition, a manager can release a specific bibliographic record that is locked by another cataloger. Consistent with previous capabilities, the released records become unassigned and are available to all other catalogers for processing.

### Technical Instructions

The Catalog Manager role can access this capability.

#### To release all bibliographic and holdings records assigned to a specific user:

- 1 From the Alma main menu > Resource Management > Cataloging, click **Open Metadata Editor**.
- 2 Access bibliographic or holdings records.
- 3 From the Tools menu, click **Release All Records for User**.

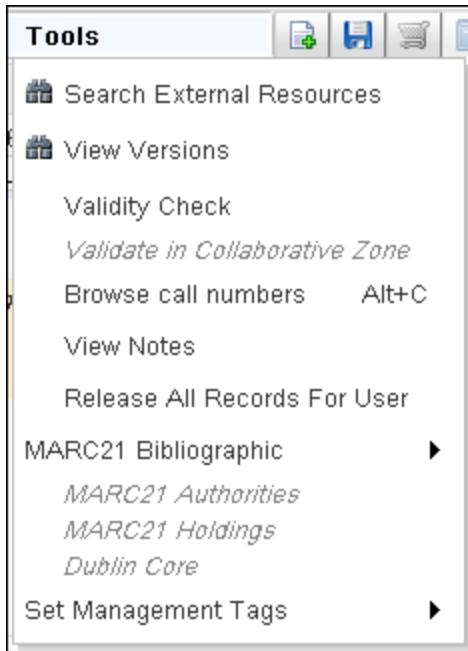


Figure 20 - Release All Records for User

- 4 From the Release All Records for User pop-up window, select the user whose records you want to delete.

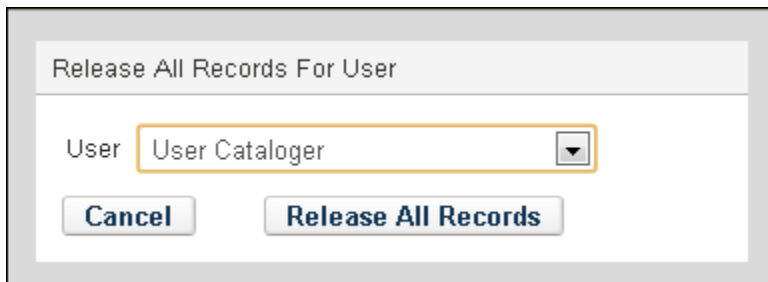


Figure 21 - Release All Records for User Pop-Up Window

- 5 Click **Release All Records**.

The release confirmation message displays in a pop-up window.

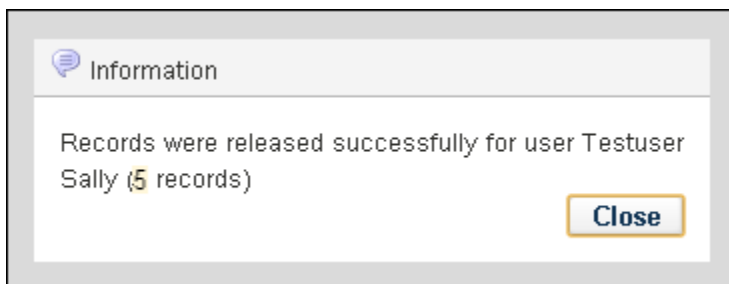


Figure 22 - Release Confirmation Message

## To release a specific bibliographic record locked by a cataloger:

- 1 Search for the bibliographic record you want to release that is locked by a different cataloger.

The search results display.

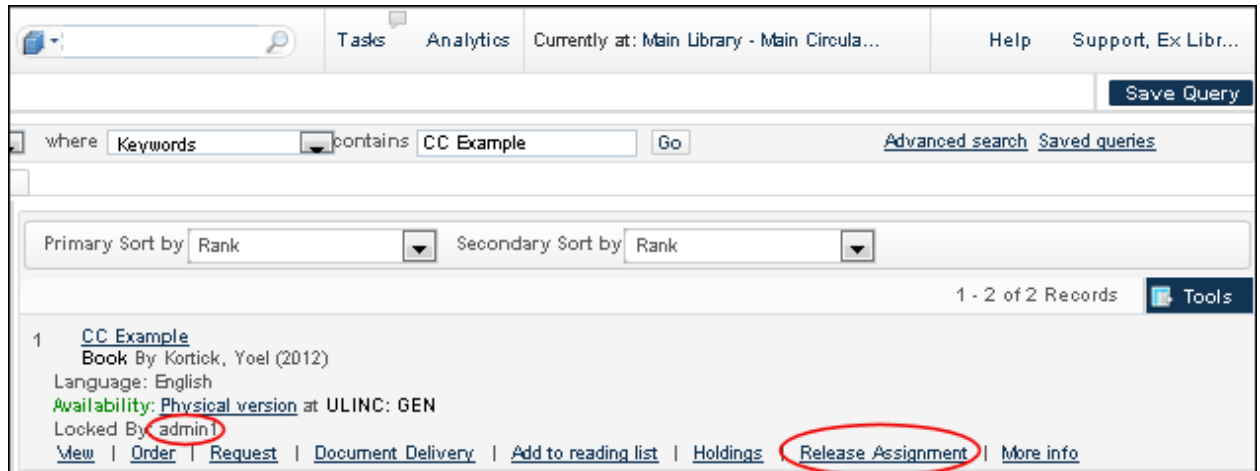


Figure 23 - Release Assignment

- 2 For the bibliographic record that you want to release, click **Release Assignment**.

## Unlink Linked E-Records Upon Import to the Institution Zone

### Description

E-resource records that are activated from the Community Zone can now, during an import process to the Institution Zone, be unlinked and overlaid (or merged) with full MARC records. The portfolios remain linked to the CZ and can benefit from any future Central KnowledgeBase (CKB) updates.

This capability in Alma has been implemented with a new option in the match profile that is part of the import profile (refer to the technical instructions below). This enhancement applies to the Repository type of import profiles and embedded order data (EOD) imports.

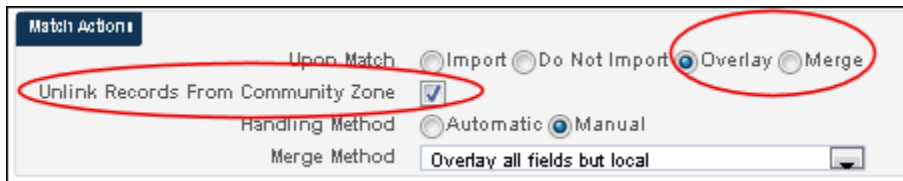
## Technical Instructions

The Catalog Administrator role can configure this capability.

### To enable the new import option:

- 1 From the Alma main menu > Resource Management > Resource Configuration, click **Configuration Menu**.
- 2 From the Record Import section, click **Import Profiles**.
- 3 Edit an existing Repository type of import profile.
  - a From the filter drop-down list, select **Repository**.
  - b For the profile you want to modify, click **Actions > Edit**.
  - c Click the **Match Profile** tab.

The new option displays in the Match Actions section.



The screenshot shows the 'Match Actions' configuration panel. It includes a 'Match Action' tab, a 'Upon Match' section with radio buttons for 'Import', 'Do Not Import', 'Overlay', and 'Merge', and a 'Handling Method' section with radio buttons for 'Automatic' and 'Manual'. The 'Unlink Records From Community Zone' checkbox is checked and circled in red. The 'Overlay' radio button is also circled in red. The 'Merge Method' dropdown is set to 'Overlay all fields but local'.

Figure 24 - Unlink Records from the Community Zone Option

**Note:** The Unlink Records from the Community Zone option works only with the Overlay and Merge **Upon Match** options. When a match is found and Overlay or Merge has been selected and the Unlink Records from the Community Zone has been selected, the existing MMS records linked to the CZ are unlinked and the new imported MMS records are overlayed or merged.

- d Select the new **Unlink Records from the Community Zone** option.
- e Click **Save**.

## Additional UResolver Tools

### Description

The purpose of this enhancement is to provide additional UResolver tools for analyzing the context services that are offered by Alma UResolver, enabling operators to perform basic troubleshooting. With this release, Alma provides two built-in URLs that can be viewed with the browser's source view option and copied to a new browser window for UResolver processing.

With this new capability, you can:

- Determine the service calculation
  - View the context object that was calculated based on the OpenURL parsing, augmentation, and related service
  - Understand how the context services object was generated
    - What were the potential services
    - Which services were added based on the calculation of related services
    - Which services were filtered out based on coverage or rules for general electronic services and display logic
- Determine the link resolution/how the end-result URL was generated
  - Which target parser was used
  - Was a proxy used
  - Was it a static URL on the portfolio level
  - Is there a direct link
  - View the end-result URL
- View the original OpenURL in the debugging content provided

## Technical Instructions

The roles that can access the UResolver can access this capability.

### To use the new UResolver tool:

- 1 Locate the debug URL. From the Available Online tab of the search results, use your browser option to view the source.

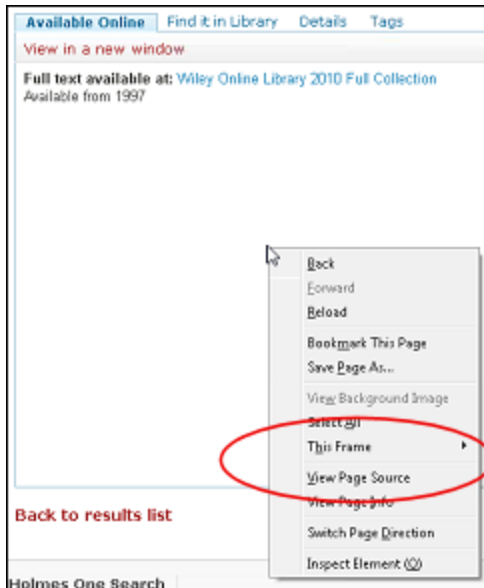


Figure 25 - View Source

- 2 Locate the debug section at the top of the source view and copy the URL.

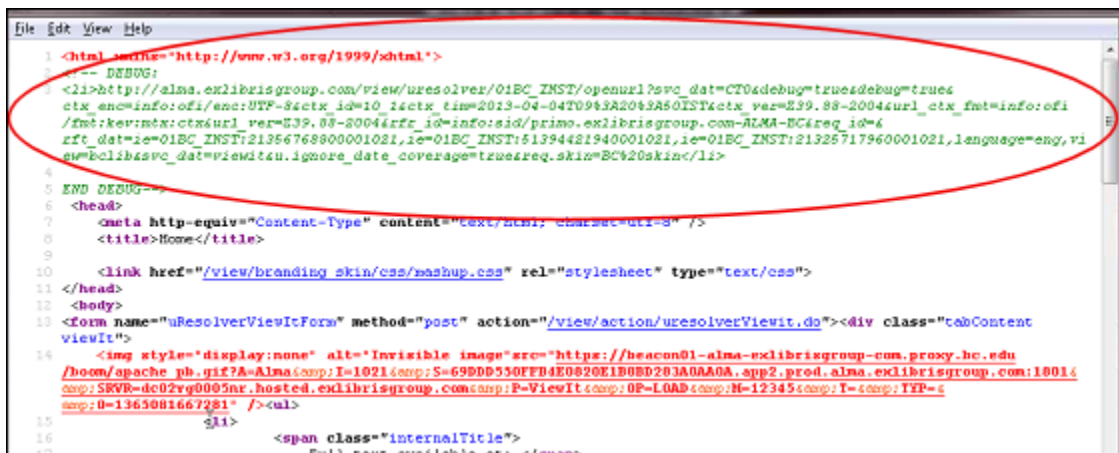


Figure 26 - Debug URL

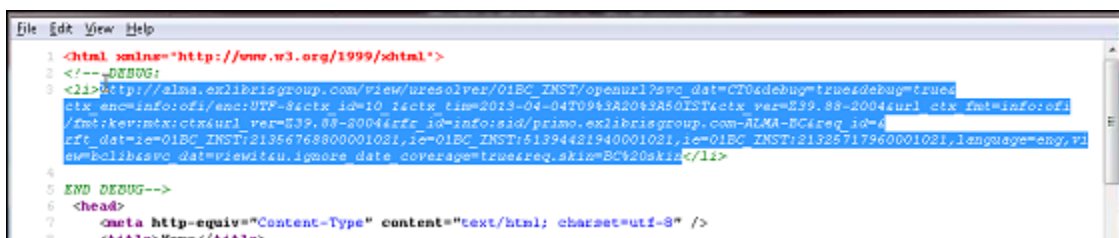


Figure 27 - Debug URL Copied

- 3 Open a new browser window and paste the debug URL that you copied in the previous step into the address bar and press **Enter**.

The XML displays starting with the <context object>.

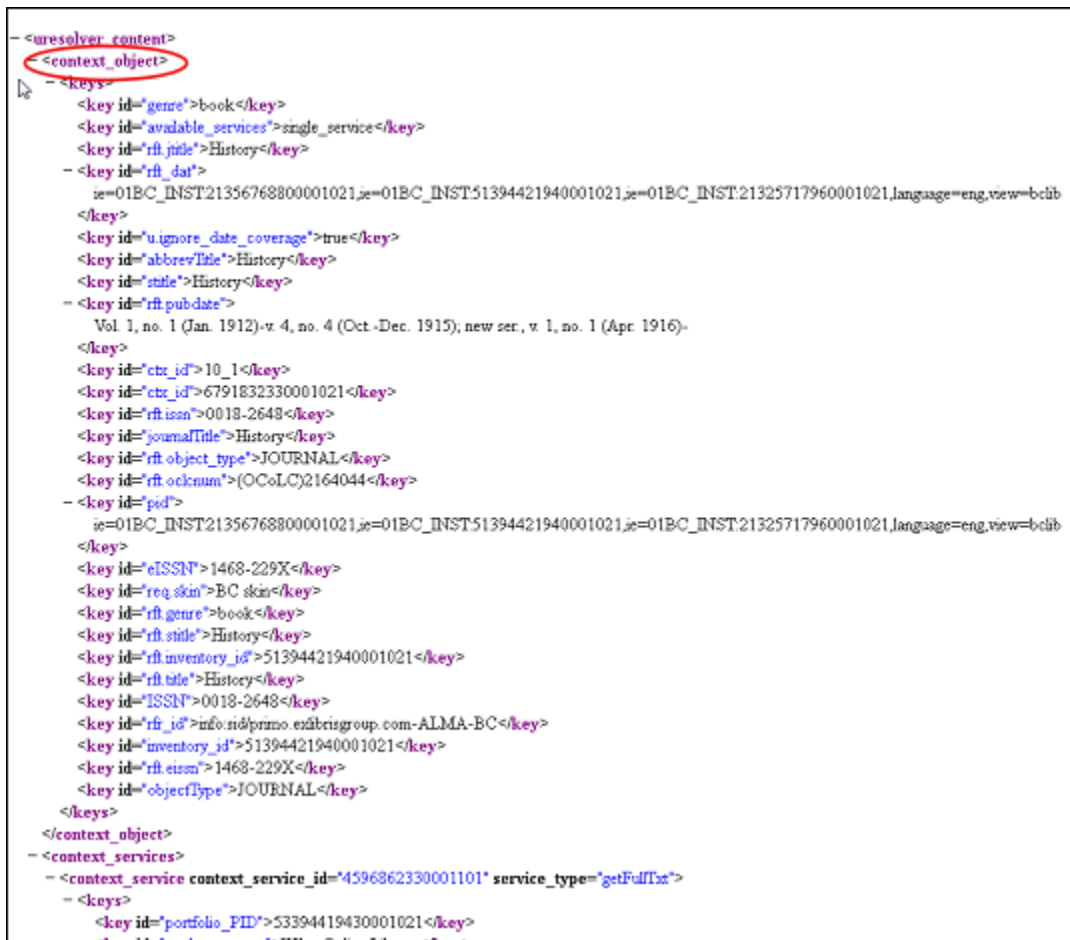
The image shows a screenshot of an XML document. The root element is <resolver\_content>. Inside it is a <context\_object> element, which is circled in red. The <context\_object> element contains a <keys> element. The <keys> element contains several key-value pairs, including <key id="genre">book</key>, <key id="available\_services">single\_service</key>, <key id="rft\_title">History</key>, <key id="rft\_dat">je=01BC\_INST21356768800001021,je=01BC\_INST51394421940001021,je=01BC\_INST:21325717960001021,language=eng,view=bcib</key>, <key id="u.ignore\_date\_coverage">true</key>, <key id="abbrevTitle">History</key>, <key id="style">History</key>, <key id="rft.pubdate">Vol. 1, no. 1 (Jan. 1912)-v. 4, no. 4 (Oct.-Dec. 1915); new ser., v. 1, no. 1 (Apr. 1916)</key>, <key id="ctc\_id">10\_1</key>, <key id="ctc\_id">6791832330001021</key>, <key id="rft.isbn">0018-2648</key>, <key id="journalTitle">History</key>, <key id="rft.object\_type">JOURNAL</key>, <key id="rft.oclcnum">(OCLC)2164044</key>, <key id="pid">je=01BC\_INST21356768800001021,je=01BC\_INST51394421940001021,je=01BC\_INST:21325717960001021,language=eng,view=bcib</key>, <key id="eISSN">1468-229X</key>, <key id="req.skin">BC skin</key>, <key id="rft.genre">book</key>, <key id="rft.style">History</key>, <key id="rft.inventory\_id">51394421940001021</key>, <key id="rft.title">History</key>, <key id="ISSN">0018-2648</key>, <key id="rft\_id">info:nd/primo.exlibrisgroup.com-ALMA-BC</key>, <key id="inventory\_id">51394421940001021</key>, <key id="rft.eissn">1468-229X</key>, <key id="objectType">JOURNAL</key>. The <context\_object> element is followed by a </context\_object> element. Below the </context\_object> element is a <context\_services> element. The <context\_services> element contains a <context\_service context\_service\_id="4596862330001101" service\_type="getFullText"> element. The <context\_service> element contains a <keys> element. The <keys> element contains a <key id="portfolio\_PID">53394419430001021</key> element.

Figure 28 – XML Display

#### 4 Scroll through the XML to analyze/debug your search result issues.

After the <context object> section is the <context services> section that contains information regarding service type, parsing, proxy, the target URL, and so forth.

Notice that in cases where records were filtered out from displaying in the results, the debug tool/XML contains key IDs for Filter (true or false) and Filter reason. In the example below, the Filter reason specifies Date Filter and the OpenURL shows a data parameter of year=2010. This may indicate that the record was filtered because it was outside the date range specified.

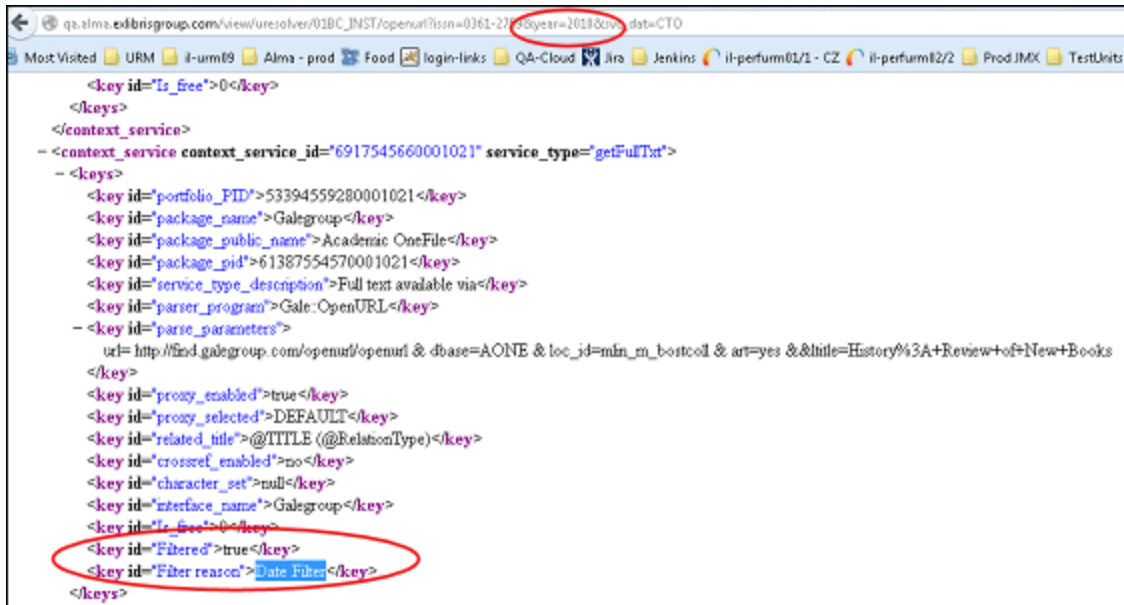


Figure 29 - Example of Filtered Out Information Provided

## Other Resource Management Enhancements

- An **Edit service** link was added to electronic collection repository staff search results at the institution level, if the package has only one service associated with it. This link opens the Electronic Service Editor.

# Fulfillment

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

## Item Barcode Field Updated to be Case Insensitive

The purpose of this enhancement is to remove case sensitivity from the item barcode field. As a result, any upper- or lower-case barcode entry will match the corresponding barcode stored in Alma regardless of which case (upper or lower) was used when it was saved in Alma. This change will take effect with the re-indexing scheduled for the beginning of May.

## Additional Renewal Request Block Option

### Description

The purpose of this enhancement is to provide more flexibility for handling (blocking) renewal requests related to recalled items. With the current function, when there are multiple copies of the same item checked out and a new request causes a recall, only one of the copies is identified for recall. With the April release, there are new configuration options that enable you to prevent renewal of the additional copies that are not recalled.

### Technical Instructions

The Fulfillment Administrator role can configure this new capability.

#### To configure this new capability:

- 1 From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.
- 2 From the Physical Fulfillment section, click **Block Preferences**.

The new configuration option, **Not Renewable – Item has Request(s)**, displays in the preferences list.

---

**Note:** The existing function, **NOT\_RENEWABLE\_STATUS** (used when the loan status is Lost, Claimed Returned, or Recalled) continues to remain in place. The **Not Renewable – Item has Request(s)** enhancement provides new and additional function. Refer to the figure below. Separately, as a point of clarification, the **Item is not renewable** blocking preference is derived from the Is Renewable fulfillment policy.

---

| Description                                              | Actions              | Handlers                                                   |
|----------------------------------------------------------|----------------------|------------------------------------------------------------|
| Item is not loanable                                     | Override By Manager  |                                                            |
| Item is not renewable                                    | Override By Manager  |                                                            |
| Item does not belong to this institution                 | Block                |                                                            |
| Item is on Hold Shelf for this patron                    | Handle Automatically | Delete the request and loan the item                       |
| Item has not been received by Acquisitions Department    | Block                |                                                            |
| Item is requested by another patron                      | Handle Automatically | Restart the request, since the item is no longer available |
| Item renew period exceeded                               | Override By All      |                                                            |
| Item cannot be loaned from this circulation desk         | Handle Automatically |                                                            |
| Item cannot be returned at this circulation desk         | Handle Automatically |                                                            |
| NOT_RENEWABLE_STATUS                                     | Override By Operator |                                                            |
| Item is on hold shelf for another patron                 | Override By Operator | Restart the request, since the item is no longer available |
| Patron cash limits has exceeded                          | Override By Operator |                                                            |
| Patron is expired                                        | Override By Operator |                                                            |
| Patron is not active                                     | Override By Operator |                                                            |
| Patron loan limit exceeded                               | Override By Operator |                                                            |
| Patron overdue limits has exceeded                       | Override By Operator |                                                            |
| Not Renewable – Item has Request(s)                      | Override By All      | Allow renewal when item is requested                       |
| Item is currently on loan by another patron              | Override By Operator | Return the item and loan to the new patron                 |
| User does not have a patron role or the role has expired | Block                |                                                            |

[Tools](#)  
[Back](#) [Save](#)

**Figure 30 - New Block Configuration Option**

**3 Select from the following list of drop-down options to configure **Not Renewable – Item has Request(s)**.**

- Block – Selecting this option blocks from renewal the additional copies of an item that are not blocked by the NOT\_RENEWABLE\_STATUS configuration.
- Handle Automatically – This is the default option which causes the system to continue processing the additional copies of an item (that is recalled) in the same manner as they have been processed in the past. In other words, the additional copies are not blocked from renewal.
- Override by All – Manager, operator, operator – limited
- Override by Manager – Manager
- Override by Operator – Manager, operator

**4 Click **Save**.**

**Note:** If a different copy other than the originally recalled copy is blocked from renewal, the original recall is not affected. However, if the request is fulfilled with one of the other copies (or canceled), the due date of the recalled item can be restored, depending upon the configuration.

## Other Fulfillment Enhancements

- Bursar integration – A new **Integration system type** field was added to the Bursar integration type profile for bursar system integrations. The following values are available: Banner, Oracle, SAP, and Other. (Note: This field is documented here for informational purposes and is intended for future use.)
- The format of dates for self-check machine messages is determined by the **system\_time\_format** parameter (General > General Configuration > Configuration Menu > Other Settings). If this parameter contains the **z** symbol, the time zone is included in the date sent in self-check machine messages.

# Course Reserves

The following sections describe the functions provided for Course Reserves in the April 2013 release of Alma.

## Automatic Handling of Courses' Status and Republishing of Citation Titles

The purpose of this enhancement is to have Alma automatically handle the status of courses and the republishing of records linked to the courses' reading lists. The status change and republishing is done based on the courses' start- and end-date information, as provided in the courses' Course Information tab.

---

**Note:** With this release, the status of the course is no longer a manually toggled setting. Instead, a course is considered active or inactive based on the course's start and end dates only.

---

For courses identified as inactive, records are republished in order to remove the inactive course information. For such records that are identified as course restricted (and the record does not belong to any other active course), the record is either suppressed or deleted, depending on job configuration. Contact Ex Libris Support if you want to activate this job.

The screenshot displays the 'Manage Course Information' interface. At the top, there are buttons for 'Cancel' and 'Save'. Below this, the course details are shown: Course Code: Matlab, Section: -, Course Name: Matlab, Processing Department: Jazz Department, and Instructor: -. The 'Course Information' tab is selected. The form contains several input fields: 'Code' (Matlab), 'Name' (Matlab), 'Processing Department' (Jazz Department), 'Instructor' (empty), 'Start date' (23/05/2012), 'Number of participants' (0), 'Year' (empty), 'Creator' (Levi, Moshe), 'Section' (empty), 'Academic Department' (dropdown), 'Terms list' (Autumn, Spring, Summer, Winter), 'Status' (Inactive/Active radio buttons, with Active selected and circled in red), 'End date' (22/05/2013), 'Weekly hours' (26), and 'Creation Date' (24/12/2012). A 'Searchable IDs' field is at the bottom.

Figure 31 - Course Reserves Automatically Updates Inactive/Active Status Changes

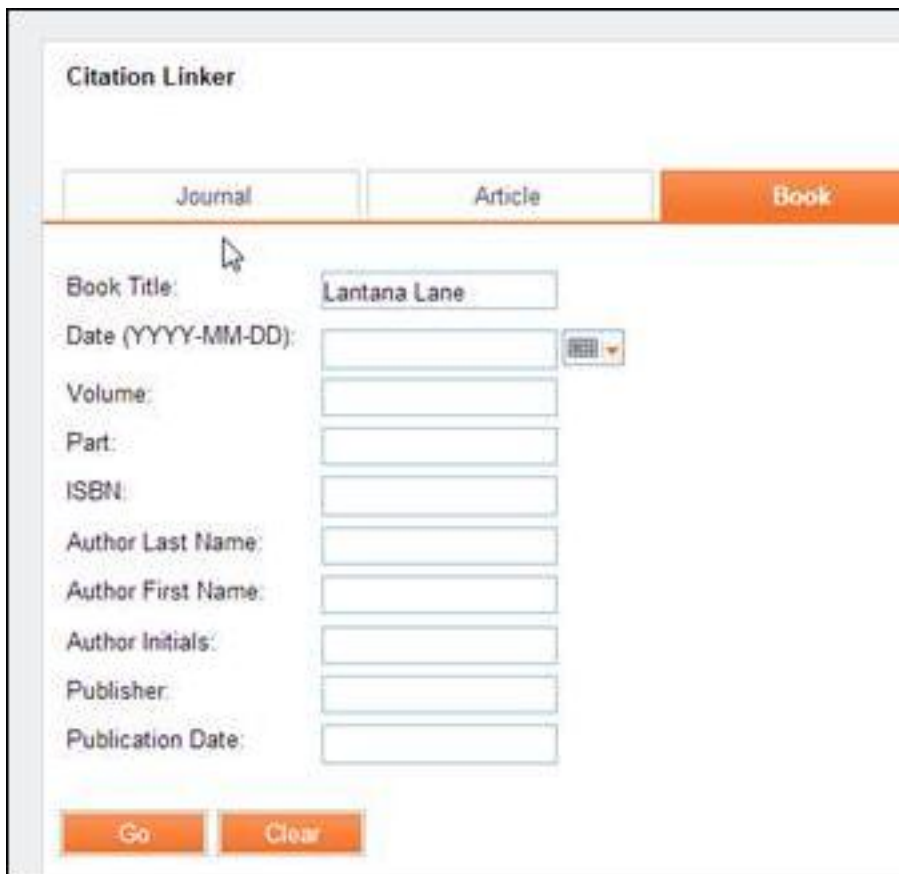
# Primo

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

## Primo 4.3 Includes Citation Linker

The purpose of this enhancement is to allow users to receive services for a specific citation of the following different types:

- Article
- Book
- Journal



The screenshot shows a web form titled "Citation Linker". At the top, there are three tabs: "Journal", "Article", and "Book". The "Book" tab is currently selected and highlighted in orange. Below the tabs, the form contains several input fields with labels to their left: "Book Title:" (with the text "Lantana Lane" entered), "Date (YYYY-MM-DD):" (with a calendar icon to its right), "Volume:", "Part:", "ISBN:", "Author Last Name:", "Author First Name:", "Author Initials:", "Publisher:", and "Publication Date:". At the bottom of the form, there are two orange buttons labeled "Go" and "Clear".

Figure 32 - Citation Linker



**Figure 33 - Citation Linker Results**

Citation linker functionality is similar to the Citation Linker provided with SFX and also enables patrons to use a citation link in order to request a resource-sharing service for a specific citation.

## Other Primo Enhancements

- Real-time availability holdings information prioritization has been improved for Primo.

# Resource Sharing

The following section highlights the updates to Resource Sharing for April 2013.

## Enhanced Support for Shipping Resources in Digital Format

The purpose of this enhancement is to enable shipping requested resources as a document delivery service regardless of whether the requested resource already exists as digital content.

The shipping action may be done by:

- Shipping physical resources
- Digitally shipping, as a document delivery service, resources that exist in Alma as digital inventory
- Digitally shipping, as a document delivery service, resources that have been digitized as part of a digitization request

### ***Shipping Physical Resources***

When the lending request is filled for a physical resource, the item is scanned in at the resource sharing library and the request status is updated to Shipped Physically.

### ***Shipping Digital Content***

When the lending request is placed on a resource that has digital inventory, a new option for Document Delivery is suggested next to the digital resources that display after the Manage Fulfillment Options action is activated for the lending request (see below). When using this option, the operator can send the digital material to the requester's email address. The request status is then updated to Shipped Digitally.

Manage Resource Options

Cancel

Remove Alerts

Place Request

Title: -

Author: -

Alerts: -

Electronic Services

1 - 1 of 1 Records

Tools

Package: Service type

Adam Matthew London Low Libs TestInterfa...

Document Delivery

Digital Services

1 - 5 of 5 Records

Tools

| Preservation type   | Revision number | Num of files |                   |
|---------------------|-----------------|--------------|-------------------|
| PRESERVATION_MASTER | 4               | 1            | Document Delivery |
| PRESERVATION_MASTER | 1               | 1            | Document Delivery |
| PRESERVATION_MASTER | 2               | 1            | Document Delivery |
| PRESERVATION_MASTER | 3               | 1            | Document Delivery |
| PRESERVATION_MASTER | 5               | 1            | Document Delivery |

Figure 34 - Document Delivery Option

## Digitization Request

When the requested resource exists in the library in physical format and the request is for a document delivery service or the lender chooses to fulfill a request by means of a document delivery service, the operator can place a digitization request using the Request button on the Manage Fulfillment Options page. At the end of the digitization process, the digitization operator at the digitization department sends the digitized content to the requester's email address. The request status is updated to Shipped Digitally.

# Analytics

The following sections describe the functions provided for Analytics in the February 2013 release of Alma.

## Usage (UStat) Data Exposed in Analytics/More Info

### Description

The purpose of this enhancement is to expose the usage data available from UStat. This can be accessed from Analytics or the More info search results link.

### Technical Instructions

The following roles can access this facility:

- Design Analytics role (for Analytics access)
- Any role that can process a staff repository search (for More info access)

#### To access this enhancement through Analytics:

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

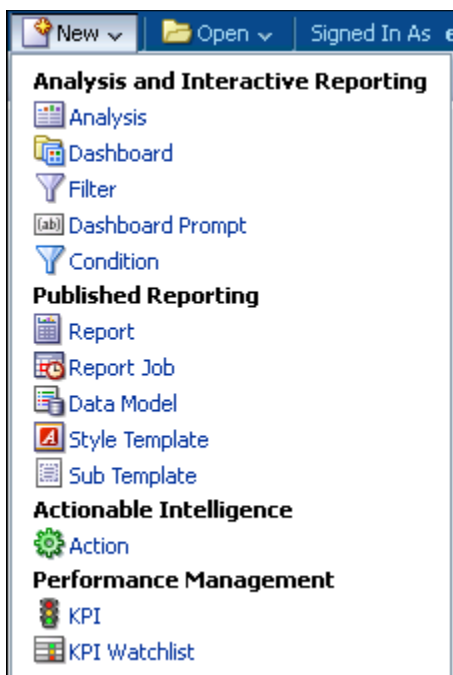


Figure 35 – New > Analysis Option

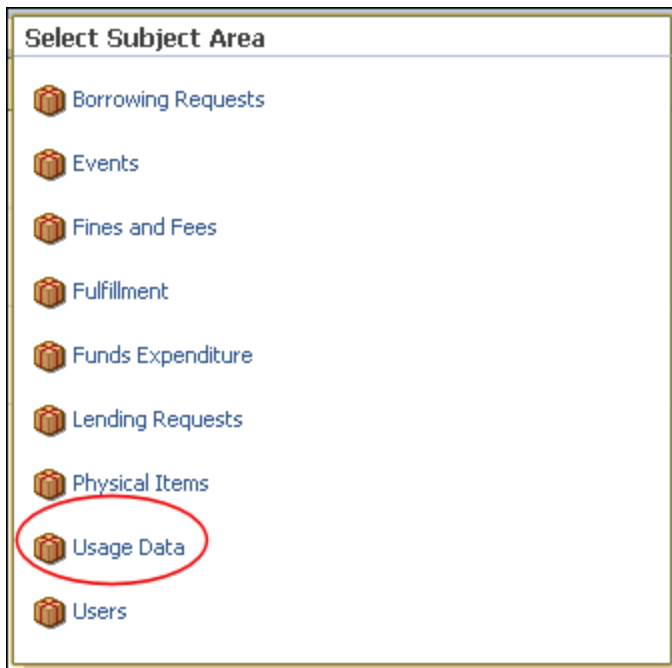


Figure 36 – UsageData Exposed in Analytics

With this subject area exposed, the dashboards are able to display results such as the example below.

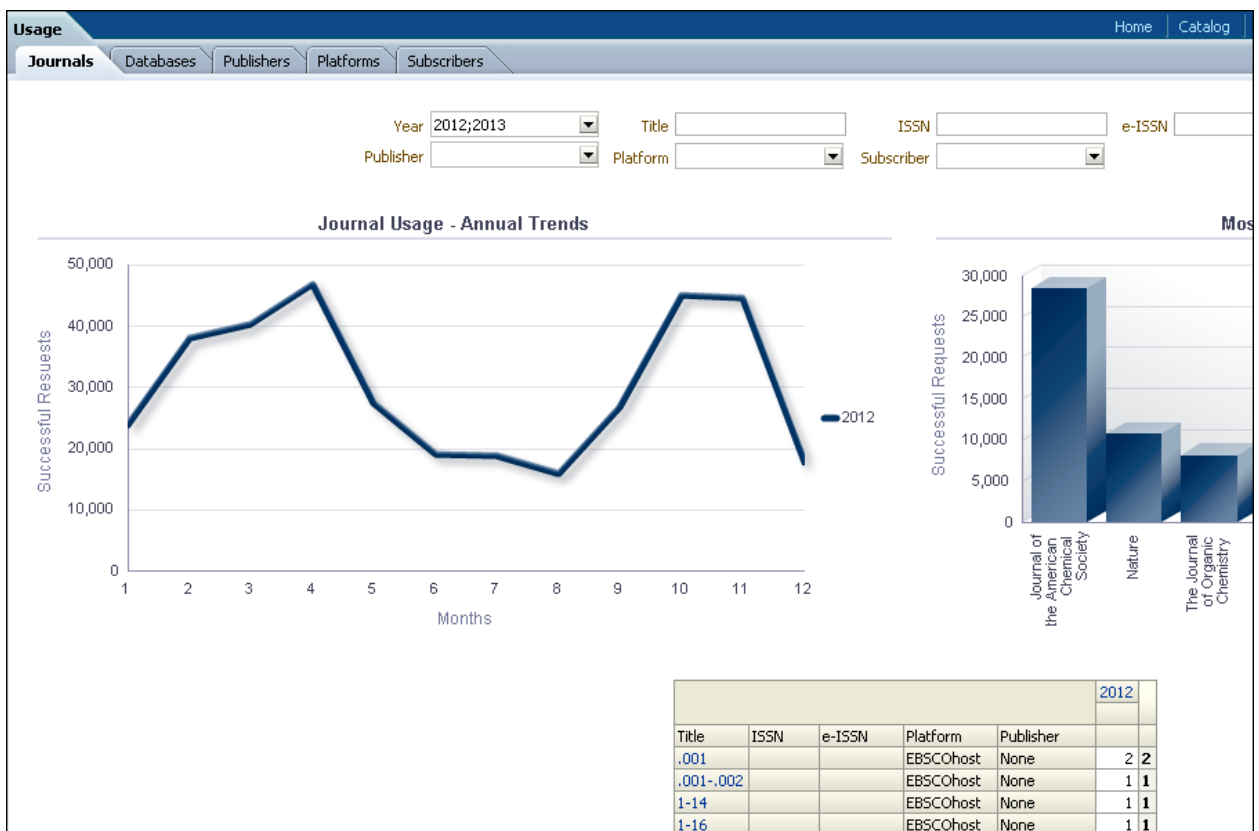


Figure 37 - Analytics Usage Displayed

### To access this enhancement through More info:

- 1 From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
- 2 Complete a search for Alma electronic titles or portfolios with usage data.
- 3 Click the **More info** link for a resource in the search results list.

The More info pop-up window displays.

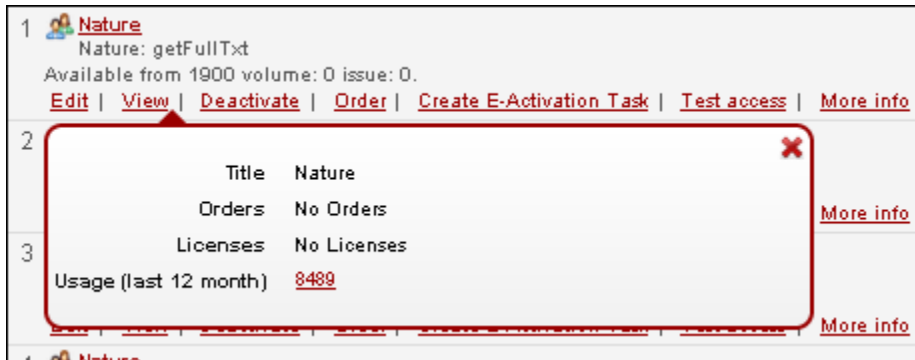


Figure 38 - More Info Usage Data

- 4 Click the **Usage** link.

A pop-up window displays with the graphical presentation of the usage data.

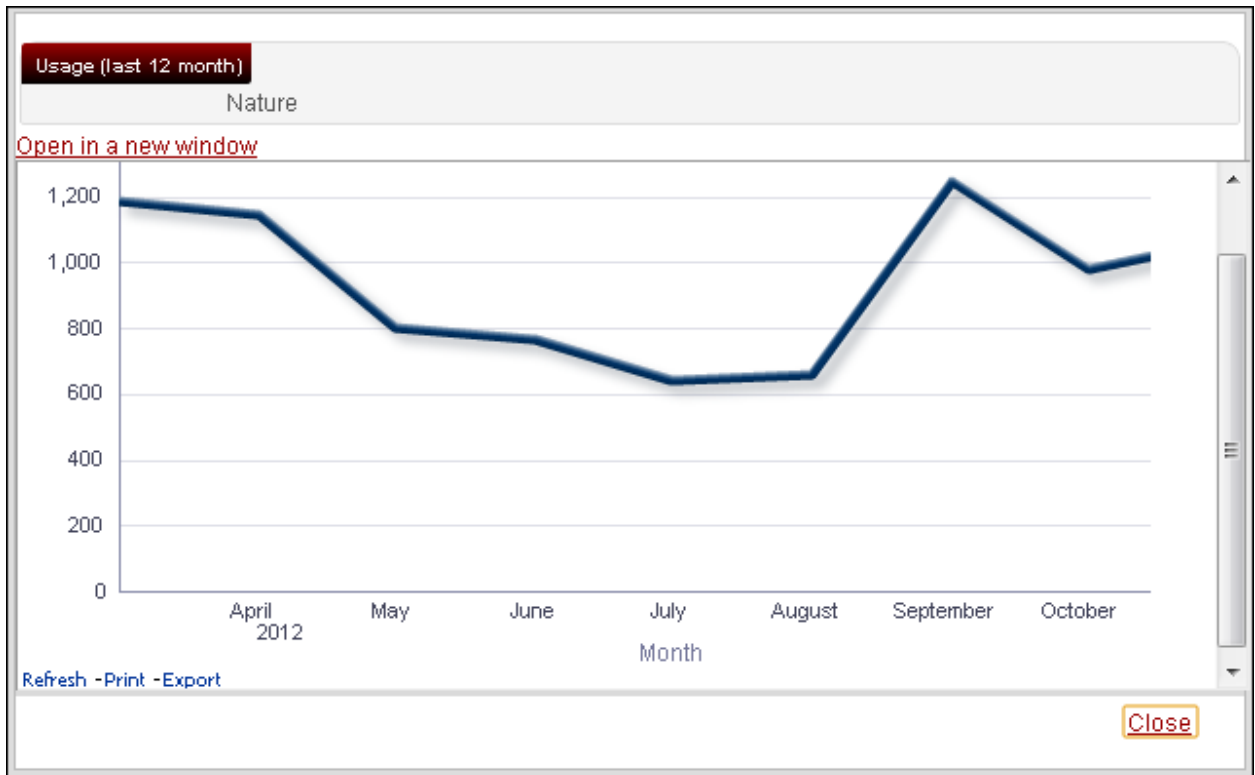


Figure 39 - Graphical Presentation of Usage Data (More Info)

# Cost-Per-Use Reports

## Description

The purpose of this enhancement is to provide cost-per-use data for continuous electronic subscriptions. With this release, Alma Analytics combines UStat and Acquisitions data to provide a tool that can be incorporated into your decision-making process for future subscriptions. This data is fed into graphs and charts that make it easy to interpret and analyze subscription usage costs.

## Technical Instructions

The following roles can access this capability:

- Design Analytics role (for Analytics access)
- Any role that can process a staff repository search (for More info access)

### To access this enhancement in Analytics:

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

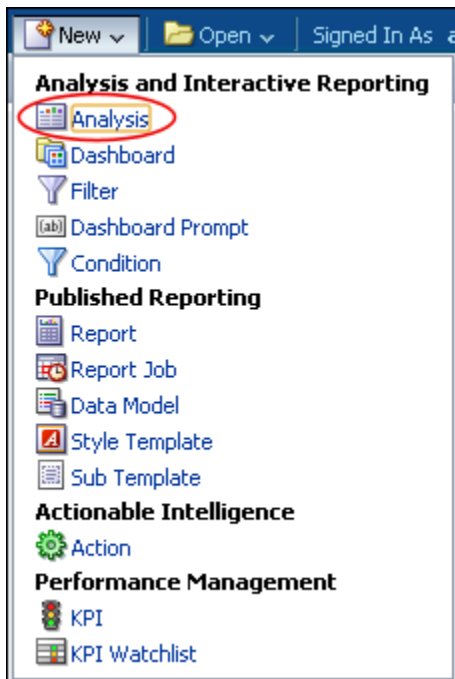


Figure 40 - New > Analysis Option

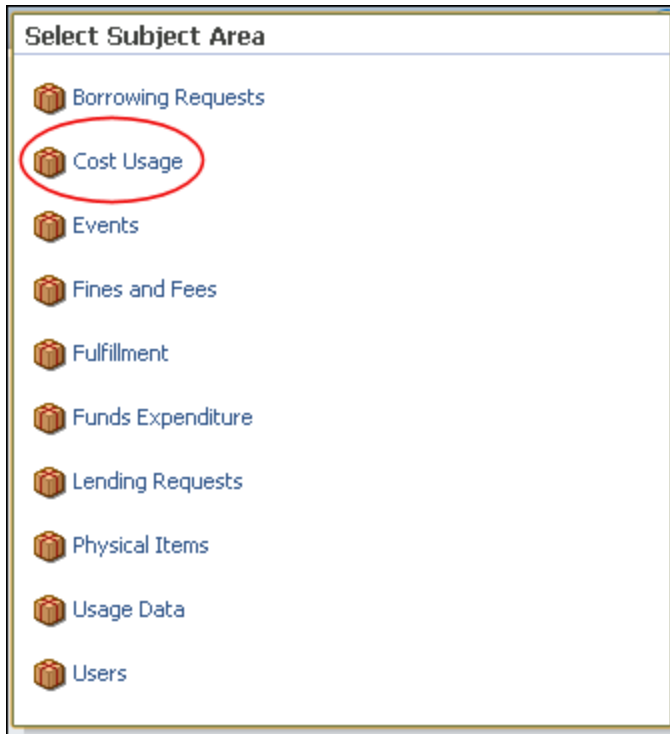


Figure 41 - Cost Usage Exposed in Analytics

With this subject area exposed, the dashboards are able to display results such as the example below.

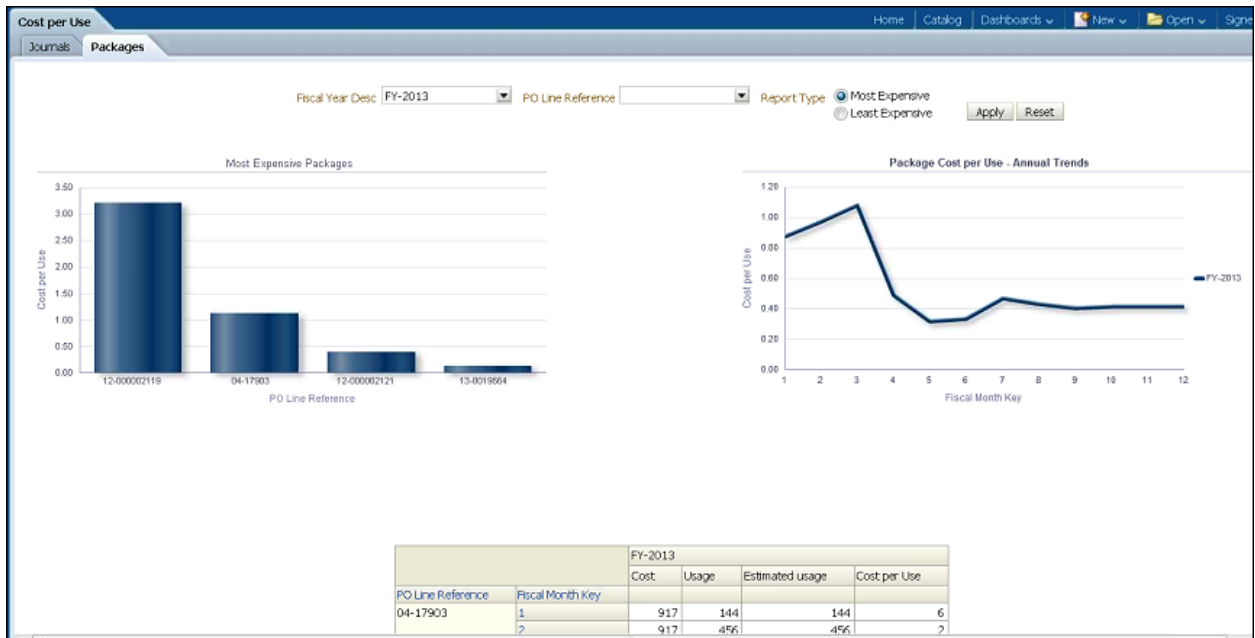


Figure 42 - Cost Usage Example

### To access the cost-per-use dashboards:

- 1 From the Alma main menu > General > Analytics, click **Design Analytics**.
- 2 Click **Catalog** and open the **Cost per Use** dashboard (Shared Folders > Alma > Cost per Use > Dashboards).

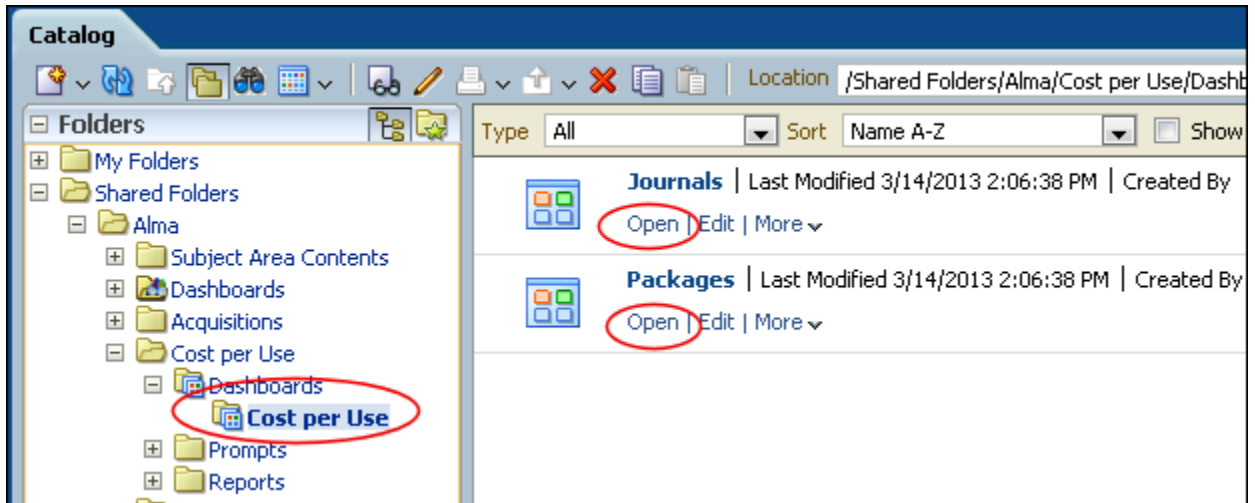


Figure 43 - Cost Per Use Dashboard Option

- 3 Click **Open** for Journals or Packages to display either of these dashboards.
- 4 From the dashboard display, select from the following dashboard options to manipulate the graphs and data details displayed:
  - Fiscal Year or Title
  - Report Type (Most Expensive/Least Expensive)



Figure 44 - Dashboard Options

At the bottom of the dashboard, the data used to generate the graphs is displayed in detail.

|                   |                                           |                  | FY-2010 |       |                 |              | FY-2011 |       |                 |              | FY-2012 |       |                 |              | FY-2013 |       |                 |              |
|-------------------|-------------------------------------------|------------------|---------|-------|-----------------|--------------|---------|-------|-----------------|--------------|---------|-------|-----------------|--------------|---------|-------|-----------------|--------------|
|                   |                                           |                  | Cost    | Usage | Estimated usage | Cost per Use | Cost    | Usage | Estimated usage | Cost per Use | Cost    | Usage | Estimated usage | Cost per Use | Cost    | Usage | Estimated usage | Cost per Use |
| PO Line Reference | Title                                     | Fiscal Month Key |         |       |                 |              |         |       |                 |              |         |       |                 |              |         |       |                 |              |
| 03-27783          | Journal of nanoscience and nanotechnology | 1                |         |       |                 |              |         |       |                 |              |         |       |                 |              | 1,693   | 36    | 36              | 47           |
|                   |                                           | 2                |         |       |                 |              |         |       |                 |              |         |       |                 |              | 1,693   | 16    | 16              | 106          |
|                   |                                           | 3                |         |       |                 |              |         |       |                 |              |         |       |                 |              | 1,693   | 20    | 20              | 85           |
|                   |                                           | 4                |         |       |                 |              |         |       |                 |              |         |       |                 |              | 1,693   | 24    | 24              | 71           |
|                   |                                           | 5                |         |       |                 |              |         |       |                 |              |         |       |                 |              | 1,693   | 248   | 248             | 7            |
|                   |                                           | 6                |         |       |                 |              |         |       |                 |              |         |       |                 |              | 1,693   | 116   | 116             | 15           |
|                   |                                           | 7                |         |       |                 |              |         |       |                 |              |         |       |                 |              | 1,693   | 32    | 32              | 53           |
|                   |                                           | 8                |         |       |                 |              |         |       |                 |              | 1,693   | 20    | 20              | 85           | 1,755   | 8     | 8               | 219          |
|                   |                                           | 9                |         |       |                 |              |         |       |                 |              | 1,693   | 28    | 28              | 60           | 1,755   | 20    | 20              | 88           |
|                   |                                           | 10               |         |       |                 |              |         |       |                 |              | 1,693   | 52    | 52              | 33           | 1,755   |       | 12              | 146          |
|                   |                                           | 11               |         |       |                 |              |         |       |                 |              | 1,693   | 16    | 16              | 106          | 1,755   |       | 12              | 146          |
|                   |                                           | 12               |         |       |                 |              |         |       |                 |              | 1,693   | 16    | 16              | 106          | 1,755   |       | 12              | 146          |

Figure 45 - Cost Per Use Data Details

### To build your own custom reports:

- 1 From the Alma main menu > General > Analytics, click **Design Analytics**.
- 2 Click **New > Analysis > Cost Usage**.
- 3 From the Subject Areas, drag and drop the specific data area into the Selected Columns section to build your custom report.

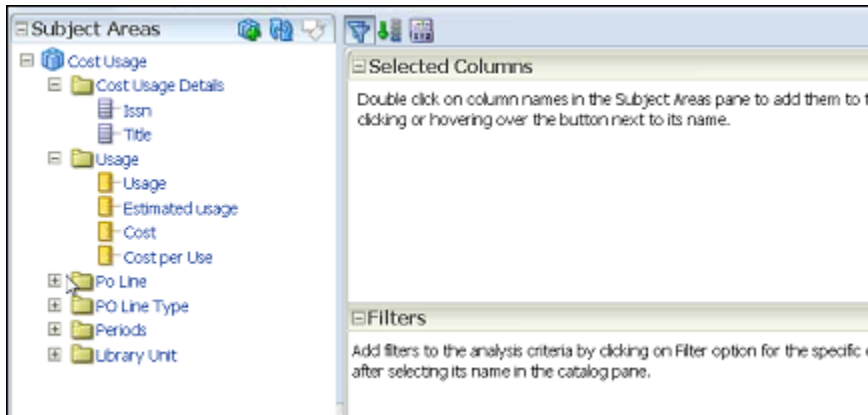


Figure 46 - Build Custom Report – Expand Subject Areas

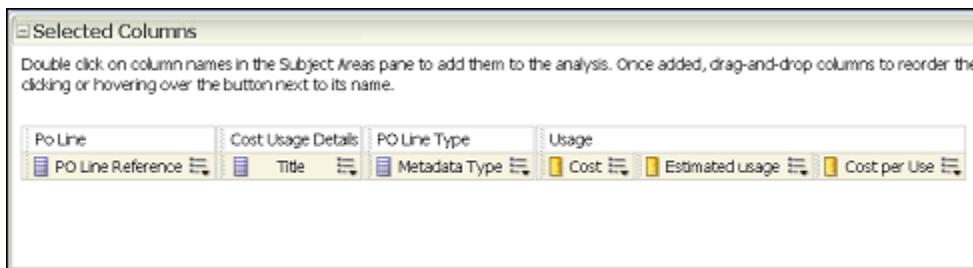


Figure 47 - Build Custom Report – Drag and Drop Subject Areas to the Selected Columns Section

# System Enhancements

The following section describes Alma system enhancements provided in the April 2013 release.

## Direct Entry of a Date in the Date Fields

The purpose of this enhancement is to enable the entry of dates directly in addition to the option of selecting them from a displayed calendar. With the April release, date options that you access display the calendar and, at the same time, allow you to enter the date manually. Alma continues to check the date format to ensure that it follows the format established for your system. This change applies to all the date options that you can access in Alma.

## Changes in the Sandbox Environment

Effective with the April 2013 release, scheduled processes in the sandbox will not run automatically, even though they seem to be scheduled (refer to the bursar export example below). However, the option remains available to run these processes on demand using the Run button.

The screenshot shows the Alma External System configuration page for Bursar Export. The page has a header with the ExLibris logo and the Alma name. Below the header, there are tabs for External System, Code, Name, and Integration Type. The main content area is divided into sections: General Information, Actions, and Contact Info. The Actions section is currently selected, showing the Export configuration. The configuration includes fields for Active status (radio buttons for Active and Non Active), Plugin (dropdown), Time before export (Days) (text input), Minimal amount for user (text input), User identifier type (dropdown), User groups (text input), Institutional fine fee (radio buttons for No and Yes), Library fine fee (text input), Output file path (text input), and Schedule (dropdown). A red circle highlights the 'Run' button at the bottom left, and a red oval highlights the 'Schedule' dropdown menu.

Figure 48 - Sandbox Bursar Export Example

For jobs that do not have a scheduling page, such as PO line renewal, the run-on-demand option, Run Now, is available through the Resource Management Monitor Processes facility (see [Figure 49](#)).

ExLibris

Alma

Tasks Analytics Currently at: None Help Support, Ex Libr...

Monitor Processes

De-Activate Selected Activate Selected

Scheduled

SP Scheduled

Running

Completed

Filter : All

1 2 1 - 20 of 29 Schedules Tools

|                          | Active                              | Name                                    | Job Category  | Creator            | Schedule              | Next Run                   | Actions                |
|--------------------------|-------------------------------------|-----------------------------------------|---------------|--------------------|-----------------------|----------------------------|------------------------|
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | PO Line - Packaging                     | Acquisition   | -                  | Every day at 24:00    | 15/04/2013 00:00:00 AM IDT | Actions                |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | PO Line - Renewal                       | Acquisition   | -                  | Every day at 05:00    | 15/04/2013 05:00:00 AM IDT | Actions                |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Invoice - Load EDI - AutoEDI_MainCode   | Acquisition   | AcquisitionManager | Every day at 19:00    | 14/04/2013 19:00:00 PM IDT | Run Now<br>Job History |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | PO Line - Claiming                      | Acquisition   | -                  | Every day at 12:00    | 15/04/2013 12:00:00 PM IDT | Actions                |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Trials - Start and Notify Participants  | Acquisition   | -                  | Every day at 07:00    | 15/04/2013 07:00:00 AM IDT | Actions                |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | PO Line - Deferred                      | Acquisition   | -                  | Every day at 06:00    | 15/04/2013 06:00:00 AM IDT | Actions                |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Recalculate transactions exchange rates | Acquisition   | -                  | Every Monday at 17:39 | 15/04/2013 17:39:00 PM IDT | Actions                |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Synchronize Changes from CZ             | Data services | -                  | Every day at 07:00    | 15/04/2013 07:00:00 AM IDT | Actions                |

Figure 49 - Monitor Processes Run Now Option

# Other Enhancements

The following sections describe other Alma system enhancements provided in the April 2013 release.

## User Management

- SIS Integration – A new Integration system type field was added to the User integration type profile for SIS system integrations. The following values are available: Banner, Oracle, SAP, and Other. (Note: This field is documented here for informational purposes and is intended for future use.)

## General

- The link Departmental Work Orders was changed to **Work Order Types**. A column called **Work Order Type** was added to the list of work order departments (General Configuration > Work Order Departments).