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Table of Contents

1	About the Alma Release Notes	5
2	Alma February 2013 Release Highlights	6
	General	6
	Acquisitions	6
	Resource Management	7
	Fulfillment	7
	Primo	8
	Users	8
3	Access to February 2013 Features	9
4	Data Services	12
	New Electronic Packages Added to the Alma CKB	12
	New External Resources That Are Open for Searching	13
5	Alma Show Me How	14
	Alma Show Me How – February	14
6	Acquisitions	16
	Alma Processing Added for Invoices Rejected by the ERP System	16
	Explicit Ratio Handling	19
	New PO Line History Tab/Audit Trail	21
	Release Lingering Encumbrances for EDI Invoices	22
	Order Portfolios at the Institution Level	23
	Acquisition Fund Form Changes	26
	Other Acquisitions Enhancements	27
7	Resource Management	28
	Icon for Suppressed Records	28
	URL Portfolio Option Added	29
	Advanced Search Enhanced with Is Empty Option	32
	Additional Parsing Options for Label Printing	35

	Portfolio Loader Enhanced and Electronic Jobs Run Asynchronously	38
	Library Ownership for Electronic Collections and Standalone Portfolios	40
	Other Resource Management Enhancements	41
8	Fulfillment	42
	Work Order Improvements	42
	Items Requiring Action Enhanced	45
	SIP2 Self-Check Support for 09/11 Messages	46
	Print Return Receipts	47
9	User Management	50
	Duplicate User Warning	50
	Release a Locked User	50
	Other User Management Enhancements	51
10	General	52
	Single Sign-on Capability	52
	New Logo Option	54
11	Alma Developers	55
	Alma Developers – User Cash Web Services	55
12	Primo	56
	Additional Get It Customization	56
	General Electronic Service Added	59
13	System Enhancements	65
	Miscellaneous Export Updates	65

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 February 2013 Release Highlights](#)
- [Access to February 2013 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](#)
 - [Alma Developers](#)
 - [Primo](#)
 - [System Enhancements](#)

Alma February 2013 Release Highlights

General

- What's New Videos

A few months ago, you saw the introduction of the Alma Show Me How's that guide staff through common tasks or new functionality. This release of Alma introduces an additional great new learning tool – What's New Videos – videos of new features. These short videos explain either online or with PowerPoint slides new functionality introduced with the release.

- Single Sign-on Capability

Alma now provides single sign-on (SSO) capability. Alma is enhanced to be a service provider that interfaces with an authentication system such as Shibboleth for SSO. Alma supports the SAML 2.0 Web Browser SSO Profile. This allows Alma to exchange authentication and authorization information.

- Alma Developers

This month more Web services related to cash handling have been added.

- New Logo Option

This enhancement provides the option to specify/load logo images of different sizes such as one image for email and another image for the site-wide header logo.

Acquisitions

- New PO Line History Tab and Audit Trail

This great new functionality provides an audit trail of PO line activity such as changes in operator assignments, status, price, fund distribution, and so forth. These changes are registered in the new History tab of the PO line.

- Alma Processing Added for Invoices Rejected by the ERP System

This enhancement provides the necessary functionality in Alma to handle invoices that have been rejected by the ERP system for various reasons. The new process resets the invoice status to In Review.

- Explicit Ratio Handling

When an invoice is given in a currency that is different from the fund's currency, the operator may want to input an explicit ratio in the invoice. New functionality in Alma now allows for this option.

- **New Feature in Acquisition Fund Records**

There is a great new option on the summary screen of the fund record. Previously, there was a graphic representation of the fund's balance, encumbrance, and so forth. It is now possible to flip this view to see the fund burn down (from Alma Analytics).

- **Order Portfolios at the Institution Level**

This enhancement provides the capability to create an order for portfolios that are part of a package from the institution search. Previously, it was only possible to order a portfolio that was part of a package from the Community Zone.

Resource Management

- **Icon for Suppressed Records**

In the Repository Search, it is now possible to see a visual cue (icon) on records that have been suppressed for discovery.

- **URL Portfolio Option Added**

The purpose of this enhancement is to provide the capability to add a URL to a local portfolio, either for a standalone portfolio or for a portfolio that is part of a package. When the portfolio is part of a package, Alma uses the URL specified in the new URL option to override the URL created based on parameters taken from the package, service, and portfolio.

- **Advanced Search Enhanced with Is Empty Option**

Another great new option provides the capability for advanced search options of physical titles/items in order to retrieve records that have no values in a defined field (or fields) such as searching on the barcode field with the new value Is Empty. Refer to the detailed section of the release notes for a complete list of fields with the Is Empty option. From your search results, you can create sets to analyze, manage, and update your Alma database.

Fulfillment

- **Work Order Improvements**

This enhancement improves work order processing. Work orders have been separated from requests to enable more granular processing. This change is visible on an item search and on the Resource Requests menu.

- Enhancements to Items Requiring Action

New functionality provides additional options for items requiring action. It is now possible to also report on claimed return and lost items. In addition, the report output has been enhanced.

- Print Return Receipts

It is now possible to define that the Alma automatically print return receipts at a circulation desk. When defining this option, it is also possible to specify that the receipt is sent via email or printed at the circulation desk. When the system is not configured for automatically creating return receipts, there is still a manual option, Send Return Receipt, that can be selected at the circulation desk.

Primo

- General Electronic Service Added

This enhancement provides for a new general electronic service configuration capability such as Search in ProQuest Dissertations or Ask a Librarian that will be presented to patrons in the Primo View It and Get It tabs.

- Additional Get It Customization

Additional CSS classes have been implemented in the Get It page enabling better control of the page look and feel by utilizing more finely tuned CSS configuration.

Users

- Duplicate User Warning

This enhancement provides an alert that you may be creating a duplicate user. When creating a new user and the first, last, and middle names, and birth date match an existing user, Alma will display a warning message.

Access to February 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/ 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: Alma Processing Added for Invoices Rejected by the ERP System				
Acquisitions: Explicit Ratio Handling				
Acquisitions: New PO Line History Tab/Audit Trail				
Acquisitions: Release Linger Encumbrances for EDI Invoices				
Acquisitions: Order Portfolios at the Institution Level				
Acquisitions: Acquisition Fund Form Changes				
Resource Management: Icon for Suppressed Records				
Resource Management: URL Portfolio Option Added				

Feature	No Activation/ Setup Required	Activation/ Setup Required	Visible to Administrator Only	Contact Ex Libris to Activate This Feature
	(Note: Automatically Visible to All Users with the Appropriate User Role/ Permission)			
Resource Management: Advanced Search Enhanced with Is Empty Option				
Resource Management: Additional Parsing Options for Label Printing				
Resource Management: Portfolio Loader Enhanced and Electronic Jobs Run Asynchronously				
Resource Management: Library Ownership for Electronic Collections and Standalone Portfolios				
Fulfillment: Work Order Improvements				
Fulfillment: Items Requiring Action Enhanced				
Fulfillment: SIP2 Self-Check Support for 09/11 Messages				
Fulfillment: Print Return Receipts				
User Management: Duplicate User Warning				

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)			
User Management: Release a Locked User				
General: Single Sign-on Capability				
General: New Logo Option				
Alma Developers: Alma Developers – User Cash Web Services				
Primo: Additional Get It Customization				
Primo: General Electronic Service Added				
System Enhancements: System Enhancements				

Data Services

The Alma February 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-January-2013 through 10-February-2013:

- GNL Taylor and Francis Online Archives
- McGraw-Hill AccessPharmacy
- McGraw-Hill AccessPhysiotherapy
- McGraw-Hill AccessEmergency Medicine
- McGraw-Hill AccessJAMAevidence
- Gale Making of the Modern World Part 1
- Liverpool University Press Books
- SAGE Premier 2013
- Elsevier ClinicalKey Journals
- Gale Making of the Modern World Part 2
- Galegroup Times Literary Supplement Centenary Archive
- EBSCOhost PsycBooks
- Digitalia eJournals
- Digitalia eBooks
- Highwire Press Sage Publications India
- R2 Digital Library
- MetaPress Manchester University Press
- MetaPress Cancer Biology & Medicine

New External Resources That Are Open for Searching

This section highlights the new external resource names. The following external resource was added for this release:

- CARM Centre (CAVAL)
- University of the Arts London - Library Catalogue
- Abertswyth University Library Catalogue
- BN-OPALE PLUS (BNF)
- COPAC
- Libraries Australia

Alma Show Me How

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

Alma Show Me How – February

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 February release, the following Show Me How scenarios are available:
 - Parsing Call Numbers for Spine Labels
 - Reassign a Record or Release Assignment
 - Schedule Patron Activity Report
 - Search for Items with No Barcode
 - New Features in Alma Developers
 - What's New Videos
 - New Year Field in Article Borrowing Requests
 - Filter PO Lines with Patron Requests
 - View PO Lines for a Vendor
 - Delivery and Claim Information in Vendor Account
 - Send Invoice to ERP Without Payment Notification

- Manage VAT/GST in Invoice
- Global Change of Physical Items

Acquisitions

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

Alma Processing Added for Invoices Rejected by the ERP System

Description

The purpose of this enhancement is to provide the necessary function in Alma to handle invoices that have been rejected by the ERP system for various reasons and reset the invoice status to In Review.

The integration between Alma and the external ERP system is handled via FTP, XML files, and an Alma import job. With this release, the XML file format has been updated to include:

- Reject status
- Reject reason

When Alma determines that an invoice has been rejected by the ERP system, it resets the invoice status to In Review and notes the reason that the invoice was rejected. With this information, a library staff person can address the issue that caused the rejection status and resubmit the invoice to the ERP system for payment.

Updated XML Schema:

```
<?xml version="1.0" encoding="UTF-8"?>
```

```
<xs:schema xmlns="http://com.exlibris/repository/acq/xmlbeans"
```

```
xmlns:xs="http://www.w3.org/2001/XMLSchema"
```

```
targetNamespace="http://com.exlibris/repository/acq/xmlbeans"
```

```
elementFormDefault="qualified" attributeFormDefault="unqualified">
```

```
  <xs:element name="payment_confirmation_data" >
```

```
    <xs:complexType>
```

```
      <xs:annotation>
```

```
        <xs:documentation>Invoice list</xs:documentation>
```

```
      </xs:annotation>
```

Updated XML Schema:

<xs:all>
<xs:element name="invoice_list" type="invoice_list" minOccurs="1" maxOccurs="1"/>
</xs:all>
</xs:complexType>
</xs:element>
<xs:complexType name="invoice_list">
<xs:annotation>
<xs:documentation>Invoice list</xs:documentation>
</xs:annotation>
<xs:sequence>
<xs:element name="invoice" type="invoice" minOccurs="1" maxOccurs="unbounded"/>
</xs:sequence>
</xs:complexType>
<xs:complexType name="invoice">
<xs:all>
<xs:element name="invoice_number" type="xs:string" minOccurs="1" maxOccurs="1">
<xs:annotation>
<xs:documentation>Must be UNIQUE per vendor if the UniqueInvoiceIdentifier flag on customer parameters is false</xs:documentation>
</xs:annotation>
</xs:element>
<xs:element name="vendor_code" type="xs:string" minOccurs="1" maxOccurs="1"/>
<xs:element name="payment_voucher_number" type="xs:string" minOccurs="0" maxOccurs="1"/>
<xs:element name="payment_voucher_date" type="FormattedDateType" minOccurs="0" maxOccurs="1"><xs:annotation><xs:documentation>Required when entry point = WAITING_PAYMENT</xs:documentation></xs:annotation></xs:element>
<xs:element name="invoice_date" type="FormattedDateType" minOccurs="1" maxOccurs="1" />
<xs:element name="voucher_amount" type="voucher_amount" minOccurs="1" maxOccurs="1"/>

Updated XML Schema:

<xs:element name="unique_identifier" type="xs:string" minOccurs="0" maxOccurs="1"/>
<xs:element name="payment_status">
<xs:annotation>
<xs:documentation>Payment status: PAID, REJECTED</xs:documentation>
</xs:annotation>
<xs:simpleType>
<xs:restriction base="xs:string">
<xs:enumeration value="PAID"/>
<xs:enumeration value="REJECTED"/>
</xs:restriction>
</xs:simpleType>
</xs:element>
<xs:element name="payment_note" type="xs:string" minOccurs="1" maxOccurs="1"/>
</xs:all>
</xs:complexType>
<xs:complexType name="voucher_amount">
<xs:all>
<xs:element name="sum" type="xs:decimal" minOccurs="1" maxOccurs="1"/>
<xs:element name="currency" type="xs:string" minOccurs="1" maxOccurs="1"/>
<xs:element name="explicit_rate" type="xs:decimal" minOccurs="1" maxOccurs="1"/>
</xs:all>
</xs:complexType>
<xs:simpleType name="FormattedDateType">
<xs:restriction base="xs:string">
<xs:pattern value="\d{8}"/>
</xs:restriction>

Updated XML Schema:

```
</xs:simpleType>
```

```
</xs:schema>
```

Explicit Ratio Handling

Description

The purpose of this enhancement is to provide the option to specify a different currency and exchange rate other than the standard one that is to be used when paying an invoice.

If, for example, you have an invoice in Euros (EUR) for 10 EUR and you define an explicit ratio of 1.5 for U.S. dollars (USD), the exchange rate is calculated as $10 \times 1.5 = 15$ USD.

Note: This feature may also be used for institutions that have only one currency. This can be used in instances where the invoice is in a currency different from the institution's.

You can define an explicit ratio for all the currencies that display in the funds and are different than the invoice currency.

Technical Instructions

The following roles can access this facility:

- Invoice Manager
- Invoice Operator

To access this facility:

- 1 From the Alma main menu > Acquisitions > Receiving and Invoicing, click **Review**.
The In Review Invoices page displays.
- 2 Click **Actions** > **Edit** for a specific invoice.
The Invoice Details page displays.
- 3 Click the plus sign to expand the Explicit Ratio section.

Figure 1 - Explicit Ratio Section

- 4 Select the currency in which to pay the invoice (different from the currency on the invoice), enter the explicit ratio, and click **Add**.

Figure 2 - Explicit Ratio Options

Example:

If the invoice is in EUR and you define Foreign Currency = USD and the Explicit Ratio= 1.5, this means 1.5 USD= 1 EUR. If you add an invoice line of 10 EUR but attach it to a USD fund, in the fund you will see a transaction of 10 X 1.5 = 15 USD.

- 5 Click **Save**.

New PO Line History Tab/Audit Trail

Description

The purpose of this enhancement is to provide an audit trail of PO line activity, such as changes in operator assignments, changes in status, changes in price, changes in fund distribution, and so forth. The History tab captures the changes that are made to the options on the Summary tab of the PO line.

Technical Instructions

The following roles can access this facility:

- Purchasing Manager
- Purchasing Operator

To view the new History tab and its contents:

- 1 From the Alma main menu > Acquisitions > Purchase Order Lines, click **Review**.
- 2 Click **Edit** for a PO line.

The new History tab displays on the PO Line Summary page.

The screenshot shows the 'PO Line Summary' page. At the top, there's a 'Back to PO' link. Below it, the description of the PO line is shown: '01082012_062529 Barnes & Noble Library of Essential Reading... [S.I.]... Barnes & Noble, 2005... 9780760765455 (Paperback), ISBN'. The order line type is 'Print Book - One Time', and the ordering is for 'Main Library'. The status is 'In Revi'. Below this, there are several tabs: 'Summary', 'Description', 'Alerts', 'Invoice Lines', 'Associated PO Lines', 'Communications', 'Interested Users', and 'History'. The 'History' tab is circled in red. Below the tabs, there's a section for 'Ordered items' with a quantity of '1' and a 'Library/Location' dropdown.

Figure 3 - New PO Line History Tab

- 3 Click the **History** tab.

The audit trail of changes displays on this tab.

The screenshot shows the 'History' tab of the PO Line Summary page. It displays a table of changes with columns: 'Date', 'Operator', 'Field name', 'Old value', and 'New value'. The table shows several changes made by 'admin1' on 30/01/2013 at 16:27:08 PM IST. The changes include: Transaction Item (Accounting and Finance Monographs(80.00 USD) to Accounting and Finance Monographs(100.00 USD)), Claiming grace period (days) (0 to 23), Discount (%) (0.0 to 10.0), Renewal date (2013-01-14 to 2), Expected Activation after Ordering (days) (0 to 2), Net price (100.0 to 90.0), Vendor account code (0-123-123 to 0-123), and Vendor code (0-123 to 0-123).

Date	Operator	Field name	Old value	New value
30/01/2013 16:26:22 PM IST	ext_support	Transaction Item	Accounting and Finance Monographs(80.00 USD)	Accounting and Finance Monographs(100.00 USD)
30/01/2013 16:27:08 PM IST	admin1	Claiming grace period (days)	0	23
30/01/2013 16:27:08 PM IST	admin1	Discount (%)	0.0	10.0
30/01/2013 16:27:08 PM IST	admin1	Renewal date	-	2013-01-14
30/01/2013 16:27:08 PM IST	admin1	Expected Activation after Ordering (days)	0	2
30/01/2013 16:27:08 PM IST	admin1	Net price	100.0	90.0
30/01/2013 16:27:08 PM IST	admin1	Vendor account code	-	0-123-123
30/01/2013 16:27:08 PM IST	admin1	Vendor code	-	0-123

Figure 4 - History Tab Audit Trail

Release Lingering Encumbrances for EDI Invoices

Description

The purpose of this enhancement is to expand the capability provided in the Alma January release to include a release lingering encumbrance configuration option for EDI invoices. This is helpful for those circumstances where, for example, a \$100 order is placed and an invoice is received for \$40, leaving an encumbrance of \$60 for the remainder of the fiscal year. Using this capability for continuous orders enables you to release any remaining encumbrances (such as the \$60 example).

Technical Instructions

The General System Administrator or Acquisition Administrator roles can access this facility.

To access the configuration for this capability:

- 1 From the Alma main menu > Acquisitions > Acquisitions Configuration, click **Configuration Menu**.
- 2 From the General section, click **Other Settings**.

The Mapping Table page displays with the new option `release.remaining_encumbrances_for_edi`.

- 3 Click **Customize** for the `release_remaining_encumbrance_for_edi` row and change the parameter value column setting to match your preference.

For invoice lines connected to continuous order PO lines where the invoice line price is lower than the PO line price, the default value of release remaining encumbrance is taken from the new `release_remaining_encumbrance_for_edi` setting. The `True` parameter value setting means that Alma will release all the remaining encumbrance amount.

Mapping Table

You are configuring: Main Campus

Table Information

Sub System

INFRA

Updated By

-

Table Description

Customer Parameters

Table Name

CustomerParameter

Last Updated

-

Mapping Table Rows

Enabled	parameter key	parameter module	parameter value	free text
☒	assertion_over_po_line_price	acquisition	10001	
☒	auto_claim	acquisition	Y	Send Cl
☒	expended_from_fund_default	acquisition	true	
☒	exportPrepaidInv	acquisition	TRUE	TRUE th
☒	handle_invoice_payment	acquisition	true	
☒	invoice_high_total_price	acquisition	2500	
☒	invoice_not_unique	acquisition	true	
☒	invoice_prefix	acquisition	INV-	
☒	invoice_subscription_overlap	acquisition	true	
☒	po_line_prefix	acquisition	POL-	
☒	po_line_send_notification_to_vendor_on_re	acquisition	true	
☒	po_prefix	acquisition	PO-	
☒	release_remaining_encumbrance_for_edi	acquisition	true	
☒	trial_notification_before_start_date	acquisition	2	Notifica
☒	vat_percent_default	acquisition	0	

Figure 5 - release_remaining_encumbrance_for_edi Option

4 Click Save.

Order Portfolios at the Institution Level

Description

The purpose of this enhancement is to provide the capability to create an order for portfolios that are part of a package in the institution. Previously, it was only possible to order a portfolio that was part of a package via the Community Zone. This release supports use cases in which a package and its associated portfolios/titles are activated from the community zone and, at a later stage, specific portfolios/titles from within the package are purchased.

Technical Instructions

The following roles can access this facility:

- Purchasing Manager
- Purchasing Operator

To create a portfolio at the institution level as part of a package:

- 1 From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
- 2 Enter a search for an Electronic Collection.
- 3 Click the **Portfolio List** link for a resource in the search results.

The Portfolios List page displays. With the February release, there is now an option to place an order.

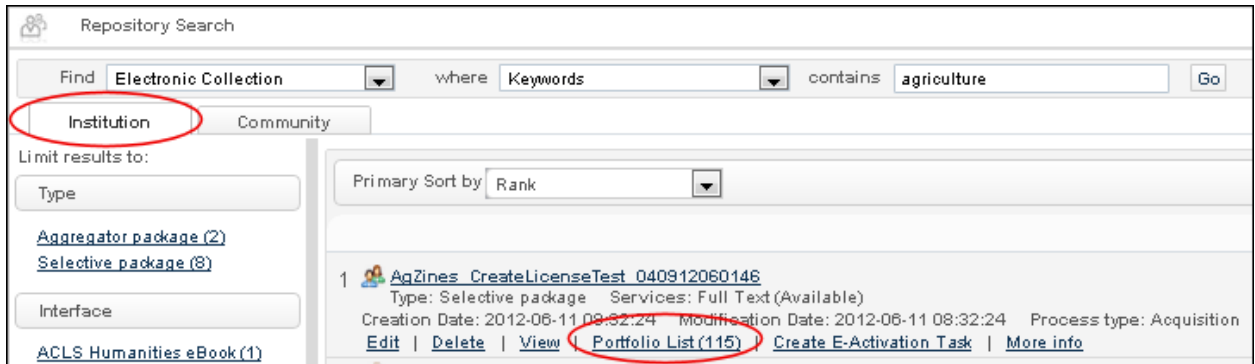


Figure 6 - Portfolio List Link

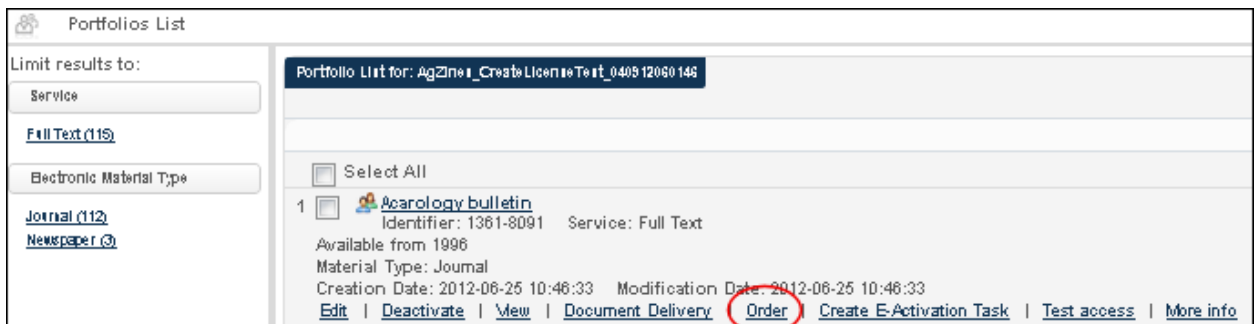
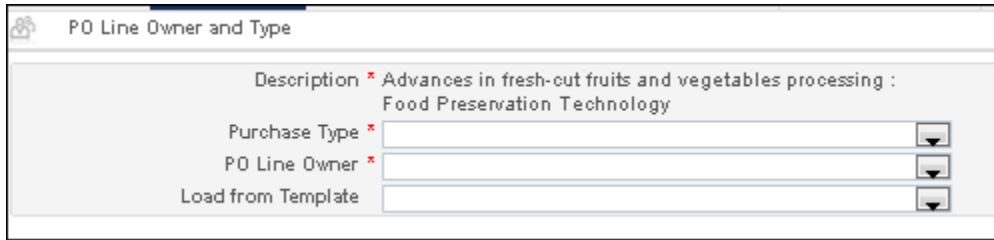


Figure 7 - Order Link

4 Click **Order**.

The PO Line Owner and Type page displays.



The screenshot shows a web form titled "PO Line Owner and Type". It contains four fields, each with a red asterisk indicating it is required: "Description" with the text "Advances in fresh-cut fruits and vegetables processing : Food Preservation Technology"; "Purchase Type" with a dropdown menu; "PO Line Owner" with a dropdown menu; and "Load from Template" with a dropdown menu.

Figure 8 - PO Line Owner and Type Options

Once you have placed an order, the order link no longer displays for that resource on the Portfolios List page.

5 Enter the required fields and click **Create PO Line**.



The screenshot shows the same "PO Line Owner and Type" form as in Figure 8, but with data entered. The "Purchase Type" dropdown is set to "Electronic Journal - One Time" and the "PO Line Owner" dropdown is set to "Main Library". The form has "Cancel" and "Create PO line" buttons at the top right and bottom right.

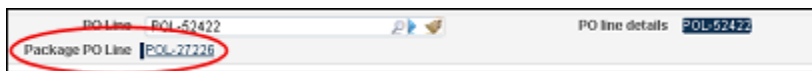
Figure 9 - PO Line Owner and Type Data Entered

6 Click **Go to inventory**.

7 Click **Edit**.

8 Click the **Portfolio** tab and view the PO line details.

There can also be a PO line package link with a different number from the PO line details number. As a result, the PO line package and the PO line can be handled separately. For example, one can be cancelled without affecting the other.



The screenshot shows a link for a "Package PO Line" with the ID "POL-27226" circled in red. Above it, the "PO Line" ID "POL-52422" is shown. To the right, the "PO line details" link is also shown with the ID "POL-52422".

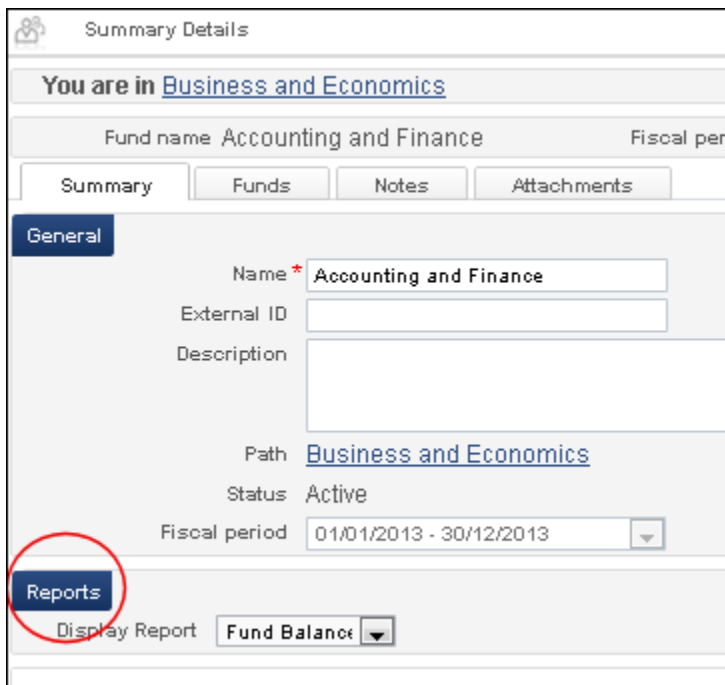
Figure 10 - PO Line Package Link

Acquisition Fund Form Changes

Description

With this release, the following fund form changes have been implemented:

- The label for the **Balance** section on the fund Summary Details page has changed to **Reports** (see Acquisitions > Acquisitions Infrastructure > Funds and Ledgers and select a fund).



Summary Details

You are in [Business and Economics](#)

Fund name: Accounting and Finance Fiscal period:

Summary Funds Notes Attachments

General

Name * Accounting and Finance

External ID

Description

Path [Business and Economics](#)

Status Active

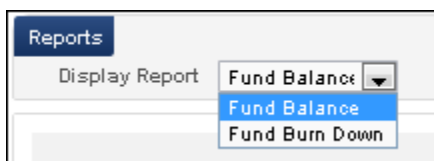
Fiscal period 01/01/2013 - 30/12/2013

Reports

Display Report Fund Balance

Figure 11 - Balance to Reports Section Label Change

- In the new Reports section, a Display Report drop-down list has been added that displays the following options:
 - Fund BalanceSelecting this option displays the previously labeled Balance report.
 - Fund Burn Down
- Selecting this option displays the new Fund Burn Down report configured in Alma Analytics.



Reports

Display Report Fund Balance

Fund Balance

Fund Burn Down

Figure 12 - Display Report Options

Other Acquisitions Enhancements

The list below highlights recent enhancements in Acquisitions:

- The invoice export job no longer fails if values for certain fields are missing.
- When loading patron-driven acquisitions (PDA) orders, the URL, proxy, and other data is now properly updated.
- When running update orders, the call number and call number type are now properly updated.

Resource Management

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

Icon for Suppressed Records

Description

The purpose of this enhancement is to provide a visual cue (an icon) to assist in identifying suppressed records.

Technical Instructions

Anyone who can perform a repository search can access this new feature.

To view the new suppressed icon:

- 1 Perform a repository search for any physical, electronic, or digital title records that may be suppressed.
 - a From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
 - b Enter your search criteria for physical, electronic, and/or digital titles, and click **Go**.
- 2 View the new suppressed icon (the eye with the slash through it).



Figure 13 - Suppressed Record Icon - Repository Search Results

The suppressed icon also displays next to suppressed records when working in the MD Editor.

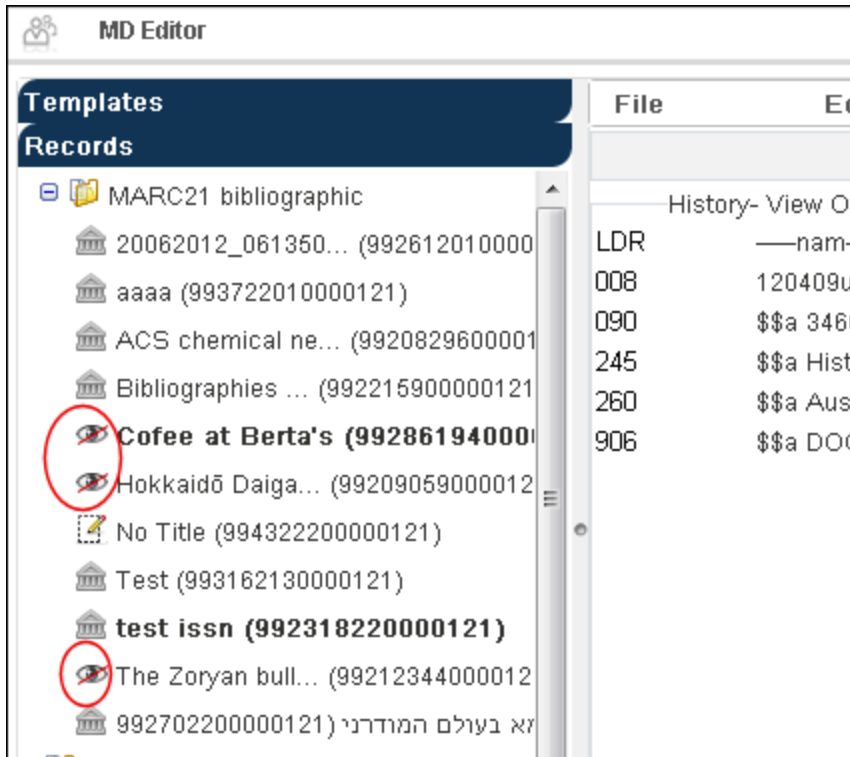


Figure 14 - Suppressed Record Icon - MD Editor

URL Portfolio Option Added

Description

The purpose of this enhancement is to provide the capability to add a URL to a local portfolio for either a standalone portfolio or for a portfolio that is part of a package. When the portfolio is part of a package, Alma uses the URL specified in the new URL option to override the URL created based on parameters taken from the package, service, and portfolio.

Technical Instructions

The Electronic Inventory Operator role can access this new capability.

To add a URL to a local portfolio:

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

The New Portfolio page displays.

The screenshot shows the 'New portfolio' form with the following sections and fields:

- Descriptive Information**
 - Creation Type: ☒ Create new title ☐ Use existing title
 - Choose Title: [Text field]
 - Title: [Text field]
 - Alternative Title 1: [Text field] Alternative Title 2: [Text field]
 - ISSN: [Text field] e-ISSN: [Text field]
 - ISBN: [Text field] e-ISBN: [Text field]
- General Information**
 - Portfolio Type: ☒ Standalone ☐ Part of a Package
 - Package: [Text field]
 - Service: [Dropdown menu] Interface Name: [Text field]
 - Library: [Text field]
- Coverage Information**
 - Date Information**
 - From Year: [Text field] Until Year: [Text field]
 - From Volume: [Text field] Until Volume: [Text field]
 - From Issue: [Text field] Until Issue: [Text field]
 - Embargo/Rolling Year**
 - Operator: [Dropdown menu] Number of Years: [Text field]
 - Number of Months: [Text field]
- Inventory Information**
 - Linking Information**
 - URL: [Text field] (circled in red)
 - Availability status: ☐ Inactive ☒ Active
- Notes**
 - Notes: [Text area]

Figure 15 - New URL Option on the New Portfolio Page

The URL option is also available in the Linking Information tab on the Electronic Portfolio Editor page.

The screenshot shows the 'Electronic Portfolio Editor' interface. At the top, there's a header with a logo and the title 'Electronic Portfolio Editor'. Below this, there are several input fields: 'Resource description' with the value 'Tomato Genetics Cooperative', 'Electronic Collection name' with the value 'AgZines CreateLicenseTest 040912060146', and 'Service Type' with the value 'Full Text'. Below these fields are four tabs: 'Portfolio Information', 'Linking Information' (which is selected), 'Coverage Information', and 'Notes'. Under the 'Linking Information' tab, there's a 'Parser' field with the value 'Bulk::BULK', a 'Service Parser Parameters' field with a hyphen, and a 'Parser Parameters' field. Below these, there's an 'Or' label, and then a 'URL' field which is circled in red. At the bottom, there's a 'Proxy enabled' section with radio buttons for 'No' (selected) and 'Yes', and a 'Proxy selected' section with a 'De' button.

Figure 16 – New URL Option in the Linking Information Tab on the Electronic Portfolio Editor Page

- 2 Enter your portfolio information to include adding a URL for the new URL option.
- 3 Click **Save**.

The new portfolio displays on the Portfolios List page.

The screenshot shows the 'Portfolios List' page. At the top, there's a header with a logo and the title 'Portfolios List'. Below this, there's a message: 'New Portfolio created with pid 5310059950000121.' Below the message, there's a section titled 'Limit results to:' with a dropdown menu showing 'Portfolio list for: Victorian literature and culture'. Below this, there's a table with one row. The row has a checkbox, a 'Select All' button, and a '1' button. The row content is 'Online: Full Text', 'Available from 1947 until 1963', 'CreationDate: 2013-02-01 18:17:51', 'ModificationDate: 2013-02-01 18:17:51', and a list of links: 'Edit', 'Deactivate', 'View', 'Order', 'Delete', 'Create E-Activation Task', and 'Test access'.

Figure 17 - Portfolios List Page

If you click Edit and select the Linking Information tab for the portfolio, you can edit the URL information.

- 4 Click **Test access**.

The UResolver Screen page displays.



Figure 18 - UResolver Screen Page

- 5 Click **view full text** to access the content.

Advanced Search Enhanced with Is Empty Option

Description

The purpose of this enhancement is to provide the capability to conduct an advanced search of physical titles/items without barcodes or other information. This is possible with the addition of a new **Is Empty** advanced search option (see the table below for a complete list of conditions with the **Is Empty** option). From your search results, you can create sets to analyze and manage/update your Alma database.

All Titles (Is Empty)	Holdings (Is Empty)	Physical Items (Is Empty)
LC call number	Permanent call number type	Inventory number
Dewey decimal class number	Permanent physical location	Public note
UDC	Library	Fulfillment note
Other classification number	Call number suffix	Internal note 1
Additional publication year	Summary holdings	Internal note 2
Language	Holdings note	Internal note 3
LC control number		Item sequence number
ISBN		PO line
ISSN		Alternative call number
ISSN link		Alternative call number type
Other standard ID		Creation date

All Titles (Is Empty)	Holdings (Is Empty)	Physical Items (Is Empty)
Government document number		Current library
National bibliography number		Currently location
Publisher number		Due back from temp location date
Standard number		Expected receiving date
Other system number		Inventory date
Notes		Is Magnetic
Local notes		Item policy
Description		Last shelf report date
MMS SIP ID		Material type
Physical description		Modification date
Country of publication		On shelf date
Genre form		On shelf seq
Publisher location		Pages
Material type		Pieces
Medium type		Process type
Originating system ID		
Originating system		
Tag suppressed		
Tag sync external catalog		
Tag brief		

All Titles (Is Empty)	Holdings (Is Empty)	Physical Items (Is Empty)
Local field 900		
Relator		

Technical Instructions

Anyone who can perform a repository search can access this new feature.

To use the Is Empty option:

- 1 From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
- 2 Click **Advanced search**.
- 3 Confirm that your Find option is set to **Physical Titles** and click **Add Conditions**.
- 4 From the Physical Items column, select **Barcode** and click **Add Conditions**.

The barcode additional condition displays with the Is Empty option available from the drop-down list.

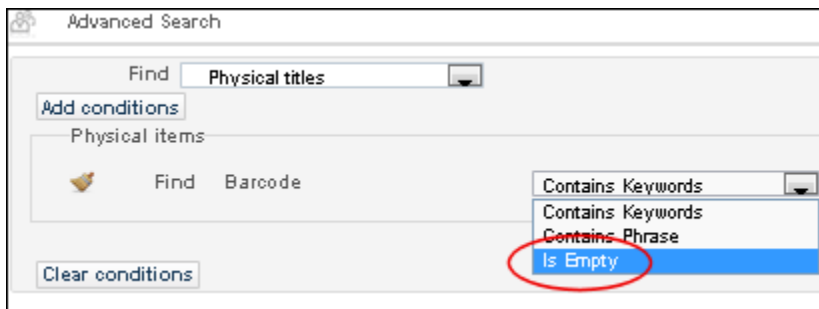


Figure 19 - Is Empty Advanced Search Option

- 5 Click **Go**.

The search results display all the physical items without barcodes.

Additional Parsing Options for Label Printing

Description

The purpose of this enhancement is to provide additional parsing options for label printing.

Technical Instructions

The General System Administrator role can access the configuration for call number parsing.

To select a new parsing option:

- 1 From the Alma main menu > Resource Management > Resource Configuration, click **Configuration Menu**.
- 2 From the General section, click **Call Number Parsing**.
- 3 View the drop-down list of options for Call Number Parsing Type.

Notice that parsing options 3, 4, 5, and 6 have been added in the February release. Refer to the table below for a description of each of these options.

Mapping Table

You are configuring: Main Camps

Table Information

Sub System: INVENTORY
Updated By: -
Table Description: Call Number Parsing Type
Table Name: CallNumber
Last Updated: -

Mapping Table Rows

Enabled	Call Number Type	Call Number Parsing Type
✓	Library of Congress classification	Parse routine 3
✓	Dewey Decimal classification	Parse routine 3
✓	National Library of Medicine classification	Parse routine 3
✓	Superintendent of Documents classification	Parse routine 3
✓	Shelving control number	Parse routine 3
✓	Title	Parse routine 3
✓	Shelved separately	Parse routine 3
✓	Source specified in subfield \$2	Parse routine 3
✓	Other scheme	Parse routine 3

Create a New Mapping Row

Call Number Type: Dewey Decimal classification
Call Number Parsing Type: Parse routine 3

[Add Row](#)

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Figure 20 - New Parsing Routines

Parsing Option	Parsing Routine
Parse routine 3	Split by a space: This parsing routine splits the call number at spaces and subfield i. If the character ^ is present in the call number, it is converted to a space but does not break at that point. Example using \$\$\$hG635.H4\$\$iA3 1989^a: G635 . H4 A3 1989 a

Parsing Option	Parsing Routine
Parse routine 4	Split by space and a period: This parsing routine splits the call number at spaces, periods, and subfield i. If the character ^ is present in the call number, it is converted to a space but does not break at that point. Example using \$\$hG635.H4\$\$iA3 1989^a: G635 .H4 A3 1989 a
Parse routine 5	Split by space and classification: In addition to splitting by a space, this parsing routine breaks between the letter and number components of the classification part of the call number (even if there is no space) and breaks on a decimal preceding a letter (even if it is not preceded by a space). Example using \$\$hKJV444.21804 A7\$\$iL63 1805: KJV 444.21804 A7 L63 1805 Example using \$\$hG635.H4\$\$iA3 1989^a: G 635 .H4 A3 1989 a

Parsing Option	Parsing Routine
Parse routine 6	Split by a space, classification, and limit length: This parsing routine splits by a space, classification, and limit length. In addition to splitting by a space and classification, it also evaluates when a line is longer than eight characters, splits on a period. Example using \$\$hKJV444.21804 A7\$\$iL63 1805: KJV 444 .21804 A7 L63 1805 Example using \$\$hG635.H4\$\$iA3 1989^a: G 635 .H4 A3 1989 a

- 4 Select a call number type and a call number parsing type from their respective drop-down lists and click **Add Row**.
- 5 Click **Customize**.

Portfolio Loader Enhanced and Electronic Jobs Run Asynchronously

Description

The purpose of this enhancement is to provide additional capabilities for loading portfolios. Specifically, the following attributes can be added to local portfolios or updated in local portfolios when they are part of the uploaded Excel:

- Publisher
- Author
- URL

Also, the loader has been enabled to handle multiple identifiers that are stored in the Excel file for uploading, and it will also be possible to add notes to any type of portfolio.

When Activate is clicked for loading portfolios, the system now submits the activation job to run asynchronously (instead of synchronously) and sends an email when the job is complete.

For additional information, refer to the **Loading Portfolios** section in the *Resource Management Guide* and online help.

Technical Instructions

The following roles can access these enhancements:

- Electronic Inventory Operator
- Repository Manager

To access the new Load Portfolios and Export Portfolios List options:

- 1 From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
- 2 Complete a search for an electronic collection.
- 3 Click **Edit**.

The Electronic Collection Editor page displays.

- 4 Click the **Additional Information** tab.

This displays the available services for this package.

Electronic Collection Editor

Electronic Collection: test for Feb release
name

Electronic Collection Description General Information Additional Information Notes

Package Information

Number of portfolios: 0 Character set: iso-8859-1

Available Services

Add Local Service

Availability	Service Type	Number of portfolios	Active from date	Active until date
	Full Text	0	-	-

Tools

Action!

Figure 21 - Electronic Collection Editor - Services Available

- 5 Click **Full Text**.

The Electronic Service Editor page displays.

- 6 Click the **Portfolios** tab.

The new Load Portfolios and Export Portfolios List buttons display.

Electronic Service Editor

Electronic Collection name test for Feb release

Service Type Full Text

Service Description Activation Information Linking Information **Portfolios**

Filter : All

[Add Local Portfolio](#) [Add Portfolios from Community](#)

[Add All Portfolios from Community](#) [Load Portfolios](#) [Export Portfolios List](#)

No records were found.

Figure 22 - New Buttons - Add Portfolios and Export Portfolios List

Refer to the procedure in the **Loading Portfolios** section of the *Resource Management Guide* and/or Alma online help for the steps to load portfolios. The **Loading Portfolios** section also provides a detailed explanation of the fields in the Excel file used for uploading portfolios.

Library Ownership for Electronic Collections and Standalone Portfolios

Description

It is now possible to indicate library ownership for electronic collections and for standalone portfolios. See the figures below.

Electronic Collection Editor Cancel Save

Electronic Collection name Factiva

Electronic Collection Description General Information Additional Information Notes

Public name Factiva

Public name (override)

Description -

Internal description

Library Main Library

Figure 23 - Electronic Collection Library Ownership Option

The screenshot shows the 'Electronic Portfolio Editor' window. At the top, there's a title bar with 'Electronic Portfolio Editor' and buttons for 'Cancel' and 'Save'. Below the title bar, the 'Resource description' field contains the text: 'Tenmon gappō = The astronomical herald. Nihon Tenmon Gakkai Tōkyō : Began in 1908. [0374-2466 0374-2466]'. The 'Interface Name' field is empty, and the 'Service Type' is set to 'Full Text'. The 'Portfolio Information' tab is selected, showing fields for 'Portfolio availability' (radio buttons for 'Not Available' and 'Available'), 'Access rights', 'Activation date', and 'Interface name'. The 'Expected activation date' field is also present. The 'Library' dropdown menu is highlighted with a red circle, showing 'Media Library' as the selected option. Below this, the 'PO Line' is set to 'POL-21823', and the 'Active license' field is empty. The 'Created by' and 'Updated by' fields both show 'Acquisition (PO line POL-21823) (22/05/2012)'. At the bottom, there are fields for 'Authentication Note' and 'Public note'.

Figure 24 - Standalone Portfolio Library Ownership Option

Ownership determines the organizational unit that manages the resource. It does not, however, determine or have an effect on who has access to the resource.

Electronic resource ownership defaults to the institution level. The library ownership is not mandatory. The Electronic Inventory Operator will now have an institution scope.

Other Resource Management Enhancements

- The N/A -- as in **Electronic title (N/A)** -- that displayed as part of the link in the Inventory section of the **Limit results to** portion of the repository search results has been removed.
- For records linked to and enriched with course information, the system now publishes the records without the course information when the course is identified as inactive.
- Integration with Google Scholar is now working properly.

Fulfillment

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

Work Order Improvements

Description

The purpose of this enhancement is to improve work order processing. With this release, work orders have been separated from requests to enable more granular processing of your workflows. This change is visible when:

- Performing a repository search for physical items
There is a new option Work Order link.
- Working with the Alma main menu
The Monitor Requests option link/label has been updated to Monitor Requests and Work Orders.
- Viewing the Resource Request Monitoring page
In the facets list, there is a new facet of Type that provides a Work Order link separate from the Requests link, permitting you to view and work on these types separately.

Technical Instructions

The following roles can access the new options:

- Anyone who can perform a repository search can access the new Work Order link.
- Requests Operator
- Fulfillment Services Operator
- Fulfillment Services Manager

To process a work order request:

- 1 From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
- 2 Enter a search for a physical item and click **Go**.
The Work Order link displays with each item in the search results list.

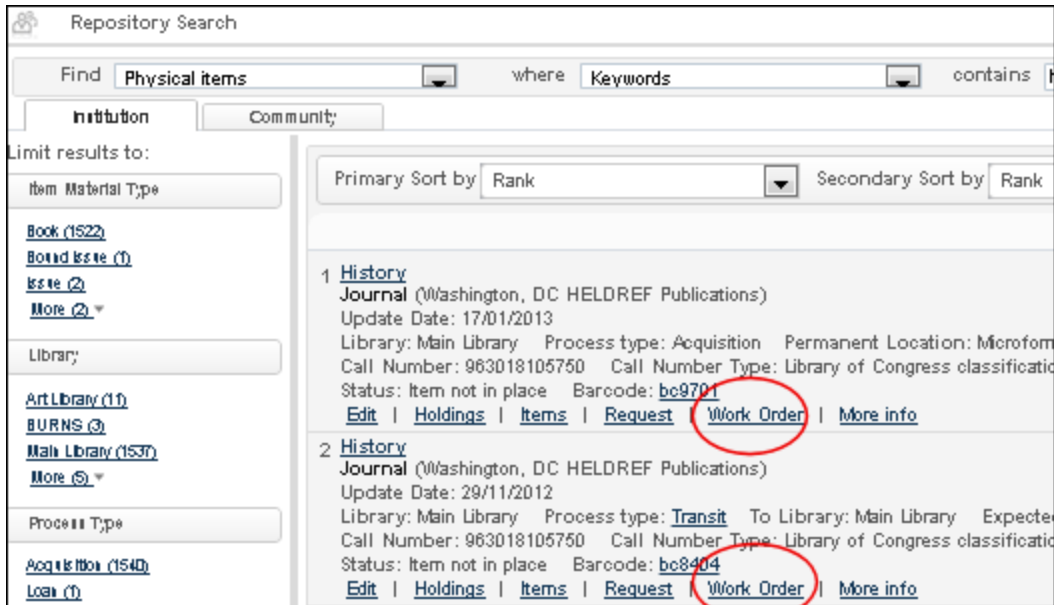


Figure 25 - Work Order Link

3 Click Work Order.

The drop-down list displays only work order options.

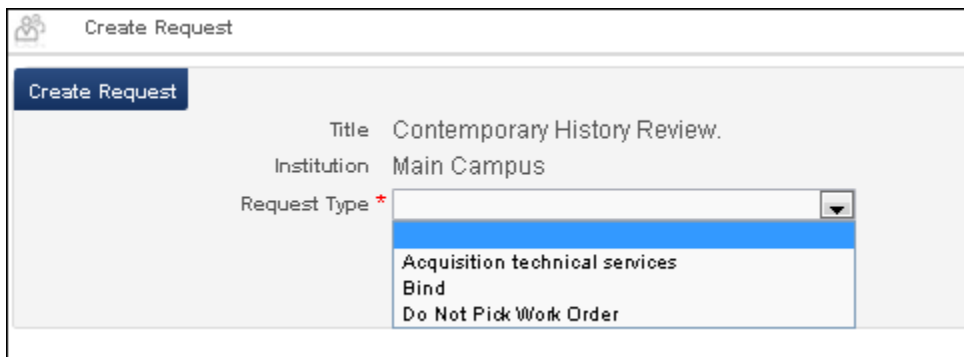


Figure 26 - Drop-Down List for Work Orders

4 Select a work order option and click Submit.

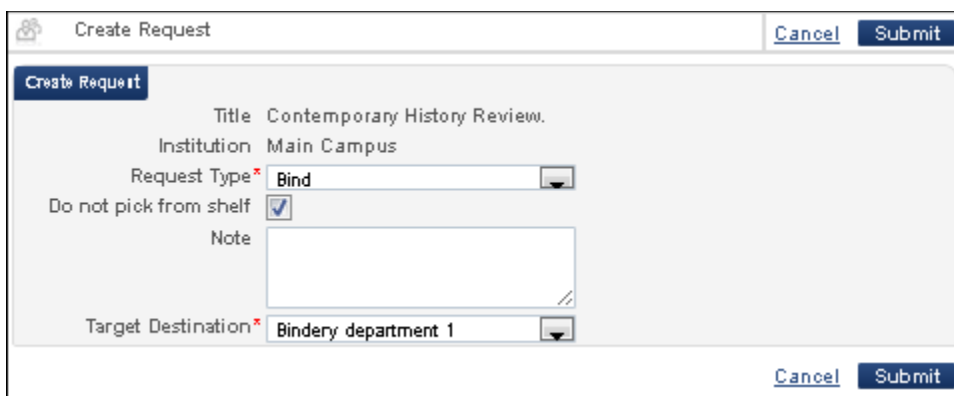


Figure 27 - Work Order Option Selected

To display work orders separately from other requests:

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

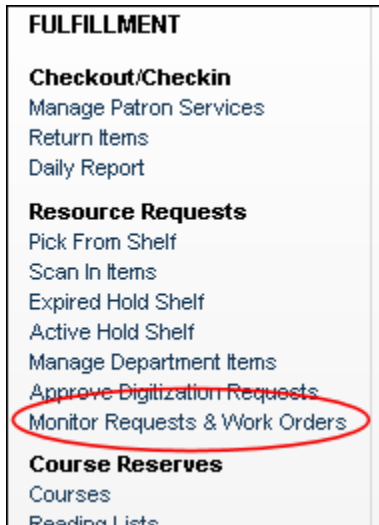


Figure 28 - Monitor Requests and Work Orders

The Resource Request Monitoring page displays. When work orders and requests both exist, the Work Order and Request links display in the facets list.

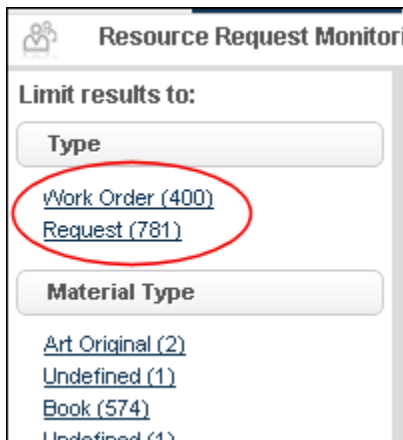


Figure 29 - Work Order and Request Links

- 2 Click **Work Order**.

The display refreshes to show only the work orders.

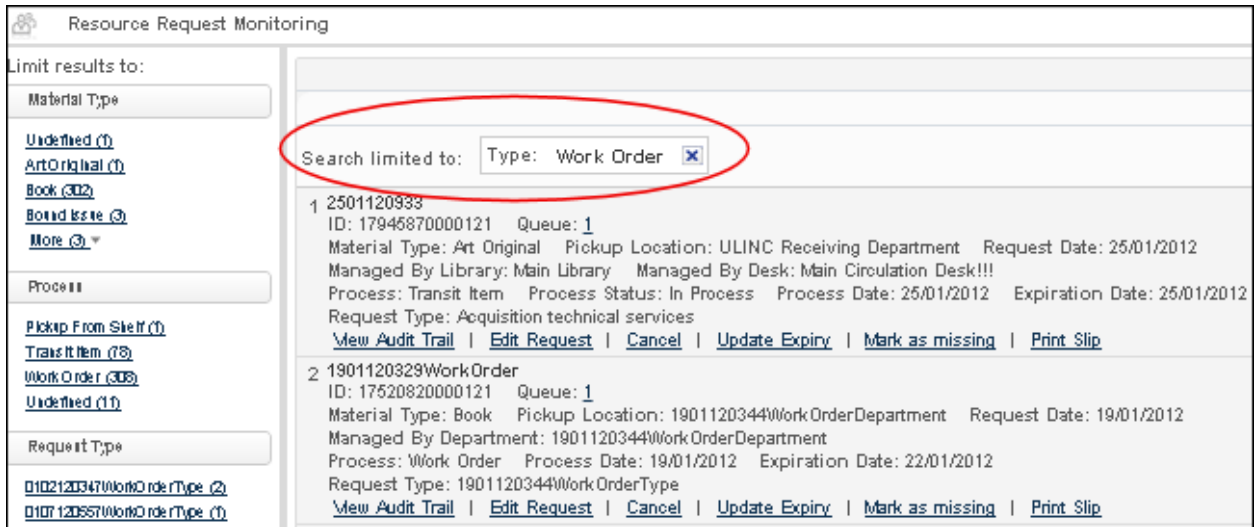


Figure 30 - Work Order Display

Items Requiring Action Enhanced

Description

The purpose of this enhancement is to provide additional options for items requiring action and to improve reporting with the jobs that are run.

The following new options have been added to Items Requiring Action (Fulfillment > Advanced Tools > Items Requiring Action):

- Items that are claimed to be returned
- Loaned items that are lost

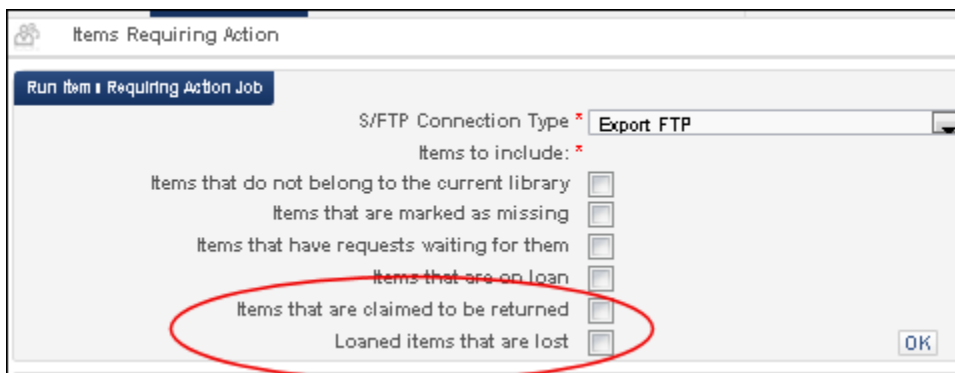


Figure 31 - New Options for Items Requiring Action

The reporting has been enhanced:

- By separating the job results/reports into different files for each option selected from the **Items to include** list instead of having them all in one single file
- For the items reported by selecting the **Items that do not belong to the current library** option, a separate file is created for each library to which the items belong, with the code of the library included in the file name

The following roles can access this new capability:

- Requests Operator
- Fulfillment Services Operator
- Fulfillment Services Manager

SIP2 Self-Check Support for 09/11 Messages

Description

The purpose of this enhancement is to provide additional SIP2 self-check support for the following messages:

- Check-in (09)
- Check-out (11)

The self-check machine sends cancel check-in and cancel check-out requests to Alma in cases where the machine was unable to complete the transaction and needs Alma to reverse the action it performed. This can occur, for example, in a case where a patron tries to check out an item through the self-check machine and Alma responds with success but the machine was unable to demagnetize the material. In this case, the self-check machine sends a cancel check-in message. Alma reverts the item back to its original status and unloans the item.

When the self-check machine sends the check-in (09) message with the cancel flag (BI field) set to Y, Alma:

- Activates a delete loan action on the item's loan
- The check-in response message includes the screen message (AF) *Loan Cancelled*.
- If the item is magnetic, the resensitize flag is set to Y

When the self-check machine sends the check-out (11) message with the cancel flag (BI field) set to Y, Alma:

- Cancels the transit status if it has been created by the return action
- Re-instates the last loan on the item

- Cancels overdue fines that may have been created by the return
- Includes the screen message (AF) *Return Cancelled* in the check-out response message
- Sets the desensitize flag to Y if the item is magnetic

Print Return Receipts

Description

The purpose of this enhancement is to provide options that define whether to print return receipts at a particular circulation desk automatically.



Figure 32 - Print Return Receipts Options

When you select the option to automatically create return receipts, you have the option to specify that the receipt is provided via email or printed at the circulation desk. The receipt is printed or emailed after processing has been completed by the circulation desk operator for all the items that the patron returned and the operator clicks Done.

When the system is not configured for automatically creating return receipts, there is still a manual option, Send Return Receipt, that can be selected at the circulation desk.

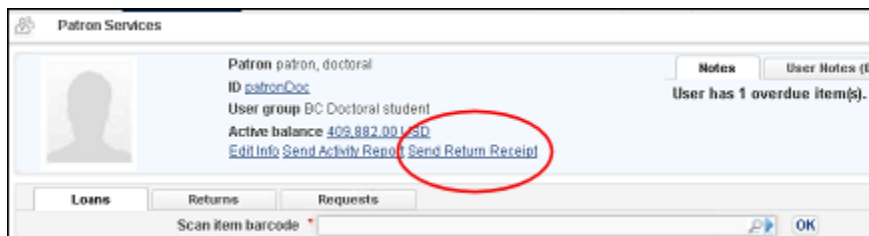


Figure 33 - Send Return Receipt Circulation Desk Link

In conjunction with the return receipt capability, there is also a letter that you can customize for the return receipt.

Return Receipt Letter

patron, doctoral
10 Main Street

Dear Sir/Madam patron

The following loans were returned to the library :

Loans:

Title	Description	Author	Due date	Return date	Fine	Library
The Tao of Pooh			18/12/2012 09:00:00 EST	31/01/2013 09:33:29 EST	78.00 USD	

Sincerely

Circulation Department

Figure 34 - Return Receipt Letter Example

Technical Instructions

The Fulfillment Administrator role can configure this new capability.

To configure automatically creating return receipts at a circulation desk:

- 1 From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.
- 2 From the **You are configuring** list, select the library of the circulation desk(s) to be configured.
- 3 From the Library section, click **Circulation Desks**.
- 4 To add the automatic return receipt option to an existing circulation desk, click **Actions > Edit** for a specific circulation desk.

The General Details tab displays.

- 5 In the Printing Information section, select **Creates return receipts**.
The display refreshes with an additional option for receipt destination.
- 6 From the **Receipt destination** drop-down list, select **User preferred email** or **Circulation desk printer**.
- 7 Click **Save**.

To customize the return receipt letter:

- 1 From the Alma main menu > General > General Configuration, click **Configuration Menu**.
- 2 From the General Configuration section, click **Letter emails**.
- 3 Click **Actions > Customize** for the Return Receipt Letter.
- 4 Click **Customize** for any row you want to edit.

Code Table

CancelCustomize

You are configuring: Main Campus

Organization Unit Us1

Table Information

Sub System

LETTER

Table Name

Return Receipt Letter

Updated By

-

Updated on

-

Table Description

Returned Items

Returned Item

LanguageEnglish

Tools

Enabled	Code	Description	Updated By	Last Updated	Language	
	author	Author	-		English	Customize
	department	Circulation Department	-		English	Customize
	dear	Dear Sir/Madam	-		English	Customize
	description	Description	-		English	Customize
	due_date	Due date	-		English	Customize
	fine	Fine	-		English	Customize
	library	Library	-		English	Customize
	loans	Loans:	-		English	Customize
	letterName	Return Receipt Letter	-		English	Customize
	subject	Return Receipt Letter	-		English	Customize
	return_date	Return date	-		English	Customize
	sincerely	Sincerely	-		English	Customize
	inform_returned_items	The following loans were returned to the library at the	-		English	Customize
	title	Title	-		English	Customize
	addressFrom	Your.Department@organization.com	-		English	Customize

Tools

1001Customize

Figure 35 - Customize the Return Receipt Letter

5 Click **Customize**.

User Management

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

Duplicate User Warning

Description

The purpose of this enhancement is to provide an alert that you may be creating a duplicate user. When you are creating a new user and the following information matches an existing user, the system displays a warning message that you may be creating a duplicate:

- First name
- Middle name
- Last name
- Birthday

Release a Locked User

Description

A user may get locked by the system after a number of failed login attempts. The locked user is unable to log in to Alma until either a defined time has passed, or the user manager has unlocked his record.

The purpose of this enhancement is to provide an option for the User Manager role to unlock the locked user. To easily access locked users, there is a **Locked out** filter option on the Find and Manager Users page.

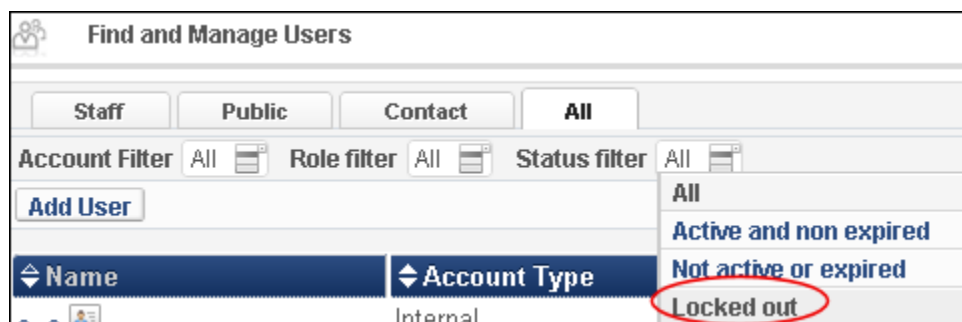


Figure 36 - Locked Out Filter

You can unlock a user as an action (**Actions > Unlock**) or you can unlock a user by clicking the **Unlock** button on the User Details page.

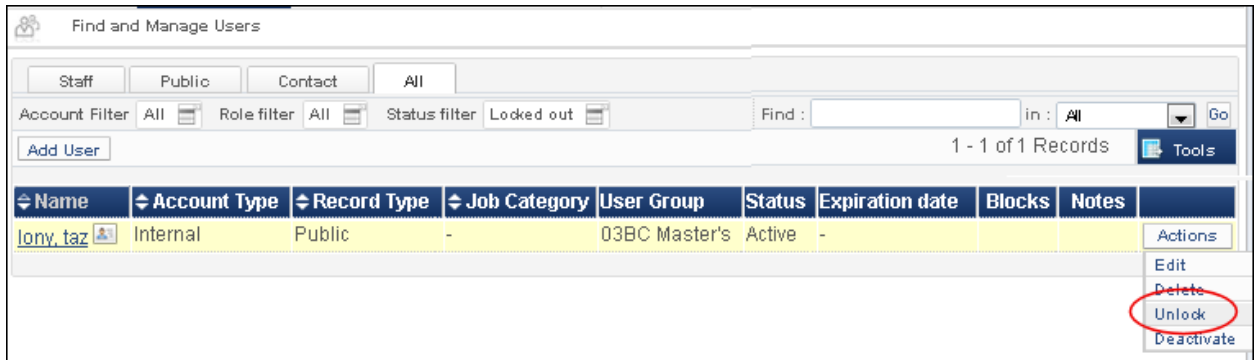


Figure 37 - Unlock Action

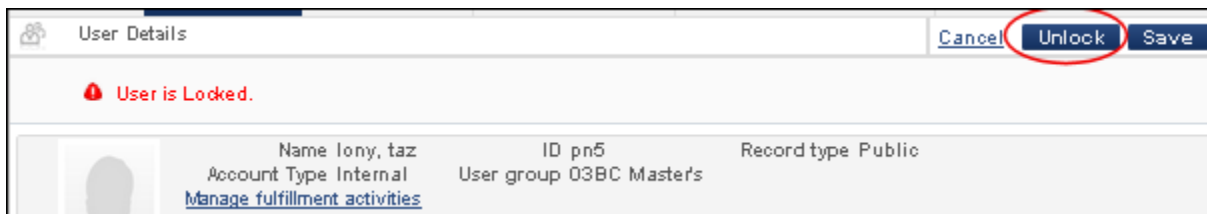


Figure 38 - Unlock Button

The Unlock button displays when the system lock-out flag equals 1 and the lock-out date is greater than the current date minus the lock-time duration.

Other User Management Enhancements

The list below highlights recent User Management enhancements:

- You now set the Electronic Inventory Operator role at the institution level not the library level.

General

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

Single Sign-on Capability

Description

The purpose of this enhancement is to provide single sign-on (SSO) capability with Alma. With this release, Alma is enhanced to be a service provider that interfaces with an authentication system such as Shibboleth for SSO. Alma supports the SAML 2.0 Web Browser SSO Profile. This enables Alma to exchange authentication and authorization information.

Technical Instructions

The General System Administrator role can access this new capability.

To define an external system in Alma for SSO:

- 1 From the Alma main menu > General > General Configuration, click **Configuration Menu**.
- 2 From the External Systems section, click **External Interfaces**.
- 3 Click **Add External System**.

SAML has been added as an option in the drop-down list for integration type.

The screenshot shows the 'External System' configuration form. The 'Integration Type' dropdown menu is open, displaying a list of options: Bursar, Z3950, SAML (highlighted with a red circle), LDAP, Payment, Self Check, Remote Storage, OCLC Client, Proxy Definition, Augmentation Definition, Discovery Interface, Sms, and User. The 'Code' field is empty, and the 'Name' field is also empty. The 'Description' field is empty. The 'Created By' field is empty.

Figure 39 - SAML Integration Type Option

- 4 Enter the external system information, select **SAML** as the integration type, and click **Next**.
- 5 Enter the Export section settings for IDP Issuer, IDP Login URL, IDP Logout URL, and User ID Attribute Name.

The screenshot shows the 'External System' configuration form with the 'Export' section expanded. The 'Code' field is 'CC_SAML', the 'Name' field is 'CC SAML System', and the 'Integration Type' is 'SAML'. The 'Export' section contains the following fields:

Field	Value
IDP Issuer	https://il-smtp01.corp.exlibrisgroup.com/idp/shibboleth
IDP Login URL	https://il-smtp01.corp.exlibrisgroup.com/idp/profile/SAML2/Redirect/SSO
IDP Logout URL	http://il-mldev03.corp.exlibrisgroup.com:8338/Shibboleth.sso/Logout
User ID Attribute Name	givenName

Figure 40 - SAML Export Section Settings

- 6 Click **Save**.

For additional information, refer to the **SAML-based Single Sign-on** section in the online help or the *Alma Integrations with External Systems* guide.

New Logo Option

Description

The purpose of this enhancement is to provide the option to specify/load logo images of different sizes. With this release, an option has been added to load an image for email and separately there remains an option to load an image for the site-wide header logo.

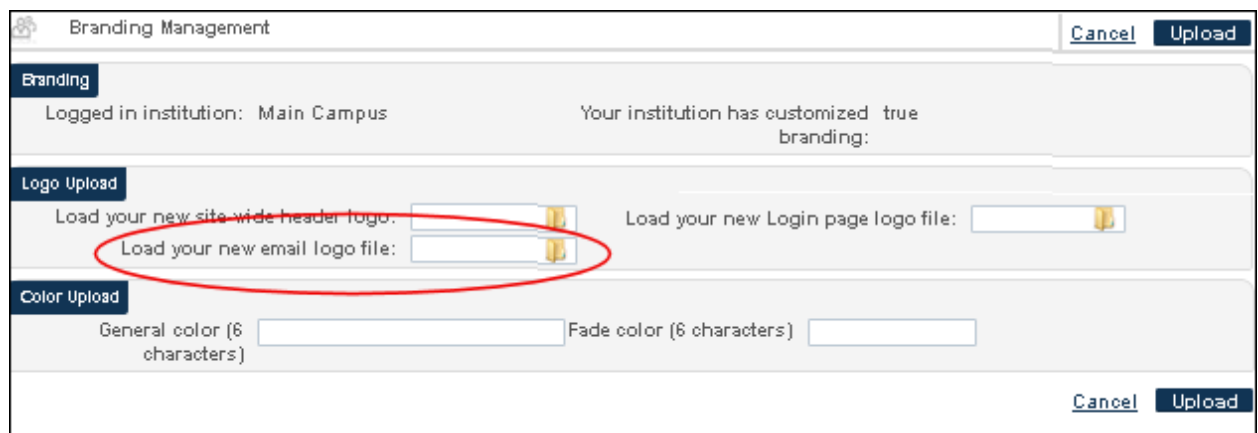
Technical Instructions

The General System Administrator role can access this new capability.

To load an email logo:

- 1 From the Alma main menu > General > General Configuration, click **Configuration Menu**.
- 2 From the Branding/Logo section, click **Back-office**.

The Branding Management page displays with the new option to load an email logo.



The screenshot shows the 'Branding Management' interface. At the top, there's a 'Branding' tab and a status bar indicating 'Logged in institution: Main Campus' and 'Your institution has customized: true branding:'. Below this, the 'Logo Upload' section is visible. It contains two file upload fields: 'Load your new site-wide header logo:' and 'Load your new email logo file:'. The second field is circled in red. To the right of these fields is another field for 'Load your new Login page logo file:'. Below the logo upload section is the 'Color Upload' section, which includes 'General color (6 characters)' and 'Fade color (6 characters)' input fields. 'Cancel' and 'Upload' buttons are located at the top right and bottom right of the form.

Figure 41 - Upload Email Logo Option

- 3 Specify the email logo and click **Upload**.

Alma responds with a confirmation after you have successfully uploaded your logo file.



The screenshot shows the 'Branding Management' interface with a confirmation message displayed in a light blue box: 'The file was uploaded and saved successfully.' The message is preceded by a blue information icon.

Figure 42 - Confirmation of Successful Upload

Alma Developers

The following section highlights the updates to Alma Developers for February 2013.

Alma Developers – User Cash Web Services

Description

The purpose of this enhancement is to provide additional options to the user cash Web services. With this enhancement, in addition to the existing `getUserCash` option, the user cash Web service enables options for:

- `userPayment` – Pay some or all of a patron's fines/fees
- `waiveFine` – Waive a patron's specific fine/fee
- `disputeFine` – Mark a patron's specific fine/fee as `in dispute`.
- `restoreFine` – Restore a patron's disputed fine/fee back to being active

For related API information, refer to the User Cash Information section in Alma Developers (Alma main menu > General > General Configuration > Alma Developers and select Web Services > User Management).

Primo

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

Additional Get It Customization

Description

The purpose of this feature is to provide the following Get It enhancements:

- Additional CSS classes have been implemented in the Get It page, enabling better control of the page look and feel by utilizing more fine-tuned CSS configuration

The following classes have been added:

CSS Class	Where
getit	Main getit div
requestOption	request options links
relationInfo	relations div
holdingsList	div that contains holdings table
empty	div of empty list label
serialSelection	div of serial materials filters
holdingInfo	ul that display holding's info
itemsList	div that contains items table
requestForm	main div of requests' forms
illRequest	main div of ill request form
digitizationRequest	main div of digitization request form
holdRequest	main div of hold request form
viewIt	main viewit div

- Additional labels in the Discovery Interface Display Logic section of Fulfillment Configuration
- A new page display in Primo for when no holdings are found

When no holdings are found, the Primo Get It page can be customized to display something similar to the following:

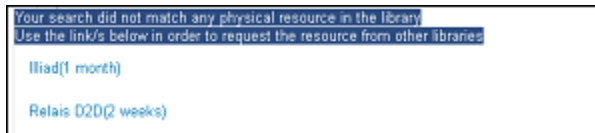


Figure 43 - Get It No Holdings

Technical Instructions

The Fulfillment Administrator role can access the new customization options.

To configure Alma with a new skin for the new CSS classes:

- 1 From the Alma main menu > General > General Configuration, click **Configuration Menu**.
- 2 From the Branding/Logo section, click **Digital Delivery**.
- 3 Click **Add Skin**.

The Add a Skin page displays.

Figure 44 - Add a Skin Page

- 4 Enter the skin details and specify the skin zip file.

You can download the default zip file that provides a `calendar.css` and `mashup.css` template.

- 5 Click **Save**.

To customize the new Discovery Interface Display Logic labels for Get It that distinguish monographs versus serials:

- 1 From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.
- 2 From the Discovery Interface Display Logic, click **Labels**.
- 3 Scroll through the list of label options to locate the ones for distinguishing between monographs and serials as shown in the example below.

c.uresolver.getit2.request.monograph	Request
c.uresolver.getit2.request.serial	Request

Figure 45 - Get It Label Options Distinguishing Monographs Versus Serials

The following list highlights all the new labels that have been added.

- c.uresolver.getit2.ill_request.monograph
 - c.uresolver.getit2.ill_request.serial
 - c.uresolver.getit2.digitization_request.monograph
 - c.uresolver.getit2.digitization_request.serial
 - c.uresolver.getit2.request.monograph
 - c.uresolver.getit2.request.serial
- 4 Edit the label options to match your preferences by clicking **Customize** for each applicable row and editing the label parameter.
 - 5 When you are finished, click the **Customize** button for the Code Table page.

To customize the new no holdings display customization options for Get It:

- 1 From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.
- 2 From the Discovery Interface Display Logic, click **Labels**.
- 3 Scroll through the list of label options to locate the ones for `holding_list.empty`.

Code	Description
c.uresolver.getit2.holding_list.empty.top	Your search did not match any physical resource in the library
c.uresolver.getit2.holding_list.empty.signed_in_user	Use the following in order to get what you need

Code	Description
c.uresolver.getit2.holding_list.empty.signed_in_user.no_services	There are no services available for you
c.uresolver.getit2.holding_list.empty.guest_user	In order to receive options to request the resource from other libraries, please sign-in
c.uresolver.getit2.holding_list.empty.bottom	Having problems? Please contact the staff

c.uresolver.getit2.holding_list.empty	No holdings were found
c.uresolver.getit2.holding_list.empty.top	Your search did not match any physical resource in the library
c.uresolver.getit2.holding_list.empty.sigl	Use the link/s below in order to request the resource from other libraries
c.uresolver.getit2.holding_list.empty.sigl	There are no services available
c.uresolver.getit2.holding_list.empty.bot	Having problems? Please contact the staff
c.uresolver.getit2.holding_list.empty.gue	In order to receive options to request the resource from other libraries, please sign in

Figure 46 - hold.list.empty Options

- Edit the label options to match your preferences by clicking **Customize** for each applicable row and editing the label parameter.
- When you are finished, click the **Customize** button for the Code Table page.

General Electronic Service Added

Description

The purpose of this enhancement is to provide the ability to define general electronic services such as Search in ProQuest Dissertations, Ask a Librarian, and so forth that will be presented to patrons in Primo View It and Get It tabs.

Additional services
ProQuest
Search here for dissertations
Amazon
Search for your book

Figure 47 - Electronic Service Example (View It Display)

Technical Instructions

The Fulfillment Administrator role can configure this new capability.

To configure general electronic services in Alma:

- 1 From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.
- 2 From the Discovery Interface Display Logic section, click **General Electronic Services**.
- 3 Click **Add Service**.

The Add Service pop-up window displays.

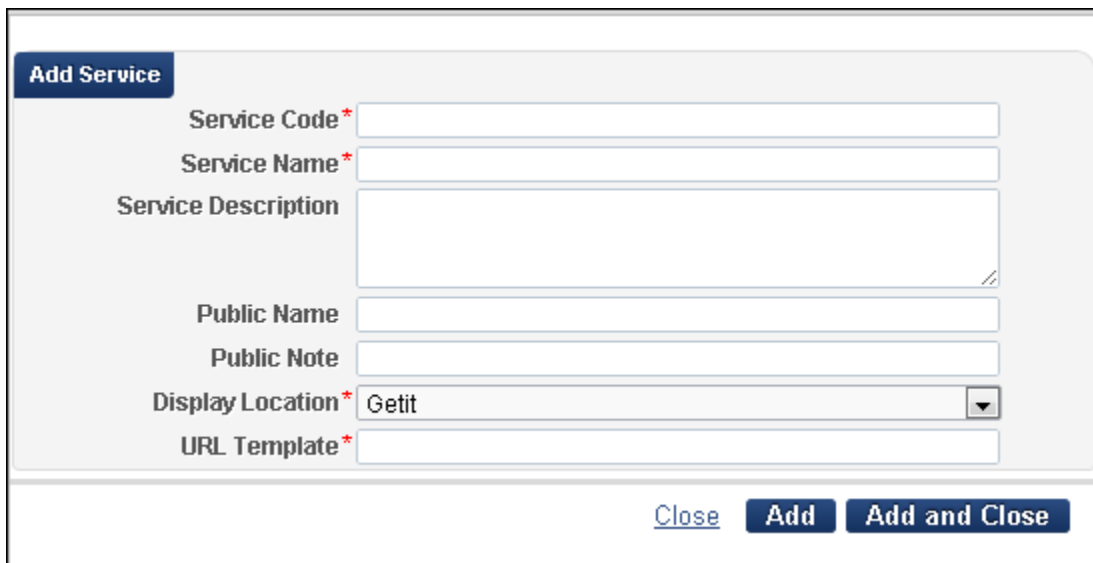


Figure 48 - Add Service Pop-Up Window

- 4 Enter the service information.

The Public Name and Public Note that you enter display in Primo.

The URL Template parameter identifies where the patron is redirected when the external service link is clicked.

The example identified in this procedure is for setting up ProQuest dissertations. The complete URL for the URL Template option is:

```
http://gateway.proquest.com/openurl?res_dat=xri%3Aapqm&title={rft.atitle}&rft_val_fmt=info%3Aofi%2Ffmt%3Akev%3Amtx%3Adissertation&url_ver=Z39.88-2004&genre={rft.genre}
```

Add Service

Service Code* ProQuest

Service Name* ProQuest

Service Description Service for dissertations

Public Name ProQuest

Public Note Search here for dissertation

Display Location* Getit & viewit

URL Template* http://gateway.proquest.com/openurl?res_dat=xi%3Aqpm&

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

Figure 49 - Electronic Service Information Entered

5 Click **Add and Close**.

The new service displays on the General Electronic Service page with the following action options:

- Remove
- Edit

Service Name	Service Code	Public Name	Service Description	Display Location	Actions
ProQuest	ProQuest	ProQuest	Service for dissertations	Getit & viewit	Remove Edit

Figure 50 - Electronic Service Added

6 To configure additional service details, click **Actions > Edit**.

The Service Details page displays.

Service Details

Service Code ProQuest

Service Name ProQuest

Service Description Service for dissertations

Service Details Service Availability Rules

Service Code * ProQuest

Service Name * ProQuest

Service Description Service for dissertations

Public Name ProQuest

Public Note Search here for dissertation

Display Location * Getit & viewit

URL Template * [http://gateway.proquest.com/openurl?res_dat=xi%3Aapqm&atile=\(rft.title\)&rft_val_fmt=info%3A](http://gateway.proquest.com/openurl?res_dat=xi%3Aapqm&atile=(rft.title)&rft_val_fmt=info%3A)

Enable without login ☒ No ☐ Yes

Figure 51 - Service Details Page

7 For Enable without login, select **Yes** or **No**.

8 Click the **Service Availability Rules** tab.

9 Add a rule.

a Click **Add Rule**.

The Edit Rule page displays. This enables you to define the conditions under which the external service is displayed (`IsDisplay=True`) or not displayed (`IsDisplay=False`) using bibliographic data as criteria.

b Enter the rule name (required) and description.

Edit rule Cancel Save

Edit rule

Name *

Description

Created By - Created On 03/02/2013

Updated By - Updated On 03/02/2013

Input Parameters

No records were found.

Name Operator Value

[Possible Values >](#) [Add Parameter](#)

Output Parameters

Name Result

IsDisplay *

Cancel Save

Figure 52 - Add Rule

- c For this ProQuest example, specify `rft.genre=dissertation` (in the Input Parameters section) and click **Add Parameter**.

Input Parameters

No records were found.

Name Operator Value

[Possible Values >](#) [Add Parameter](#)

Output Parameters

Name Result

IsDisplay *

Figure 53 – ProQuest Add Rule - Input Parameters

- d In the Output Parameters section, specify `IsDisplay=true`.

Output Parameters	
Name	Result
IsDisplay	* True ▼

Figure 54 - ProQuest Add Rule - Output Parameter

The completed input and output parameters display as in the figure below.

Input Parameters

Tools

Name	Operator	Value	
rft.genre	=	dissertation	Delete

Name

Operator

Value

▼

▼

Possible Values >

Add Parameter

Output Parameters

Name	Result
IsDisplay	* True ▼

Cancel

Save

Figure 55 - ProQuest Input/Output Parameters Entered

e Click **Save**.

10 Click **Save**.

The General Electronic Services page displays.

System Enhancements

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

Miscellaneous Export Updates

Description

With this release the following system updates and processing enhancements are being handled:

- Old export files are being deleted.
- The **Exported Processes** page name has changed to **Exported Processes From Last 30 Days** (see Resource Management > Search and Sets > Manage Exports). Only processes from the last 30 days are displayed on this page.
- The **Available until** column has been removed from the Exported Files page (see Resource Management > Search and Sets > Manage Exports and click **Action** > **View Files** for a specific row).