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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 September 2013 Release Highlights](#)
- Feature/enhancement descriptions for the respective Alma components and functional areas
 - [Analytics](#)
 - [Primo](#)
 - [Acquisition Enhancement](#)
 - [Linking Bibliographic Records to Authority Records and Other Bibliographic Records](#)

Alma September 2013 Release Highlights

Alma, as a cloud based SaaS system, from time to time requires focus on infrastructure, performance, and user experience improvements. The September 2013 release concentrates on the above-mentioned areas.

In addition, the release includes the following important areas:

- **Analytics Data Refresh**

We have invested heavily in the analytical tools available as an integral part of Alma. This now allows for the option of implementing a daily data refresh (rather than the current weekly data refresh). This daily refresh functionality will be rolled out gradually and should be available to all customers in all regions by the end of October.

- **Localization and Multilingual Support**

An additional area of focus has been on building the capabilities for localization and multilingual support. These developments will facilitate a streamlined process for ongoing translation and localization tasks.

- **Network Performance**

We are continually investigating ways to improve the user's experience through different types of technologies aimed at accelerating network performance and reducing latency. We are now at an advanced stage of testing such technologies with two customers in Australia for our Singapore Data Center.

Data Services

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

New Electronic Packages Added to the Alma CKB

- Ingenta Connect Ingenta The Mailout Trust
- Ingenta Connect American Association of Family & Consumer Sciences
- Ingenta Connect Editorial Office of Journal of China Coal Society
- Ingenta Connect Editorial Office of Journal of Plant Genetic Resources
- Ingenta Connect The Chinese Ceramic Society
- Ingenta Connect Editorial Office of Transactions of the Chinese Society of Agricultural Engineering
- Ingenta Connect Optimal Clinical Ltd.
- Safari Premium Content Library
- ebrary History Political Science
- Morgan & Claypool Synthesis Collection Five
- Japanese Free E- Journals
- ProQuest PAO Periodicals Archive Online Literary Studies
- EBSCOhost African American Historical Serials
- CRKN Informahealthcare Journals
- CAIRN CRKN Collection
- CAIRN CRKN Upgrade Collection
- JSTOR Books
- Scholarvox
- ProQuest Western Newsstand
- CRKN Institute of Physics Journals Archive Update
- Jurisquare Journals
- Oxford Handbooks Online Classical Studies

- Oxford Handbooks Online Criminology and Criminal Justice
- Oxford Handbooks Online Economics and Finance
- Oxford Handbooks Online History
- Oxford Handbooks Online Law
- Oxford Handbooks Online Music
- Oxford Handbooks Online Linguistics
- Oxford Handbooks Online Literature
- Metapress Academic Publishing
- Metapress Maney Publishing

Alma Show Me How and Videos

The following sections describe Alma Show Me How and videos for the September 2013 release of Alma.

Alma Show Me How – September

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? dialog box displays.
- 2 Select one of the processes in order to start the prompted step-by-step instructions.
For the September release, the following Show Me How scenarios are available:
 - Import Physical & Electronic Material in One File
 - Search for E-Resources in the Network Zone
 - Manual Rota Assignment for Borrowing Requests
 - Send or Print Loan Receipts
 - Move Items between Holdings Records

Alma Videos – September

The following new videos are available when you select **Help > What's New Videos** in Alma:

- Alma Resolver
- Requests Flow in Alma
- Normalization Rules

Documentation Highlights

In addition to handling minor fixes to the documentation based on feedback we received, we have added documentation, or improved upon the existing documentation, in the following key areas since the August release:

Acquisitions

- Added some further explanations to the Explanation of Purchase Types Workflow and Inventory section (under Acquisitions > Purchasing > Purchasing Workflow)
- Clarified the Invoice Status field in the creation of a PO line (under Acquisitions > Purchasing > Creating Purchase Order (PO) Lines > Manually Creating a PO Line)
- Added clarifications and explanations of the PO line renewal process (under Acquisitions > Renewals)

Resource Management

- Added explanations for each of the merge methods (under Resource Management > Managing Profiles for Record Imports > Creating New Import Profiles > Creating the Profile Using the Wizard and Integrations with External Systems > Resource Management > Importing Records from OCLC Connexion)
- Clarified the workflow steps for RSS configuration (under Resource Management > Configuring Resource Management > Configuring RSS in Alma)
- Added explanations for the options in the Coverage Information tab (under Resource Management > Inventory > Managing Electronic Resources > Managing Local Portfolios)
- Added examples of normalization rule prioritization (under Resource Management > Metadata Management > Working with Normalization Rules > Normalization Rules – Syntax and Examples)

Fulfillment

- Added documentation on the shortcut keys in the Fulfillment area (under Fulfillment > Circulation Desk Operations > Managing Patron Services)
- Reorganized and clarified several areas of Fulfillment configuration (under Fulfillment > Configuring Fulfillment), including the direct linking, display logic rules, and general electronic services

General

- Added clarifications and explanations to the Configuring Work Order Departments section (under Configuring General Alma Functions > Configuring General Activities > Configuring Work Order Departments)

Analytics

The following section describes the functions provided for the Analytics component in the September 2013 release of Alma.

Loans/Items Ratio Reports

Description

Two new reports can be created to display the ratio of loans to items per library/location and per LC classification. Each report contains three columns displaying the number of loans, the number of items, and the ratio of loans to items.

Technical Instructions

The Design Analytics role can access this enhancement.

To access the Loans/Items Ratio reports in Alma Analytics:

- 1 From the main Alma menu, select **General > Analytics > Design Analytics**.
- 2 Open the Fulfillment Dashboard (**Open > Shared Folders > Alma > Fulfillment > Dashboards > Fulfillment Dashboard**), select **Loans Items Ratio**, and click **OK**.

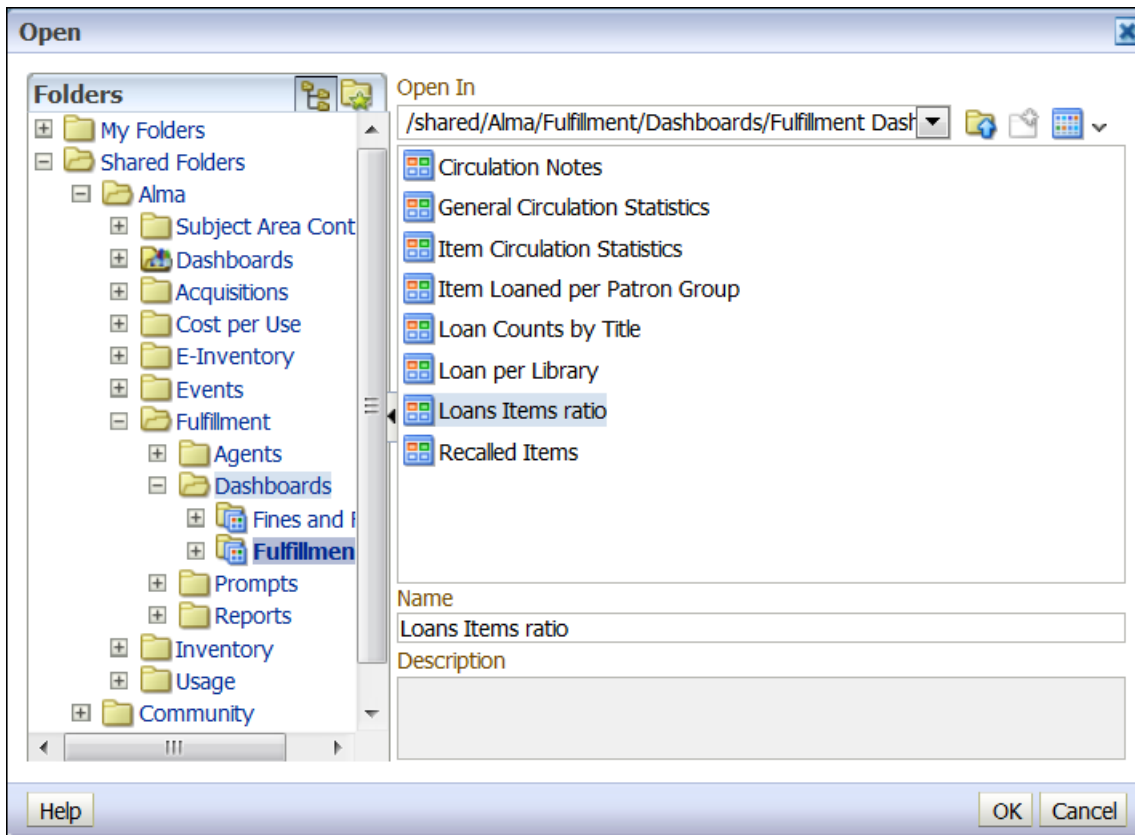


Figure 1 – Fulfillment Dashboard > Loans Items Ratio

The Loans Items Ratio tab is displayed.

- 3 Select the first level LC classification(s) as well as the library name and location(s) for which you want to view data, and click **Apply**.

The Loans - Items Ratio per Classification and Loans - Items Ratio per Location reports are displayed.

For example:

Loans - Items ratio per Classification			
Group1	Loans	Num of Items	Loans/Items
Academies and learned societies		2	
Agriculture (General)		2	
American literature		1	
Armies: Organization, distribution, military situation		9	
Astronomy		25	
Biology (General)		26	
Books (General). Writing. Paleography		6	
Chemistry		2	
Christian Denominations		1	
Christianity		4	
Commerce		12	
Communities. Classes. Races		1	
Economic history and conditions	16	124	0.129
Engineering (General). Civil engineering (General)	3	37	0.081
English literature		3	
Environmental technology. Sanitary engineering		2	
Fiction and juvenile belles lettres	11		
General legislative and executive papers		33	
Geology		1	
German literature		1	
History (General)		4	
History of Africa		1	
Home economics	7		
Indexes	1		
Industries. Land use. Labor	1	53	0.019
International law, see JZ and KZ		2	
Judaism		2	
Law in general. Comparative and uniform law. Jurisprudence		6	
Law of the United States		4	
Libraries		7	

Figure 2 – Loans/Items Ratio per Classification Report

Loans - Items ratio per location				
Library Name	Location Name	Loans	Num of Items	Loans/Items
Art Library	Ballet Music Collection	10	43	0.233
	General		33	
	Music Programmes Collection		1	
	Music Theses		1	
	Scores Collection	1	2	0.500

Figure 3 – Loans/Items Ratio per Location Report

Item Withdrawal Report

Description

A standard report for item withdrawals can now be created.

Technical Instructions

The Design Analytics role can access this enhancement.

To access the Item Withdrawals report in Alma Analytics:

- 1 From the main Alma menu, select **General > Analytics > Design Analytics**.
- 2 Open the Inventory Reports (**Open > Shared Folders > Alma > Inventory > Reports**), select **Item Withdrawals**, and click **OK**.

The Results tab displays the Item Withdrawals report, which lists the number of withdrawn items per process type (Hold Shelf, Loan, Missing, and so forth), for both items that are in place and not in place.

Life Cycle	Base Status	Process Type	Num of Items
Total Items Withdrawn			284
Deleted	Item in place	None	44
		Acquisition	152
	Item not in place	Hold Shelf	6
		Loan	1
		Managed by Department	4
		Missing	1
		Resource Sharing Request	73
		Transit	3

Figure 4 – Item Withdrawals Report

Primo

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

Available For and Library-Level Ownership of E-Resources Published to Primo

The purpose of this enhancement is to expand the Primo publishing bibliographic data by adding library-level ownership and **Available for** information to the Primo publishing bibliographic record for e-resources. Similar to the handling of library-level ownership for physical materials, this expanded e-resource data for Primo publishing supports the ability to assign records in Primo to specific scopes or views for filtering purposes.

For cases in which library ownership does not determine who can access the resource, the **Available for** information is provided in the Primo publishing bibliographic record.

Previously available in Alma, the **Available for** settings/groups are configured in Inventory Network Groups (**Resource Management > Resource Configuration > Configuration Menu**). Refer to the *Alma Resource Management Guide* for additional information.

The following new data fields are provided for Primo publishing:

- AVE (Available Electronic) for **Available for** information
 - Subfield i contains a single e-resource's **Available for** institution code
 - Subfield c contains a single e-resource's **Available for** campus code
 - Subfield l contains a single e-resource's **Available for** library code
- OWN (Ownership) for the ownership information
 - Subfield i contains a single e-resource ownership associated with the bibliographic record (the institution ID)
 - Subfield l contains a single e-resource ownership associated with the bibliographic record (the library)

If an e-resource is open to all (free usage), only one AVE field is added that contains the word ALL for each subfield.

Acquisition Enhancement

If the access provider has been specified in the PO line, Alma creates a portfolio that includes the name of the access provider.

If the access provider has not been specified in the PO line:

- If the material supplier has been specified in the PO line and the material supplier is also the access provider, Alma creates a portfolio that includes the name of the material supplier.
- If the material supplier is not the access provider, Alma creates a portfolio with no name.

Linking Bibliographic Records to Authority Records and Other Bibliographic Records

Note: We are planning to introduce a change in this area in the October and November releases and are taking this opportunity to provide you with a preview of these changes.

The October release will provide catalogers with improved navigation to the authority records that are associated with a bibliographic record that they are editing in the MD Editor.

When working with a MARC record, a magnifying glass icon to the left of the field number will indicate that there is a related authority record heading for the information contained in the field. Upon clicking the magnifying glass icon, the right side of the split screen will display the full authority record, as in the following example:

Working on -Ancient History (991111000000121) , Created by CKB (29/08/2013 14:01:36 IDT)		Morle, James, 1970- (9866330820000041)	
LDR	01919nam a22003613u 4500	LDR	00353nz a2200121n 4500
001	9910000000000000588	001	9866330820000041
005	20130527015523.0	005	19991004150026.0
006	m d	008	991004n acannaabn n aaa
007	cr -n-----	010	\$\$a n 99255797
008	130527s2013 s engld	040	\$\$a DLC \$\$b eng \$\$c DLC
020	\$\$a 0-415-16509-1	100	1 \$\$a Morle, James, \$\$d 1970-
035	\$\$a (CKB)1000000000000588	670	\$\$a Morle, James. Scaling Oracle 8i, 2000: \$\$b CIP t.p. (James Morle) data sheet (b. July 6, 1970)
035	\$\$a (EBL)168619	035	# # \$\$a (DLC) n 99255797
035	\$\$a (OCoLC)50766728		
040	\$\$a AU-PeEL \$\$b eng \$\$c AU-PeEL \$\$d AU-PeEL		
050	4 \$\$a D56.M659 2		
050	4 \$\$a D56.M659 2000eb		
082	0 0 \$\$a 930		
 100	1 \$\$a Morle, James, \$\$d 1970-		

Figure 5 – Display of Authority Record Heading

At the moment, when working in MD Editor authority-controlled fields, catalogers automatically receive a drop-down list of related authority and bibliographic records headings after entering three characters, as in the following example:

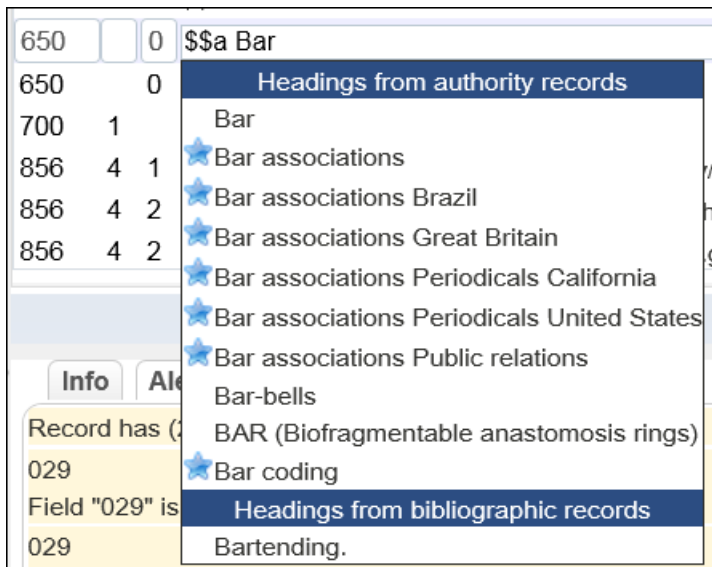


Figure 6 – Current Suggested Headings Drop-Down List

As of the October release, catalogers will view a screen such as the following after entering three characters and pressing F3. They can then use the **Select** button to choose the required heading:

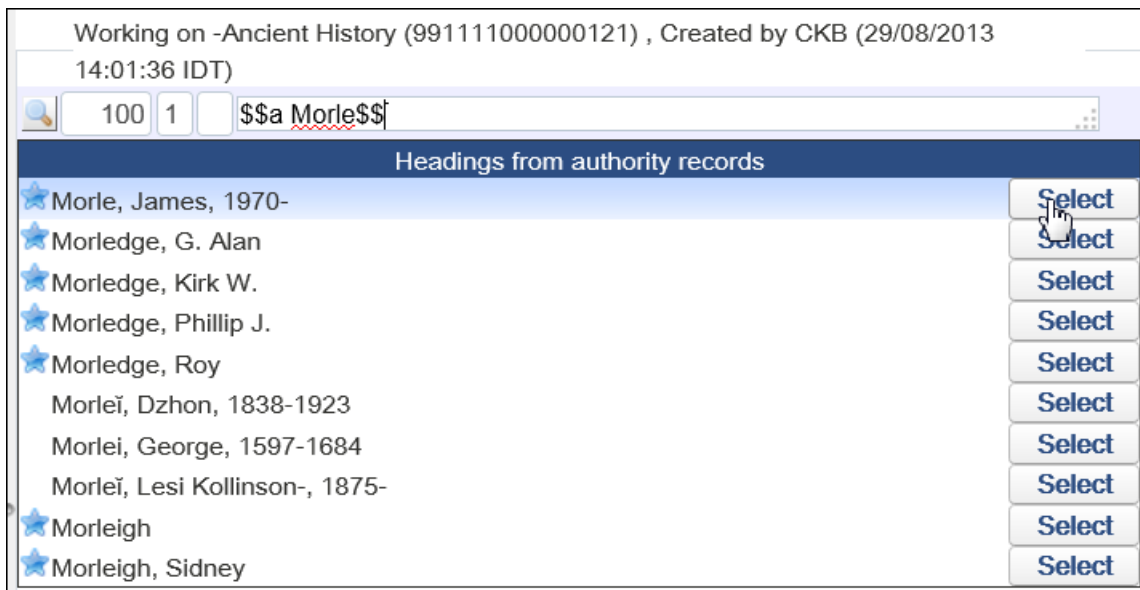


Figure 7 – New Suggested Headings Screen

For the November release, a **View** button will be added for each suggested authority record heading and the right side of the split screen will be developed so that a read-only version of the full authority record is displayed.

For example:

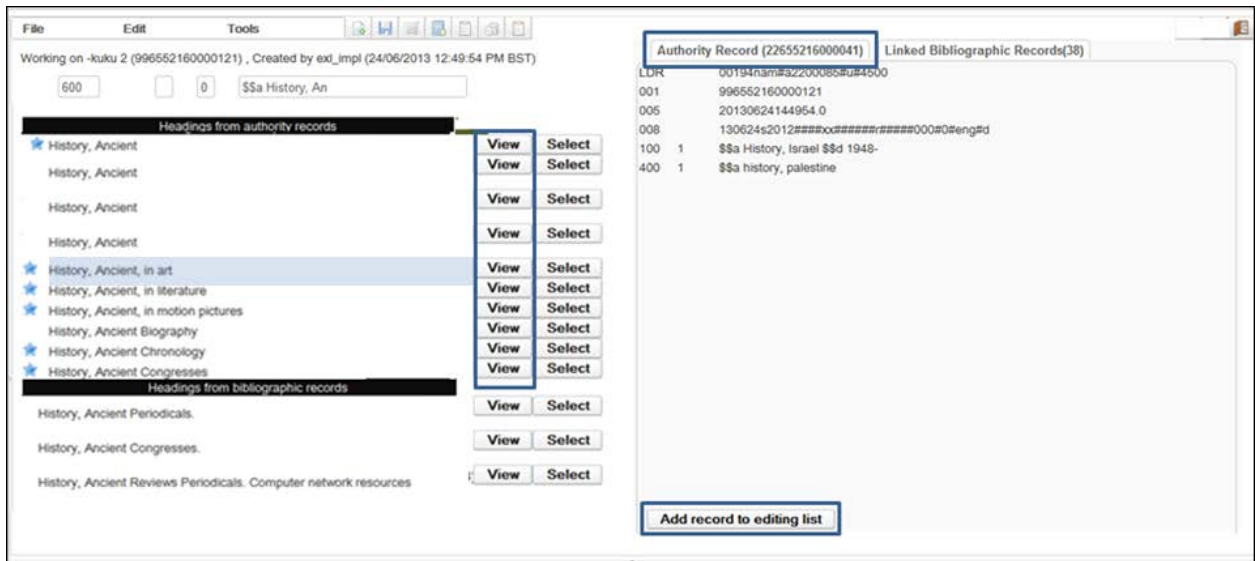


Figure 8 – View Authority Record

Note that if the authority record is local, not locked by another user, and not already included in the authority draft list, you will be able to add it to your authority draft list by clicking the **Add Record to Editing List** button.

In addition, you will be able to click the **Linked Bibliographic Records** tab on the right side of the split screen to view a list of local bibliographic records that are linked to the selected authority record. When you click the **View** link for each result, Alma will display a full, read-only bibliographic record.

For example:

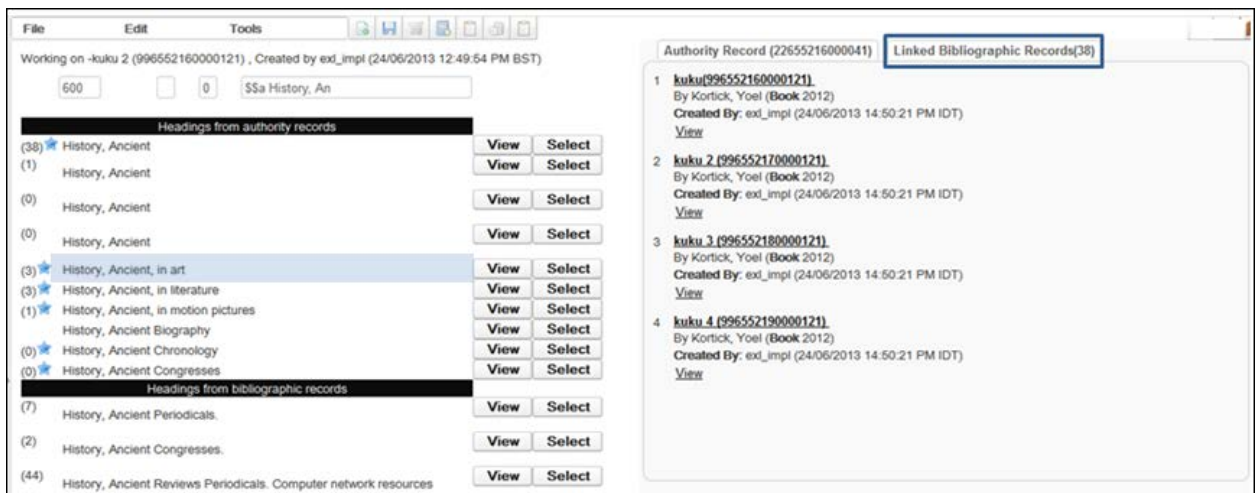


Figure 9 – View Linked Bibliographic Records

For the November release, a **View** button will also be added for each suggested bibliographic record heading and the right side of the split screen will be developed to display a **Bibliographic Records** tab, which will include a list of local bibliographic records containing

the selected bibliographic record heading value. When you click the **View** link for each result, Alma will display a full, read-only bibliographic record.

For example:

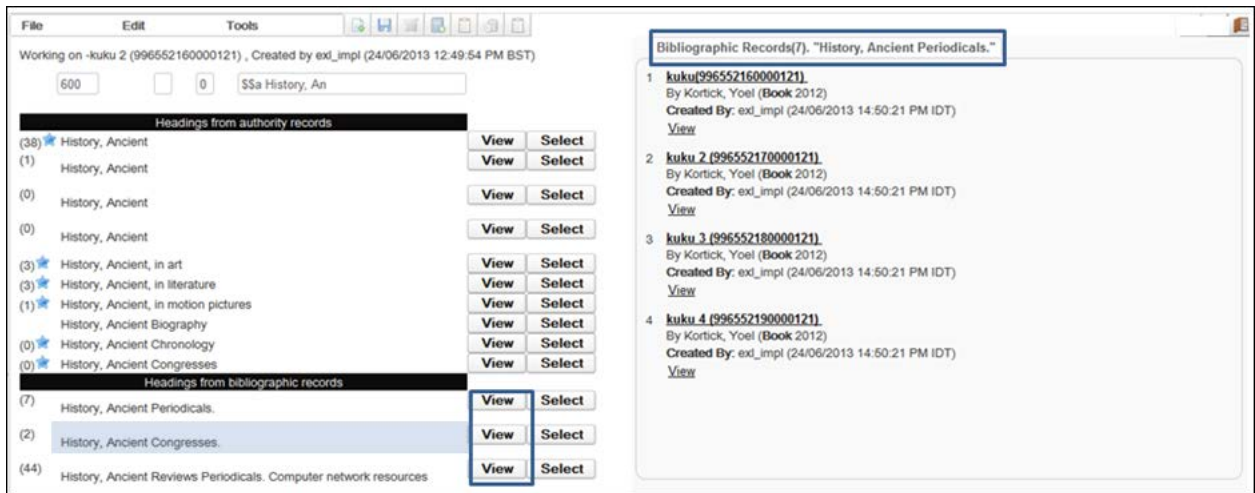


Figure 10 – View Bibliographic Records Tab