

Alma August 2016 Release Notes

**Great Inventions
Around the Alma World**
New Zealand – Arthur Lydiard
Jogging



The Alma August release provides numerous new features and enhancements. Some of these enhancements are a result of the NERS or Idea Exchange initiatives.



[Download a PDF of the Release Notes](#) - Note that the PDF includes the online help pages that describe the core functionality of the new features.

Make the Most of This Release

Action Items

- ☐ [Export URL Options Expanded](#) – Are you using Export URL functionality accessible from Resource Management configuration? If so, note that this functionality is now replaced by the new and improved Export URL job, which allows exporting URLs from all entity types, including URLs that are created dynamically by the Alma Link Resolver. We recommend that you use the new Export URL job when working with third-party link checkers, and when configuring your proxy server. Note that as of the November release, the previous Resource Management configuration Export URL functionality will be deprecated.
- ☐ [BCC Selected Notifications](#) – If you want copies of your library notices to be sent to another email address—for example, for archiving purposes or for use by another application—you can now easily do so for any notification.

Action Items

☐ [Enhanced CampusM Integration](#) – Do you use or plan to use CampusM as your library mobile application? If so, you can now enjoy a new integration option that pushes Alma-generated patron notifications to your CampusM university application so that your patrons can get their notifications directly in their university apps.

☐ [Loan Anonymization Rules](#) – Like many other libraries that utilize loan anonymization, you may be interested in setting up exceptions to the anonymization process. With this new development, you can easily set up your exceptions and data retention rules.

☐ [Customizing Primo Resource Sharing Forms](#) – Do you want to allow patrons to directly submit resource sharing requests from Primo without staff mediation? If so, you probably want better control over the look and feel of the request form. With this new development, you have a simple configuration tool that enables you to control the request form.

☐ [Available For Fields Added to E-Inventory Subject Area](#) – By reporting with the new Available For Group settings attributes in the E-Inventory subject area, you can get a more accurate and in-depth analysis of the electronic inventory. Information regarding the availability of the resources across libraries and campuses, coupled with the already existing wide variety of fields, can provide key decision makers with all the information they require.

What's New?

The following sections present the new and changed features in this release of Alma.

Acquisitions

- [Analytics Issues Report for Continuous Items](#) - You can now view an Analytics report on missing items directly from the Received Items List page when managing the items of a continuous PO line.
- [Additional Acquisitions Enhancements](#)

Resource Management

- [Brief Record Levels - Final Phase of the Implementation](#) - The final phase of the three-phase implementation for brief record levels is now complete.

- [Changing the Placement of an Authority Record](#) - While working in draft mode with an authority record, you can change the placement of the record to the Community Zone, Network Zone, or Institution Zone. Placement of authority records is limited to vocabularies to which contributions are possible. Currently, these include the GND and BARE vocabularies.
 - [Generation of Author Numbers](#) - Alma cataloging now generates the author number in MARC 21 bibliographic records based on a new cutter file.
 - [Normalization Process Enhancement for the CNMARC Bibliographic Profile](#) - Alma cataloging now has a new normalization process for the CNMARC bibliographic profile to create the 210 \$a from the 010 \$a.
 - [Export URL Options Expanded](#) - To support your ongoing needs for managing URL content, Alma's export options now provide additional flexibility for improved workflows and URL content accuracy.
 - [Sharing Alma Link Resolver Statistics with bX](#) - In the following releases, Alma will start sharing Alma Link Resolver data statistics with the bX community.
 - [Delete Electronic Collection Job](#) - Deleting electronic collections that contain portfolios is now performed by a background job.
 - [Additional Resource Management Enhancements](#)
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Digital Resource Management

- [Dublin Core Support for Bulk Ingest of Bibliographic Records](#) - Enhancements were made to several areas of Alma to better support Dublin Core format for bibliographic records.
 - [Additional Digital Resource Management Enhancements](#)
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Fulfillment



- **Idea Exchange:** [BCC Selected Notifications](#) - It is now possible to send notifications and emails with blind carbon copies (BCC) for any preconfigured email address.
- [Enhanced CampusM Integration](#) - Integration options with CampusM, the Ex Libris mobile campus solution (<http://www.campusm.com/>), now include an option to export Alma notifications to CampusM. This enables displaying patron library notifications in the mobile CampusM application.
- [Loan Anonymization Rules](#) - Loan anonymization rules now include more flexibility over which loans are anonymized.

- [Support for 3M/Biblioteca liber8:connect RFID Readers](#) - Alma may now be integrated with the 3M/Biblioteca liber8:connect equipment for RFID scan-in, check-out, check-in, and item updates.
 - [Additional Fulfillment Enhancements](#)
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Resource Sharing

- [Customizing Primo Resource Sharing Forms](#) - For resource sharing request forms in Primo, fields may now be moved, made mandatory, or hidden from the patron's view.



Watch the [Customizing Primo Resource Sharing Forms](#) video

- [Excluding Items from Resource Sharing](#) - It is now possible to define item policies to indicate that the item should be considered unavailable for a resource sharing request.
 - [Language Field in Resource Sharing Requests](#) - The language for materials in a resource sharing request may now be selected for both borrowing and lending requests.
 - [Additional Resource Sharing Enhancements](#)
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Collaborative Networks

- [Enhanced Network Search Results for the Held By Details Page](#) - The Held By Details page now includes a new left pane listing all institutions, and the Electronic Collections tab has been updated to provide more information.



Watch the [Enhanced Network Search Results](#) video

Analytics

- [Enhancements to Usage Data Details](#) - Several enhancements were implemented to the Usage Data Details dimension of the Usage Data subject area.
- [Available For Fields Added to E-Inventory Subject Area](#) - New **Available For** fields indicating group settings are available in the Portfolio dimension of the E-Inventory subject area.
- [Additional Analytics Enhancements](#)

Administration and Infrastructure

- [Sandbox Management](#) - You can view the status and history of your sandboxes, and the sandboxes of the institutions for which your institution is the contract lead with Ex Libris, on the new Sandbox Management page.
- [Alma Social Login](#) - Staff may now use selected social networks to log in to their Alma accounts.
- [Additional Administration and Infrastructure Enhancements](#)

APIs

- The material type (**secondary_type**) was added to the reading list citations API.
- A new API enables you to create, read, update, and delete representations and files. For more information, see <https://developers.exlibrisgroup.com/alma/apis/bibs>.
- A new API enables you to retrieve itemized or logical set members:

```
GET /conf/sets
GET /conf/sets/{set id}
GET /conf/sets/{set id}/\members
```

The retrieved information depends on the records included in the set.

- JSON-LD linked data responses are now enriched with wikidata links. For more information, see https://developers.exlibrisgroup.com/alma/integrations/linked_data.

Known Issues

- When importing an EOD file using the New Order profile, if the location of the item does not have a call number type, the call number type of the institution should be used as the alternative call number type. Currently, however, no alternative call number is used.
- Related to merging bibliographic records in the MD Editor, if there are no requests, the Merge Records and Combine Inventory pop-up window does not display a count of 0 (zero) requests. The count appears for requests only when it is greater than 0 (zero). The count should also appear as 0 (zero) requests when there are no requests.
- Regarding the autocomplete/pop-up assistance being provided for several UNIMARC fields in the MD Editor, there is a known issue related to UNIMARC 327 \$a and 327 \$b. These subfields are based on the same functionality and as a result, the pop-up suggestions in the MD Editor suggests both subfields' values when entering content in either the 327 \$a or the 327 \$b.
- Fixed position fields cannot be modified using the extension loader (extension packs) at this time.

- When creating an OCLC Connexion import profile in a Network Zone member institution with the **Use NZ** option selected, the **Use NZ record** option is used upon finding a match. Currently, there is no possibility to select the **Merge**, **Overlay**, or **Do not import** options instead.
- When a record is deleted in Alma, the headings associated with the record are still available when browsing bibliographic headings.
- The **Total electronic portfolios imported** count in the MD import report does not take into account the portfolios imported in the first file that is imported when the import is split into several files.
- When LDAP is used for authentication, and one or more fields values in the LDAP integration profile are missing, the values from a previously defined LDAP integration profile are used. If there is no previously defined LDAP profile, or if this profile also contains missing values for these fields, authentication will fail. In the future, mandatory fields will be enforced and the previous LDAP profile values won't be used. In the meantime, it is recommended that you fix your LDAP profile if you have missing field values.
- The **URL** condition that was added as an advanced search option under Electronic Collection when searching for electronic titles is not functioning properly.

The following previously known issue was fixed for this release:

- When LDAP is used for authentication, and one or more field values in the LDAP integration profile are missing, the values from a previously defined LDAP integration profile are used. If there is no previously defined LDAP profile, or if this profile also contains missing values for these fields, authentication will fail. As of this release, each profile is handled separately so that if a profile is missing parameters, these parameters are not taken from a previously defined profile.

Data Services

- [Library of Congress Authorities Community Zone Updates](#)
- [New Electronic Collections Added to the Alma CKB](#)
- [New External Search Resources](#)

Acquisitions - August 2016 Enhancements

Analytics Issues Report for Continuous Items

You can now view an Analytics report on missing items directly from the Received Items List page when managing the items of a continuous PO line.

To view the report:

1. On the Receive New Material page for continuous items (**Acquisitions > Receiving and Invoicing > Receive**; select the **Continuous** tab), select **Actions > Manage Items** for one of the PO lines. The Received Items List page appears.

Received Items List

Back Save

Description [AAHS Journal, AAHS title, ... ISSN](#)

Vendor/Account [EBSCO INFORMATION SERVICES / EBSCO INFORMATION SERVICES](#)

Order/Line [AV-564427/](#) POL-38819

Status Waiting for Manual Renewal (2015-07-07)

Order line type Print Journal - Subscription

PO Line Owner Eugene McDermott Library

Sent Date 10/25/2013

Bibliographic Information

Title AAHS Journal

Identifier -

Identifier Type ISSN

Vendor's Title Number 037-721-339

Publication Place -

Publisher AAHS title

Publication Date -

Frequency -

Start/End -

Language -

PO line Items

Receiving note -

Sort routine Description

Receiving status All Location All

Receive New Items

Analytics Issues Report

1 2 3 Go 1 - 20 of 67 Records Columns Tools

	Library	Location	Temp Loc	Date Received	Modified	Call Number	Alternative Call Number	Barcode	Description	Current Step	
1	Eugene McDermott Library	SpecColl Aviation	No	02/2...	05/0...	TL501 .A678	-		AAHS Newsletter - no. 146 (1st Q. 2004)	-	Edit Inve
2	Eugene McDermott Library	SpecColl Aviation	No	09/1...	05/0...	TL501 .A678	-		AAHS Newsletter - no. 147 (2nd Q. 2004)	-	Edit Inve
3	Eugene McDermott Library	SpecColl Aviation	No	06/2...	05/0...	TL501 .A678	-		AAHS Newsletter - no. 148 (3rd Q. 2004)	-	Edit Inve

Received Items List Page

2. Click **Analytics Issues Report**. The Missing Items report appears.

PO Line Reference	Vendor Code	Barcode	Title	Description	Expected Arrival Date	Receiving Date
106970-yilis	J & S Press	A104169	Anticancer research.	v.36;no.2(2016)	5/8/2016 9:21:37 AM	2/16/2016
		A104170	Anticancer research.	v.36;no.3(2016)	6/8/2016 9:21:37 AM	3/22/2016
		A104171	Anticancer research.	v.36;no.4(2016)	7/8/2016 9:21:37 AM	4/26/2016
		A104172	Anticancer research.	v.36;no.5(2016)	8/8/2016 9:21:37 AM	5/16/2016
		A104173	Anticancer research.	v.36;no.6(2016)	9/7/2016 9:21:37 AM	6/17/2016
		A104174	Anticancer research.	v.36;no.7(2016)	10/8/2016 10:21:37 AM	7/11/2016
		A104175	Anticancer research.	v.36;no.8(2016)	11/8/2016 10:21:37 AM	
		A104176	Anticancer research.	v.36;no.9(2016)	12/8/2016 10:21:37 AM	
		A104177	Anticancer research.	v.36;no.10(2016)	1/8/2017 10:21:37 AM	
		A104178	Anticancer research.	v.36;no.11(2016)	2/7/2017 10:21:37 AM	
		A104179	Anticancer research.	v.36;no.12(2017)	3/10/2017 10:21:37 AM	
		A104180	Anticancer research.	v.36;no.13(2017)	4/10/2017 9:21:37 AM	
		A52622	Anticancer research.	v.35;no.13(2016)	3/9/2016 11:51:07 AM	
		A52623	Anticancer research.	v.35;no.14(2016)	4/9/2016 10:51:07 AM	

Missing Issues Report

- Click **Open in a new window** to open the report in a new browser tab.
- Click **Expand** to open the report in Analytics and change the settings.
- Click **Close** to close the report.

Additional Acquisitions Enhancements

- The assertion **PO Line created by EOD** was added to purchasing review rules.
- For added convenience, the default field selected for the **Find** search on the transactions page is now **PO Line**.
- You can now configure the list of rejection reasons for a patron purchase request. See [Configuring Purchase Request Reject Reasons](#).
- When saving or receiving a PO line, the warning **The bib record is brief** appears for PO lines attached to records considered brief (equal to or lower than the value specified in **brief_level**).
- Patron purchase requests are now visible in Primo together with other requests initiated by the user (**My Account > Requests**). The information includes:
 - **Type** - Purchase Request

- **Title** - The title, with a link to the title (if one exists)
- **Author**
- **Status** - Status of the request
- **Location** - The owning library

Resource Management - August 2016 Enhancements

Brief Record Levels - Final Phase of the Implementation

With the August release, the final phase of the three-phase implementation for brief record levels is complete. As part of this final phase, the following changes have been implemented:

- In the Advanced Search options, the Tag Brief condition has been removed. This has been replaced by the Brief Level condition.
- The Identifying Brief Records job has been removed and replaced by the Identifying Brief Level job that is available for calculating the brief level of records. See [Identifying Brief Level](#) for more information.
- The **Brief record** field that displayed Yes or No in the MARC Record Simple View has been removed. The **Brief level** field is available instead to display the level number of the record (01-10).
- The **Brief?** set management tag indicator has been removed from the MD Editor. Instead, there is an indicator that specifies the brief level number. For more information, see [Viewing the Brief Record Level Set for a Bibliographic Record](#).
- For import profiles, the Merge/Overlay option **Do not override/merge a non-brief record with a brief version** has been replaced with **Do not override/merge a record with a lower brief version**. When this option is selected, the system checks/compares the brief level number of the record (01-10) versus a yes/no condition for whether the record is brief. See [Do not override/merge a non-brief record with a brief version](#) for more information.
- For the OCLC Connexion external system integration profile, the merge option **Do not override/merge a non-brief record with a brief version** has been replaced with **Do not override/merge a record with a lower brief version**. When this option is selected, the system checks/compares the brief level number of the record (01-10) versus a yes/no condition for whether the record is brief. See [Do not override/merge a non-brief record with a brief version](#) for more information.
- In the MARC21 Bibliographic metadata configuration profile details, the **MmsIdentifyingBriefRecords** normalization process has been removed and replaced by the **Identifying Brief Level** process. See [Identifying Brief Level](#) and the [Working with Normalization Processes](#) section for more information.
- When saving or receiving a PO line, the warning **The bib record is brief** appears for PO lines attached to records considered brief (equal to or lower than the value specified in **brief_level**).

See the June ([Brief Record Levels](#)) and July ([Brief Record Levels - Phase 2](#)) release notes regarding the previous phases of this feature's implementation and [Working with Brief Record Levels](#) for more information.

Changing the Placement of an Authority Record

While working in draft mode with an authority record, you can change the placement of the record to the Community Zone, Network Zone, or Institution Zone. The options with which you are provided when changing the placement of the authority record vary depending on how your metadata configuration is set for locally managed or community-managed authority records (see [Controlling the Display and Access of Global Authorities in the MD Editor](#)) and the vocabulary that you select when creating your draft record. For more information, see [Change Authority Placement](#) and the [Changing the Placement of an Authority Record](#) section on the [Working with Authority Records](#) page.

Placement of authority records is limited to vocabularies to which contributions are possible. Currently, these include the GND and BARE vocabularies.

Generation of Author Numbers

NOTE:

This feature has been developed for the Chinese market.

Alma cataloging is enhanced to generate the author number in MARC 21 bibliographic records. This capability is based on an author table (Cutter Sanborn Three-Figure Author Table). See [Generating Author Numbers Automatically](#) on the [Working with Bibliographic Records](#) page, [Configuring Author Number Lists](#), or [Generate Author Number](#) for more information.

Normalization Process Enhancement for the CNMARC Bibliographic Profile

NOTE:

This feature has been developed for the Chinese market.

Alma cataloging is enhanced with a new normalization process for the CNMARC Bibliographic profile to create the 210 \$a from the 010 \$a. See the [Working with CNMARC Fields, Normalization, and Validation](#) section on the [Configuring Cataloging](#) page for more information.

Export URL Options Expanded

To support your ongoing needs for managing URL content, Alma's export options have been expanded to provide additional flexibility for improved workflows and URL content accuracy. With the new Export URLs capability under **Administration > Manage Jobs > Run a Job**, you can export the following:

- Logical sets and itemized sets

- Static URLs and dynamic URLs
- URLs from electronic collection level sets
- URLs from portfolio level sets
- URLs from the 856 \$u (repeatable) in bibliographic records

With these new export options, you will be able to perform periodic validation tests to find broken links and fix them. With a file of exported URLs, it will be possible to test the URLs using third-party, external link checkers such as LinkChecker (<https://wummel.github.io/linkchecker/>). To support these third-party options, both the CVS and HTML export output formats are being provided.

This expanded capability will also help with setting up EZproxy.

For more information, see the [Exporting URLs](#) section on the [Running Manual Jobs on Defined Sets](#) page.

NOTE:

As a result of this enhancement, the **Export URLs** configuration option under Resource Management (**Resource Management > Resource Configuration > Configuration Menu > Record Export section**) is labeled **To Be Deprecated** and will be removed at some point in the future. See [Extracting Electronic Portfolio URLs - Export URLs \(To Be Deprecated\)](#) and [Viewing Extracted Electronic Portfolio URLs Job Report \(To Be Deprecated\)](#).

Sharing Alma Link Resolver Data Statistics with bX

In the following releases, Alma will start sharing Alma Link Resolver data statistics with the bX community. For Alma customers with bX installed, this capability will be automatically configured and set up in Alma to begin sharing these statistics. Alma customers that do not have bX installed may also optionally choose to share their data statistics. For more information, see [Sharing Alma Link Resolver Data Statistics with bX](#).

Delete Electronic Collection Job

The deletion of electronic collections that contain portfolios is now performed by a background job. Electronic collections can be deleted by clicking the **Delete** link for an electronic collection in the repository search results. While the job is running, the action buttons for the record are not available. The job ID is displayed at the top of the page. To monitor the job and view the job report, access Monitor Jobs (**Administration > Manage Jobs > Monitor Jobs**). If the job runs for a long time and the action links are still disabled, you can request Alma Support to restore these links. For more information, see the **Delete** entry under **Electronic Collections** in the [Actions You Can Perform on the Repository Search Results Page](#) table, as well as [Viewing the Delete Electronic Collection Job Report](#).

Additional Resource Management Enhancements

- The reports for the **Publish bibliographic records to OCLC**, **Publish holdings records to OCLC**, and **Publish holdings to Libraries Australia** jobs now contain information regarding deleted records.
- There is now an option to handle both double quotation marks and Hebrew dates in normalization rules, for conditions only. To use double quotation marks as part of a condition, use single quotation marks to enclose text in the rule (') instead of double quotation marks ("). This way you can use double quotation marks inside the text following a double slash (//). For example:

```
rule "populate 008 7-10 2016"  
when  
  ((exists '260.{*, }.c.1"\עשׁת') OR (exists '264.{*, }.c.1"\עשׁת'))  
then  
  replaceControlContents "008.{7,4}" with "2016"  
end
```

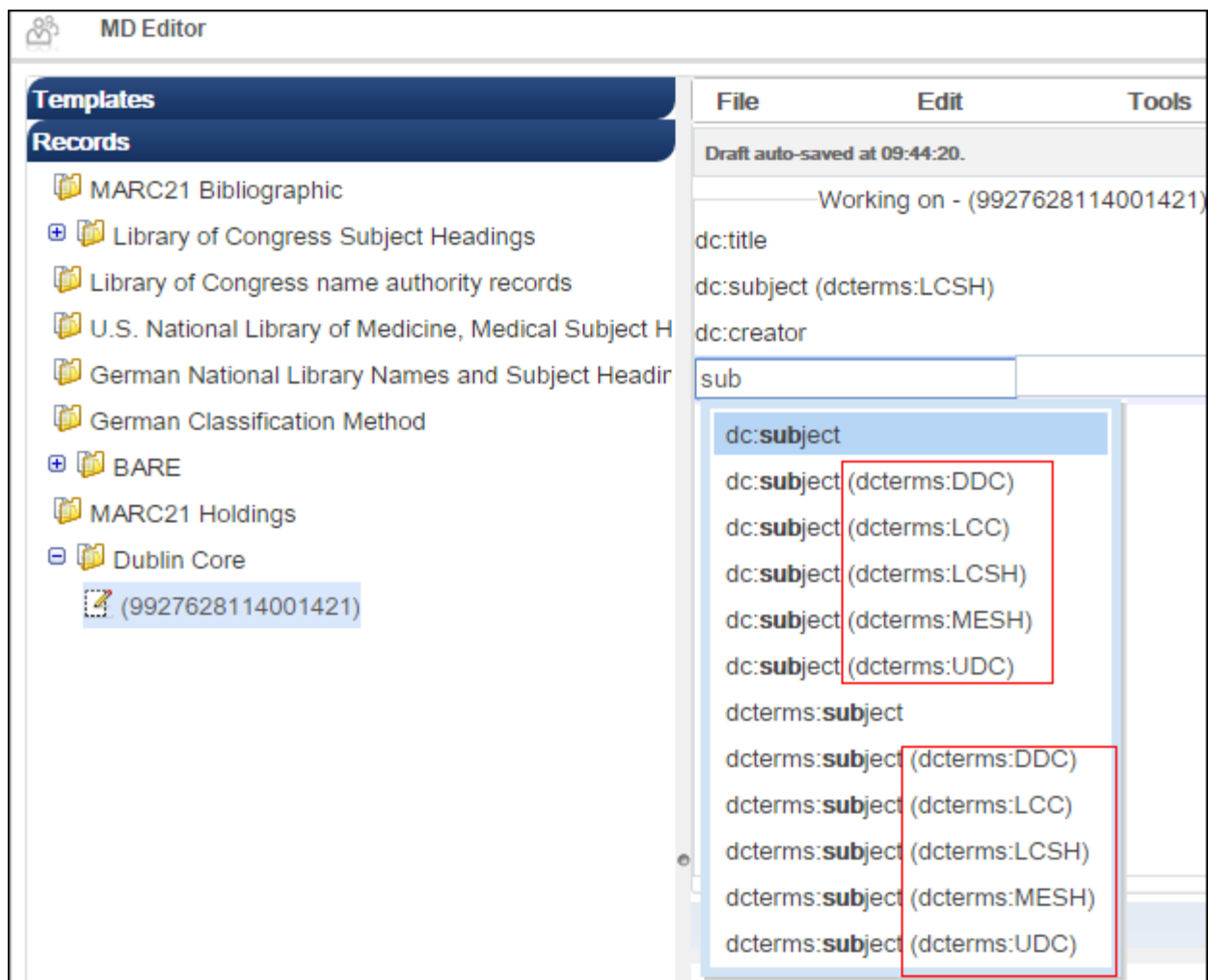
- In the MD Editor, Sanskrit and Persian are now available under **Edit > Add Alternate Graphic Representation**.

Digital Resource Management - August 2016 Enhancements

Dublin Core Support for Bulk Ingest of Bibliographic Records

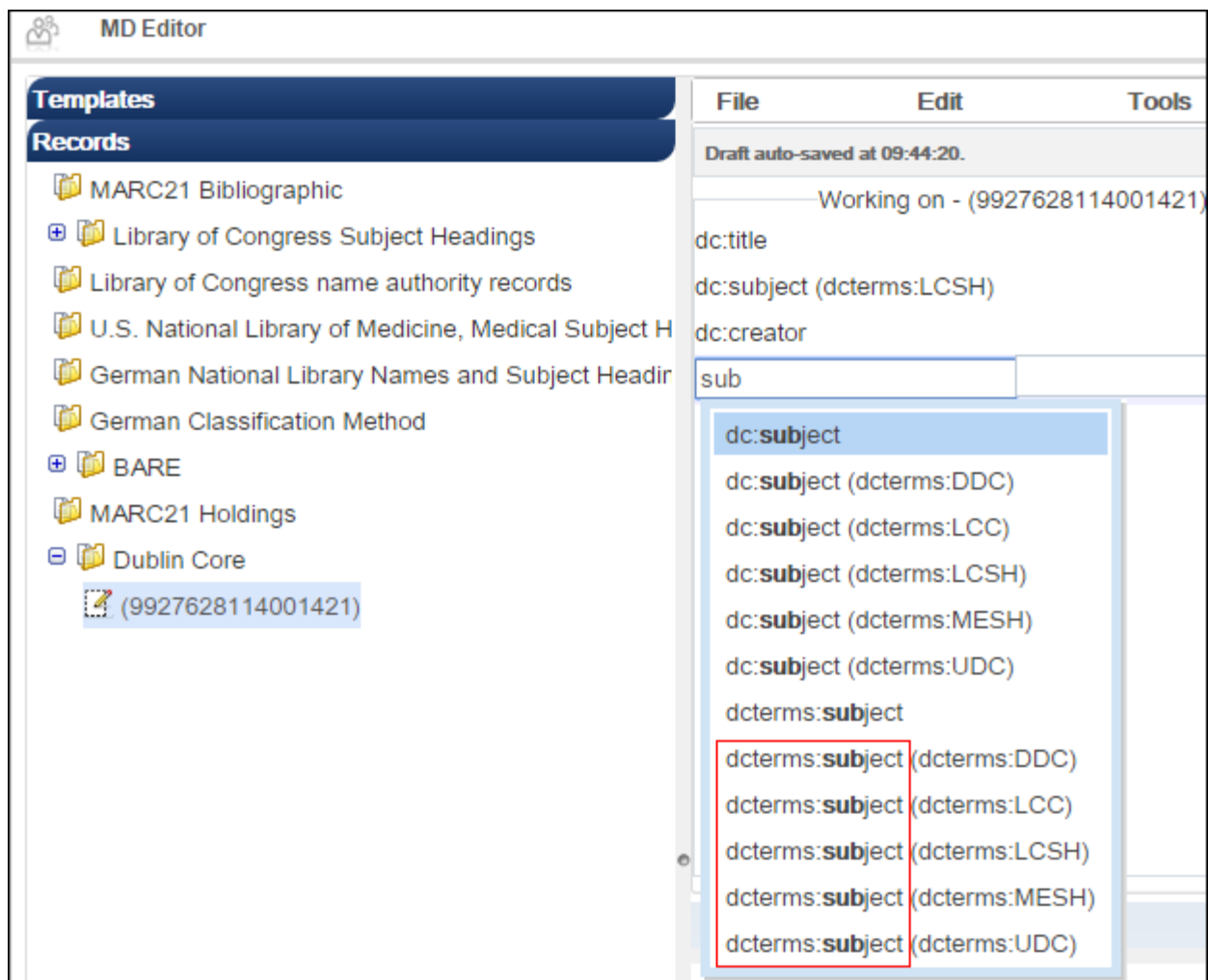
Enhancements have been made to several areas of Alma to support Dublin Core format for bibliographic records.

- In the MD Editor, when adding a metadata element with an encoding schema, a list of the schemas appears in a drop-down list. For example:



Dublin Core Encoding Schema

- The dcterms namespace has been added for DC elements in the MD Editor and when creating import profiles that use the DC format.



DCterms

This is configured in **Resource Management > Resource Configuration > Configuration Menu > Cataloging > Metadata Configuration**:

Profile Details			
Profile		Qualified Dublin Core	
Type		Bibliographic	
Fields		Normalization Processes	Validation
Field	Encoding Schema	Description	
1 dc:title	-	Title	
2 dcterms:title	-	Title	
3 dc:subject	-	Subject	
4 dcterms:subject	-	Subject	
5 dc:subject	dcterms:LCSH	Subject LCSH	
6 dcterms:subject	dcterms:LCSH	Subject LCSH	
7 dc:subject	dcterms:MESH	Subject MESH	
8 dcterms:subject	dcterms:MESH	Subject MESH	
9 dc:subject	dcterms:DDC	Subject DDC	
10 dcterms:subject	dcterms:DDC	Subject DDC	
11 dc:subject	dcterms:LCC	Subject LCC	
12 dcterms:subject	dcterms:LCC	Subject LCC	
13 dc:subject	dcterms:UDC	Subject UDC	
14 dcterms:subject	dcterms:UDC	Subject UDC	
15 dc:description	-	Description	
16 dcterms:description	-	Description	
17 dc:date	-	Date	
18 dcterms:date	-	Date	
19 dc:type	-	Type	
20 dcterms:type	-	Type	

Metadata Configuration - Qualified Dublin Core

- In View mode, the namespaces and encoding schema now appear for records in DC format.

Dublin Core Record Simple View				Back	Edit
MMS ID	99330210000121	Title	The art of worldly wisdom		
Suppress from publishing	No	Export to WorldCat	Publish Bibliographic records	Brief level	-
Record Format	dc				
Originating system	-	Originating system ID	-	Originating System Version	-
 Tools					
dc:title The art of worldly wisdom					
dc:creator Smith, John					
dc:type Interactive Resource					
Back Edit					

DC Namespaces

- You can select DC fields as conditions when performing an advanced search:

Advanced Search - Add Conditions

All titles

☐ dc:contributor
☐ dc:coverage
☐ dc:creator
☐ dc:date
☐ dc:description
☐ dc:format
☐ dc:identifier
☐ dc:language
☐ dc:publisher
☐ dc:relation
☐ dc:rights
☐ dc:source
☐ dc:subject
☐ dc:title

Advanced Search Conditions

Additional Digital Resource Management Enhancements

- In mobile devices, PDF files are now displayed as download links, so that you can download these files and view them using a PDF viewer.

- The job report produced when selecting **Remove All** to remove all titles from a collection (**Resource Management > Search and Sets > Managing Collections > Actions > Edit**) now displays the number of titles that were not removed from the collection because they contain digital inventory.

Fulfillment - August 2016 Enhancements

BCC Selected Notifications

It is now possible to send system emails with blind carbon copies (BCC) for any preconfigured email address. All letter tables will contain the new field, **bcc_address**. This may be used to send copies of letters to the relevant library's email address.


Code Table
[Back](#)

Table Information

Sub System	LETTER	Table Name	Fines And Fees Report Letter
Updated By	-	Updated on	-
Patron Facing	Yes	Table Description	Fines And Fees Report Letter
Table code	FinesAndFeesReportLetter		
Customization mode:	Specific rows can be customized		

Fines And Fees Report Letter

Filter :


Tools

	Enabled	Code	Description	Translation	Updated By	Last Updated
1		subject	Fines And Fees Report	Fines And Fees Report	-	-
2		letterName	Fines And Fees Report Letter	Fines And Fees Report Letter	-	-
3		Bcc	None	None	-	-
4		Cc	None	None	-	-
5		message	The fines and fees report is attached.	The fines and fees report is attached.	-	-
6		addressFrom	Your.Department@organization.com	Your.Department@organization.com	-	-


Tools

[Back](#)

Letter Table Example

Enhanced CampusM Integration

Integration options with CampusM, the Ex Libris mobile campus solution (<http://www.campusm.com/>), are now enhanced with an option to export Alma notifications to CampusM. This enables displaying patron library notifications in the mobile CampusM application.

The new integration option is based on the new [email BCC feature](#) which allows Alma to export any notification to an additional BCC email address (see below). CampusM uses the email to push the notification to its application interface.

Loan Anonymization Rules

Loan anonymization rules have been introduced to allow more flexibility over which loans are anonymized.

Rules may be defined based on the following parameters:

- Days since loan expired
- Days since user expiry
- Library
- Location
- Number of loans to retain
- User Group

For more on loan anonymization rules, see [Configuring Anonymization](#).

Support for 3M/Bibliotheca liber8:connect RFID Readers

In addition to the already supported 3M RFID model 896 readers, Alma may now also be integrated with the 3M/Bibliotheca liber8:connect equipment for scan-in, check-out, check-in, and item update.

For detailed information about RFID and the integration profile setup, see [RFID Support](#).

Additional Fulfillment Enhancements

- The Fulfillment Jobs Configuration page now has a selection next to each job to set the active status of each job individually.

Fulfillment Jobs Configuration
Back Save

Borrowing Activity Report Job

Status ☒Active ☐Inactive

Schedule On the 02 of every month at 08:00

Run Now

Send Courtesy Notices and Handle Loan Renewals Job

Status ☒Active ☐Inactive

Days before due date * 2

Schedule Every day at 04:00

Send Overdue Notices Job

Status ☒Active ☐Inactive

Schedule Every day at 07:00

Fines/Fees Notifications Job

Status ☒Active ☐Inactive

Schedule Not scheduled

Run Now

Anonymization Job

Status ☒Active ☐Inactive

Anonymize item loans ☐ [Loan Anonymization Rules](#)

Anonymize fines and fees ☐

Anonymize resource sharing requests ☐

Schedule Every day at 03:00

Loans - Overdue And Lost Loan Job

Status ☒Active ☐Inactive

Schedule Every day at 20:00

Loans - Due Date Correction after Calendar Change

Status ☒Active ☐Inactive

Schedule Every day at 22:00

Requests - Handle Expiration Step

Status ☒Active ☐Inactive

Schedule Every day at 04:00

Requests - Restore Temporarily Shelved Items

Status ☒Active ☐Inactive

Schedule Every day at 05:00

Requests - Recalculate after Inventory Update

Status ☒Active ☐Inactive

Schedule Every day at 23:00

Send Overdue Message to Resource Sharing Borrowing Partner

Status ☒Active ☐Inactive

Schedule Every day at 04:00

Expired Lending Request

Status ☒Active ☐Inactive

Schedule Every day at 03:00

Users - Remove Blocks

Status ☒Active ☐Inactive

Schedule Every day at 05:00

Activate/Deactivate Courses

Status ☐Active ☒Inactive

Schedule Every day at 05:00

Back Save

Fulfillment Jobs Configuration Page

- The following digital-related labels have been added to the Labels code table:

Row	Code	Default Value
207	partial.rep.viewit.sort_results.by	Sort results by
208	partial.rep.viewit.find	Find

Row	Code	Default Value
209	partial.rep.viewit.in	in
210	partial.rep.viewit.go	Go
211	partial.rep.viewit.enter_search_term	Please enter a search term
212	partial.rep.viewit.enter_et_option	Please select an entity type option
213	partial.rep.viewit.result_no_match	Your search result returns no match
214	enhanced_special_rep.all	ALL
215	enhanced_special_rep.clear	Clear
216	enhanced_special_rep.date	Date
217	enhanced_special_rep.volume	Volume
218	enhanced_special_rep.year	Year
219	ui.viewit.digital_version	Digital Version(s)
220	ui.viewit.mixed_content	mixed
221	ui.viewit.remote_rep_availability	available at:
222	c.search.bib_results.viewit.more	More...

Resource Sharing - August 2016 Enhancements

Customizing Primo Resource Sharing Forms

For resource sharing request forms in Primo, fields may now be moved, made mandatory, or hidden from the patron's view. A new mapping table has been created to define which fields are visible. The mapping table's visibility is controlled by a new parameter, **rs_use_new_mashup_form**. For more information on the parameter, see [Configuring Other Settings](#).

For detailed information about configuring the mapping table, see [Customizing Primo Resource Sharing Forms](#).

Excluding Items from Resource Sharing

It is now possible to define item policies to indicate that the item should be considered unavailable for a resource sharing request. See [Configuring Item Policy Exceptions](#).

Language Field in Resource Sharing Requests

The language for materials in a resource sharing request may now be selected for both borrowing and lending requests. The requested language is automatically communicated from the borrower to the lender and is displayed on the lender's request form as well. If email communication is used, the language element may be added to the email letter based on the **Requested_language** element that has been added to the **FulOutgoingEmailLetter** letter.

NCIP peer-to-peer messages will now include the language code if a language was selected in the request.

To select which languages are available in resource sharing request forms, see [Configuring Resource Languages](#).

In the resource sharing request, the configured languages appear in the **Language** drop-down list.

Resource Sharing Borrowing Request [Cancel](#) Dismiss Notes [Go](#) [Save and Edit](#) [Locate](#) [Save](#)

General Information Parameters

Request Attribute

Title Stone cold / David Baldacci.

Requester *

Request Status Created borrowing request

Requested Format Physical

Requested Media Any

Allow Other Format ☐

Preferred Send Method

Language

Date Needed By

Delivery Location

Requested Pickup Location *

For Reading-Room Use Only ☐

Shipping Cost

Patron Request Cost

Willing to Pay

Agree to Copyright terms ☐

Needs patron information ☐

Request Note

Maximum Fee

Level of Service

[Add Partners](#) [Add Rotas](#)

[Cancel](#) Dismiss Notes [Go](#) [Save and Edit](#) [Locate](#) [Save](#)

Borrowing Request

The language field is also available in Primo resource sharing requests. It is hidden by default but may be enabled (see [Customizing Primo Resource Sharing Forms](#)).

NOTE:

The language field is available in the Primo form only when the **rs_use_new_mashup_form** parameter is set to **True** to display the customizable request form.

Delivery Information:

Format: ☒ Physical ☐ Digital ☐ Physical non-returnable

Requested Media: Any

Language: [Dropdown]

Delivery Location: ☒ Deliver to library ☐ Alternative address

Pickup/delivery location: [Dropdown]

Not Needed After: [Calendar Icon] [Icon]

Comment: [Text Area]

Maximum fee (USD): [Text Area]

Copyright: Auto_Copyright_Content_Default 1603161557

Primo Borrowing Request

Additional Resource Sharing Enhancements

- For borrowing requests in **Ready to Be Sent** or **Created Borrowing Request** statuses, a new partner can now be added to the rota in the first position (in addition to existing options for adding a partner after another partner or at the end).

Rota

Cancel Cancel Request Go Locate Send Save

General Information Audit Rota Parameters General Messages Notes Received Items Attachments

Partners

Partner Alma Un [Icon]

Place At/Before First [Dropdown] Add partners

First
Last

	Move Up	Move Down	Name	Profile Type	Status	Actions
1	[Icon]	[Icon]	1802131125_NCIP	NCIP	Active	Actions
2	[Icon]	[Icon]	2404131339_ARTEmail	ARTEmail	Pending	Remove
3	[Icon]	[Icon]	Auto_Partner_Default_ARTEmail	ARTEmail	Pending	Remove

Place At/Before First [Dropdown] Move Selected

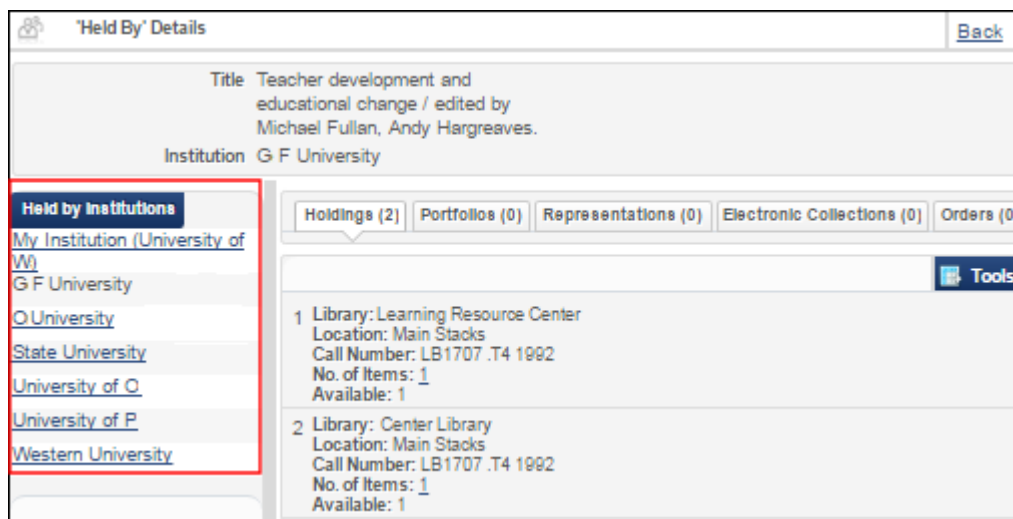
Cancel Cancel Request Go Locate Send Save

Borrowing Request Rota Tab

Collaborative Networks - August 2016 Enhancements

Enhanced Network Search Results for the Held By Details Page

For easy navigation between institutions from within the **Held by** search results list in the Network tab, the Held By Details page now has a new left pane that lists all the institutions in hyperlink format. This enables you to easily switch from institution to institution while the page refreshes to display the selected institution's holdings.



Held By Institution Left Pane

In addition, the Electronic Collections tab on the Held By Details page has been updated to display the following information:

- Electronic collection name
- Collection type (selective package, aggregator package, or database)
- Service type (full text or selective full text)
- Coverage (the coverage period of the electronic collection)
- Status (activated or deactivated)

See [Held By Details](#) for more information.

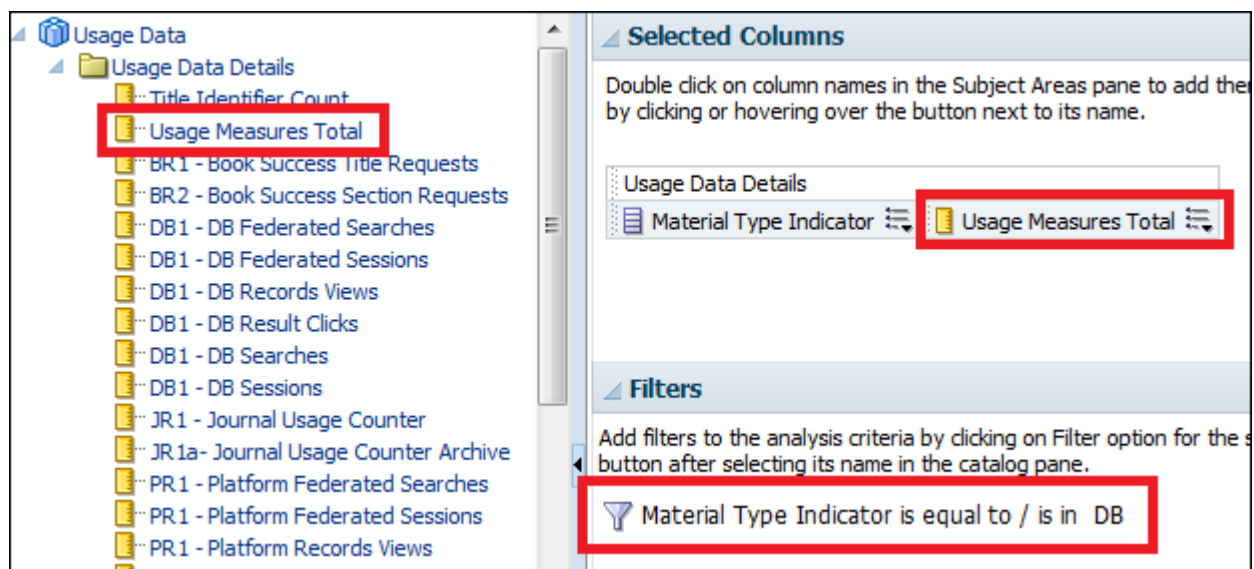
Analytics - August 2016 Enhancements

Enhancements to Usage Data Details

Several enhancements have been implemented to the **Usage Data Details** dimension of the **Usage Data** subject area.

- The **Usage Measures Total** field was added. This field displays the sum total of all of the other measures for the particular query. Previously, you needed to edit the formula and enter a mathematical calculation.

For example, when determining the usage of databases, there no need to manually add together the various database measures. Filter the Usage Measures Total field by Usage Data Details Material Type Indicator = DB to display all of the database measures combined.



Usage Measures Total

The following is an example report using these fields:

Material Type Indicator	Usage Measures Total
DB	124,563,784

Usage Measures Total Report

- The names of the following fields were changed to be clearer:

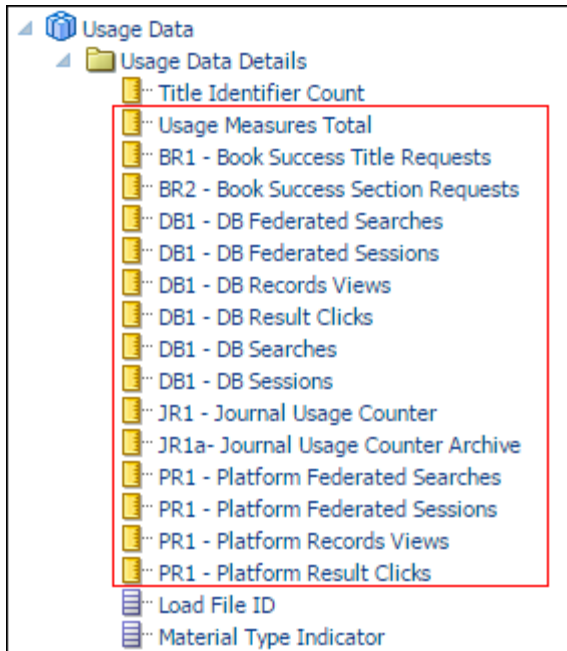
NOTE: For existing reports, there is no need to edit the report and change the queries to the new name.

New Name	Old Name
BR1 - Book Success Title Requests	Book Success Title Requests
BR2 - Book Success Section Requests	Book Success Section Requests
DB1 - DB Federated Searches	DB Federated Searches
DB1 - DB Federated Sessions	DB Federated Sessions
DB1 - DB Records Views	DB Records Views
DB1 - DB Result Clicks	DB Result Clicks
DB1 - DB Searches	DB Searches
DB1 - DB Sessions	DB Sessions
JR1 - Journal Usage Counter	Journal Usage Counter

- The following new measures were added as part of the infrastructure for the upcoming support of additional COUNTER reports.

NOTE: Currently, these fields do not have data and should not be used, because these report types are still not supported.

- JR1a - Journal Usage Counter Archive
- PR1 - Platform Federated Searches
- PR1 - Platform Federated Sessions
- PR1 - Platform Result Clicks
- PR1 - Platform Records Views



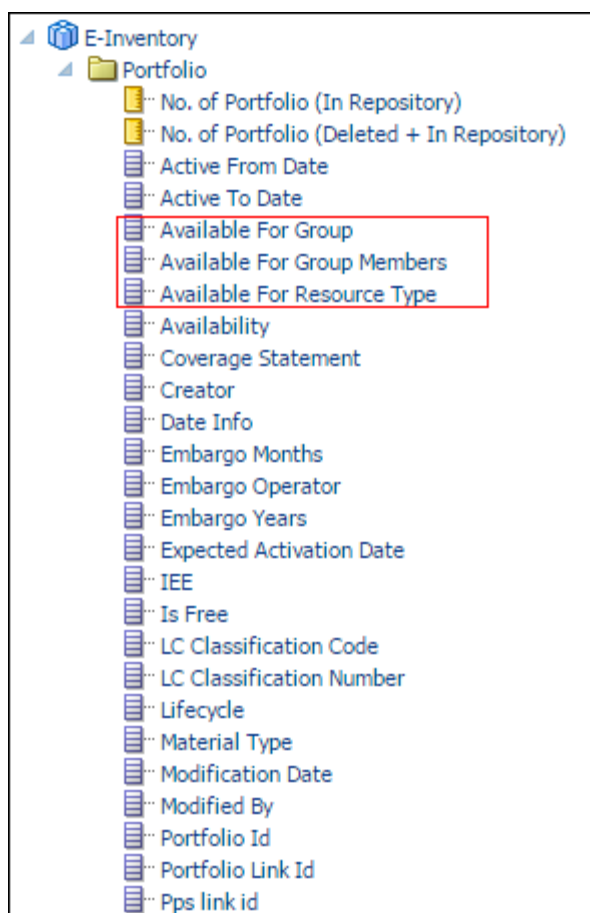
Fields to Support Additional Types of COUNTER Reports

Available For Fields Added to E-Inventory Subject Area

In an Alma Network Zone or multi-campus environment, it is possible to define **Available For** settings per electronic collection or specific electronic portfolio. Each **Available For** group includes one or more institutions. If an activated electronic collection or portfolio contains an **Available For** setting, the resource is available only for the institutions in the **Available For** group. The **Available For** institutions appear in the repository search results.

The following **Available For** fields were added to the Portfolio dimension of the E-Inventory subject area:

- Available For Group - the group codes available for the specific collection, service, or portfolio.
- Available For Group Members - the members of the groups in the **Available For Groups** field.
- Available For Resource Type - the resource type that is available to the member institution.



Available For Fields

The following is an example of a report using the **Available For** fields.

Available For Group ▲▼	Available For Group Members	Available For Resource Type	No. of Portfolio (In Repository)
Group A	BRIGHTON; Bapst	Electronic Collection	272,446
Group A; Group B	BRIGHTON; Bapst; MAIN; NEWTON	Electronic Portfolio	4
Group A; Group B; Group C	BRIGHTON; Bapst; Law; MAIN; Merkert Chemistry Building; NEWTON; Social Work Library	Electronic Portfolio	16
Group A; Group C	BRIGHTON; Bapst; Law; Merkert Chemistry Building; Social Work Library	Electronic Portfolio	6
		Service	2,078
Group B	BRIGHTON; MAIN; NEWTON	Service	35,438
Group B; Group C	BRIGHTON; Law; MAIN; Merkert Chemistry Building; NEWTON; Social Work Library	Electronic Portfolio	9
Group C	Law; Merkert Chemistry Building; Social Work Library	Electronic Collection	108,678
		Electronic Portfolio	1
			1,002,825

Available For Fields Report

Additional Analytics Enhancements

- As part of the plans to increase the export size of CSV reports in Analytics, the Analytics OBIEE is being upgraded to version 11.1.1.9. This was handled in Europe on July 10, North America on July 17, and Asia Pacific on July 24. Initially, the exported number of rows from Analytics to a CSV report will be increased to 250,000. At a later stage, this number will be increased to 500,000.
- The **Transaction Date** dimension of the **Fines and Fees** subject area contains unnecessary fields. These have been marked as `to be deprecated`.
- The **Fund Amount** field located under **Fund Information > Fund Measures** in the **Physical Items** subject area has been renamed **Fund Expenditure**. This change does not affect existing reports.
- The **Creator** and **Creation Date** fields have been added under the **Block** dimension of the **Users** subject area.

Administration and Infrastructure - August 2016 Enhancements

Sandbox Management

You can view the status and history of your sandboxes, and the sandboxes of the institutions for which your institution is the contract lead, on the new Sandbox Management page. You can also add a widget with links to your sandboxes to the Alma home page. The privilege **MANAGE_SUPPORT_AND_MAINTENANCE** was added to the **General System Administrator** role for this feature.

For more information, see [Sandbox Management](#).

Sandbox Management

General

No. of entitled premium sandboxes7Next Available Refresh Date06/10/2016No. of entitled standard sandboxes0

Sandbox Status

1 - 7 of 7 RecordsColumnsTools

	Active	Institution Code	Sandbox Environment	Type	Production Snapshot Date	Sandbox Refresh Date	Status	Status Date	Next Available Refresh Date	Note	Updated By	Updated Date	
1	✔	01ALLIANCE_WWU	sandbox01-na...	Premium	03/10/2016 02:00:00 PST	03/10/2016 02:00:00 PST	Ready	06/29/2016	06/10/2016	-	SYSTEM	06/29/...	Show History
2	✔	01ALLIANCE_WU	sandbox01-na...	Premium	03/10/2016 02:00:00 PST	03/10/2016 02:00:00 PST	Ready	06/29/2016	06/10/2016	-	SYSTEM	06/29/...	Show History
3	✔	01ALLIANCE_UW	sandbox01-na...	Premium	03/10/2016 02:00:00 PST	03/10/2016 02:00:00 PST	Ready	06/29/2016	06/10/2016	-	SYSTEM	06/29/...	Show History
4	✔	01ALLIANCE_PU	sandbox01-na...	Premium	03/10/2016 02:00:00 PST	03/10/2016 02:00:00 PST	Ready	06/29/2016	06/10/2016	-	SYSTEM	06/29/...	Show History
5	✔	01ALLIANCE_PCC	sandbox01-na...	Premium	03/10/2016 02:00:00 PST	03/10/2016 02:00:00 PST	Ready	06/29/2016	06/10/2016	-	SYSTEM	06/29/...	Show History
6	✔	01ALLIANCE_OHSU	sandbox01-na...	Premium	-	03/10/2016 02:00:00 PST	Ready	06/29/2016	06/10/2016	-	SYSTEM	06/29/...	Show History
7	✔	01ALLIANCE_NETWO...	sandbox01-na...	Premium	03/10/2016 02:00:00 PST	03/10/2016 02:00:00 PST	Ready	06/29/2016	06/10/2016	-	SYSTEM	06/29/...	Show History

1 - 7 of 7 RecordsTools

Cancel

Sandbox Management Page

Alma Social Login

Staff may now use Facebook or Google to log in to their Alma accounts. The social login information is defined in an [integration profile](#). On the User Details page, the user types have been removed and the password is now an optional field to allow for the social network sign-in. For more information, see [Adding Users](#).

An invitation to log in using a social network may be emailed to staff users. This can be done from the [Manage Users interface](#) (see Send Social Login Invitation Letter) for an individual user, or can be sent in bulk using the Update/Notify Users job.

Additional Administration and Infrastructure Enhancements

- The option to sign logout requests has been added to SAML single logout. In order to sign single logout requests, click the **Sign Single Logout Requests** check box.

External System

12BackCancelSave

External System

CodeSAMLNameSAMLIntegration TypeSAML

Actions

SAML Definitions

Default SAML profile

IDP Issuer *

IDP Login URL *

User ID Location *

User ID is in an Attribute element

User ID Attribute Name *

IDP Logout URL

IDP Single Logout Service

Sign Single Logout Requests

Alma Metadata File Version *

Version 2

Upload Certificate

Please upload a certificate file

BackCancelSave

SAML Integration Profile

- The **All** option was removed from the **Find in** drop-down list on the List of S/FTP Connections page (**Administration > General Configuration > Configuration Menu > External Systems > S/FTP Definitions**).

Data Services - August 2016 Enhancements

The Alma July Central KnowledgeBase and Community Zone package was applied to the Alma environments.

Library of Congress Authorities Community Zone Updates

The following are the Library of Congress Subject authority updates for the period of June 30th through July 28th:

- Number of records updated: 132
- Number of records added: 243
- Number of records deleted: 12

The following are the Library of Congress Name authority updates for the period of June 30th through July 28th:

- Number of records updated: 14615
- Number of records added: 21450
- Number of records deleted: 379

The following are the Canadian name authority updates for the period of June 30th through July 28th:

- Number of records updated: 11
- Number of records added: 791
- Number of records deleted: 12

The following are the Library of Congress Genre/Form Terms (LCGFT) updates for the period of June 30th through July 28th:

- Number of records updated: 2
- Number of records added: 4

New Electronic Collections Added to the Alma CKB

The following collections were added to the Alma Community Zone from June 27, 2016 until Junly 31, 2016:

- 123Library

- Books@Ovid Purchase Complete (Test)
- Books@Ovid Subscription Complete (Test)
- De Gruyter eBooks Art 2016
- eDuke 2016 Books
- iG Publishing: ASM Press
- iG Publishing: ASTM International
- iG Publishing: Berkshire
- iG Publishing: Children's Literature - eBooks
- iG Publishing: Culturecom/Chinese Novel
- iG Publishing: Dorling Kindersley
- iG Publishing: Elsevier
- iG Publishing: Global Media
- iG Publishing: GSE/Greenleaf
- iG Publishing: HCPro Publications
- iG Publishing: Heritage Books from ISEAS
- iG Publishing: Heritage Books from WEL
- iG Publishing: Heritage Books on Asian Literature
- iG Publishing: Industrial Press
- iG Publishing: Institution of Engineering and Technology
- iG Publishing: Joint Commission Resources
- iG Publishing: Journal of the Burma Research Society
- iG Publishing: Karnac
- iG Publishing: Manson
- iG Publishing: National Taiwan University Press
- iG Publishing: NBN International
- iG Publishing: Osprey Publishing Ltd.
- iG Publishing: Praeger Business
- iG Publishing: Rare Books on Burma
- iG Publishing: Rothstein Publishing
- iG Publishing: SciTech
- iG Publishing: SIAM
- iG Publishing: The World Bank

- iG Publishing: Wiley
- iG Publishing: World Trade Executive
- Journals@Ovid Complete (Test)
- KB+ BIBSAM Inderscience Journals 2014-2017
- KB+ BIBSAM SPIE Digital Library 2014-2016
- KB+ Eduserv American Mathematical Society 2014-2016
- KB+ Eduserv American Psychological Association PsycARTICLES 2014-2017
- KB+ JISC Collections American Association For The Advancement Of Science 1880-1996
- KB+ JISC Collections American Institute Of Physics Complete Collection 2014-2016
- KB+ JISC Collections American Institute Of Physics With Extended Backfile 2014-2016
- KB+ Jisc Collections American Society Of Civil Engineers ASCE Journals 2015
- KB+ JISC Collections American Society of Civil Engineers Journals 2016
- KB+ JISC Collections Annual Reviews Sciences Collection 2015-2017 Post 2008
- KB+ JISC Collections Annual Reviews Sciences Collection 2015-2017 Pre 2008
- KB+ JISC Collections Association For Computing Machinery Digital Library 2014-2016
- KB+ Jisc Collections BioOne 2015
- KB+ JISC Collections BioOne 2016-2018
- KB+ JISC Collections Brill Collection 2015
- KB+ JISC Collections Brill Collection 2016
- KB+ JISC Collections British Medical Journal Journal Collection 2015-2016
- KB+ JISC Collections British Medical Journal Optional Access Journals 2015-2016
- KB+ JISC Collections De Gruyter Complete Collection 2016
- KB+ JISC Collections Duke University Press Expanded Collection 2015
- KB+ JISC Collections Duke University Press Scholarly Collection 2016
- KB+ JISC Collections Edinburgh University Press Complete Collection 2015
- KB+ JISC Collections Edinburgh University Press Complete Collection 2016
- KB+ JISC Collections Elsevier Cell Press 2012-2016
- KB+ JISC Collections Exact Editions 2013-2016
- KB+ JISC Collections Georg Thieme Verlag Chemistry Collection 2015
- KB+ JISC Collections Georg Thieme Verlag Chemistry Collection 2016
- KB+ JISC Collections Georg Thieme Verlag Medicine Collection 2015
- KB+ JISC Collections Georg Thieme Verlag Medicine Collection 2016

- KB+ JISC Collections Independent Scholarly Publishers Group 2015-2017
- KB+ JISC Collections Institute Of Physics Option 1 2016
- KB+ JISC Collections Institute Of Physics Option 2 2016
- KB+ JISC Collections Institution Of Civil Engineers Publishing Virtual Library Archive
- KB+ JISC Collections Internet Archaeology Journal Archive 1996-2006
- KB+ JISC Collections IOS Press 2015-2017
- KB+ JISC Collections JSTOR Music Enhanced Collection 2016
- KB+ JISC Collections Liverpool University Press 2016-2018
- KB+ JISC Collections Multi-Science Publishing Full Collection 2015
- KB+ JISC Collections Nature Publishing Group 2015
- KB+ JISC Collections Nature Publishing Group 2016
- KB+ JISC Collections Oxford University Press Berg Fashion Library 2014
- KB+ JISC Collections Oxford University Press Science Technology and Medicine Collection 2016
- KB+ JISC Collections Project Euclid Prime 2015
- KB+ JISC Collections Project Euclid Prime 2016
- KB+ JISC Collections Royal College Of Nursing Archive
- KB+ JISC Collections Society For Industrial and Applied Mathematics Journal Collection 2015
- KB+ JISC Collections Society For Industrial and Applied Mathematics Journal Collection 2016
- KB+ JISC Collections The National Library Of Wales Aberystwyth Welsh Journals Online Collection
- KB+ JISC Collections The National Library Of Wales Welsh Newspapers Online
- KB+ SHEDL Edinburgh University Press Complete Collection 2015
- Morgan & Claypool Computer & Information Science Collection Eight
- Morgan & Claypool Synthesis Collection Seven
- Nomos eLibrary
- Reveal Digital Independent Voices
- SAGE Complete Books, Reference and Navigator Collection 2016
- Wiley Online Library Chemistry Societies Backfiles (New)
- Wiley Online Library Chemistry Societies II Backfiles

New External Search Resources

The following external resources were added to Alma for the August release:

- BIBSYS
- British Library Legal Deposit Shared Database - fee to access
- DanBib - fee to access
- Griffith University Library
- Hebrew University
- Queensland University of Technology
- Tel Aviv University
- Temasek Polytechnic Library and Information Resources Department (Z3950)
- Trinity College Dublin
- UNSW (z3950)
- Weizmann Institute

7. Click **Save**. Your import profile is saved and displays on the Run Import page.
8. For the profile you created, select **Actions > Run Import**.

Active	Profile Name	Profile Description	Profile Type	Actions
✓	2109111211auto	-	Repository	Actions
✓	2209111653auto	-	Repository	Actions
✓	2209111701auto	-	Repository	Actions
✓	2609111205auto	-	Repository	Actions
✓	2609111639_auto	-	Repository	Actions
✓	2609111639_man	-	Repository	Actions
✓	2609111706_auto	-	Repository	Actions
✓	2609111706_man	-	Repository	Actions
✓	2709111504_auto	-	Repository	Actions
✓	2709111504_man	-	Repository	Actions
✓	Acq_Automation	-	New Order	Actions
✓	CC Local Authority Record Import	-	Authority	Actions
✓	Copy of Acq_Automation	-	New Order	Edit
✓	Copy of New Order Physical 980	-	New Order	View
✓	Marc Bibliographic Import - test1	-	New Order	Job History Run Import Copy
✓	MARC Binary	-	Repository	Delete
✓	New Order Electronic	-	New Order	

Run Import

9. Enter the name of the file to be imported and click **Add** and **Submit** the job to run.

For additional information regarding import profiles, refer to [Configuring New Import Profiles](#).

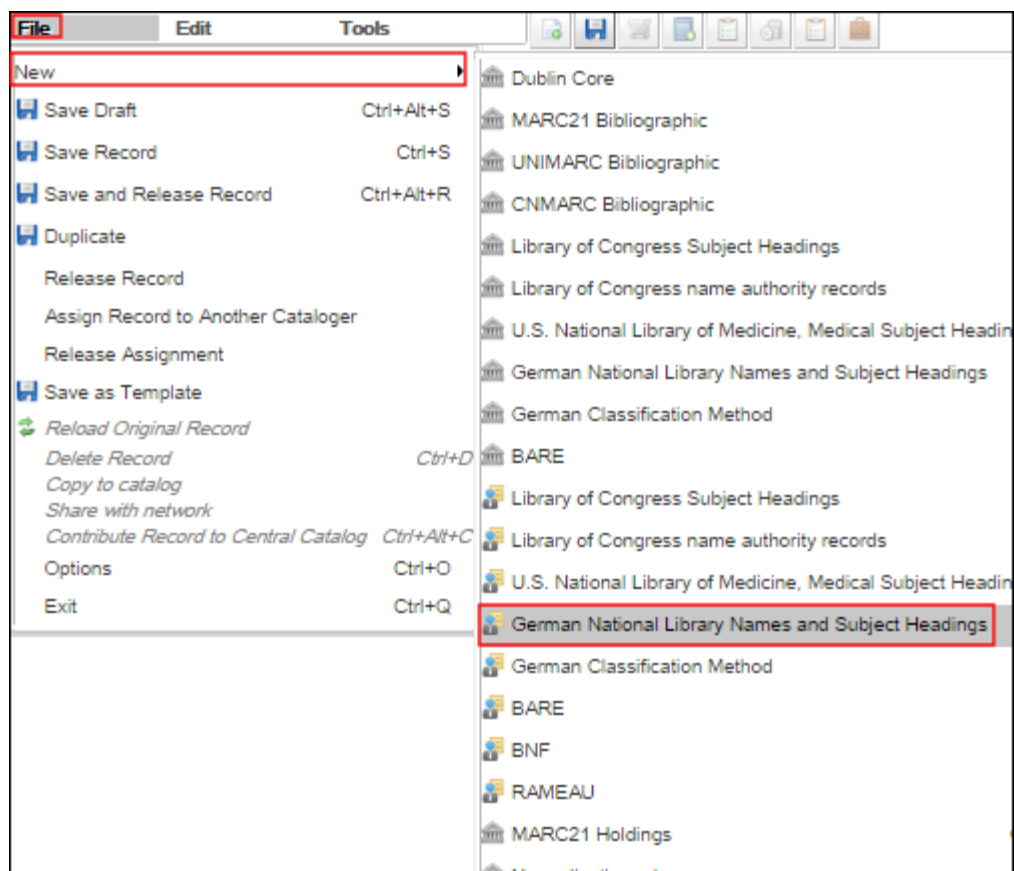
Changing the Placement of an Authority Record New for August!

While working in draft mode with an authority record, you can change the placement of the record to the Community Zone, Network Zone, or the Institution Zone. The options that you are provided when changing the placement of the authority record vary depending on how your Metadata configuration is set for locally managed or community managed authority records (see [Controlling the Display and Access of Global Authorities in the MD Editor](#)) and the vocabulary that you select when creating your draft record.

To change the placement of a draft authority record:

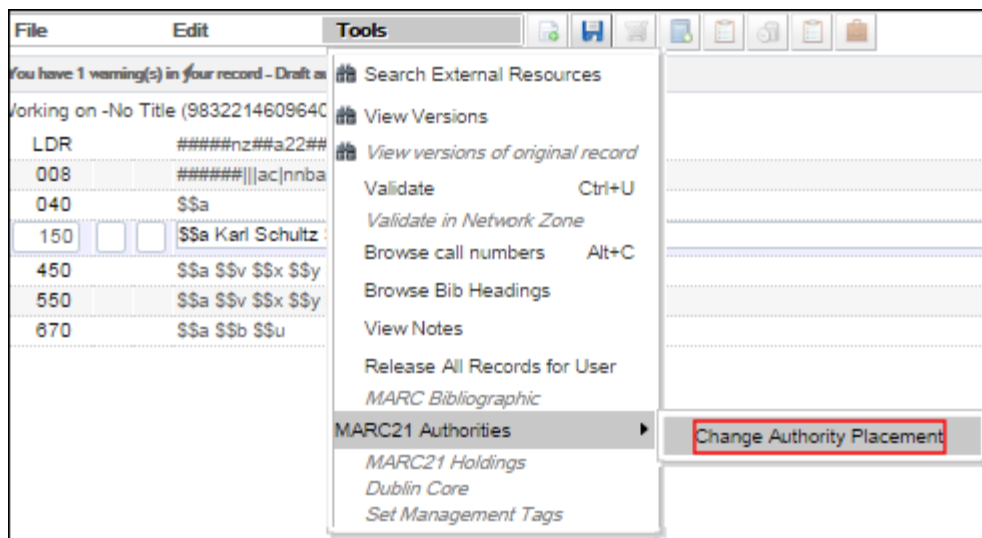
1. Open the MD Editor (**Resource Management > Cataloging > Open Metadata Editor**).
2. Click **File > New** and select the vocabulary name.

For this example, a Network vocabulary has been selected.



Creating a Network Authority Record

3. Enter the authority record details.
4. Click **Tools > MARC21 Authorities**.

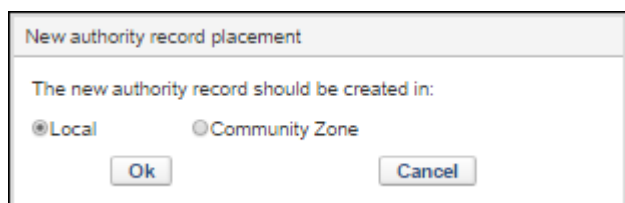


Change Authority Placement

5. Click **Change Authority Placement**.

The New Authority Record Placement dialog box appears. One or more of the following options are provided:

- Community Zone
- Network (Zone)
- Local (Institution Zone)



New Authority Record Placement Dialog Box

The options that are provided vary depending on the vocabulary that you selected for your draft authority record (Local or Network) and how your Metadata configuration is set for locally managed or community managed authority records (see [Controlling the Display and Access of Global Authorities in the MD Editor](#)).

6. Select the placement location and click **OK**.

You may click **Tools > MARC21 Authorities > Change Authority Placement** and change the placement location, again. However, once you have saved the record, you can no longer change the placement. The **Change Authority Placement** option appears as disabled after the record has been saved.

job (see [Viewing All Scheduled Jobs](#)) in order for the link to be recreated. If you edit a field that is not related to a field in another record, the link between the records remains intact.

Generating Author Numbers Automatically New for August!

With Alma cataloging, you can automatically generate the author number in MARC 21 bibliographic records. For example, you can automatically generate the Chinese author call number for the 905 local call number field in a MARC 21 bibliographic record. The 905 local call number field consists of the following:

- 905 \$d - Created by copying the 093 \$a using an Alma normalization rule
- 905 \$e - Created based on the content in \$a of the 100, 110, 111, or 245 fields, the mapping table configured in the Author Number Lists mapping table, and the Generate Author Number menu option in the MD Editor (see the procedure below)
- 905 \$s - Created using an Alma normalization rule to concatenate the content of 905 \$d, 905 \$e, 905 \$v (not mandatory), and 905 \$y (not mandatory) with a forward slash (/) used to separate each subfield's content.

To enable this capability, you need to:

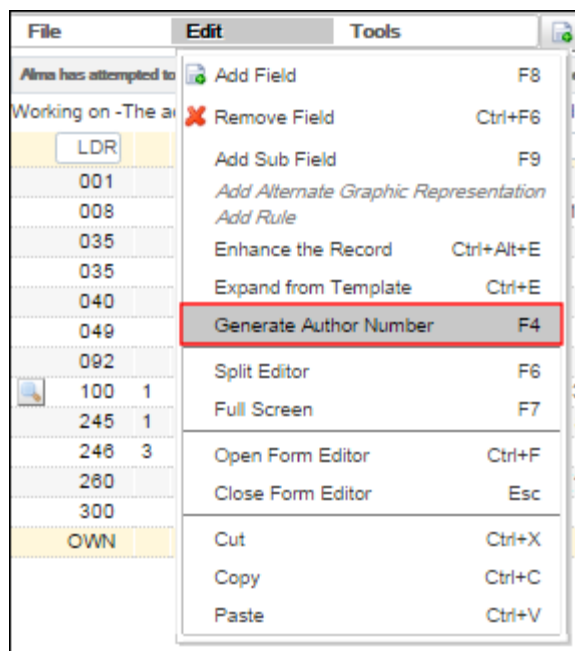
- Configure the author number list in the Author Number Lists mapping table

Note that the standardized list of Chinese author call numbers (obtained from the Cutter Sanborn Three-Figure Author Table) is maintained in Alma and can be configured with the Author Number Lists mapping table. See [Configuring Author Number Lists](#) for more information regarding how to configure this table.

- Create the normalization rules for generating the 905 \$d and 905 \$s.

To automatically generate a Chinese author call number for the 905 \$e:

1. In the MD Editor, open a bibliographic record to which you want to add the 905 author number.
2. Make the 100, 110, 111, or 245 field the active field. The field that you select as the active field must have content in \$a.
3. Select **Edit > Generate Author Number** (or press **F4**).



Generate Author Number

The 905 \$e is automatically generated with the author number.

File	Edit	Tools
You have 3 warning(s) in your record - Draft auto-saved at 13:33:52.		
Working on -Science and your fut (991382320000541) , Created by import (17/12/2011 23:43:39 PM IST)		
LDR		00805nam#a2200241i#4500
001		41644
008		780731s1964####maua####b####001#0#eng#d
035		\$\$a ocm04097549
035		\$\$a (TrN)41644-train20072_c2db
040		\$\$a GZO \$\$c GZO \$\$d m.c. \$\$d SHC
049		\$\$a SHCM
090		\$\$a Q161.H41 \$\$b S353 1964
092		\$\$a 500 \$\$b S358f 1964
100	1	\$\$a Schneider, Herman, \$\$d 1905-
245	1 0	\$\$a Science and your future / \$\$c by Herman and Nina Schneider ; teacher's guide prepared by LeRoy D. Weber.
250		\$\$a Teacher's ed.
280		\$\$a Boston : \$\$b Heath, \$\$c 1964.
300		\$\$a 281, 434 p. : \$\$b ill. ; \$\$c 24 cm.
440	0	\$\$a Heath science series ; \$\$v 8
500		\$\$a Pagings for teacher's guide and text intermingled.
504		\$\$a Includes bibliographies and indexes.
650	0	\$\$a Science \$\$x Study and teaching.
700	1	\$\$a Schneider, Nina, \$\$d 1913-
700	1	\$\$a Weber, LeRoy D.
OWN		\$\$a Training Master DB
905		\$\$e S358

Author Number Automatically Generated for the 905 \$e

4. Save your record.

NOTE: To add \$d and \$s to the 905 field, create normalization rules and use the **Enhance the Record** option in the MD Editor **Edit** menu (with your cursor positioned in the 905 field) to copy the 093 \$a and generate the concatenated 905 \$s. See [Working with Normalization Rules](#) for more information about creating normalization rules. In particular, note the suffixSubField and prefixSubField normalization syntax needed for concatenating the fields for the 905 \$s.

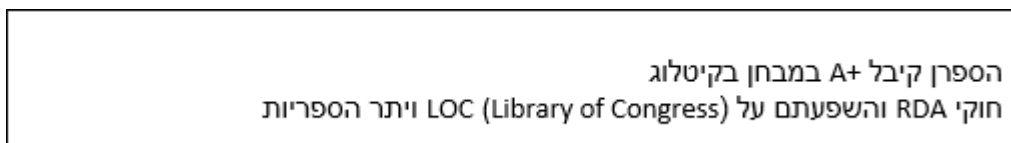
Adding Record Content in Hebrew

Through a use case example, this section describes how to enter Hebrew content using special Unicode directionality characters when you are cataloging in the Alma MD Editor.

This example uses:

- 202A LRE Left to Right Embedding
- 202C PDF Pop Directional Formatting

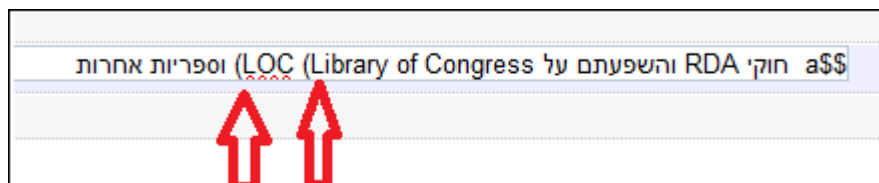
The following example illustrates titles as they should appear in Hebrew. The procedure below describes how to catalog titles in Hebrew like the ones in the illustration below that use a combination of Latin and Hebrew characters.



Examples as They Should Appear in Hebrew

To create the example above that contains the (Library of Congress) content:

1. Open the Alma MD Editor and create a new MARC21 Bibliographic record.
2. Enter the content for the (Library of Congress) example above. Notice that when you enter the text, it does not appear correctly (see the illustration below).



Cataloging Content Not Appearing as Intended

3. Put your cursor after the word על before where the first parentheses should appear as).

Sharing Alma Link Resolver Data Statistics with bX

New for August!

Alma Link Resolver data statistics can be shared with the bX community to enrich bX's recommender service. This is enabled through Alma's Link Resolver Statistics type external integration profile. With an active Link Resolver Statistics external integration profile, you can share your institution's Link Resolver data statistics with the bX community starting with your current statistics and going forward (previous, historical data statistics are not included). A bX integration profile is provided on the Integration Profile List page. To use this profile, you need to edit it (**Actions > Edit**) and select the **Active** option.

The screenshot shows the 'External System' configuration page. The 'External System' tab is active, displaying a table with columns: Code BX, Name BX, and Integration Type. The 'Integration Type' is 'Link Resolver Statistics'. Below the table, the 'Actions' tab is selected, showing the 'Statistics publish job parameters' section. The 'Active Export Electronic *' option is selected, with the 'Active' radio button chosen. The 'Schedule Link Resolver Statistics publish job' is set to 'Every Sunday at 24:00'.

Edit the bX Integration Profile

See the instructions below to configure a new **Link Resolver Statistics** Integration Type profile.

To configure an Alma external integration profile to share Alma Link Resolver data statistics with bX:

1. Click **Integration Profiles** in the External Systems section of the General Configuration (**Administration > General Configuration > Configuration Menu**). The Integration Profile List page appears.
2. Click **Add Integration Profile**. The External System page appears.

The screenshot shows a web form titled 'External System'. At the top right, there are navigation buttons: '1' (selected), '2', 'Cancel', and 'Next'. Below the title bar, there is a section header 'External System' followed by a table with columns 'Code -', 'Name -', and 'Integration Type -'. Below this, the form fields are: 'Code *' (text input), 'Name *' (text input), 'Integration Type *' (dropdown menu), 'Default' (checkbox), and 'Description' (text area). The 'Integration Type' dropdown is currently empty.

External System Page

3. Select **Link Resolver Statistics** from the Integration Type drop-down list.

This screenshot shows the same 'External System' form, but the 'Integration Type *' dropdown menu is now open, and 'Link Resolver Statistics' is selected. A red rectangle highlights the dropdown menu. The 'Target System *' dropdown menu is also visible below it. The 'Code *', 'Name *', 'Default' checkbox, and 'Description' text area remain the same as in the previous screenshot.

Link Resolver Statistics Integration Type Selected

4. Enter the following information and click **Next**:
 - Profile code (required)
 - Profile name (required)
 - Select **bX** from the Target System drop-down list (required)
 - Default, if you want this to be your default profile (optional)
 - Description (optional)

The Actions parameters appear.

External System

Code CCbX Name CC bX Configuration Integration Type Link Resolver Statistics

Actions

Statistics publish job parameters

Active Export Electronic ☒ Active ☐ Non Active

Statistics to bX

Schedule Link Resolver Not scheduled

Statistics publish job

External System Actions Parameters

5. Select **Active** to make this an active profile and select a scheduling option from the **Schedule Link Resolver Statistics publish job** drop-down list.
6. Click **Save**.

To view the completion status of the Link Resolver Statistics publishing job:

1. Open the **History** tab on the Monitor Jobs page ([Administration > Manage Jobs > Monitor Jobs](#)).
2. Select the appropriate date range and use the **Publishing** Job Category option to narrow the selection of jobs that appear in the list.

See [Viewing Completed Jobs](#) for more information.

Working with KORMARC Fields, Normalization, and Validation

Similar to the support Alma provides for MARC 21, Alma provides support for KORMARC validation and normalization. Alma uses the settings in the validation and normalization profiles when importing records and when working with records in the MD Editor.

Default normalization processes have been created for KORMARC bibliographic record normalization.

To view the KORMARC normalization tasks:

1. Open the Metadata Configuration List page ([Resource Management > Resource Configuration > Configuration Menu](#)).
2. Click the **KORMARC Bibliographic** link. The Profile Details page appears.
3. Select the **Normalization Processes** tab. The following default normalization processes appear on the **Normalization Processes** tab:
 - Kormarc Bib normalize on save
 - Kormarc Bib Re-sequence
 - Kormarc Bib Re-sequence And Clear empty fields
4. Select **Actions > Edit** for one of the normalization processes and select the **Task List** tab to view the KORMARC tasks provided (in the **Process List Pool** section of the tab).
5. When you are finished, click **Save**.

Working with CNMARC Fields, Normalization, and Validation

Similar to the support Alma provides for MARC 21, Alma provides support for CNMARC validation and normalization. Alma uses the settings in the validation and normalization profiles when importing records and when working with records in the MD Editor.

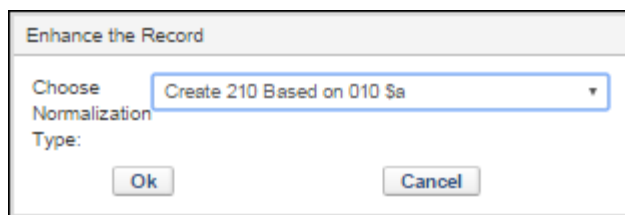
Default normalization processes have been created for CNMARC bibliographic record normalization.

To view the CNMARC normalization tasks:

1. Open the Metadata Configuration List page ([Resource Management > Resource Configuration > Configuration Menu](#)).
2. Click the **CNMARC Bibliographic** link. The Profile Details page appears.
3. Select the **Normalization Processes** tab. The following default normalization processes appear on the **Normalization Processes** tab:
 - Cnmarc Bib normalize on save
 - Cnmarc Bib Re-sequence

- Cnmarc Bib Re-sequence And Clear empty fields
4. Select **Actions > Edit** for one of the normalization processes and select the **Task List** tab to view the CNMARC tasks provided (in the **Process List Pool** section of the tab). The following normalization tasks are provided:
- CnmarcBibReSequenceTask
 - CnmarcBibClearEmptyFieldsTask
 - MarcDroolNormalization
 - CnmarcBibAdd005Task
 - CnmarcBibTag100Task
 - CnmarcBibTag100OpenDateTask
 - Add Hanja To Hangul Transliterations
 - Update originating system information
 - Add Hanja To Hangul CK Transliterations
 - Add Hanja To Hangul MOE Transliterations
 - Add Hanja To Pinyin Transliterations
 - BibGenerateControlNumberSequence
 - Add Kana To Hangul Transliterations
 - Add Kana To Romanized Kana Transliterations
 - Create210BasedOn010 New for August!

This normalization process task adds the MARC 210 \$a to the record and places the Chinese publisher in the 210 based on the ISBN in the MARC 010 \$a and a table managed within Alma. After you create and save a normalization process with this task selected, you can use the **Edit > Enhance the Record** option in the MD Editor to update records that you are cataloging.



Enhance the Record with Create 210 \$a Based on 010 \$a Normalization Process Task

File	Edit	Tools
Alma has attempted to link the bib headings to authority records while loading the record. Loading the record was therefore slower.		
Working on -Retinal Müller Cell (99136454202586) , Created by exl_impl (28/06/2016 08:14:23 CEST)		
LDR		01441nhm##22004573u#4500
001		99136454202586
005		20160628082040.0
010		\$\$a 978-7-5013-3969-3
035		\$\$a (CKB)111056485440712
035		\$\$a (EBL)3035548
035		\$\$a (EXLCZ)99111056485440712
035		\$\$a 9949289801873
100		\$\$a 20151005d2001----#u #####
101	0	\$\$a eng
135		\$\$a ur n ---
200	1 0	\$\$a Retinal Müller Cell \$\$b [electronic resource] \$\$e Structure and Function
210		\$\$a 北京 \$\$c 国家图书馆出版社

210 \$a Created

See [Enhance the Record](#) in the **MD Editor - Edit Menu** table on the [Navigating the MD Editor](#) page for more information.

- When you are finished, click **Save**.

Working with MARC 21 Holdings Profiles

Working with MARC 21 holdings profiles is similar to working with the bibliographic and authority profiles. They all manage configuration options on the following tabs:

- Fields
- Normalization Processes
- Validation Processes
- Validation Exception Profile List

The differences between them have to do with the fields that are being managed (normalized and validated). Due to the similarities, reference the viewing, editing and configuring sections above for detailed steps in navigating the Metadata Configuration profiles when you work with the **MARC21 Holding** link to profile configurations.

- Days before due date = 7

Loans with a due date of June 18 are covered by the job.

However, if a loan was created on June 11 and is due on June 17, that loan is also covered by the June 11 job, since it was not covered by the previous day's job.

2. In the **Loan renewal schedule** field, select whether the job is not scheduled or when to run the job each day from one of the available options.
3. Click **Save**. If scheduled, the updated **Notifications – Send Courtesy Notices and Handle Loan Renewals** job appears on the Monitor Jobs page (see [Viewing All Scheduled Jobs](#)).

To configure the Send Overdue Notices job:

1. In the **Overdue notice schedule** field, select whether the job is not scheduled or when to run the job each day from one of the available options.
2. Click **Save**. If scheduled, the updated **Notifications – Send Due Date Reminders** job appears on the Monitor Jobs page (see [Viewing All Scheduled Jobs](#)).

Configuring Anonymization

For questions and answers about anonymization, see the [Data Privacy FAQs](#).

To configure the Anonymization job:

1. Select **Anonymize item loans** to enable deleting user information in completed loans. Note that loans with open fines/fees cannot be anonymized.
2. Select **Anonymize fines and fees** to enable deleting user information in closed fines/fees.
3. Select **Anonymize resource sharing requests** to enable deleting user information in completed and deleted resource sharing requests.
4. In the **Schedule** field, select whether the job is not scheduled, when to run the job each day or each month from one of the available options.
5. Click **Save**. If scheduled, the updated **Fulfillment – Handle Historical Archiving** job appears on the Monitor Jobs page (see [Viewing All Scheduled Jobs](#)).

When the job runs, the **Borrower Name** and **Borrower ID** are removed from the item history of all loaned items. For example, before the job runs, the Borrower Name and Borrower ID are displayed:

Summary						
General Information						
ENUM/CHRON information						
Notes						
History						
Report type						
☐ Item changes ☐ Holdings changes ☒ Fulfillment activities						
Find						
Action type	Desk name	Operator	Date	Borrower name	Borrower id	
Return	Circulation Desk	exd_support [A]	06/27/2014 11:18:54 EDT	Kortick, Yoel	313972002	
Loan	Circulation Desk	exd_support [A]	06/27/2014 11:17:50 EDT	Kortick, Yoel	313972002	

Loan History

After the job runs, the Borrower Name and Borrower ID do not appear:

Process type -						
Summary						
General Information						
ENUM/CHRON information						
Notes						
History						
Report type						
☐ Item changes ☐ Holdings change ☒ Fulfillment activities						
Find :						
Action type	Desk name	Operator	Date	Borrower name	Borrower id	
Return	Circulation Desk	exd_support [A]	06/27/2014 11:18:54 EDT	-	-	
Loan	Circulation Desk	exd_support [A]	06/27/2014 11:17:50 EDT	-	-	
Return	Music Library Circulation	[A]	06/26/2014 11:14:24 EDT	-	-	

Loan History After Anonymization

For anonymization to occur in Alma Analytics, first the Handle Historical Archiving job must be run and then the ETL must occur. After anonymization, none of the user details are displayed in Analytics; however, the following information is displayed:

- Patron Details > Patron group (called **User Group** in Alma)
- Patron Details > Patron job title (called **Job Category** in Alma)
- Patron Details > Record type (**Public**, **Staff**, or **Contact**)
- Patron Details > Account type (**Internal** or **External**)

Barcode	Date Key	User Id	User Name	User Group	First Name	Last Name	Patron Group	Patron Id	Patron Job Title	Patron Record Type	Patron Type
11719013765864	6/27/2014	-1	None				Staff member, library	-1	GeneralAdministrator	Staff	Internal

Analytics After Anonymization

New for August!

To configure the Loan Anonymization Rules:

Loan Anonymization Rule Editor

Name *

Description

Created By Ex Libris Created On 13/07/2016

Updated By Ex Libris Updated On 13/07/2016

Input Parameters

No records were found.

Name	Operator	Value

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

Output Parameters

Name	Result
Anonymize	* True

[Cancel](#) [Save](#)

Loan Anonymization Rule Editor

1. After selecting **Anonymize item loans**, click the link for **Loan Anonymization Rules**. Or access the **Loan Anonymization Rules** page directly from the menu (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Loan Anonymization Rules**).
2. Add a new rule or edit an existing rule.
3. Options for input parameters are:
 - Days since loan ended- Operators are: <, >, =, not equals. Whole numbers are counted. So if Days since loan ended > 1, the loan ended yesterday, and Anonymize is selected, the loan will not be anonymized.
 - Days since user expiry - Operators are: <, >, =, not equals. Whole numbers are counted. So if Days since user expiry > 1, the user expired yesterday, and Anonymize is selected, the loan will not be anonymized.
 - Library - Optional operators are: =, in list, is empty, is not empty, not equals, not in list, contains.
 - Location - Operators are: =, in list, is empty, is not empty, not equals, not in list, contains. If Library input was added, the location list will be populated according to the selected libraries. If library input was not added, the list will be empty.
 - Number of loans to retain - Operators are: =. For example, if a rule is set with Number of loans to retain = 3 and there are 3 loan history records for an item, they will not be anonymized. If there are 4 loan history records for the item then only the oldest one will be anonymized.

- User group - Optional operators are: =, in list, is empty, is not empty, not equals, not in list, contains.

4. Select **True** or **False** for the output parameter, **Anonymize**.
5. Click **Save**.

To configure the Change Loan to Lost job:

1. In the **Schedule** field, select whether the job is not scheduled, or when to run the job each day or each week from one of the available options.
2. Click **Save**. If scheduled, the updated **Change Loan to Lost** job appears on the Monitor Jobs page (see [Viewing All Scheduled Jobs](#)).

To configure the Distribute Resource Sharing Network Configuration job:

1. In the **Warning Percentage Threshold** field, enter a whole number. If the percentage of records that fail to distribute stays at or below this figure, the job will display a warning. If the percentage is exceeded, the job will fail.
2. Click **Save**. The next time the job runs, the warning percentage threshold will be used.

Configuring Other Settings

PERMISSIONS: To configure other settings, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

This option enables you to customize settings that are not specific to any other fulfillment action. These other settings can be configured on the institution level only.

You configure other settings on the Customer Parameters Mapping Table page (**Fulfillment > Fulfillment Configuration > General > Other Settings**).

Configuring Item Policy Exceptions

PERMISSIONS: To configure item policy exceptions, you must have one of the following roles:

- General System Administrator
 - Fulfillment Administrator
-

New for August! You can configure an item policy exception that indicates that the item should not be shipped for a resource sharing request. Access the **Item Policy Exceptions** page ([Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Item Policy Exceptions](#)). An item policy may be added with the exception set to either **True** or **False**. Setting the policy to **True** will create the item policy exception, which means it will be unavailable for resource sharing. Setting the item policy exception to **False** means that no exception will be created and the item will continue to be available for resource sharing as previously.


Mapping Table
Cancel Customize

You are configuring: QA - Provisioning
 Organization Unit List

Table Information

Sub System

FULFILLMENT

Table Name

Item Policy Exceptions for Resource Sharing

Updated By

-

Last Updated

-

Table Description

Item Policy Exceptions for Resource Sharing

Customization mode:

Entire table needs to be customized

Mapping Table Rows
Tools

	Item Policy	Exception	Updated By	Last Updated	
1	4 day Loan	True	Ex Libris	12/07/2016	Delete

Create a New Mapping Row

Quick Add

Item Policy

1 hour loan

Exception

False

Add Row

Cancel Customize

Item Policy Exceptions

Customizing Primo Resource Sharing Forms

PERMISSIONS: To configure the displayed fields on the Primo resource sharing forms, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

New for August!



For more information about customizing Primo's resource sharing forms, see the [Customizing Primo Resource Sharing Forms](#) video (1:03 mins).

You can hide non-mandatory fields on Primo resource sharing request forms. All fields are visible by default.

You must enable the **rs_use_new_mashup_form** parameter on the Other Settings page (see [Configuring Other Settings](#)) for the **Resource Sharing Form Customization** link to appear on the Fulfillment Configuration menu.

Access the Resource Sharing Form Customization page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Discovery Interface Display Logic > Resource Sharing Form Customization**).

Resource sharing request fields

Columns
Tools

Field Name	Mandatory	Visible
1 For Library:	☐	☒

Book fields

Columns
Tools

		Move Up	Move Down	Field Name	Mandatory	Visible
1	☐		v	Citation type:	☐	☒
2	☐	▲	▼	Title:	☐	☒
3	☐	▲	▼	Author (Last name, first name):	☐	☒
4	☐	▲	▼	Author initials:	☐	☒
5	☐	▲	▼	Specific Edition Only:	☐	☒
6	☐	▲	▼	Edition:	☐	☒
7	☐	▲	▼	ISBN:	☐	☒
8	☐	▲	▼	LCCN:	☐	☒
9	☐	▲	▼	OCLC Number:	☐	☒
10	☐	▲	▼	Publisher:	☐	☒
11	☐	▲	▼	Publication date:	☐	☒
12	☐	▲	▼	Place of publication:	☐	☒
13	☐	▲	▼	Additional Author (Last name, first name):	☐	☒
14	☐	▲	▼	Volume:	☐	☒
15	☐	▲	▼	Part:	☐	☒
16	☐	▲	▼	Chapter:	☐	☒
17	☐	▲	▼	Source:	☐	☒
18	☐	▲	▼	Series Title Number:	☐	☒
19	☐	▲		Pages to photocopy:	☐	☒

Tools

First
Move Selected

Article fields

Columns
Tools

		Move Up	Move Down	Field Name	Mandatory	Visible
1	☐		v	Citation type:	☐	☒
2	☐	▲	▼	Article title:	☐	☒
3	☐	▲	▼	Journal Title:	☐	☒
4	☐	▲	▼	Author (Last name, first name):	☐	☒
5	☐	▲	▼	Author initials:	☐	☒
6	☐	▲	▼	Volume:	☐	☒
7	☐	▲	▼	Issue:	☐	☒
8	☐	▲	▼	ISSN:	☐	☒
9	☐	▲	▼	LCCN:	☐	☒
10	☐	▲	▼	OCLC Number:	☐	☒
11	☐	▲	▼	DOI:	☐	☒
12	☐	▲	▼	PMID:	☐	☒
13	☐	▲	▼	Publication date:	☐	☒
14	☐	▲	▼	Place of publication:	☐	☒
15	☐	▲	▼	Additional Author (Last name, first name):	☐	☒
16	☐	▲	▼	Chapter:	☐	☒
17	☐	▲	▼	Source:	☐	☒
18	☐	▲	▼	Series Title Number:	☐	☒
19	☐	▲	▼	Fill the Pages or the Start and End fields:	☐	☒
20	☐	▲	▼	Pages to photocopy:	☐	☒
21	☐	▲	▼	Start page:	☐	☒
22	☐	▲		End page:	☐	☒

Tools

First
Move Selected

Delivery information fields

Columns
Tools

		Move Up	Move Down	Field Name	Mandatory	Visible
1	☐		v	Physical	☐	☒
2	☐	▲	▼	Digital	☐	☒
3	☐	▲	▼	Physical non-returnable	☐	☒
4	☐	▲	▼	Requested Media:	☐	☒
5	☐	▲	▼	Deliver to library	☐	☒
6	☐	▲	▼	Alternative address	☐	☒
7	☐	▲	▼	Pickup/delivery location:	☐	☒

To customize the visible fields on a Primo request form:

1. You can set the order of the fields on the request form, by sorting the fields in this mapping table. There are two methods to change a field's location in the list.
 - Click the up or down arrow next to the field to move until the field is in the desired order.
 - Select the check box to the left of the arrows. In the drop-down box below the section, select a field name or **First** or **Last**. Click the **Move Selected** button. If a field name is chosen, the checked field will move to the position just above the field in the drop-down box.

Italicized fields in the **Book fields** and **Article fields** sections may not be moved. Italicized fields in the **Delivery information fields** section will move together as a group with the non-italicized field immediately above them.

NOTE:

The **Copyright** and **Copyright statement** fields in the **Delivery information fields** section must be kept together but are not programmatically restricted to move as a together as a group.

2. Select or deselect the **Mandatory** and **Visible** check boxes as desired.
3. Click **Save**.

Support and Maintenance

New for August!

Sandbox Management

PERMISSIONS: To perform sandbox management, you must have the following role:

- General System Administrator

Any user can add or view the sandboxes widget.

You can view the status and history of your sandboxes on the Sandbox Management page ([Administration > General Configuration > Configuration Menu > Support and Maintenance > Sandbox Management](#)). If your institution is the contract lead for other institutions' sandboxes, their information also appears on this page.

For more information about sandboxes, see [Alma Sandbox Environments](#).

Sandbox Management

General

No. of entitled premium sandboxes 2
Next Available Refresh Date 30/09/2016

No. of entitled standard sandboxes 0

Sandbox Status

1 - 2 of 2 Records | Columns | Tools

	Active	Institution Code	Sandbox Environment	Type	Production Snapshot Date	Sandbox Refresh Date	Status	Status Date	Next Available Refresh Date	Note	Updated By	Updated Date	
1		TRAINING_MEMBER1_CLEAN	sandbox01-eu.alma.exlibris...	Premium	30/06/2016 15:18:00 CEST	30/06/2016 18:00:00 CEST	Ready	07/07/2016	30/09/2016	-	exl_impl	07/07/2016	Show History
2		TRAINING_NZ_CLEAN	sandbox01-eu.alma.exlibris...	Premium	30/06/2016 14:47:00 CEST	30/06/2016 17:45:00 CEST	Ready	03/07/2016	30/09/2016	-	exl_impl	07/07/2016	Show History

Cancel

Sandbox Management Page

The page includes the following information; all of the information is read-only.

- General information about all the sandboxes you manage:
 - No of entitled premium sandboxes
 - No of entitled standard sandboxes
 - Next Available Refresh Date - The earliest date on or after which a refresh is permitted on any of the sandboxes. Typically, a refresh is available every three months.
- For each sandbox:

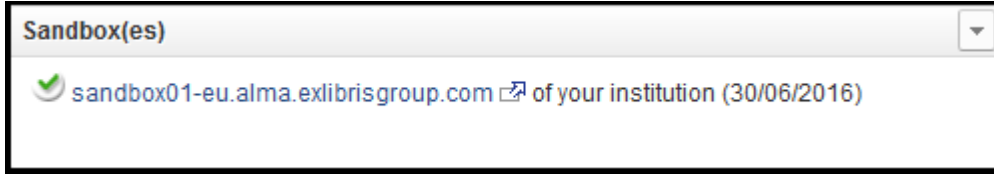
- **Active** - Whether the sandbox is active (yellow check mark) or inactive (gray check mark). An active institution can request refreshes of the sandbox environment.
- **Institution Code**
- **Sandbox Environment** - The Alma server sandbox environment
- **Type** - Premium or Standard
- **Production Snapshot Date** - The date and time that the data was exported from the production environment (premium sandboxes only)
- **Sandbox Refresh Date** - The date and the time that the data was imported to the sandbox environment
- **Status** - Status of the sandbox environment:
 - **Not provisioned** - The sandbox was not yet provisioned with data
 - **Refresh running** - The data is being exported from the production environment and/or imported into the sandbox environment
 - **Refresh waiting for approval** - The data is ready on the sandbox, but the sandbox environment is not yet ready for use
 - **Ready** - The sandbox is ready and available to use
 - **Temporarily unavailable** - The sandbox is unavailable for some reason (maintenance is being performed, network issue, and so forth)
- **Status Date** - The date of the last time the status was changed
- **Next Available Refresh Date** - The date on or after which a refresh is permitted on this sandbox (active sandboxes only)
- **Note** - Any notes added by support about this sandbox
- **Updated By** - The user who last modified any information about the sandbox
- **Updated Date** - The date that any information about the sandbox was modified
- **Show History** - Click to display the Sandbox Management History page with historical information about the sandbox's refreshes.

Sandbox Management History Back									
General Institution Code TRAINING_NZ_CLEAN Sandbox Environment sandbox01-eu.alma.exlibrisgroup.com									
Sandbox History 1 - 1 of 1 Records Columns Tools									
	Active	Type	Production Snapshot Date	Sandbox Refresh Date	Status	Status Date	Note	Updated By	Updated Date
1		Premium	30/06/2016 14:47:00 CEST	30/06/2016 17:45:00 CEST	Ready	03/07/2016	-	ext_impl	07/07/2016
Back									

Sandbox Management History Page

The Sandboxes Widget

Any user can add or view the sandbox widget on the Alma home page (see [Managing Widgets](#)).



The Sandboxes Widget

The widget includes status checkmarks and links to all relevant sandboxes, as well as a **More Info** link that opens the Sandbox Management page (see [PRIVATE - Support and Maintenance](#)).

Social Login

New for August!

PERMISSIONS: To configure social login profiles, you must have the following role:

- General System Administrator

Facebook or Google may be used to login into staff accounts. The setup below is required to enable the option to email users with an invitation to use social login. The email option may be found in the [Manage Users interface](#) for an individual user, or can be sent in bulk in the Update/Notify Users job. The email letter is **SocialLoginInviteLetter**.

For a detailed overview of social logins, see the [Developer Network](#).

To configure a social login integration profile:

1. Access the Integration Profile List page (**Administration > General Configuration > Configuration Menu > External Systems > Integration Profiles**).
2. Click **Add Integration Profile**.
3. Enter the external system information, such as (Profile) Code and Name, select **Social Login** as the integration type, and click **Next**. The Social Login configuration dialog box appears:


External System
1 2
[Back](#)
[Cancel](#)
[Save](#)

External System

Code	FACEBOOK	Name	Facebook	Integration Type	Social Login
------	----------	------	----------	------------------	--------------

Actions

Login

Active * ☒ Active ☐ Non Active

App ID *

App Secret *

Self Registration

Active * ☒ Active ☐ Non Active

User Group *

Resource sharing library

Statistical Category

[Back](#)
[Cancel](#)
[Save](#)

Social Login Integration Profile

- The login section defines the required attributes for the OAuth protocol to establish authentication with the external application. The App ID and App Secret are provided by the social network.
- The self registration section is for future use.
- Click **Save**.