

Alma December 2016 Release Notes

Great Inventions Around the Alma World

Norway - Erik Rotheim
The aerosol spray can



The Alma December release provides numerous new features and enhancements. Some of these enhancements are a result of 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

- ☐ [Upload Electronic Holdings from Ovid](#) – Save time by replacing the manual workflow with this new Alma feature, which enables you to automatically update Ovid electronic holdings by retrieving the institution-specific Ovid electronic holdings and updating the Ovid collection content accordingly.
- ☐ [BLDSS Implementation](#) – If you borrow from the British Library and rely on the Alma-generated ARTEmails, you can finally switch to using the newly supported British Library Document Supply Service (BLDSS) APIs and automate your resource sharing workflow with the British Library.
- ☐ [Digitization Request Fees](#) – If you charge service fees for supplying some or all of your patrons with a digitization service, you can easily manage and report on these costs using Alma's new flexible fee options for digitization requests, allowing you to implement your policies using Alma's Terms of Use.

Action Items

☐ [Managing Display Logic Rules When Working with a Network Zone](#) – Institutions implementing a Network Zone that want to centrally manage display logic configurations can now do so by configuring their logic rules in the Network Zone. This new ability complements previously existing options for centrally managing resource sharing, fulfillment, and other system configurations.

☐ [Restore Updated or Deleted Records](#) – This great new feature allows you to revert changes or accidental deletions that may have occurred as part of running certain batch update or withdrawal jobs.

What's New?

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

Acquisitions

- [Auto-Claim for Continuous PO Lines](#) – Claims can now be sent automatically by email for continuous PO lines. This is in addition to sending claims automatically by EDI, which is already supported.
- [Managing COUNTER Reports in Alma](#) – Ex Libris is implementing the ability to manage COUNTER reports in Alma (rather than from UStat), both for manual upload and SUSHI harvesting. Several early tester institutions are using this functionality. General availability for this feature is planned for March 2017.
- [Additional Acquisitions Enhancements](#)

Resource Management



- **Idea Exchange:** [Moving an Item Record from One Bibliographic Record to Another Bibliographic Record](#) – You can now move one or more items from one bibliographic record to another bibliographic record, including items associated with requests, work orders, PO lines, and so forth.
- [Enhanced Barcode Generation](#) – The barcode generation feature was enhanced to provide a library-level barcode counter, in addition to the existing institution-level barcode counter and the ability to create multiple barcode counter sequences.
- [Upload Electronic Holdings from Ovid](#) – A new Upload Electronic Holdings integration profile is provided for updating Ovid electronic collection institutional holdings automatically.



Watch the [Upload Electronic Holdings from Ovid](#) video

- [Directional Control Characters](#) – You can now insert and view directional control characters when cataloging in the MD Editor.
- [Hanzi to Pinyin Normalization](#) – A normalization process was added for Hanzi to Pinyin transliterations.
- [Generate Alternative and Temporary Item-Level Call Numbers](#) – When editing items on the Physical Item Editor page, the new **Generate** button can be used to create alternative and/or temporary item-level call numbers from sequences defined in the Accession Number configuration.



Watch the [Generate Alternative and Temporary Item-Level Call Numbers](#) video

- [Calculate Alternative and Temporary Item-Level Call Numbers](#) (Developed for use in German-speaking regions) – When editing items on the Physical Item Editor page, the new **Calculate** button can be used to create alternative and/or temporary item-level call numbers based on existing call number prefixes and sequences in the Alma repository.
- [Semi-Annual Re-indexing](#) – Several new enhancements are becoming available as a result of the re-indexing process starting at the beginning of December.
- [Additional Resource Management Enhancements](#)

Digital Resource Management

- [Enhancements to Dublin Core Publishing](#) – Several enhancements were added to allow for better publishing of Dublin Core records.
- [Display Representations Based on Public Note](#) – You can now configure Alma to hide a representation, depending on the value of the **Public Note** field of the representation.
- [Enhanced Support for Automatic Generation of Thumbnails](#) – Additional formats are supported for the automatic generation of thumbnails and a new **Thumbnail Generation** job has been added.
- [Additional Digital Resource Management Enhancements](#)

Fulfillment

- [Enhancements to Block When Overdue Policy](#) – Overdue loan blocks may now be calculated based on the number of overdue days accumulated across multiple loans.



- **Idea Exchange:** [Call Number Added to Fulfillment Pages and Letters](#) – **Call Number**, **Accession Number**, and **Alternative Call Number** now optionally appear on Fulfillment pages and letters.



Watch the [Call Number Added to Fulfillment Pages and Letters](#) video

- [Digitization Request Fees](#) – Digitization fees can now be charged per digitization and/or per page.



Watch the [Digitization Request Fees](#) video

- [Additional Fulfillment Enhancements](#)

Resource Sharing

- [Enhanced Overdue Messages](#) – Overdue messages for borrowing requests can now be presented to the borrowing institution at a set interval of days. In addition, SLNP partners that do not have an overdue message can be configured with an email address for sending overdue notifications in addition to the resending interval.
- [BLDSS Implementation](#) – The British Library Document Supply Service APIs can now be used for seamless integration between your library and the British Library for resource sharing.
- [Enhancing Message to Email Partners](#) – Alma is now able to generate notifications to email resource sharing partners for each request status change.



Watch the [Enhancing Message to Email Partners](#) video

- [Additional Resource Sharing Enhancements](#)

Collaborative Networks

- [Managing Shared Digital Resources When Working with a Network Zone](#) – Digital inventory created in a Network Zone can now be exposed to member institutions.
- [Managing Display Logic Rules When Working with a Network Zone](#) – It is now possible for the Network Zone to distribute additions, deletions, and updates of display logic rules to all member institutions, or to a specific member institution only.

Analytics

- [Enhancements to Course Reserves Subject Area](#) – Enhancements were made to the Course Reserves subject area to allow for the creation of more comprehensive course reserve reports.
- [Institutional Analytics Profile](#) – As part of preparing Alma for comparative, cross-institution benchmark Analytics, you can configure an institutional Analytics profile to be used in this upcoming enhancement.
- [Additional Analytics Enhancements](#)

Mobile

- [Alma Mobile](#) – Using mobile smartphones and tablets, Alma Mobile enables you to access Alma anywhere.

Administration and Infrastructure

- [Restore Updated or Deleted Records](#) – You can restore certain types of records that were removed or changed by jobs.
- [Additional Administration and Infrastructure Enhancements](#)

APIs



- **Idea Exchange:** The Sets APIs were enhanced and it is now possible to create an itemized set, and then add, delete, or replace members of the set. It is also possible to create and populate a set of records according to lists that are the output of an MD import job that was run. To assist with this, the API `GET /jobs/{job id}/instances/{instance_job_id}` now returns links with the relevant details for creating these sets (see <https://developers.exlibrisgroup.com...using-Alma-API>). For detailed information on these APIs, see <https://developers.exlibrisgroup.com/alma/apis/conf>.
- The response for retrieving a job instance by ID using the Jobs API now includes the related job information.
- The Retrieve Resource Sharing Request API now supports retrieval by external identifier.
- Purge user records and itemize a set were added to the Jobs API GET methods under type=OTHER. Note, however, that it is not possible to run these jobs using the API.

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 (control 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.
- The **URL** condition that was added as an advanced search option under Electronic Collection when searching for electronic titles is not functioning properly.
- A user with the Physical Inventory Operator role can edit a holdings record using the **View Inventory** option in the MD Editor, although the user should not have this capability and cannot perform this action from the List of Holdings.
- Receiving of multiple items using Scan In Item is currently not possible when shared barcodes are used.
- When using the **Calculate** functionality (on the Physical Item Editor page) with both the Alternative and Temporary call numbers for the same prefix at the same time, an identical sequence is calculated and saved in both.
- It is currently possible to create two sequences with the same prefix for the same library and location (with a different sequence name). Two sequences with the same prefix should not be allowed. Numeric sequences (which have no prefix) that are configured with the Prefix+Sequence method should only be created once in every institution (either as an institution-level sequence, library-level sequence, or location-level sequence). This issue applies to both barcode sequences and accession number sequences.

- For the Upload Electronic Holdings job for the Ovid integration profile (see [Creating the Ovid Integration Profile](#)), one of the portfolios won't be activated as expected when the vendor supplies a file with two entries that stand for two different portfolios with different coverages of the same bibliographic record but each entry refers to a different ISBN.

Data Services

- [Library of Congress Authorities Community Zone Updates](#)
- [New Electronic Collections Added to the Alma CKB](#)
- No new external resources were added to Alma for the December release.

Next Release Sneak Preview

[View a list of the features](#) that are planned for the January 2017 Alma release.

Acquisitions - December 2016 Enhancements

Auto-Claim for Continuous PO Lines

Until now, claims were sent automatically by email to vendors only for missing one-time physical PO lines. Now claims can also be sent automatically by email for missing continuous physical PO lines. When configured, a claim is sent automatically by email to the vendor for an item when triggered, in addition to being added to the claims task list. For more information, see [Processing Claims](#).

Set the new parameter **auto_claim_co** ([Configuring Other Settings](#)) to **Y** to enable this feature.

For one-time PO lines, notifications (EDI or email) are sent to the vendor only the first time that the PO line is sent to the Claims page (if, for example, an operator updates the PO line date, and the PO line is sent to the Claims page again after the new date passes, another notification is not sent to the vendor). For continuous PO lines, notifications are sent to the vendor every time the PO line is sent to the Claims page.

As with one-time physical PO lines, the email PO Line Claims letter must also be enabled (see [Enabling/Disabling Letters](#)). This letter has new XML fields to support additional information for continuous claims. If the item description is complete (this is the case if you are using prediction patterns), the following XML is added to the EDI claim about the missing volume/issue; otherwise the XML contains information about the last received item.

```
<issues_or_copies>
<issue_or_copy>
<item_description>v.1:no.3(2015:Jan. 20)</item_description>
<expected_arrival_date>2015-05-03</expected_arrival_date>
</issue_or_copy>
</issues_or_copies>
```

You can configure the letter using XSL; see [Customizing Letter XSL Style Sheets](#).

Managing COUNTER Reports in Alma

Electronic resource usage statistics information can be provided by vendors in COUNTER format. With access to these reports, librarians have more options for analyzing and understanding usage within their institutions. COUNTER (Counting Online Usage of NeTworked Electronic Resources) compliant usage statistics is explained here: <https://www.projectcounter.org/>.

Many vendors can provide COUNTER statistics for your institution's users' usage. In some cases, you receive this information in a file. In some cases your vendor supports the SUSHI protocol (Standardized Usage Statistics

Harvesting Initiative), which allows you to automatically retrieve (harvest) the data. For more information about SUSHI, see <http://www.niso.org/workrooms/sushi/>.

Ex Libris is implementing the ability to manage COUNTER reports in Alma (rather than from UStat), both for manual upload and SUSHI harvesting. Several early tester institutions are using this functionality. For detailed information, see [Managing COUNTER-Compliant Usage Data](#). In March 2017, all Alma institutions will be moved from UStat to Alma for COUNTER reports management and UStat will no longer be available for new COUNTER reports. In advance, your SUSHI vendor account details will be available so that you can review and prepare your SUSHI vendor information when the migration occurs in March.

Additional Acquisitions Enhancements

- The alert indicating that an **Order Now** process was successful no longer states that the order was sent to the vendor (since some acquisition methods, such as Purchased at Vendor, do not send anything to the vendor). The new message simply indicates that the process was successful and is continuing in its workflow.
- You can now search licenses from the Persistent Search box. See [Using the Persistent Search Box](#).
- The message that appears after selecting one or more patron purchase requests and then clicking **Reject Selected** was updated to note that already approved requests cannot be rejected.
- When you reopen a canceled PO line, any fund associated with the PO line is removed. You must associate a fund to the PO line again, as for newly created PO lines. An alert indicating this appears at the top of the page when you are editing the PO line information.

Resource Management - December 2016 Enhancements

Moving an Item Record from One Bibliographic Record to Another Bibliographic Record

Previously, you were able to move items from one bibliographic record to another bibliographic record at the holdings level. With this release, you can move an individual item or multiple items from one bibliographic record to another bibliographic record.

Since item records may be linked to several different processes, where applicable, the following functional areas of Alma are evaluated and handled when you request to move an individual item. Unless otherwise noted, the outstanding/pending processes are moved with the item.

- Requests
- Loans
- Reading lists
- Holds
- Resource sharing requests
- Work orders
- PO lines – For certain use cases, items attached to a PO line cannot be moved to another bibliographic record. When this occurs an informational error message appears. This happens in instances where the item that you want to move is under a bibliographic record with other items that point to the same PO line.
- Fines and fees – Fines and fees are attached to a loan and are typically not affected if an item is moved. However, when a barcode is added to the fine or fee, it is then also attached to the item. When this occurs, the fine/fee title is changed to the title from the new record. In either case, the fee owner remains as it was.

As a result of this enhancement, the following changes have been implemented on the List of Items page:

- The **Move Items** button has been relabeled **Change Holdings**
- The **Move** row action (**Actions > Move**) has been relabeled **Change Location**
- The **Relink Items** button has been relabeled **Relink to another Bib**

See the [Working with the List of Items](#) section for more information.

Enhanced Barcode Number Generation

The barcode generation feature was enhanced to provide a library-level barcode counter in addition to the existing institution-level barcode counter and the ability to create multiple barcode counter sequences. Your existing barcode counter sequence will be identified as the default at the institution level effective with this release. For more information, see [Configuring the Barcode Generation Method and Barcode Validation](#).

Upload Electronic Holdings from Ovid

A new Upload Electronic Holdings integration profile is provided for Ovid collections. The Ovid integration profile can be used to automatically update the institution electronic holdings for Ovid electronic collections and, thereby, eliminate the more manual workflow that you currently use. See [Upload Electronic Holdings from Ovid](#) for more information.

Directional Control Characters

With the December release, Alma provides support for inserting directional control characters when cataloging in the MD Editor. These characters are used to control the direction of the text when cataloging text that has both left-to-right and right-to-left languages. Since directional control characters are non-printing characters, they are normally not visible. However, as part of this new feature, you can use the options in the MD Editor to show the directional control characters when you are cataloging. See the [MD Editor Menu and Toolbar Options](#) section for more information.

Hanzi to Pinyin Normalization

A normalization process has been added for Hanzi to Pinyin transliterations. This enables catalogers to more easily enhance bibliographic and authority records when working in the MD Editor. See [Working with Normalization Processes](#) for more information.

Generate Alternative and Temporary Item-Level Call Numbers

When editing items on the Physical Item Editor page, the new **Generate** button can be used to create alternative and/or temporary item-level call numbers from sequences defined in the Accession Number configuration. See [Configuring Other Settings \(Resource Management\)](#) and [Configuring Accession Numbers](#) to configure your system for this new capability and [Updating Item-Level Information](#) for how to use it.

Calculate Alternative and Temporary Item-Level Call Numbers

When editing items on the Physical Item Editor page, the new **Calculate** button can be used to create alternative and/or temporary item-level call numbers based on existing call numbers in the Alma repository. See [Updating Item-Level Information](#) for more information.

NOTE:

You may choose to configure your system to use both the **Calculate** and **Generate** features on the Physical Item Editor page or only one of either of these features.

If you are interested in using this feature, contact Ex Libris to configure this capability for your institution.

Semi-Annual Re-indexing

Several new enhancements are becoming available as a result of the re-indexing process starting at the beginning of December. See the following list:

- The authorities 100 \$t field is now also indexed under the Uniform Titles authorities index (in addition to already being indexed under Name Titles).
 - Subfield \$p (the name of a part/section of a work) of field 830 (Series Added Entry – Uniform Title) was added to the Series field in the repository search results.
 - The note subfields \$x and \$z of the holdings field 863 are now searchable through the Holdings Note index.
-

Additional Resource Management Enhancements

- As announced in the August 2016 release, the **Export URLs** configuration option under Resource Management (**Resource Management > Resource Configuration > Configuration Menu > Record Export section**) was removed. See [Export URL Options Expanded](#). The **Extracting Electronic Portfolio URLs - Export URLs (To Be Deprecated)** and the **Viewing Extracted Electronic Portfolio URLs Job Report (To Be Deprecated)** sections have been removed from the online help.
- As a performance improvement, when a record is edited and saved in the MD Editor, only that record is refreshed. Previously, all draft records (not released) listed in the left panel of the MD Editor were refreshed when one of the records in the list was edited and saved.
- The **drools/remove856.dsI** normalization rule can now be used in the MD Editor.
- When deleting electronic collections, the pop-up confirmation dialog box was updated to indicate the number of portfolios that are going to be deleted in a background job that is run to complete this process. For more information, see the **Delete** entry under **Electronic Collections** in the [Actions You Can Perform on the Repository Search Results Page](#) table.

- The holdings copy number, if one exists for the holdings, is now appended to the holdings location information displayed on the List of Items page. The copy number was also added to the holdings information displayed when a single item is selected from the List of Items, or when clicking **Add Item** on the List of Items page.
- If you include the **Duplicate Validation MARC21 Holding Other Title** task in your validation check ([Resource Management > Resource Configuration > Configuration Menu > Cataloging > Metadata Configuration](#), select **MARC21 Holding**, click the **Validation Processes** tab, edit a validation process, select the Task List tab, select the **Duplicate Validation MARC21 Holding Other Title** task from the **Process List Pool**, and click **Add to Selection**), the **Check different locations for duplicate call numbers** check box appears in the **Task Parameters** tab. If this check box is selected, the validation check is performed on holdings records in different locations. If this check box is cleared, the validation check is performed only on the holdings records in the current location.
- The Publishing to Primo job now publishes up to 1000 relations per bibliographic record.
- The deployment of the browse bibliographic headings sorting improvement started in November continues with the December release. See the [Browse Bibliographic Headings Sorting Improvement](#) section from the November release notes for more information.
- The following physical item material types were added to Alma:
 - DAT (Digital Audio Tape)
 - Globe
 - Laptop Accessory
 - Microopaque
 - Motion picture
 - Record (phonodisc)
 - Video Recording (Other)

Digital Resource Management - December 2016 Enhancements

Enhancements to Dublin Core Publishing

The following developments were added for publishing in Dublin Core format:

- Alma now supports publishing DC records in DC format. Alma records that contain qualified DC properties can be published with one of two output formats:
 - Qualified DC – The DC record is published in its original format
 - Simple DC – The dcterms elements of the record are simplified to DC elements


Publishing Profile Details

Profile Id -

Profile Name *

Profile Description

Status
☒ Active
☐ Inactive

Scheduling
Not scheduled

Content

Set name *

Filter Records

Publish on:
☒ Bibliographic level
☐ Holdings/Portfolio/Representation level
☐ Item/Portfolio level

Output format
MARC21 Bibliographic

Publishing Mode

MARC21 Bibliographic
Dublin Core (Simple)
Dublin Core (Qualified)

Publishing Protocol

FTP
☐

OAI
☐

Z39.50
☐

Dublin Core Qualified

- When selecting the **Dublin Core (Simple)** output format with the **OAI** publishing protocol, the metadata prefix is set to `oai_dc` and with the **Dublin Core (Qualified)** output format the metadata prefix is set to `oai_qdc`.

Content

Set name *

Publish on:

☒ Bibliographic level
☐ Holdings/Portfolio/Representation level
☐ Item/Portfolio level

Output format

Dublin Core (Qualified)

Publishing Mode

☒ Incremental
☐ Full
☐ Date Range
☐ Republish Set

Publishing Protocol

FTP
☐

OAI
☒

Set Spec *

Set Name *

Metadata Prefix * oai_qdc

Metadata Prefix

- In the **Digital Enrichment** section, you can now select a repeatable field from a drop-down list to which you want to add the representation delivery URL. For simple DC, the 15 core DC elements appear:


Publishing Profile Details

Profile Id -

Digital Inventory Enrichment

Add Digital Representation Information ☒

Add Remote Representation Information ☒

Repeatable field dc:identifier

Collection Enrichment

Add Collection Information ☐

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
dc:type

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Repeatable Field for Simple DC

For qualified DC, the full list as configured appears, including qualified DC terms:

 **Publishing Profile Details**

Profile Id -

Digital Inventory Enrichment

Add Digital Representation Information ☒

Add Remote Representation Information ☒

Repeatable field

Collection Enrichment

Add Collection Information ☐

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dc:contributor
 dc:coverage
 dc:creator
 dc:date
 dc:description
 dc:format
 dc:format (dcterms:IMT)
 dc:identifier
 dc:identifier (dcterms:ISBN)
 dc:identifier (dcterms:ISMN)
 dc:identifier (dcterms:ISSN)
 dc:identifier (dcterms:URI)
 dc:language
 dc:language (dcterms:ISO639-2)
 dc:language (dcterms:RFC1766)
 dc:language (dcterms:RFC3066)

Repeatable Field for Qualified DC

- The following normalization routines occur:

- BIB-level published DC records are enriched with an MMS ID:

```
<dc:identifier>alma:{INST_CODE}/bibs/{MMS_ID}</dc:identifier>
```

- REP-level published DC records also contain a REP PID:

```
<dc:identifier>alma:{INST_CODE}/bibs/{MMS_ID}/representations/{REP_PID}</dc:identifier>
```

Normalizations are applied post-transformation and post-enrichment.

- A **Collection Enrichment** section was added, that allows you to add collection information to the DC record, as already exists for MARC:

Collection Enrichment

Select **Add Collection Information** to add the following for each collection:

```
<dc:relation>alma:{INST_CODE}/bibs/collections/{COLLECTION_ID}</dc:relation>
```

For more information, see [Publishing and Inventory Enrichment \(General Publishing\)](#).

Display Representations Based on Public Note

You can now configure Alma to hide a representation in the View It tab, depending on the value of the **Public Note** field of the representation. This is done by using display logic rules to hide the **Representation Delivery Service** depending on the value of the **Public Note** field.

Public Note

The following are examples of regular expressions with which you can configure the Display Logic Rules to hide representations when the expressions are in the **Public Note** field. A flag can be used to determine if the expression is case sensitive or not:

- `/Restricted Access/` – Matches a public note containing the phrase **Restricted Access**, case sensitive.

- `/Restricted Access/i` – Matches a public note containing the phrase **Restricted Access**, case insensitive.
- `/^(?!Open Access$)` – Matches a public note that does not equal **Open Access**, case sensitive.
- `/^((?!Open Access).)*$/i` – Matches a public note that does not contain the phrase **Open Access**, case insensitive.

For more information, see [Discovery Interface Display Logic](#).

Enhanced Support for Automatic Generation of Thumbnails

Alma can automatically generate thumbnails from digital files. This allows thumbnails to be displayed without having to provide a thumbnail file or the use of an external system. When uploading digital files, Alma generates a thumbnail image that you can accept or replace. This feature was enhanced with support for the following:

- Additional file formats:

- jpg
- png
- mp4
- wav
- m4v
- pdf
- doc
- ppt
- docx
- pptx

NOTE: Alma will continue to support the existing method of providing thumbnails (with a *.thumb extension). This is the preferred method in cases where the first page is unsuitable for a thumbnail.

- The new **Thumbnail Generation** job was added to create thumbnails from sets of digital files. You can select one of the following options when running the job:
 - Add (default) - Generated thumbnails are added where no thumbnail exists.
 - Add and Overwrite - Generated thumbnails are added for all files in the set. If one already exists, it is overwritten with a generated thumbnail.
 - Delete - Thumbnails are removed for all files in the set.

For more information, see [Running Manual Jobs on Defined Sets](#).

Additional Digital Resource Management Enhancements

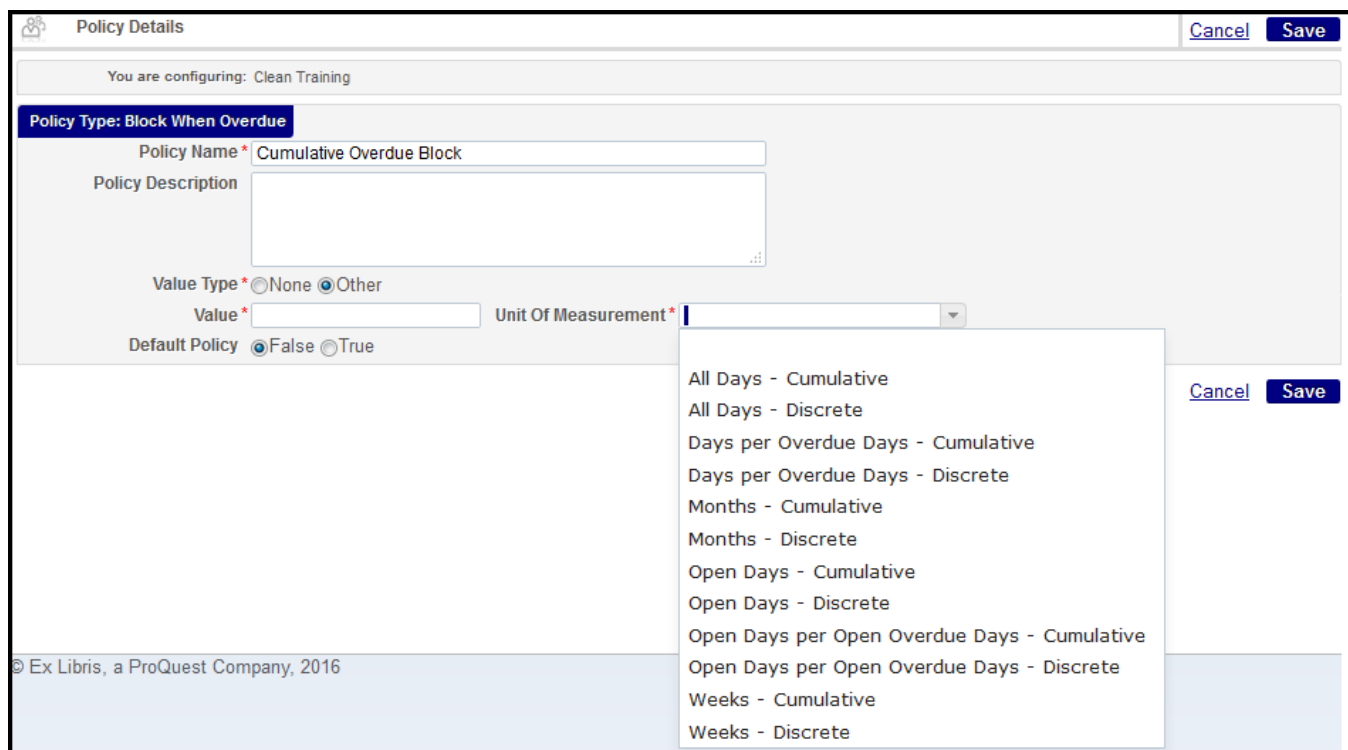
- The **Collection** facet was added to the results that are displayed when you perform a physical, electronic, or digital title repository search. This facet allows you to filter the results by collection.

Fulfillment - December 2016 Enhancements

Enhancements to Block When Overdue Policy

Overdue loan blocks may now be calculated based on number of overdue days accumulated across multiple loans. Each of the previous units of measurement for the policy are now listed as **Discrete** (for example, the unit of measurement that was previously All Days is now All Days - Discrete). If an applicable Block When Overdue policy has a **Cumulative** unit of measurement, the expiry date is calculated as the latest block expire date plus the number of days that the policy dictates. If a cumulative value is not chosen, the expiry date will be according to the policy only, without considering previous blocks.

For example, if the patron is already blocked for the next 10 days and a loan with the **All Days - Discrete** policy is returned 12 days late, the exiting block will be extended by 2 days. If the loan has an **All Days - Cumulative** policy, the exiting block will be extended by 12 days.



Policy Details Cancel Save

You are configuring: Clean Training

Policy Type: Block When Overdue

Policy Name * Cumulative Overdue Block

Policy Description

Value Type * ☐ None ☒ Other

Value * Unit Of Measurement *

Default Policy ☒ False ☐ True

Unit Of Measurement dropdown options:

- All Days - Cumulative
- All Days - Discrete
- Days per Overdue Days - Cumulative
- Days per Overdue Days - Discrete
- Months - Cumulative
- Months - Discrete
- Open Days - Cumulative
- Open Days - Discrete
- Open Days per Open Overdue Days - Cumulative
- Open Days per Open Overdue Days - Discrete
- Weeks - Cumulative
- Weeks - Discrete

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Block When Overdue Policy

A maximum overdue block period policy was also added. The maximum overdue block period policy affects the calculation of the overdue loan block's expiry date. If a block's expiry date is calculated to be later than the maximum, the block will be shortened to match the limit. The default policy does not set a maximum overdue block period.

The screenshot shows a web interface titled "Policy Details" with a "Cancel" and "Save" button in the top right. Below the title bar, it says "You are configuring: Clean Training". A blue header bar indicates the "Policy Type: Maximum Period For Overdue Block". The form contains several fields: "Policy Name*" (a text input), "Policy Description" (a larger text area), "Value Type*" with radio buttons for "None" and "Other" (where "Other" is selected), "Value*" (a text input), "Unit Of Measurement*" (a dropdown menu currently showing "All Days" and "Open Days" as options), and "Default Policy" with radio buttons for "False" and "True" (where "False" is selected). There are "Cancel" and "Save" buttons at the bottom right of the form area.

Maximum Period for Overdue Block Policy

For more information, see [Configuring User Blocks Due to Overdue Loans](#).

Call Number Added to Fulfillment Pages and Letters

Call Number, **Accession Number**, and **Alternative Call Number** are now available in fulfillment letter XMLs and on the following pages:

- Patron Services: Loans, Returns
- Return Items
- Scan In Items
- Manage in Process Items
- Expired Hold Shelf
- Active Hold Shelf
- Pick from Shelf
- Monitor Requests

For the Patron Services, Return Items, Scan In Items, and Manage In Process Items, the new fields are available from the **Columns** drop-down in the upper right corner of the grid. For example, in the Patron Services Loans tab:

Patron Services

Refresh Blocks/Notes Done

Patron Batson, Billy
ID [8888](#)
User group Undergraduate Student
Active balance [0.00 USD](#)
[Edit Info](#) [Send Activity Report](#) [Send Requests Report](#) [Submit Request](#)

Notes User Notes (0)

Loans Returns Requests

Scan item barcode * OK Create Item Loan Display This session

Renew All Change due date 1 - 1 of 1 Records Columns Tools

	Title	Due Date	Barcode	Fine	Loan Date
1	Earth science [by] John F. Louns...	2016/12/08 19:00:00 CST	15379	-	2016/11/08

Columns dropdown menu:

- ☒ Title
- ☒ Due Date
- ☒ Barcode
- ☒ Fine
- ☒ Loan Date
- ☒ Loan Status
- ☒ Item Policy
- ☒ Library
- ☐ Call Number
- ☐ Accession Number
- ☐ Alternative Call Number

Done

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Patron Services Loan Tab

Expired Hold Shelf and Active Hold Shelf already show the call number. The accession number and alternative call number, if populated, will display on these pages.

Pick from Shelf already displays the call number. If a request is connected to a holdings, the accession number now displays, if it is populated. If a request is connected to an item, both accession number and alternative call number display, if populated.

The fulfillment letters affected are:

- Borrowing Activity Letter
- Courtesy Letter
- Ful Overdue And Lost Loan Letter
- Ful Overdue And Lost Loan Notification Letter
- Overdue Notice Letter
- Due today notice

- Loan/Return receipts
- Print Slip (Ful Resource Request Slip Letter)
- Ful Lost Loan Letter
- Ful Lost Loan Notification Letter
- Ful Transit Slip Letter
- Personal Delivery Letter
- Loan Status Notice (FullItemChangeDueDateLetter)
- On Hold Shelf Letter
- Short loan Letter
- Shortened Due Date Letter

Digitization Request Fees

Digitization fees can now be charged per digitization and/or per page. The fees, **Digitization Fee per Digitization** and **Digitization Fee per Page**, are configured in the Requests Terms of Use. They default to **No Fee**. See [Adding Fulfillment Policies](#).

A **Calculate Digitization Fee** button appears on the Patron Digitization Request form in Alma and in the Get It tab in Primo.

NOTE: The Primo field will not show by default unless activated using the Digitization Request Form Customization option on the Fulfillment Configuration page.

The button does not actually apply the fee. The fee is applied when the patron digitization request is completed or approved, if approval is necessary. The fee calculation is: <Digitization Fee per Digitization> + <number of pages> * < Digitization Fee per Page>. For more information, see [Creating a Request](#).

Additional Fulfillment Enhancements

- On the Approval Requests List page, select **Actions > View Rule** to view the digitization profile rule that resulted in this request requiring manual approval (instead of being automatically approved or rejected). A read-only version of the Digitization Workflow Setup page appears, containing information about the rule that triggered manual approval for this request.

Digitization Workflow Setup Page (Read-Only)

- On the Edit Reading List Citation page, the **Copyright Status** field (used for manually managing the copyright status) was moved to the **Copyright Attributes** section. When the **Copyright Auditing Required** field (used for automatically managing the copyright status) is selected and the citation is saved, the **Copyright Status** field cannot be selected. In addition, the citation's copyright status cannot be changed using **Change Copyright Status** on the Edit Reading List page.

- When rolling over copyright approvals together with a course, the copyright approval date ranges are updated to the new course's date range.
- When editing a citation's copyright attributes, the **Requires Digitization** and **Send for Manual Approval** checkboxes were removed, as they are no longer required (due to the new automatic copyright approval rules system).
- For any citation whose copyright status is Waiting for Approval or Waiting for CC, you can resubmit the citation for automatic approval by clicking **Recalculate Rules** beneath the citation on the Edit Reading List page.

[Back](#)
[Print Slip](#)
[Being Prepared](#)
[Change Status](#)
[Print Slip Report](#)
[Place Request](#)
[Remove Alerts](#)
[Remove Cite](#)

Course Code: HIST215 Section: - Course Name: History of Modern Europe
 Processing Department: Graduate Library Course Reserves Instructors: Number of participants: 100

Reading List Information

Code: * HIST215
 Name: * Modern European History
 Owners:
 Status: Being Prepared
 Due Back Date: 05/17/2013

[Citations](#)
[Owners](#)
[Notes](#)

Alerts [All](#) [Citation/Locate](#) [Status](#) [All](#) [Citation Type](#) [All](#) [Tags](#) [Copyright Status](#) [All](#)

[Add Repository Citation](#)
[Add Non-Repository Citation](#)
[Add Brief](#)

☐ Select All

1 ☐ [Heresy in transition : transforming ideas of heresy in medieval and early modern Europe /](#)
Book (Ashgate, c2005.)
 ISBN: 0754654281
 Series: Catholic Christendom, 1300-1700
 Subject: Heresies, Christian--History--Middle Ages, 600-1500. -- Heresies, Christian--History. -- Europe--Church history--600-1500. and others
 Availability: Physical version temporarily at GRAD: gradres; BT1319 .H48 2005 (1 copy, 1 available)
 Request Status: Being Prepared
 Resource Locate Status: Resource Located
 Copyright Status: Waiting for Approval / Default Digitization Flow
 Alerts: Citation Move Request Completed
 Citation Move Request In Process
[Edit](#) | [Set Complete](#) | [Manage Fulfillment Options](#) | [Items](#) | [Remove](#) | [Duplicate](#) | [Print Slip](#) | [Detach from Repository](#) | [Citation Details](#) | [More Info](#) | [Recalculate Rules](#)

2 ☐ [Journal of modern European history](#)
Article By Leonhard, Jörn
 Availability: Physical version at GRAD: gradres (1 copy, 1 available)
 Request Status: Being Prepared
 Resource Locate Status: Resource Located
 Copyright Status: Not Determined
[Edit](#) | [Set Complete](#) | [Manage Fulfillment Options](#) | [Items](#) | [Remove](#) | [Duplicate](#) | [Print Slip](#) | [Detach from Repository](#) | [Citation Details](#) | [More Info](#)

3 ☐ [Modernizing Germany : Karl Biedermann's career in the kingdom of Saxony, 1835-1901 /](#)
Book By Bazillion, Richard J., 1943- (P. Lang, c1990.)
 ISBN: 082041485X

Edit Reading List Page

- On the Edit Reading List page, the filter **Citation Type** now includes the citation's material types, as well as the primary types **Book** or **Article**. In addition, the filter **Copyright Status** was added.

[Back](#)
[Print Slip](#)
[Being Prepared](#)
[Change Status](#)
[Print Slip Report](#)
[Pl](#)

Course Code: HIST215 Section: - Course Name:
 Processing Department: Graduate Library Course Reserves Instructors: Number of participants

Reading List Information

Code: * HIST215
 Name: * Modern European History
 Owners:
 Status: Being Prepared
 Due Back Date: 05/17/2013

[Citations](#)
[Owners](#)
[Notes](#)

Alerts [All](#) [Citation/Locate](#) [Status](#) [All](#) [Citation Type](#) [All](#) [Tags](#) [Copyright Status](#) [All](#)

[Add Repository Citation](#)
[Add Non-Repository Citation](#)
[Add Brief](#)

☐ Select All

1 ☐ [Heresy in transition : transforming ideas of heresy in medieval and early modern Europe /](#)
Book (Ashgate, c2005.)
 ISBN: 0754654281
 Series: Catholic Christendom, 1300-1700
 Subject: Heresies, Christian--History--Middle Ages, 600-1500. -- Heresies, Christian--History. -- Europe--Church history--600-1500. and others
 Availability: Physical version temporarily at GRAD: gradres; BT1319 .H48 2005 (1 copy, 1 available)
 Request Status: Being Prepared
 Resource Locate Status: Resource Located
 Copyright Status: Not Determined
 Alerts: Citation Move Request Completed
 Citation Move Request In Process

Edit Reading List Page

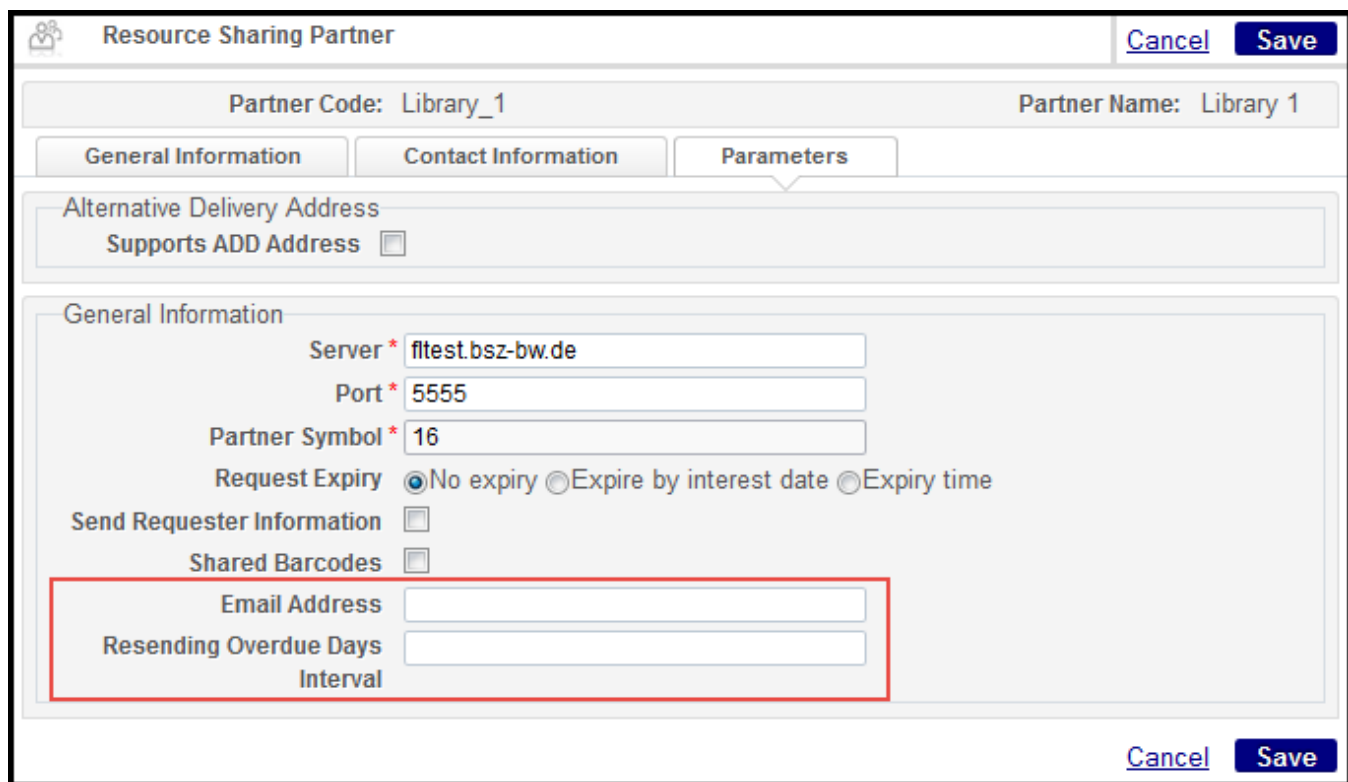
Resource Sharing - December 2016 Enhancements

Enhanced Overdue Messages

Overdue messages for borrowing requests may now be resent to the borrowing institution at a set interval of days.

For SLNP partners that do not have an overdue message, the lending institution can configure the email address for sending overdue notifications in addition to the resending interval. This enhancement is applicable only to requests that become overdue after the December 2016 release is active.

The partner configuration contains two new fields:



Resource Sharing Partner

Partner Code: Library_1 Partner Name: Library 1

General Information Contact Information Parameters

Alternative Delivery Address
Supports ADD Address ☐

General Information

Server * fittest.bsz-bw.de

Port * 5555

Partner Symbol * 16

Request Expiry ☒ No expiry ☐ Expire by interest date ☐ Expiry time

Send Requester Information ☐

Shared Barcodes ☐

Email Address

Resending Overdue Days Interval

Cancel Save

Resource Sharing Partner

For ISO and email partners that already send overdue messages, the resending overdue days interval field was added to the partner configuration as well to allow recurring overdue notifications.

The **Send Overdue Message to Resource Sharing Borrowing Partner** job will now send overdue emails to SLNP partners that are configured with an email address, in addition to sending the notifications for ISO and email partners. The job results report for the job includes a new section for SLNP partner requests.

For more information, see [Partner Parameters](#).

BLDSS Implementation

The British Library Document Supply Service (BLDSS) APIs create a seamless integration between your library and the British Library for resource sharing. The APIs allow for all of the actions that are part of the process of requesting British Library material to be done from within Alma as part of its internal workflows. For more information, see [British Library Document Supply Service \(BLDSS\)](#).

Enhancing Messages to Email Partners

Alma now generates notifications to email resource sharing partners for each request status change. The new notifications cover:

- Receive - **Borrower Receive Email Letter**
- Checked in - **Lender Checked-in Email Letter**
- General messages - **General Message Email Letter**
- Will supply - **Will Supply Email Letter**
- Reject - **Lender Reject Email letter**
- Ship - **Lender Ship Email Letter**
- Return - **Borrower Return Email Letter**
- Renew Response - **Lender Renew Response Email Letter**

Sent messages appear in the audit tab of the request. The new messages are disabled by default for existing customers. They are enabled by default for new customers. The letters are enabled/disabled from the Letter Emails interface (**General Configuration Menu > Letter Activity**).

For more information, see [Configuring Alma Letters](#).

Additional Resource Sharing Enhancements

- On the Lending Requests Task List, the **Assigned to Me**, **Unassigned**, and **Assigned to Others** tabs now have Has Content (blue/gray) icons.

- Deleting a resource sharing partner can now be done after all of its requests are either completed or deleted. As was true previously, the partner still cannot be deleted if it appears on the rota of an active request.
- The following has been changed for request notes:
 - When editing an incoming request, if notes are activated or dismissed and the **Save** button is then clicked, the notes action will now take effect in addition to the request being saved.
 - The label **Request with active notes** on a request in the task list is now a link that opens the request's **Notes** tab.
 - Requests with active general messages now display a link in the borrowing and lending requests task lists, **Request with active general messages**. This link opens the **General Messages** tab of the request.
- The customer parameter **rs_block_sending_requester_info**, previously accessible only to Ex Libris Support, can now be found on the **Fulfillment > Fulfillment Configuration > Configuration Menu > General > Other Settings** page. This parameter allows patron information to be suppressed from a resource sharing request that is sent to another institution. The parameter is set to **False** by default. When it is set to **True**, the **Send Requester Information** check box on the ISO partner parameters is hidden. For more information, see [Configuring Other Settings](#).
- Lending requests' automatic send request retry interval has been increased to 15 minutes.

Collaborative Networks - December 2016 Enhancements

Managing Shared Digital Resources When Working with a Network Zone

Digital inventory created in a Network Zone can now be exposed to member institutions. This allows the Network Zone's inventory to be discoverable by member institutions and appear in the View It tab. To allow sharing of an institution's digital inventory, set the **shareDigitalResources** parameter to **True**. For more information, see [Configuring Other Settings](#).

This is in addition to last month's development whereby member institutions can share their digital inventory with each other.

Managing Display Logic Rules When Working with a Network Zone

It is now possible for the Network Zone to distribute additions, deletions, and updates of display logic rules to all of its member institutions, or to a specific member institution only. Executing **Republish Shared Entities** or **Distribute Network Fulfillment Changes to Members** republishes the display logic rules. The member institution has the option to remove or deactivate its own institution rules.

Discovery Interface Display Logic
Back

Add Rule

Institution Rules

Remove Selected
Deactivate Selected
Columns
Tools

	☐	Active	Move Up	Move Down	Rule Description	
1	☐				Hide service Purchase Request	Remove

Network Rules

Columns
Tools

	Active	Rule Description
1		Hide service Purchase Request
2		For user groups Guest: Hide service Full Text

Back

Remove or Deactivate Institution Rules

Deactivation or deletion of institution rules at distribution time is controlled by a new parameter, **network_display_logic_distribution_members_behavior**. The values for this parameter are **None**, **Remove**, and **Deactivate**. The parameter defaults to **None**, which does not change the institution rules. **Remove** will remove all institution rules. **Deactivate** will deactivate all institution rules. For more information, see [Configuring Other Settings](#).

An additional new parameter, **network_display_logic_rules_precedence**, allows the Network Zone to determine which rules take precedence—the institution's rules or the network's rules. The parameter defaults to **False**, which sets the institution rule to taking precedence. **True** defines the Network Zone rule as having precedence. For more information, see [Configuring Other Settings](#).

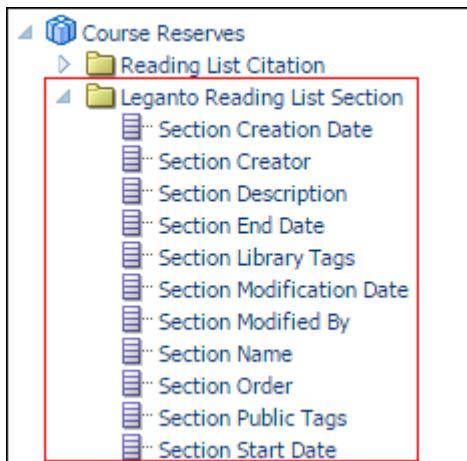
For more information, see [Configuring Fulfillment Information in the Network Zone](#).

Analytics - December 2016 Enhancements

Enhancements to Course Reserves Subject Area

The following enhancements were made to the Course Reserves subject area to allow for the creation of more comprehensive reports concerning Course Reserves.

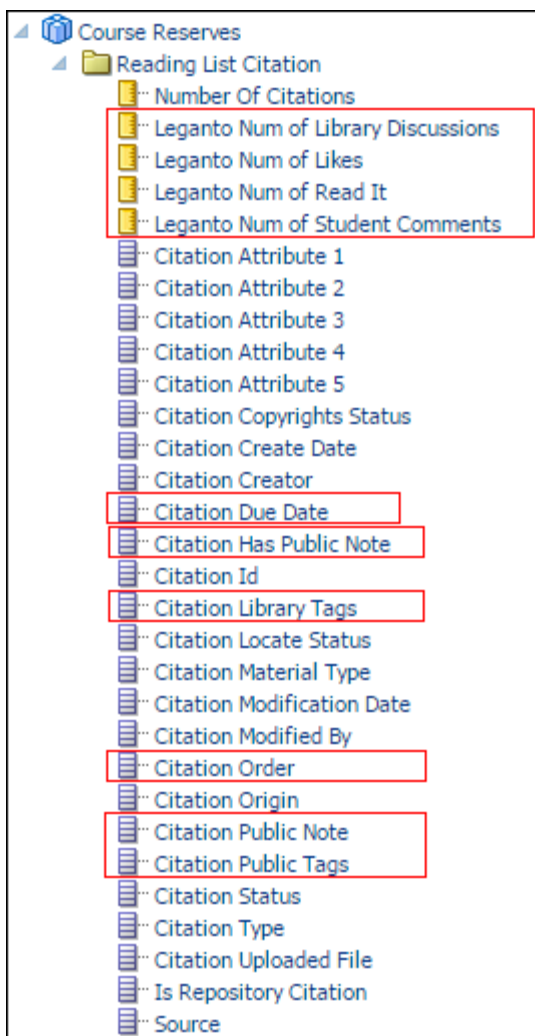
- The **Leganto Reading List Section** dimension was added, containing the following fields:



Leganto Reading List Section

For more information, see [Leganto Reading List Section](#).

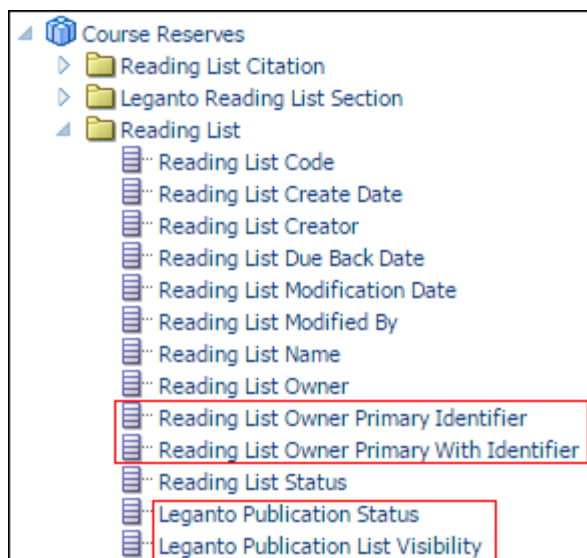
- The following fields were added to the **Reading List Citation** dimension:



Reading List Citation Fields

For more information, see [Reading List Citation](#).

- The following fields were added to the **Reading List** dimension:



Reading List Fields

For more information, see [Reading List](#).

Institutional Analytics Profile

In February 2017, Alma comparative benchmark Analytics will be released. As part of this feature, an institutional Analytics profile will be used. Although the full feature will not be available until February, beginning with the December 2016 release, you can configure an institutional Analytics profile.

Note that the value of benchmark Analytics increases as more institutions participate. As the data from multiple institutions increases, the KPIs in benchmark Analytics become more representative of the entire community and more indicative of library activities. We therefore strongly encourage users to fill out the institutional profile and take part in comparative benchmark Analytics.

The profile is available at **Administration > Analytics > Configuration Menu > Institutional Analytics Profile**. To configure the profile, you answer a series of questions:

Questions and Answers

Confirm including anonymized statistical data (such as average time for order receipt, number of physical items etc.) from my institution in the aggregated data used by Benchmark Analytics. No personal data or detailed transactional data is used in the benchmark analytics. (The data will be included only in the same regional data center as the institution and will not be transferred outside the data center).

- ☐ Yes
- ☐ No

Total annual amount spent on library resources of all formats? *

- ☐ Under 1 Million
- ☐ 1-2 Million
- ☐ 2-5 Million
- ☐ 5-10 Million
- ☐ 10-15 Million
- ☐ 15-20 Million
- ☐ 20-25 Million
- ☐ 25-30 Million
- ☐ Over 30 Million

Total annual percent spent on electronic materials? *

- ☐ Below 25%
- ☐ 25-50%
- ☐ 50-75%
- ☐ More than 75%

Total annual percent spent on physical materials? *

- ☐ Below 25%
- ☐ 25-50%
- ☐ 50-75%
- ☐ More than 75%

Total undergraduate student body size? *

- ☐ Below 2 Thousand
- ☐ 2-5 Thousand
- ☐ 5-10 Thousand
- ☐ 10-15 Thousand
- ☐ 15-20 Thousand

Configuring Institutional Analytics Profile

NOTE: If you confirm the use of the anonymized statistical data (such as average time for order receipt, number of physical items, and so forth) from your institution in the aggregated data used by Alma comparative benchmark Analytics:

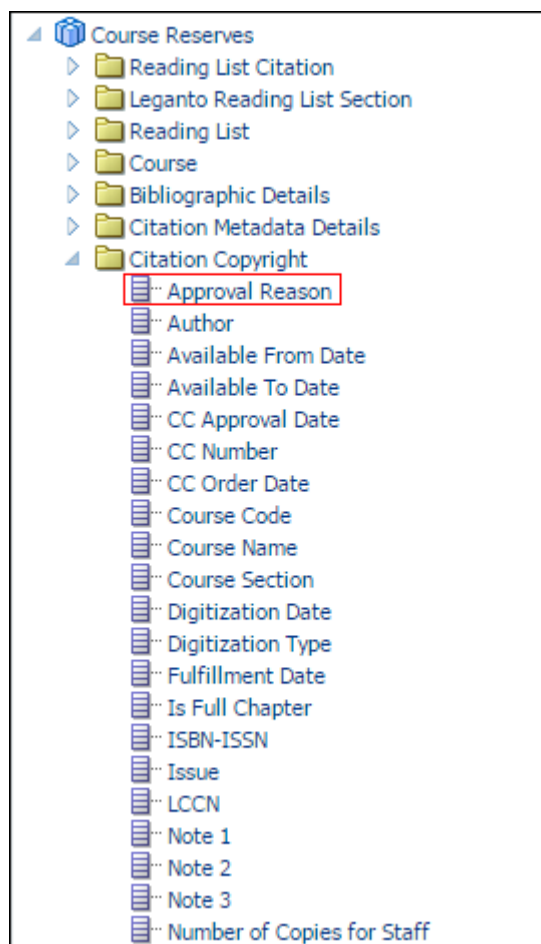
- All statistical data is anonymized and aggregated and contains no personal data or detailed transaction data. There is no way of identifying this data per institution.

- This aggregated and anonymized statistical data will be used only within the same regional data center as the institution, and will not be transferred outside the data center.
- It will not be possible to create benchmark Analytics reports across regional data centers.
- You will be able to create the benchmark Analytics reports.

If you do not allow your anonymized statistical data to be aggregated, you will not see any statistical data in Alma comparative benchmark Analytics.

Additional Analytics Enhancements

- The **Approval Reason** field was added to the **Citation Copyright** dimension of the **Course Reserves** subject area. It contains the approval reason of the copyright.



Approval Reason



Mobile - December 2016 Enhancements

Alma Mobile

Using Android and iOS mobile smartphones and tablets, Alma Mobile enables you to access Alma anywhere. With this initial release of Alma Mobile, you can perform certain fulfillment activities on the go, and even scan in item barcodes to register in-house use from anywhere in the library. Built on a flexible advanced mobile-application framework, Alma Mobile will significantly improve your operational efficiency and continue to grow over time to include more features.

For detailed information, see [Introduction to Alma Mobile](#), [Using Pick Up from Shelf](#), and [Using Scan In](#).

Administration and Infrastructure - December 2016 Enhancements

Restore Updated or Deleted Records

You can restore records that were removed or changed by the following jobs:

- Withdraw items
- Delete portfolios
- Delete bibliographic records
- KORMARC/Marc21/UNIMARC normalization
- Change holdings information
- Authorities-preferred term correction

For more information, see [Restoring Jobs](#).

Additional Administration and Infrastructure Enhancements

- The functionality of the **EnvelopeFrom** parameter was replaced by the new mail handling integration profile. For more information, see [Configuring Outgoing Email](#). For customers that had the **EnvelopeFrom** parameter defined, Ex Libris has added an integration profile with the same value defined in the profile.
- If more than 50,000 changes are to be performed in the Community Zone by the Synchronize Changes for the Community Zone job, Alma launches an additional job to handle the rest of the changes. The name of each additional job now contains the position of the job in the sequence (part 2, part 3, and so forth).
- On the User Details page, the IdP option in the **Send Message** drop-down has changed to **Update/Reset on IdP**. Additionally, the letter is now available to users with the USER_MANAGER_UPDATE_PASSWORD privilege, who can send the letter to all users, or users with the USER_MANAGER_UPDATE privilege, who can send the letter only to patrons. The prefix `az` has been added for all randomly generated passwords.

Data Services - December 2016 Enhancements

The Alma November 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 October 28th through November 23rd:

- Number of records updated: 84
- Number of records added: 178
- Number of records deleted: 23

The following are the Library of Congress Name authority updates for the period of October 28th through November 23rd:

- Number of records updated: 14361
- Number of records added: 21991
- Number of records deleted: 635

The following are the Canadian name authority updates for the period of October 28th through November 23rd:

- Number of records updated: 15
- Number of records added: 426
- Number of records deleted: 5

The following are the Library of Congress Genre/Form Terms (LCGFT) updates for the period of October 28th through November 23rd:

- Number of records added: 4

New Electronic Collections Added to the Alma CKB

The following collections were added to the Alma Community Zone from October 31st through November 27th:

- Elsevier ScienceDirect Book Series Backfile Package - Agricultural and Biological Sciences
- Elsevier ScienceDirect Book Series Backfile Package - All Subjects
- Elsevier ScienceDirect Book Series Backfile Package - Biochemistry, Genetics and Molecular Biology
- Elsevier ScienceDirect Book Series Backfile Package - Engineering
- Elsevier ScienceDirect Book Series Backfile Package - Immunology and Microbiology
- Elsevier ScienceDirect Book Series Backfile Package - Life Sciences
- Elsevier ScienceDirect Book Series Backfile Package - Neuroscience
- Elsevier ScienceDirect Book Series Backfile Package - Pharmacology, Toxicology and Pharmaceutical Science
- Elsevier ScienceDirect Book Series Backfile Package - Physics and Astronomy
- Elsevier ScienceDirect Book Series Backfile Package - Psychology
- Elsevier ScienceDirect Book Series Package - Agricultural and Biological Sciences
- Elsevier ScienceDirect Book Series Package - All Subjects
- Elsevier ScienceDirect Book Series Package - Biochemistry, Genetics and Molecular Biology
- Elsevier ScienceDirect Book Series Package - Chemistry
- Elsevier ScienceDirect Book Series Package - Engineering
- Elsevier ScienceDirect Book Series Package - Immunology and Microbiology
- Elsevier ScienceDirect Book Series Package - Life Sciences
- Elsevier ScienceDirect Book Series Package - Life Sciences (Legacy)
- Elsevier ScienceDirect Book Series Package - Methods in Cell Biology (1964-1999)
- Elsevier ScienceDirect Book Series Package - Methods in Cell Biology (2000-ongoing)
- Elsevier ScienceDirect Book Series Package - Neuroscience
- Elsevier ScienceDirect Book Series Package - Pharmacology, Toxicology and Pharmaceutical Science
- Elsevier ScienceDirect Book Series Package - Physics and Astronomy
- Elsevier ScienceDirect Book Series Package - Psychology
- Elsevier ScienceDirect Book Series Package - Psychology (Legacy)
- Elsevier ScienceDirect Book Series Package - Side Effects of Drugs Annual (1977-1999)
- Elsevier ScienceDirect Book Series Package - Side Effects of Drugs Annual (2000-ongoing)
- Elsevier ScienceDirect Book Series Package - Social Sciences
- Elsevier ScienceDirect eBook - Agricultural and Biological Sciences 1995 - 2006
- Elsevier ScienceDirect eBook - Agricultural and Biological Sciences 2007
- Elsevier ScienceDirect eBook - Agricultural and Biological Sciences 2008
- Elsevier ScienceDirect eBook - Agricultural and Biological Sciences 2009

- Elsevier ScienceDirect eBook - Agricultural and Biological Sciences 2010
- Elsevier ScienceDirect eBook - Agricultural and Biological Sciences 2011
- Elsevier ScienceDirect eBook - Agricultural and Biological Sciences 2012
- Elsevier ScienceDirect eBook - Agricultural and Biological Sciences 2013
- Elsevier ScienceDirect eBook - Agricultural and Biological Sciences (Legacy 1)
- Elsevier ScienceDirect eBook - Agricultural and Biological Sciences (Legacy 2)
- Elsevier ScienceDirect eBook - Agricultural and Biological Sciences pre-2007
- Elsevier ScienceDirect eBook - Agricultural and Biological Sciences Supplement pre-1995
- Elsevier ScienceDirect eBook - Agricultural, Biological, and Food Sciences 2007
- Elsevier ScienceDirect eBook - Agricultural, Biological, and Food Sciences 2007 - 2013
- Elsevier ScienceDirect eBook - Agricultural, Biological, and Food Sciences 2008
- Elsevier ScienceDirect eBook - Agricultural, Biological, and Food Sciences 2009
- Elsevier ScienceDirect eBook - Agricultural, Biological, and Food Sciences 2010
- Elsevier ScienceDirect eBook - Agricultural, Biological, and Food Sciences 2011
- Elsevier ScienceDirect eBook - Agricultural, Biological, and Food Sciences 2012
- Elsevier ScienceDirect eBook - Agricultural, Biological, and Food Sciences 2013
- Elsevier ScienceDirect eBook - Agricultural, Biological, and Food Sciences 2014
- Elsevier ScienceDirect eBook - Agricultural, Biological, and Food Sciences 2015
- Elsevier ScienceDirect eBook - Agricultural, Biological, and Food Sciences 2016
- Elsevier ScienceDirect eBook - Agricultural, Biological, and Food Sciences pre-2007
- Elsevier ScienceDirect eBook - AGRICULTUREnetBASE
- Elsevier ScienceDirect eBook - Arts and Humanities (Legacy 1)
- Elsevier ScienceDirect eBook - Asian Studies 2007 - 2011
- Elsevier ScienceDirect eBook - Asian Studies 2012
- Elsevier ScienceDirect eBook - Asian Studies 2013
- Elsevier ScienceDirect eBook - Asian Studies 2014
- Elsevier ScienceDirect eBook - Biochemistry, Genetics and Molecular Biology 1995 - 2006
- Elsevier ScienceDirect eBook - Biochemistry, Genetics and Molecular Biology 2007
- Elsevier ScienceDirect eBook - Biochemistry, Genetics and Molecular Biology 2008
- Elsevier ScienceDirect eBook - Biochemistry, Genetics and Molecular Biology 2009
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- Elsevier ScienceDirect eBook - Biochemistry, Genetics and Molecular Biology 2015
- Elsevier ScienceDirect eBook - Biochemistry, Genetics and Molecular Biology 2016
- Elsevier ScienceDirect eBook - Biochemistry, Genetics and Molecular Biology (Legacy 1)
- Elsevier ScienceDirect eBook - Biochemistry, Genetics and Molecular Biology (Legacy 2)
- Elsevier ScienceDirect eBook - Biomedical Science and Medicine (Legacy 1)
- Elsevier ScienceDirect eBook - Biomedical Science and Medicine 2007- 2013
- Elsevier ScienceDirect eBook - Biomedical Science and Medicine 2011
- Elsevier ScienceDirect eBook - Biomedical Science and Medicine 2012
- Elsevier ScienceDirect eBook - Biomedical Science and Medicine 2013
- Elsevier ScienceDirect eBook - Biomedical Science and Medicine 2014
- Elsevier ScienceDirect eBook - Biomedical Science and Medicine 2015
- Elsevier ScienceDirect eBook - Biomedical Science and Medicine 2016
- Elsevier ScienceDirect eBook - Biomedicine 2011
- Elsevier ScienceDirect eBook - Biomedicine 2012
- Elsevier ScienceDirect eBook - Biomedicine 2013
- Elsevier ScienceDirect eBook - Biomedicine 2014
- Elsevier ScienceDirect eBook - BIOSCIENCEnetBASE
- Elsevier ScienceDirect eBook - Brazil Business, Science and Technology
- Elsevier ScienceDirect eBook - Brazil Business, Science and Technology 2013
- Elsevier ScienceDirect eBook - Brazil Law 2007-2013
- Elsevier ScienceDirect eBook - Chemical Engineering (Legacy 1)
- Elsevier ScienceDirect eBook - Chemical Engineering (Legacy 2)
- Elsevier ScienceDirect eBook - Chemical Engineering 1995 - 2006
- Elsevier ScienceDirect eBook - Chemical Engineering 2007
- Elsevier ScienceDirect eBook - Chemical Engineering 2008
- Elsevier ScienceDirect eBook - Chemical Engineering 2009
- Elsevier ScienceDirect eBook - Chemical Engineering 2010
- Elsevier ScienceDirect eBook - Chemical Engineering 2011
- Elsevier ScienceDirect eBook - Chemical Engineering 2012

- Elsevier ScienceDirect eBook - Chemical Engineering 2013
- Elsevier ScienceDirect eBook - Chemical Engineering 2014
- Elsevier ScienceDirect eBook - Chemical Engineering 2015
- Elsevier ScienceDirect eBook - Chemical Engineering 2016
- Elsevier ScienceDirect eBook - Chemical Engineering pre-2007
- Elsevier ScienceDirect eBook - Chemical Engineering Supplement pre-1995
- Elsevier ScienceDirect eBook - Chemistry (Legacy 1)
- Elsevier ScienceDirect eBook - Chemistry (Legacy 2)
- Elsevier ScienceDirect eBook - Chemistry 1995 - 2006
- Elsevier ScienceDirect eBook - Chemistry 2007
- Elsevier ScienceDirect eBook - Chemistry 2008
- Elsevier ScienceDirect eBook - Chemistry 2009
- Elsevier ScienceDirect eBook - Chemistry 2010
- Elsevier ScienceDirect eBook - Chemistry 2011
- Elsevier ScienceDirect eBook - Chemistry 2012
- Elsevier ScienceDirect eBook - Chemistry 2013
- Elsevier ScienceDirect eBook - Chemistry 2014
- Elsevier ScienceDirect eBook - Chemistry 2015
- Elsevier ScienceDirect eBook - Chemistry 2016
- Elsevier ScienceDirect eBook - Chemistry pre-2007
- Elsevier ScienceDirect eBook - Chemistry Supplement pre-1995
- Elsevier ScienceDirect eBook - CHEMLIBnetBASE
- Elsevier ScienceDirect eBook - CLEANTECHnetBASE
- Elsevier ScienceDirect eBook - Clinical Dentistry 2000-2010
- Elsevier ScienceDirect eBook - Clinical Medicine 2000 - 2007
- Elsevier ScienceDirect eBook - Clinical Medicine 2007
- Elsevier ScienceDirect eBook - Clinical Medicine 2008
- Elsevier ScienceDirect eBook - Clinical Medicine 2009
- Elsevier ScienceDirect eBook - Clinical Medicine 2010
- Elsevier ScienceDirect eBook - Clinical Medicine 2011
- Elsevier ScienceDirect eBook - Clinical Medicine 2012
- Elsevier ScienceDirect eBook - Clinical Medicine 2013

- Elsevier ScienceDirect eBook - Clinical Medicine pre-2007
- Elsevier ScienceDirect eBook - Elsevier Masson French Health Sciences Collection 2007 - 2010 (2)
- Elsevier ScienceDirect eBook - Elsevier Masson French Health Sciences Collection 2007-2010
- Elsevier ScienceDirect eBook - Elsevier Masson French Health Sciences Collection 2011
- Elsevier ScienceDirect eBook - Elsevier Masson French Health Sciences Collection 2012
- Elsevier ScienceDirect eBook - Elsevier Masson French Health Sciences Collection 2013
- Elsevier ScienceDirect eBook - Elsevier Masson French Health Sciences Collection 2014
- Elsevier ScienceDirect eBook - Elsevier Masson French Health Sciences Collection 2015
- Elsevier ScienceDirect eBook - Health Professions 2000 - 2007
- Elsevier ScienceDirect eBook - Health Professions 2007
- Elsevier ScienceDirect eBook - Health Professions 2008
- Elsevier ScienceDirect eBook - Health Professions 2009
- Elsevier ScienceDirect eBook - Health Professions 2010
- Elsevier ScienceDirect eBook - Health Professions 2011
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- Elsevier ScienceDirect eBook - Health Professions 2014
- Elsevier ScienceDirect eBook - Health Professions 2015
- Elsevier ScienceDirect eBook - Health Professions 2016
- Elsevier ScienceDirect eBook - Health Professions pre-2007
- Elsevier ScienceDirect eBook - Immunology and Microbiology 1995 - 2006
- Elsevier ScienceDirect eBook - Immunology and Microbiology 2007
- Elsevier ScienceDirect eBook - Immunology and Microbiology 2008
- Elsevier ScienceDirect eBook - Immunology and Microbiology 2009
- Elsevier ScienceDirect eBook - Immunology and Microbiology 2010
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- Elsevier ScienceDirect eBook - Insights Library 2016: Energy
- Elsevier ScienceDirect eBook - Insights Library 2016: Engineering
- Elsevier ScienceDirect eBook - Insights Library 2016: Food Science
- Elsevier ScienceDirect eBook - Insights Library 2016: Life and Biomedical Sciences
- Elsevier ScienceDirect eBook - Insights Library 2016: Materials Science and Materials Engineering
- Elsevier ScienceDirect eBook - Insights Library 2016: Mathematics and Physics

- Elsevier ScienceDirect eBook - Insights Library 2016: Neuroscience and Biobehavioral Psychology
- Elsevier ScienceDirect eBook - Insights Library 2016: Social Sciences
- Elsevier ScienceDirect eBook - Insights Library 2017: Chemistry, Molecular Sciences and Chemical Engineering
- Elsevier ScienceDirect eBook - Insights Library 2017: Computer Science
- Elsevier ScienceDirect eBook - Insights Library 2017: Earth Systems and Environmental Sciences
- Elsevier ScienceDirect eBook - Insights Library 2017: Energy
- Elsevier ScienceDirect eBook - Insights Library 2017: Engineering
- Elsevier ScienceDirect eBook - Insights Library 2017: Food Science
- Elsevier ScienceDirect eBook - Insights Library 2017: Health Sciences Corporate
- Elsevier ScienceDirect eBook - Insights Library 2017: Life and Biomedical Sciences
- Elsevier ScienceDirect eBook - Insights Library 2017: Materials Science and Materials Engineering
- Elsevier ScienceDirect eBook - Insights Library 2017: Mathematics and Physics
- Elsevier ScienceDirect eBook - Insights Library 2017: Neuroscience and Biobehavioral Psychology
- Elsevier ScienceDirect eBook - Insights Library 2017: Social Sciences
- Elsevier ScienceDirect eBook - Materials Science 1995 - 2006
- Elsevier ScienceDirect eBook - Materials Science 2007
- Elsevier ScienceDirect eBook - Materials Science 2008
- Elsevier ScienceDirect eBook - Materials Science 2009
- Elsevier ScienceDirect eBook - Materials Science 2010
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- Elsevier ScienceDirect eBook - Materials Science 2014
- Elsevier ScienceDirect eBook - Materials Science 2015
- Elsevier ScienceDirect eBook - Materials Science 2016
- Elsevier ScienceDirect eBook - Materials Science pre-2007
- Elsevier ScienceDirect eBook - Mathematics 1995 - 2006
- Elsevier ScienceDirect eBook - Mathematics 2007
- Elsevier ScienceDirect eBook - Mathematics 2008
- Elsevier ScienceDirect eBook - Mathematics 2009
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- Elsevier ScienceDirect eBook - MRW subscription package: Encyclopedia of Biological Chemistry
- Elsevier ScienceDirect eBook - MRW subscription package: Encyclopedia of Dairy Sciences
- Elsevier ScienceDirect eBook - MRW subscription package: Encyclopedia of Food Microbiology
- Elsevier ScienceDirect eBook - MRW subscription package: Encyclopedia of Forensic Sciences
- Elsevier ScienceDirect eBook - MRW subscription package: Encyclopedia of Human Nutrition
- Elsevier ScienceDirect eBook - MRW subscription package: Encyclopedia of Meat Sciences
- Elsevier ScienceDirect eBook - MRW subscription package: Encyclopedia of Ocean Sciences
- Elsevier ScienceDirect eBook - MRW subscription package: Encyclopedia of Quaternary Science
- Elsevier ScienceDirect eBook - MRW subscription package: Encyclopedia of Toxicology
- Elsevier ScienceDirect eBook - MRW subscription package: Encyclopedia of Virology
- Elsevier ScienceDirect eBook - MRW subscription package: International Encyclopedia of the Social & Behavioral Sciences
- Elsevier ScienceDirect eBook - MRW subscription package: Treatise on Geochemistry

- Elsevier ScienceDirect eBook - Neuroscience 1995 - 2006
- Elsevier ScienceDirect eBook - Neuroscience 2007
- Elsevier ScienceDirect eBook - Neuroscience 2008
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- Elsevier ScienceDirect eBook - Portuguese Legal 2013 p1
- Elsevier ScienceDirect eBook - Portuguese Social Sciences 2013 p1
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- Elsevier ScienceDirect eBook - Psychology 2007
- Elsevier ScienceDirect eBook - Psychology 2008
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- Elsevier ScienceDirect eBook - Social Sciences 2014
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- Elsevier ScienceDirect eBook 2009 German Premium Collection
- Elsevier ScienceDirect eBook Backlist German Premium Collection
- Elsevier ScienceDirect FC Complete Collection Books 2008
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- Elsevier ScienceDirect FC Complete Collection Books 2010
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- Elsevier ScienceDirect FC Complete Collection Books 2015
- Elsevier ScienceDirect FC Complete Collection Books 2016
- Elsevier ScienceDirect FC Complete Collection Books 2017
- Elsevier ScienceDirect Handbook Series Backfile Package: Handbooks in Operations Research and Management Science
- Elsevier ScienceDirect Handbook Series Backfile Package: Handbooks in Economics Series
- Elsevier ScienceDirect Handbook Series Package: Handbooks in Economics Series
- Project Muse All Journals
- Project Muse American Literature
- Project Muse Archive Complete Foundation
- Project Muse Archive Complete Supplement
- Project Muse Archive Complete Supplement 2
- Project Muse Archive Complete Supplement 3
- Project Muse Archive Complete Supplement 4
- Project Muse Arts Collection
- Project Muse Asian Studies
- Project Muse Asian Studies Collection
- Project Muse British and Irish Literature
- Project Muse Classical and Medieval Studies
- Project Muse eBooks 2011
- Project Muse eBooks 2012
- Project Muse eBooks Supplement 2 2012
- Project Muse eBooks Supplement 2 2013
- Project Muse eBooks Supplement 2011
- Project Muse eBooks Supplement 2012
- Project Muse eBooks Supplement 2013
- Project Muse eBooks Supplement 2014
- Project Muse Film, Theater and Performing Arts
- Project Muse Global Cultural Studies
- Project Muse History Collection

- Project Muse Literary Magazines
- Project Muse Literary Studies (General)
- Project Muse Literature Core Collection
- Project Muse Literature Expanded Collection
- Project Muse Philosophy & Religion Collection
- Project Muse Religious Studies
- ProQuest Historical Newspapers: The Washington Post
- ProQuest Historical Newspapers: Toronto Star
- ProQuest Vogue Italia
- ProQuest Women's Magazine Archive II
- Staempfli uni.recht.ch
- Wiley Online Library 2017 Full Collection
- Wiley Online Library Database Model 2017
- Wiley Online Library Science Technology and Medicine Collection 2017
- Wiley Online Library Social Science and Humanities Collection 2017
- Wiley Online Library: Medicine and Nursing 2017

New External Search Resources

No new external resources were added to Alma for the December release.

Next Release Sneak Preview

Resource Management

- Call Number/Shelf List Browse for the Item Level Call Numbers – With the January release, the browse shelf listing will include item-level call numbers in addition to call numbers at the holdings level.
- Specialized Support for 689 Headings – Access from the 689 field to authority headings will be available using the standard F3 button. This is a development for the German market.

Digital Resource Management

- System Generation of Thumbnails – Alma will now generate thumbnails for a wide array of files loaded to Alma, as well as update thumbnails for existing (relevant) files.
- Option to Delete/Deactivate Remote Repositories – It will now be possible to activate/deactivate or delete remote repository configurations.
- End User Deposit Using SWORD – As part of the institutional repository workflows, Alma will support depositing digital material using the SWORD 2.0 protocol.
- Support for Same Source/Target MD Format in Digital Ingest – You will now be able to load localized MARC records (for example, UNIMARC) and keep them in the same schema (that is, they will not be converted to MARC 21).

Fulfillment

- Resend Printouts/Emails – A new job, Resend Printouts/Emails, will allow for resending emails based on parameters such as: date/time range of creation,; job ID, and printer name and printout type.
- Calendar Days Options for Lost and Overdue Loan Profiles – It will be possible to set the Lost and Overdue Loan profiles to count the days as either calendar days (as it is today) or as open days only.

Resource Sharing

- Digital Shipment - Alma Document Delivery – A new document delivery mechanism will be instituted so that the resource sharing lender can place an article at a secure server, allowing the borrower to access (with a password) the requested file.

Collaborative Networks

- Identify Records Not Used in the Network Zone – There will be a new process, Identify records that are not used in the network (that will be shown only in the Network Zone). You may want to use this to identify records that do not have inventory in the Network Zone or in any of the local institutions so that these records can be deleted from the Network Zone catalog.

APIs

- API to manage logical sets
- Updates to the Sets API in order to fully support logical sets
- Enhanced Update BIB API for member institutions working with a Network Zone.
- API for RDA/RDF – This API will offer an option to publish bibliographic records in RDA/RDF XML format.

Analytics

- Network ID in the Bibliographic Details Dimension – The **Network ID** column will display in the Bibliographic Details dimension in all subject areas.
- The "Normalized" Title, ISBN, and ISSN will be added to the Bibliographic Details dimension in all subject areas. This will assist in overlap analysis reports.

Administration

- Social Login - Add URL to activation confirmation – When activating authentication to Primo or Alma via a social network provider, the confirmation message will include a login URL to bookmark.

Upload Electronic Holdings from Ovid

With the Ovid integration profile, you can automatically update your Ovid electronic portfolios and, thus, eliminate the more manual workflow you currently use. The Ovid integration profile uses the KBART format to retrieve institution-specific portfolios. It is also designed to specifically identify the subscription and purchase values in the KBART notes field for monographs in order to manage the Ovid subscription and Ovid purchase electronic collections separately. See the [Prerequisite Tasks for Creating the Ovid Integration Profile](#) section and the [Creating the Ovid Integration Profile](#) section for information regarding prerequisites and creating the Ovid integration profile.



For more information on uploading electronic holdings from Ovid, watch the [Upload Electronic Holdings from Ovid](#) video (2:27 mins).

Prerequisite Tasks for Creating the Ovid Integration Profile

Before you can begin automatically importing Ovid portfolios, you need to:

- Contact Ovid Customer Support to obtain the account information required for the integration profile. See [Obtaining Your Ovid Account Information](#).
- Activate the Ovid electronic collections from the Alma Community Zone. See [Activating the Ovid Electronic Collectins from the Alma Community Zone](#).

Obtaining Your Ovid Account Information

In order to create an Ovid integration profile in Alma, you need to contact Ovid Customer Support (support@ovid.com) and have them set up and provide you with the following account information:

- User name
- Password
- Ovid group name

After you have obtained these log-in parameters from Ovid, test them using the following URL format:

```
https://Charlotte.ovid.com:8443/OrionAPI/rest/Reporting/KBARTHoldings/<Ovid group name>?UserName=<user name>&Password=<password>
```

When user name is **testuser@gmail.com**, password is **testpassword**, and Ovid group name is **testOvidgroup**, the URL would be formatted as shown below.

```
https://Charlotte.ovid.com:8443/OrionAPI/rest/Reporting/KBARTHoldings/testOvidgroup?UserName=testuser@gmail.com&Password=testpassword
```

When you execute this URL, you should receive a tab-delimited KBART file. If the URL does not process successfully, contact Ovid Customer Support for assistance.

Activating the Ovid Electronic Collections from the Alma Community Zone

The Community Zone provides the following Ovid electronic collections:

- Books@Ovid Subscription Complete
- Books@Ovid Purchase Complete
- Journals@Ovid Complete

Using repository search, locate these collections in the Community Zone and activate them prior to running the Ovid integration profile.

Creating the Ovid Integration Profile

After you have successfully obtained your Ovid account information and activated the Ovid electronic collections from the Community Zone, you are ready to create your Ovid integration profile in Alma.

To create your Ovid integration profile:

1. Click **Integration Profiles** in the External Systems section of the General Configuration page ([Administration > General Configuration > Configuration Menu](#)).
2. Click **Add Integration Profile**.
3. For Integration Type on the External System page, select the **Upload Electronic Holdings** option. The External System page dynamically updates and presents the proper parameters for an Upload Electronic Holdings type of profile.

Upload Electronic Holdings Type of Integration Profile

- From the Vendor drop-down list, select **OVID**; and click **Next**. The External Systems section summarizes the entries you have made thus far, and the Actions section appears.

External System

1 2 Back Cancel Save

External System

Code	Name	Integration Type	Upload Electronic Holdings
OVID	OVID		Upload Electronic Holdings

Actions

Upload electronic holdings

Active ☒ Active ☐ Non Active

User name * Password *

Ovid group *

File format * KBART

Schedule Not scheduled

Run Now

External Systems and Actions Section

- Enter the user name, password, and Ovid group account information that you received from Ovid.
- Select the **Active** radio button to make this integration profile active.
- Select one of the following scheduling options to have this integration profile run automatically:
 - Every Saturday at 06:00
 - On the 01 of every month at 06:00

You may optionally choose at any time (now or at some later point in time) to run the integration profile manually by clicking the **Run Now** button.

- Click **Save**.

Configuring the Barcode Generation Method and Barcode Validation

Configuring Barcode Generation

PERMISSIONS: To configure barcode generation, you must have one of the following roles:

- Repository Administrator
 - General System Administrator
-

New for December!

The barcode is a unique identifier given to each item. During implementation, if you chose to implement barcode generation, you can configure barcode counter sequences that can be defined at the institution level or the library level. Once you have configured barcode counter sequences, barcodes can be generated in the following areas of Alma:

- Physical Item Editor (see [To update item-level information for a physical item](#) for more information)
- Adding a new physical item (see [Adding a New Book or Journal Article](#) for more information)

To configure an automatic barcode counter sequence:

1. On the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**), click **Barcode Generation** in the **General** section. The Barcode Generation Configuration page appears.

Barcode Generation Configuration Back Save

Sequence List

Columns Tools

Library	Sequence Name	Method	Prefix	Next Sequence	Padding	Default	
1 -	default_institution	Prefix + Sequence A		13593	-	Yes	Actions
2 MUS	CC Music Sequence	Prefix + Sequence	CCMS	7001	3	Yes	Actions
3 MUS	CC Music Sequence 2	Prefix + Sequence	CCMS	9001	3	No	Actions

Create a New Sequence

Library

Sequence Start

Prefix

Sequence Name

Method Prefix + Sequence

Padding

Add Row

Barcode Generation Configuration Page

- Complete the parameters for barcode generation. See the table below for an explanation of your options.

Barcode Generation Parameters

Parameter	Description
Library	If you want to create a library-level barcode counter sequence, click the browse icon to select a library from the Organization Units List page. Leave this parameter blank if you are creating an institution-level barcode counter sequence. NOTE: The first library-level barcode counter sequence configuration for a specific library will be identified as the default for that library. If you create one or more additional library-level barcode counter sequence configurations for the same library, the default setting is set to No. Use the row action Set as Default (see below) to change the library-level barcode counter sequence default.
Sequence Name	Since you can have multiple barcode counter sequences, use this parameter to enter a sequence name that helps you identify each sequence that you configure.
Sequence Start	Specify the sequence number with which to start. Alma can generate a sequence of up to 28 digits. See the procedure To update item-level information for a physical item for more information about generating barcodes for a physical item.
Method	This parameter is configured by Ex Libris during the implementation phase. The Prefix + Sequence option indicates that the barcode starts with the value specified for the Prefix parameter followed by a number.

Prefix	Enter a prefix value for your barcode sequence. This prefix precedes the sequence number that is automatically generated.
Padding	Enter the number of positions to add zeroes as padding in front of the sequence number.

3. Click **Add Row**. The sequence that you created appears in the Sequence List.

For each row that you create, the following actions are available that allow you to modify your barcode sequence counter configuration:

- Set Next Sequence Value
- Set as Default

NOTE:

There can be only one default per institution and one default per library.

- Delete
- Edit

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

Configuring Barcode Validation

Barcodes in Alma are validated for their format and for uniqueness.

On a Quick Cataloging page, if the barcode format is invalid, an error is generated and the page cannot be submitted. In most other locations, such as the Physical Item Editor, if the barcode format is not valid, a warning message is generated; the user can confirm to proceed with the invalid barcode.

NOTE: Validation is not performed when entering an invalid barcode using the Metadata Editor.

When an item is imported, it is created/saved and any resulting barcode validation warning messages are stored in the import report.

The list of barcode format validation routines supported by Alma is in a mapping table and maintained by Ex Libris for institutions. To configure this list, contact Ex Libris customer support.

A validation routine can be enabled or disabled. Enabled routines are tested in list order until the barcode is validated or there are no more routines in the list.

The available validation routines include:

- **Codabar 13** – See <https://en.wikipedia.org/wiki/Codabar>.
- Prefix + Sequence

NOTE: If empty barcodes are allowed, an empty value is not validated for format or uniqueness.

British Library Document Supply Service (BLDSS)

The British Library Document Supply Service (BLDSS) APIs create a seamless integration between your library and the British Library for resource sharing. The APIs are integrated into Alma's resource sharing and allow for all of the actions that are part of the process of requesting British Library material to be done from within Alma as part of its internal workflows.

British Library Online Account Setup

To setup your British Library online account:

1. Register for your British Library Online Account at <https://register.bl.uk/Ui/RegOnline.aspx?ServiceId=3>

As a result of this registration process, the library will obtain:

- Account Number (e.g. 73-0226)
- Password (e.g. API6722264)

Account number and password will be used for partner configuration.

2. Contact Ex Libris Support to notify Ex Libris of your account number.
3. Ex Libris Support notifies the library that the account is linked to Alma.
4. Log in to application management: <https://api.bldss.bl.uk/applications/> to confirm that Alma has been linked to the account. Alma application will appear in applications client is registered to (e.g. AlmaExTestApp).

API Client applications your Business Unit(s) are registered to use			
Application Name	Business unit Name	Business unit Key	Status
My API Application	BLDSS TEST Chicago Pharmaceuticals	51-0083	CREATED

File:/C:/Users/tovah/AppData/Local/Temp/msohtmlclip1/01/clip_image001.png

Click the CREATED button. It will change to CONFIRMED.

Alma Configuration

- **Locate Profile** - A locate profile of type BLDSS must be created. For more information, see [Adding Locate Profiles](#).

NOTE: The Alma locate process communicates with the partner's server. If the communication process fails, the locate will still be considered a success, leaving the partner on the rota. When this happens, the record ID is not recorded so the send request process will fail. The resulting message is "Cannot send a request that was not located." Should this occur, manually re-run the locate from the action on the task list. If this problem happens repeatedly, contact Ex Libris support to adjust your timeout settings.

- Partner Record - A partner record of type BLDSS must be create. For more information, see [Resource Sharing Partners](#).

Alma Workflow Components

- Activate Job - Two jobs entitled **Update BLDSS Requests** are found in the Monitor Jobs scheduler. One or both of them must be activated in order to receive status updates from the British Library. The British Library system posts status updates on their server. The Update BLDSS Requests job retrieves the updates. If both jobs are activated, status retrieval will be done twice a day.
- BLDSS Facet - In addition to the Active Partner facet which allows you to select BLDSS to display only BLDSS requests, there is a facet to filter on a particular BLDSS status. The BLDSS statuses are independent of Alma statuses because they are the statuses supplied by the British Library.

The screenshot shows the 'Resource Sharing Borrowing Requests' interface. On the left, there's a sidebar with filters: Status (Cancelled by staff (7), Mediated Patron Renewal (3), Physically received by library (4), Ready to be sent (10), Request sent to partner (18)), BL Event Type (Despatched (8), Ready for download (5)), Creation Date (Older (42)), Update Date (Older (33)), Requested Format (Digital (12), Physical (30)), Supplied Format (Physical (8), Undefined (34)), Due date (Older (2), Undefined (40)), and Last Interest Date (Older (1)). The main area has a search bar with 'Active Partner: BLDSS' selected. Below the search bar, there's a list of requests. The first request is 'Le petit prince / Book (Gallimard c.1946, 1966 printing.)' with internal identifier 1784763320000561, request status 'Ready to be sent', partner 'BLDSS', and creation date 26/09/2016. The second request is 'A brief history of time / Book By Hawking, S. W. (Stephen W.) (Bantam Books 2008.)' with ISBN 978053385465 (pbk.), internal identifier 1128082520000561, request status 'Physically received by library', partner 'BLDSS', and creation date 26/04/2016. The third request is 'A history of magic / Book By Cavendish, Richard. (Taplinger Pub Co 1977.)' with ISBN 0800838866, LCCN 76056613, internal identifier 1542258970000561, request status 'Cancelled by staff', partner 'BLDSS', and creation date 23/06/2016. The fourth request is 'A monotonicity property of the composition of regularized and inverted-regularized gamma functions with applications' with ISSN 0022-247X, LCCN: sn 97000925, OCLC Number: 36945500, external identifier 60021574-001, internal identifier 1574458990000561, request status 'Request sent to partner', partner 'BLDSS', event type 'Ready for download', and additional info 'http://cds.bl.uk/delivery/Deliver.action?key=081B2F49B8C7E86A3E40441F824BFA62'. Each request has a list of actions: Edit, Duplicate, Send, Send query to patron, Receive, Reject, Locate Resource, View Local Resources, Recalculate Rota Assignment, and More details.

Borrowing Request Task List

- BLDSS Renewals - An option exists on the British Library account setup to automatically renew loans. If this option has been selected, an outstanding loan will automatically receive a status update of **Renew Requested**.

It is recommended that you use the **Status** facet and select all BLDSS loans with a **Renew Requested** status. Manually renew the loan using the **Renew** action. Then manually change the status to **Renewed**.



Introduction to Alma Mobile

New for December!

Alma Mobile provides portability of Alma functions that align with your workflows using mobile phones and tablets. For example, Alma Mobile enables you to process Pick Up from Shelf (**Fulfillment > Resource Requests > Pick from Shelf**) requests directly from your mobile device. The sections below provide the following information to help you get started:

- [Supported Operating Systems](#)
- [Supported Devices](#)
- [Supported Barcode Symbologies](#)
- [Getting Started and Logging In](#)
- [Working with Settings](#)

Download the Alma Mobile app from:

- Google Play
- Apple App Store

The licensing information for the Alma Mobile app can be found at [Alma Mobile EULA](#) and [Alma Mobile App](#).

Supported Operating Systems

Alma Mobile supports the following device operating systems:

- Android
- iOS

Supported Devices

Alma Mobile supports the following mobile devices:

- iPhones
- iPads
- Android cell phones

- Android tablets
 - Bluetooth-enabled, hand-held scanners
-

Supported Barcode Symbolologies

The operating system barcode symbolologies identified below are supported when using the mobile device's camera to scan in barcodes. If you are using a bluetooth-enabled scanner connected to your mobile device to scan in barcodes, you will need to check which barcode symbolologies are supported for that scanner.

For devices using the Android operating system, the following barcode symbolologies are supported when using the device's camera:

- QR_CODE
- DATA_MATRIX
- UPC_E
- UPC_A
- EAN_8
- EAN_13
- CODE_128
- CODE_39
- CODE_93
- CODABAR
- ITF
- RSS14
- RSS_EXPANDED

For devices using the iOS operating system, the following barcode symbolologies are supported when using the device's camera:

- QR_CODE
- DATA_MATRIX
- UPC_E
- UPC_A
- EAN_8
- EAN_13
- CODE_128
- CODE_39

Getting Started and Logging In

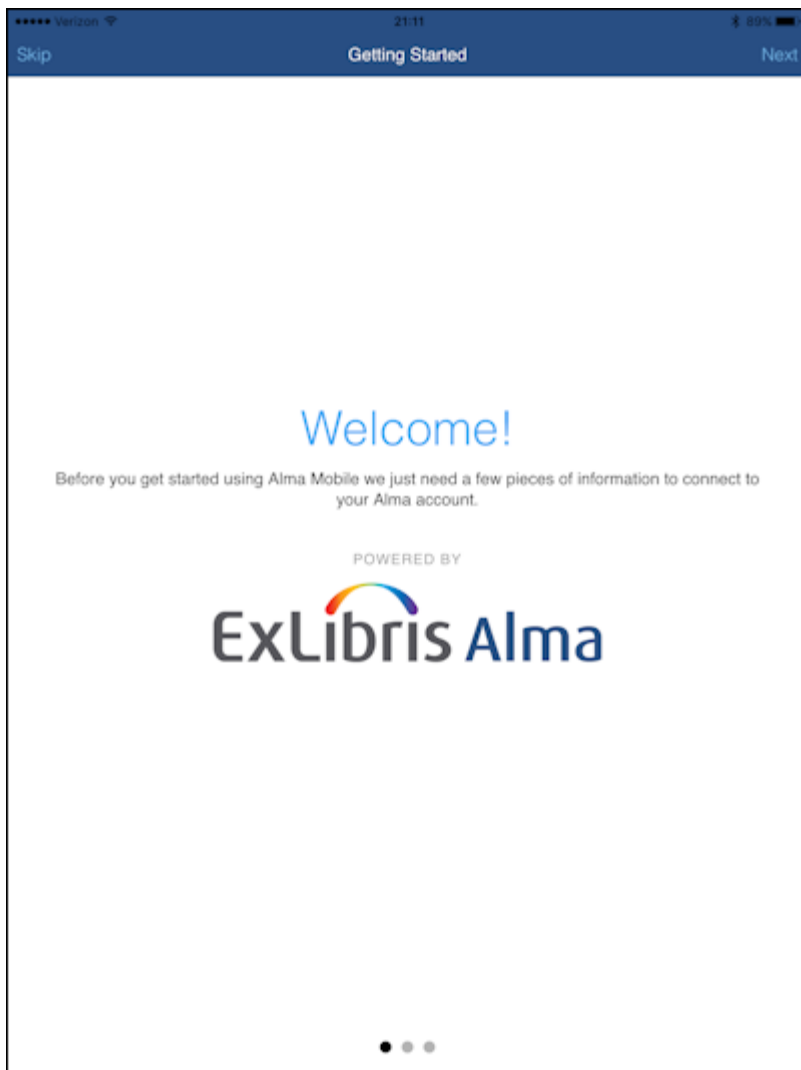
To get started:

1. Using the Apple App Store or Google Play, download the Alma Mobile app.
2. Locate the Alma Mobile icon on your mobile device and start the app.

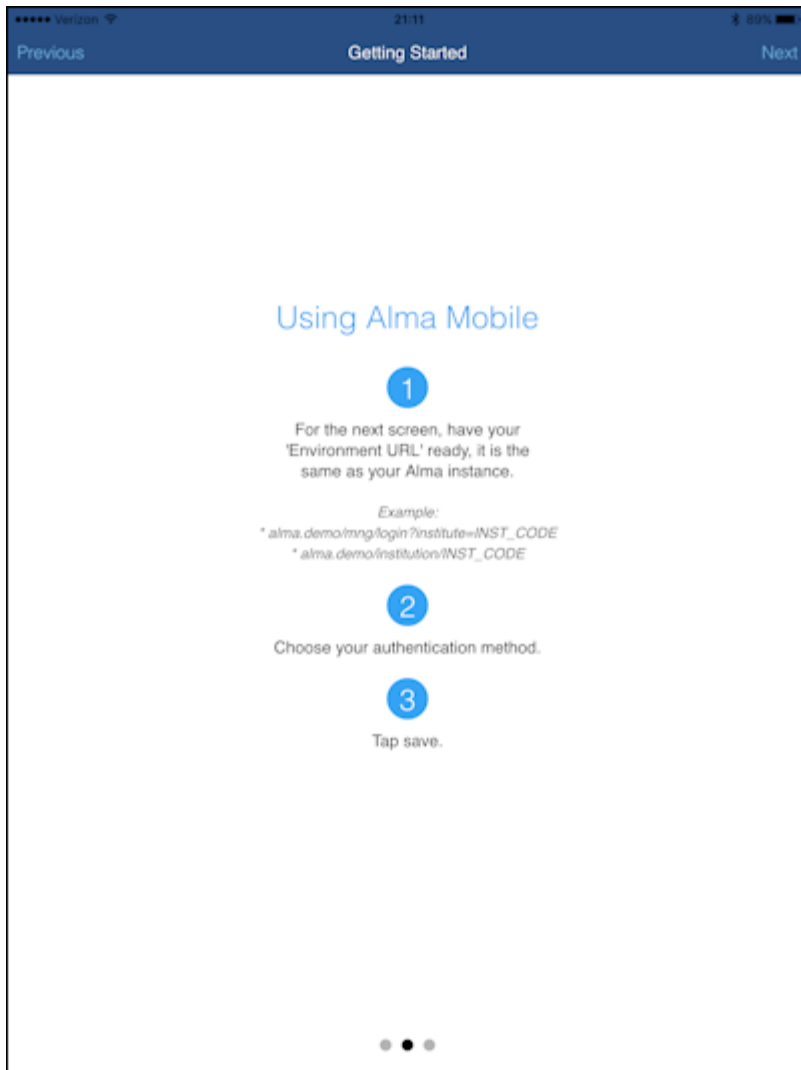


Alma Mobile Icon

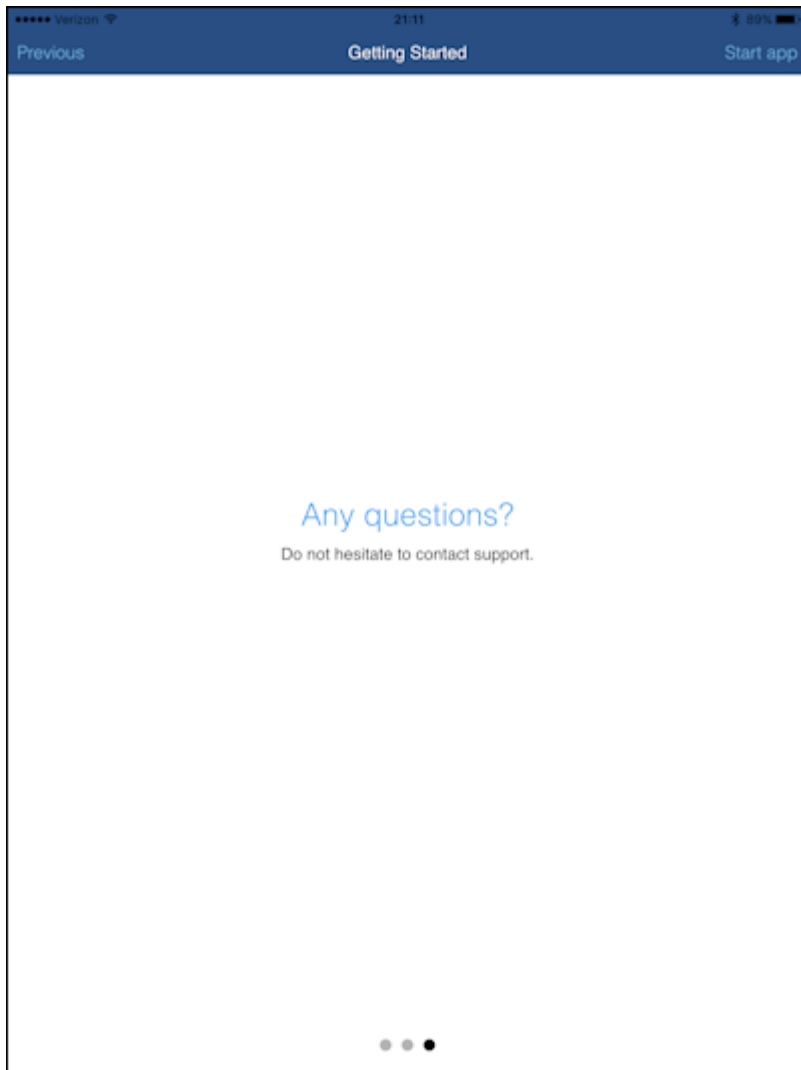
The Getting Started pages appear.



Getting Started Page 1

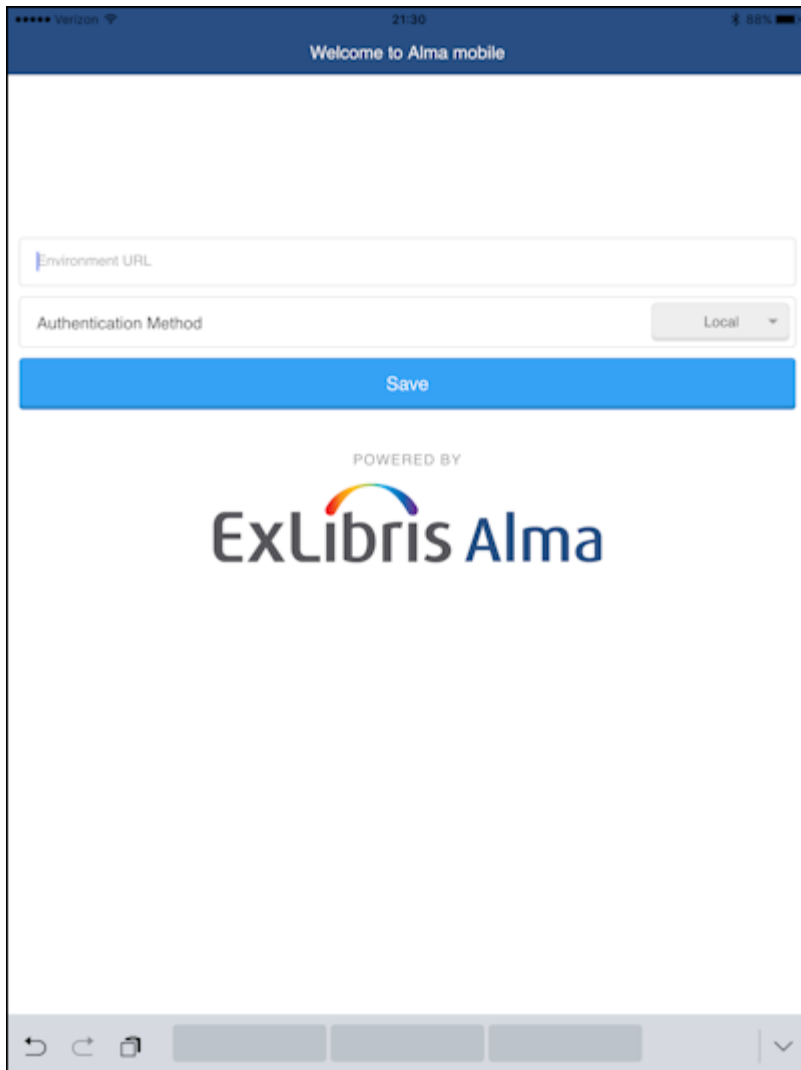


Getting Started Page 2



Getting Started Page 3

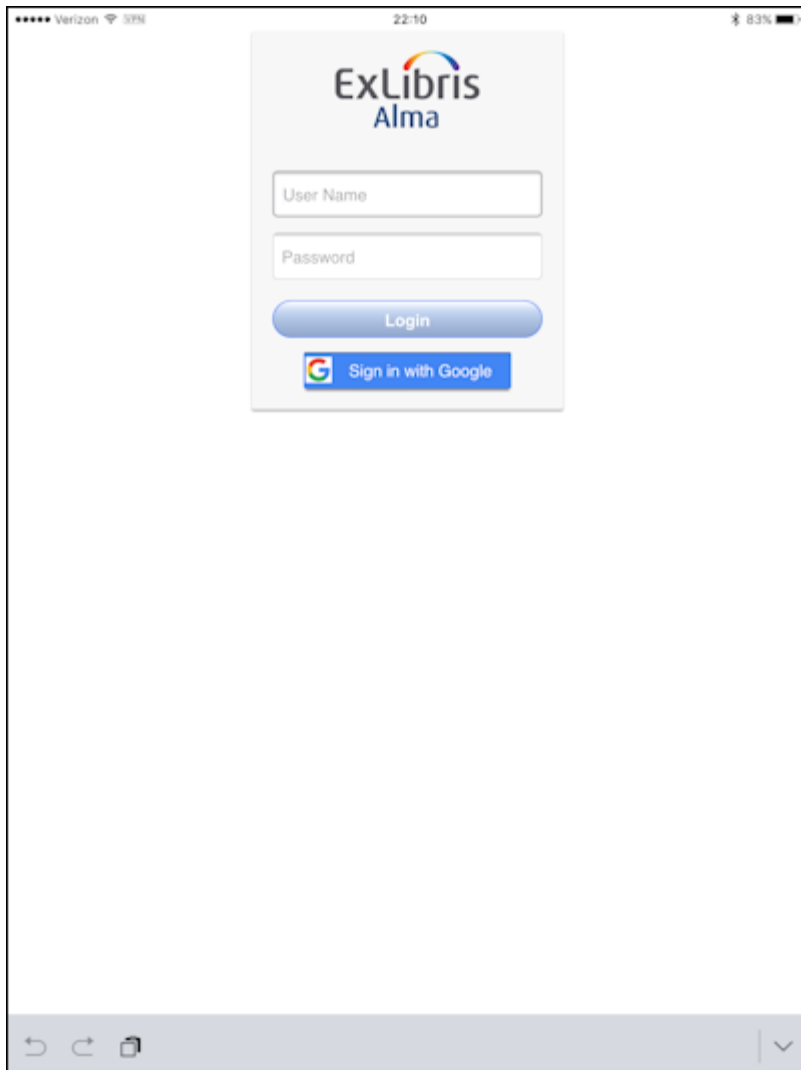
3. Tap **Start app**. The URL / Authentication configuration page appears.



URL / Authentication Page

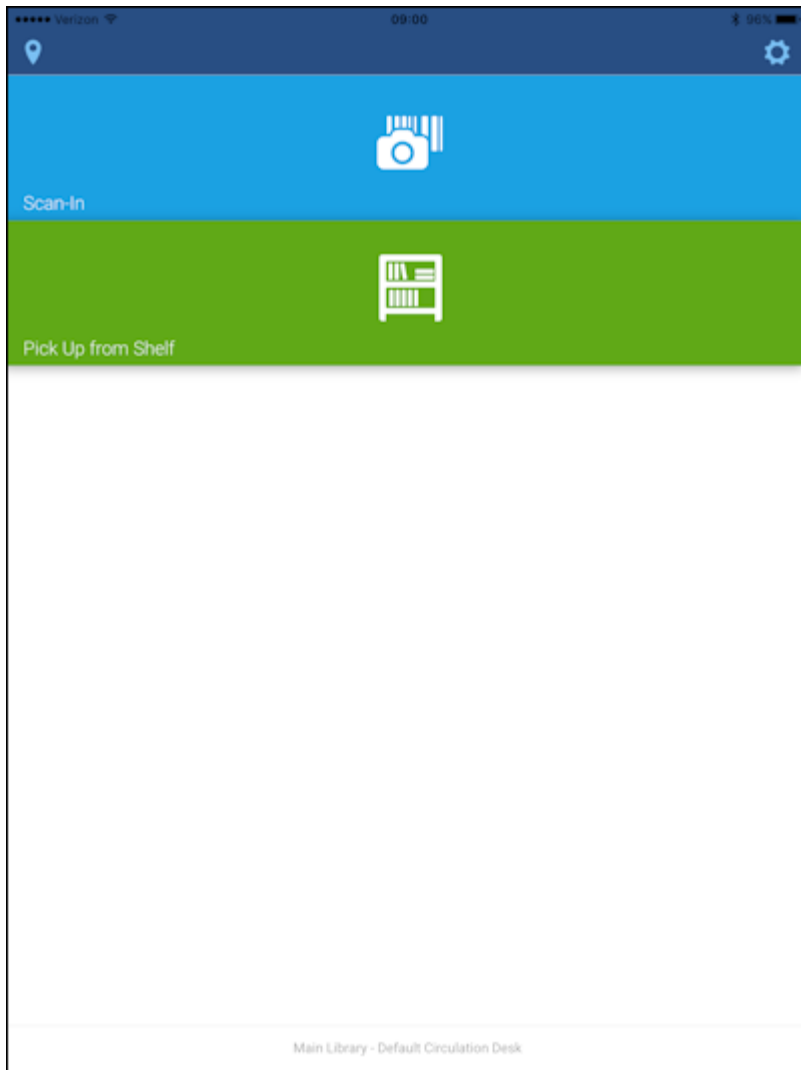
4. Enter your institution URL as described in the Getting Started pages. This is your Alma instance as in the following generic format where `mng` is replaced with `mobile`:

`https://<hostname:port>/mobile/login?institute=<institution_code>`
5. Open the **Authentication Method** drop-down list and select one of the following:
 - Local - With this option, authentication is handled by Alma.
 - SAML - This option uses the Security Assertion Markup Language, XML-based format, for processing authentication.
 - CAS - This option uses the Central Authentication Service for handling authentication.
 - Social Login - This option uses a social networking service such as Facebook or Google+ for authentication.
6. Tap **Save**. The Alma log-in page appears.



Alma Login

7. Enter your Alma log-in user name and password. The Alma Mobile options appear.



Alma Mobile Options

For more information regarding working with the Alma Mobile options, see:

- [Using Pick Up from Shelf](#)
- [Using Scan In](#)

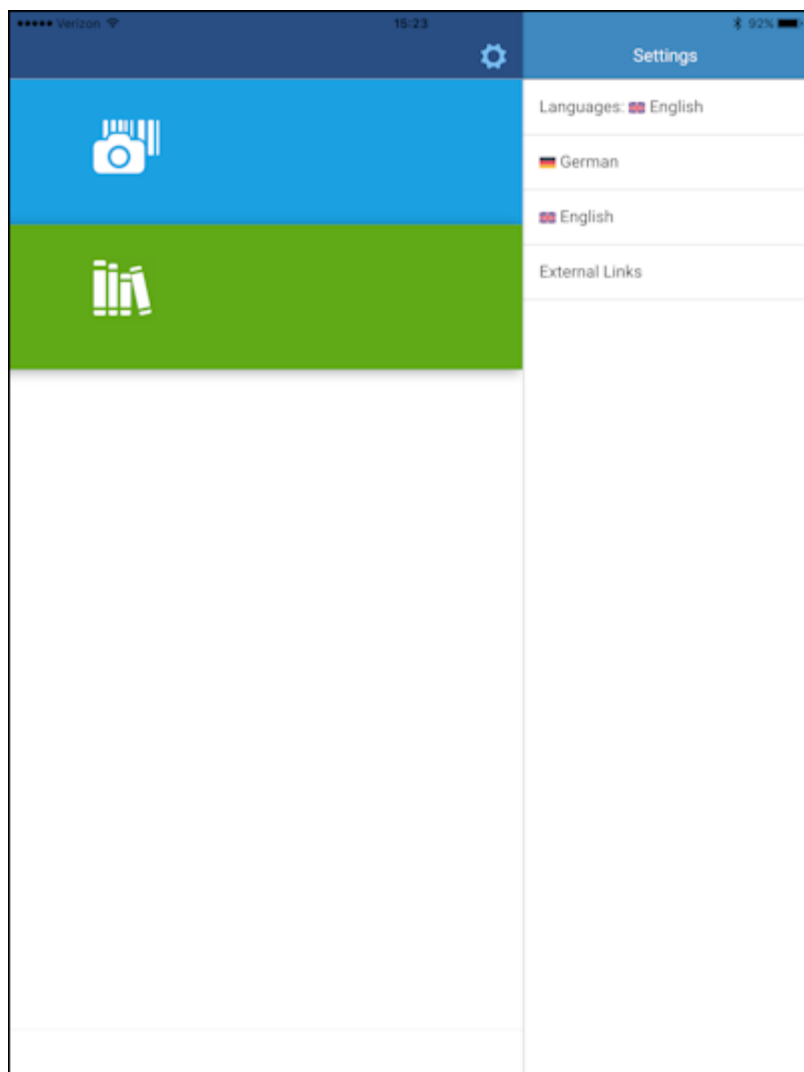
Working with Settings

Alma Mobile provides settings for:

- Languages
- External Links

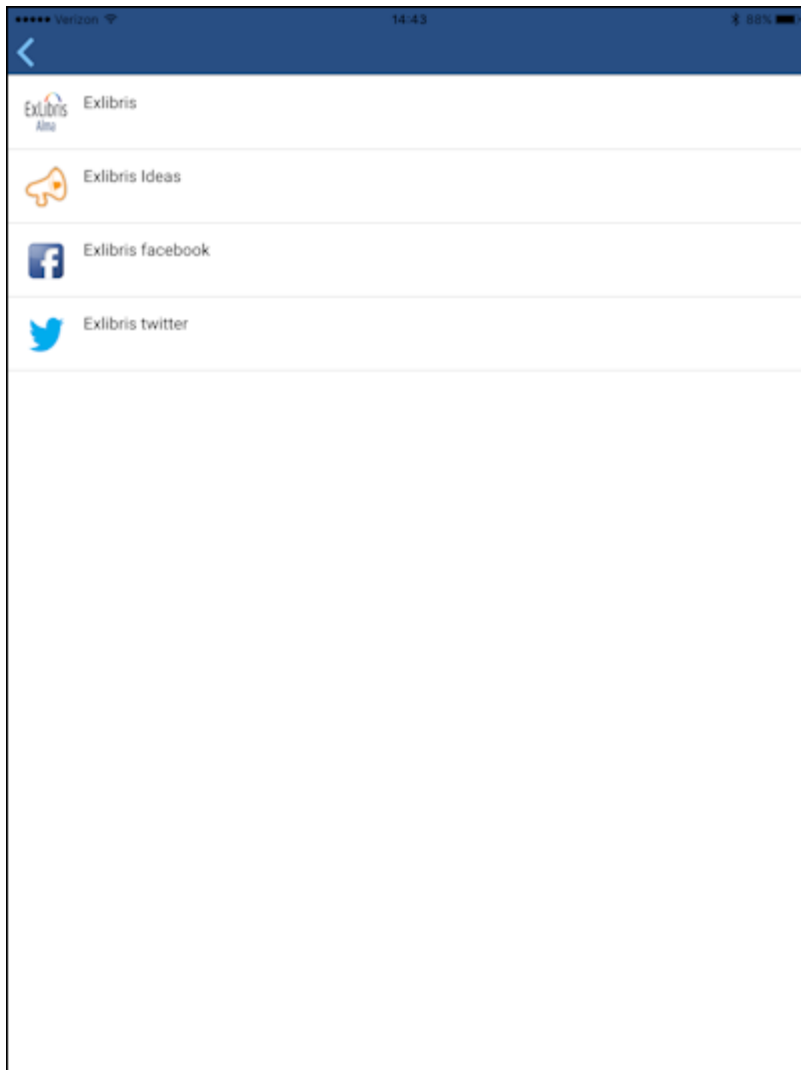
To work with Alma Mobile settings:

1. Tap the gear icon to open the Settings pane.
2. Tap **Languages** to display and/or select the preferred language option for the Alma Mobile user interface.



Language Settings for the User Interface

3. Tap **External Links** to conveniently switch from Alma Mobile to one of the following external links:
 - Ex Libris Ideas
 - Ex Libris Facebook
 - Ex Libris Twitter



External Links

4. Tap the gear icon to close the Settings pane.

Using Pick Up from Shelf

New for December!

Alma Mobile Pick Up from Shelf enables you to process holdings requests easily from your mobile device and without the need for printing lists to take to the shelves with you.

Working with Pick Up from Shelf

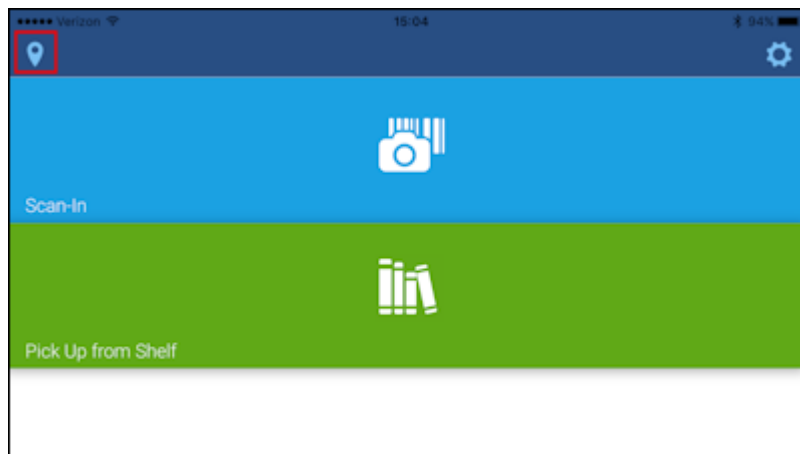
PERMISSIONS: To work with Pick Up from Shelf, you need to have the same role as you do when you are logged in to Alma without your mobile device:

- Requests Operator
-

To work with Pick Up from Shelf:

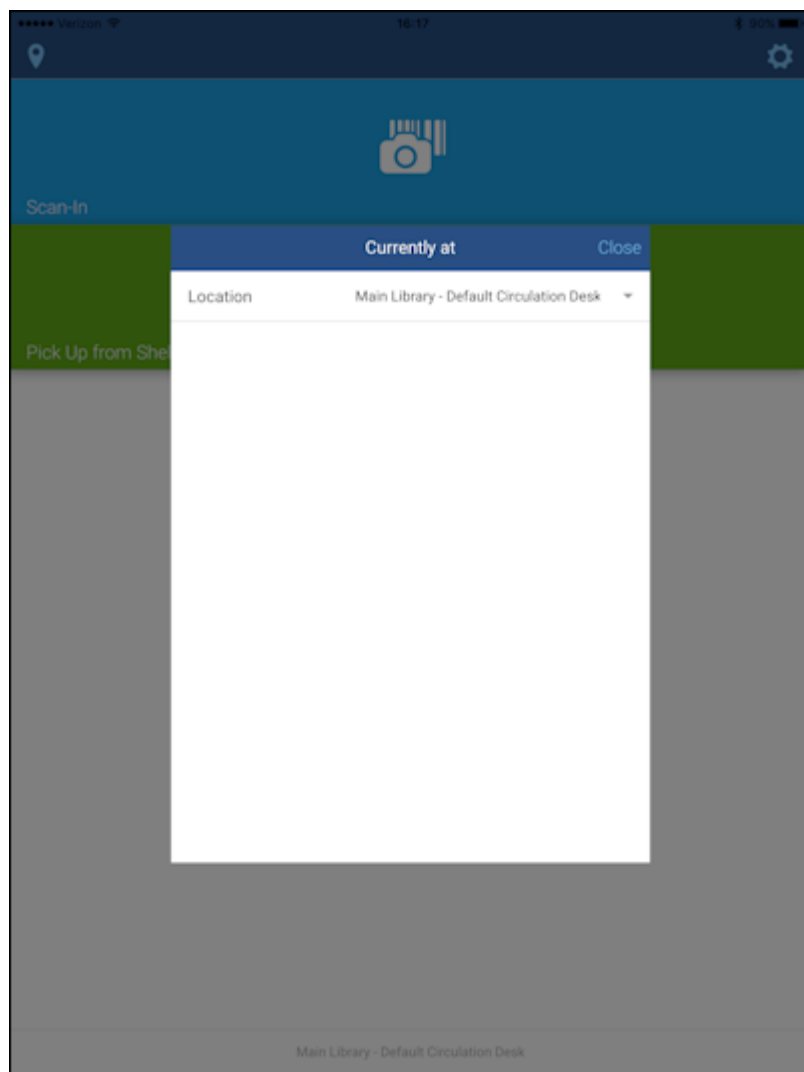
1. After you have logged in to the Alma Mobile app, select your location for processing pick-up requests.

- Tap the teardrop icon.



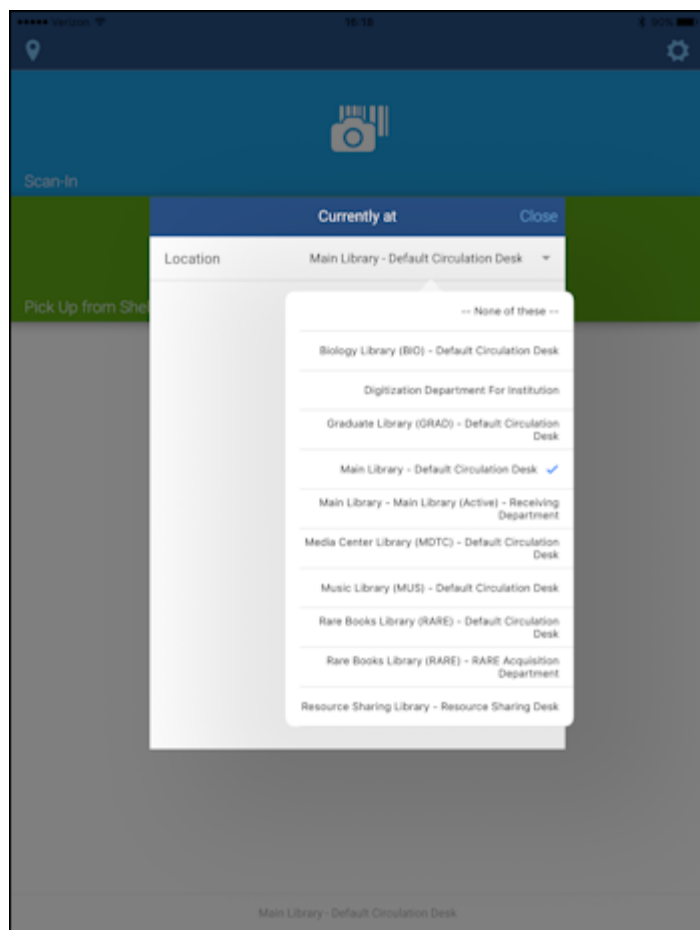
Teardrop Locations Icon

The **Currently at** page opens.



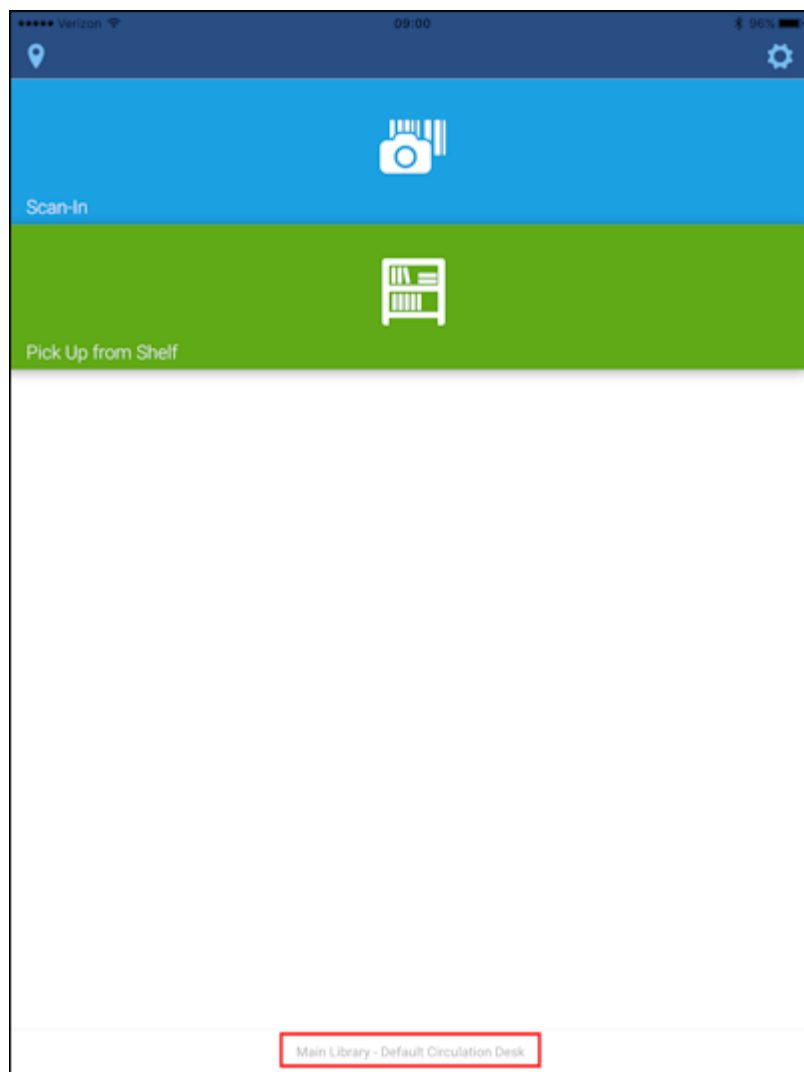
Currently at Page

- Open the Location drop-down list.



Location Drop-Down List

- Tap the location for which you will be processing pickup requests. The **Currently at** location that you selected appears at the bottom of the page.



Currently at Location Selected

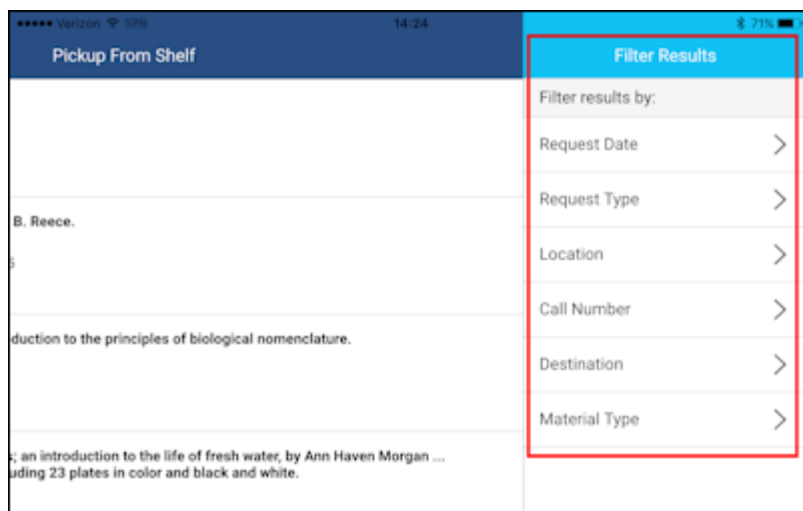
2. On the home page, tap the Pick Up from Shelf icon. The Pick Up from Shelf page appears.



Pick Up from Shelf Page

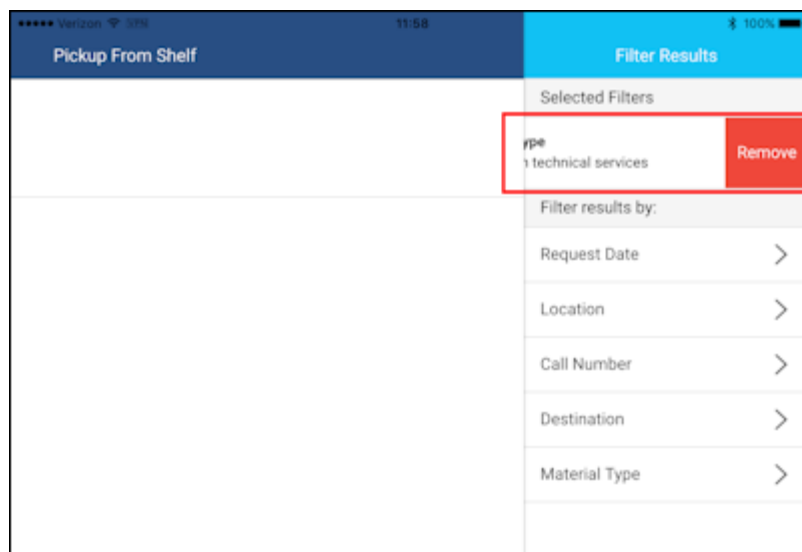
For long lists, scroll up from the bottom to view more information.

3. If the Pick Up from Shelf list of requests is exceptionally long, filter the list to shorten it.
 - a. Tap **Filter Results**. The Filter Results pane appears.



Filter Results Pane

- b. Tap one or more of the following options, and enter your filtering criteria:
 - Request Date
 - Request Type
 - Location
 - Call Number
 - Destination
 - Material Type
- c. If you choose not to use the filters, tap outside the Filter Results pane to return to your list.
- d. If you change your mind about using a filter that you've selected, swipe the filter from right to left and tap **Remove**.

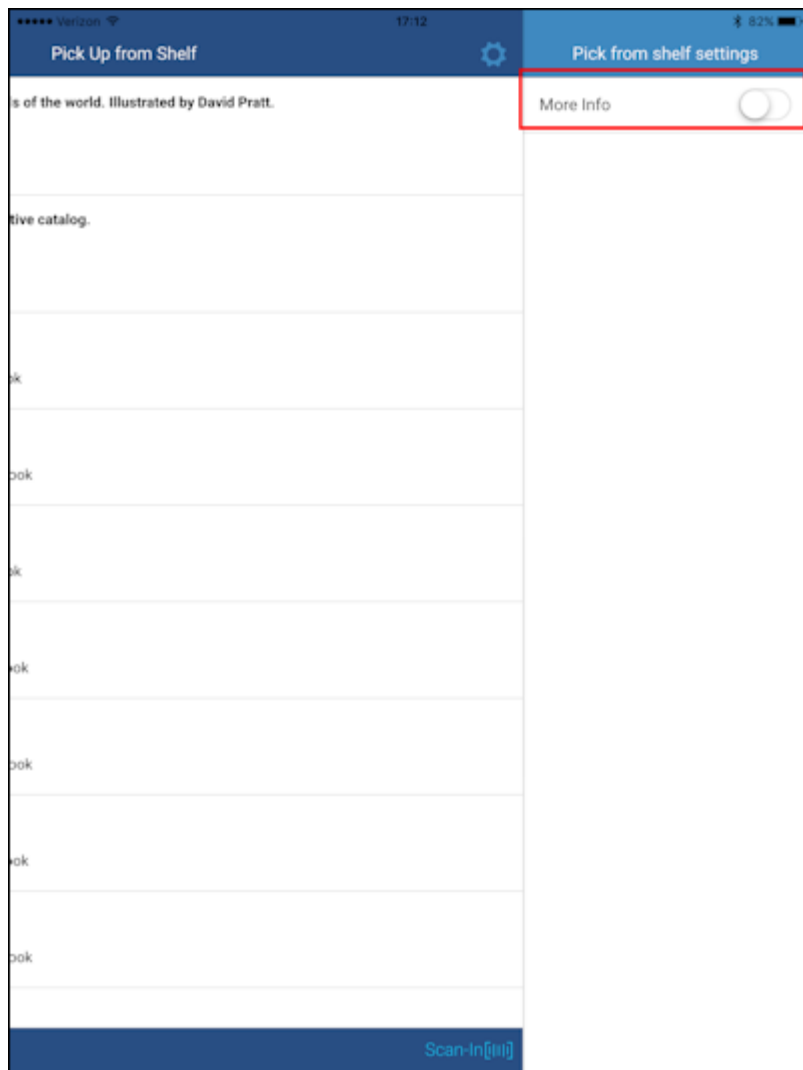


Remove Filter

4. If you want to view More Info such as Edition, Volume or Issue, tap the gear icon to turn on the More Info setting.

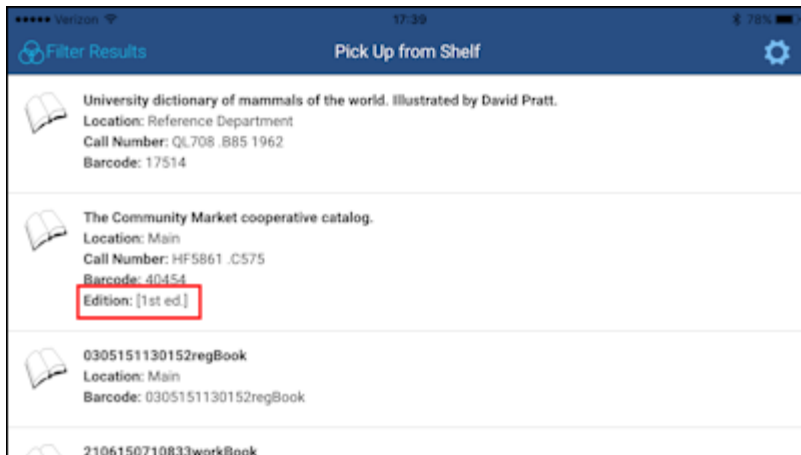
NOTE:

Depending on your page location, the gear icon may present different options.



More Info Setting

After you have selected the More Info setting, the items in the Pick Up from Shelf list display any additional More Info data that is available.

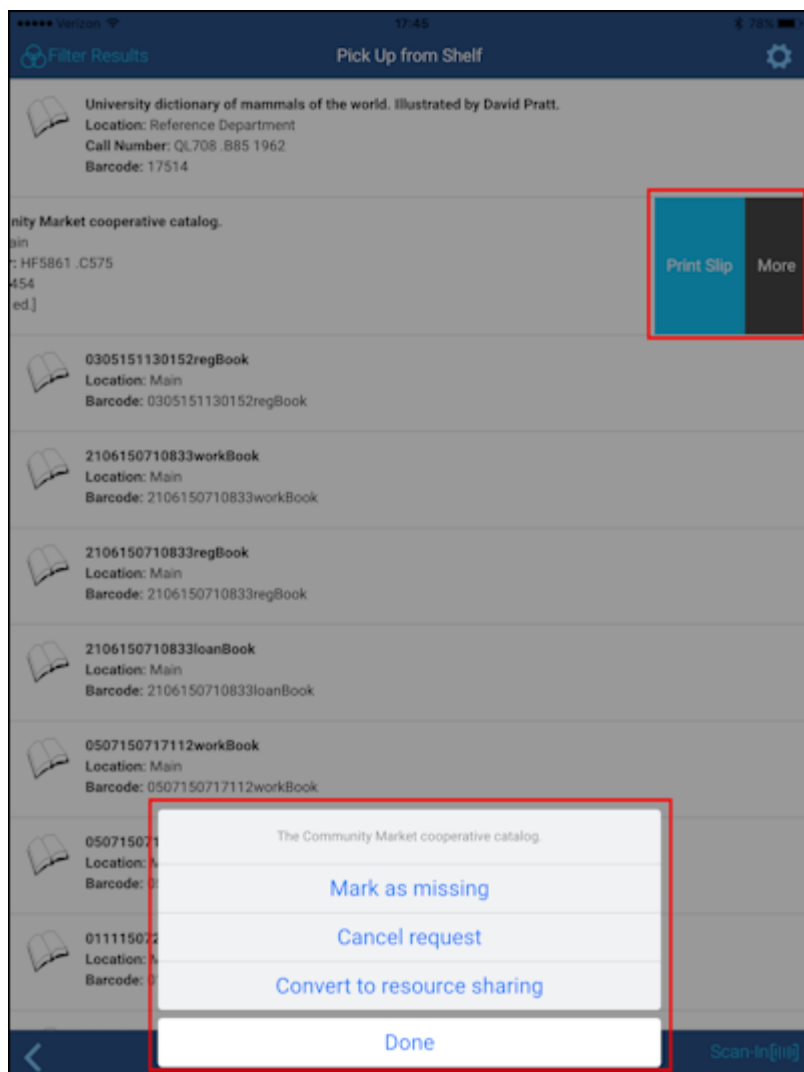


More Info Data Appears

5. In any item row swipe from right to left to display the **Print Slip** and **More** actions.

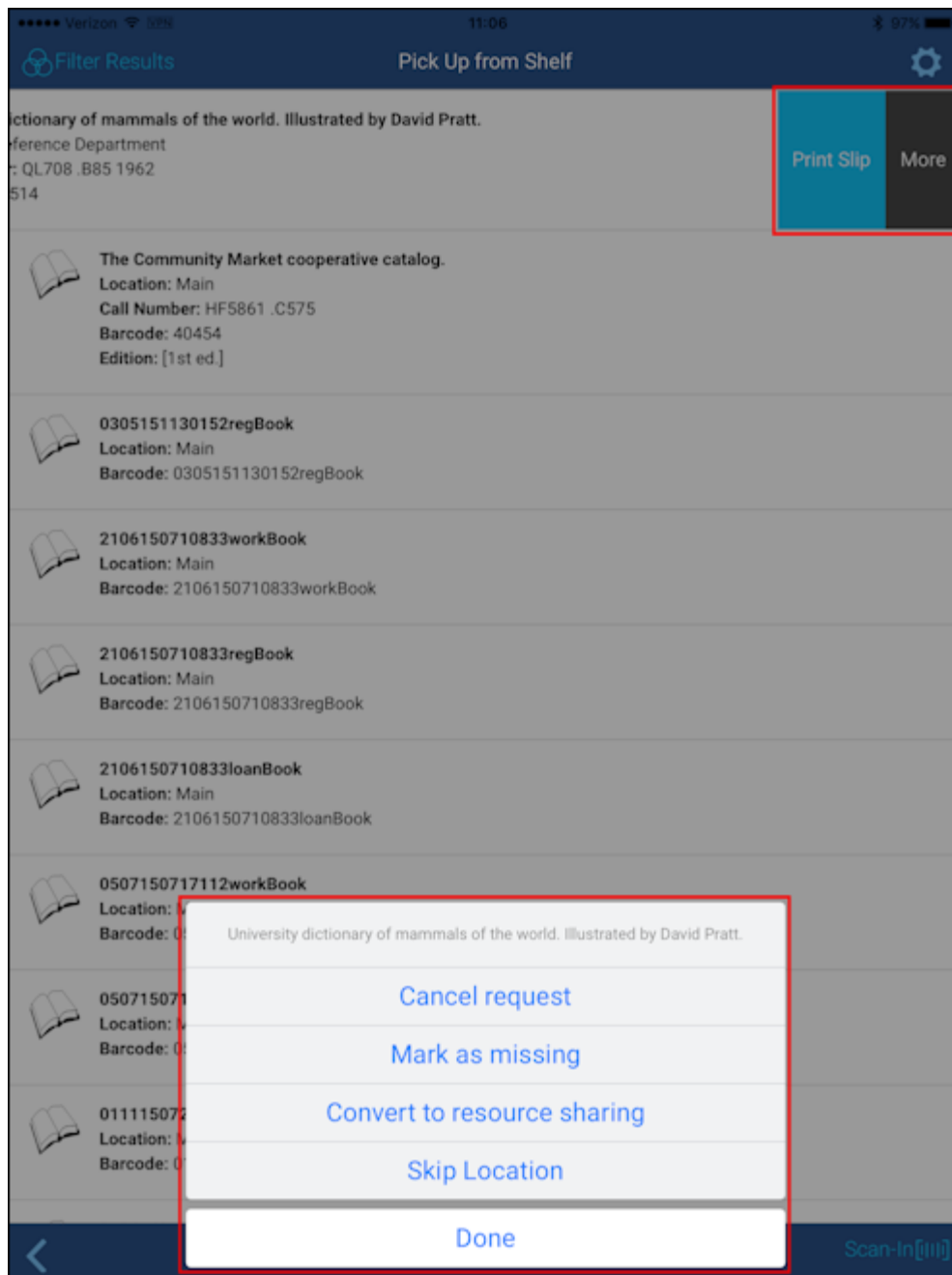
When you tap **More**, the following options appear:

- Cancel request
- Mark as missing
- Convert to resource sharing



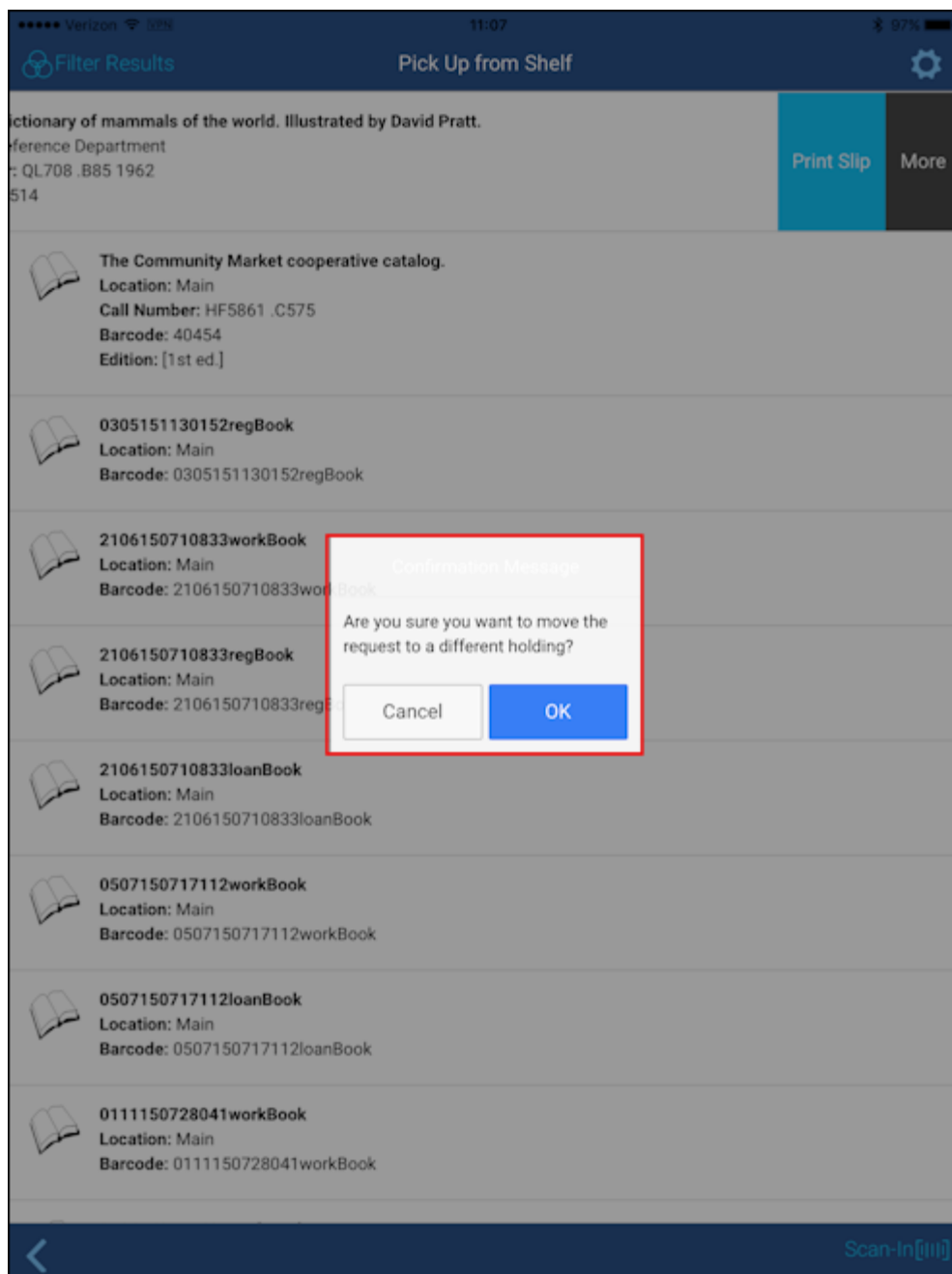
Print Slip and More Actions

Similar to the web-based version of Alma, **Skip Location** may optionally appear in the list of options when the requested item can be obtained from another location.



Skip Location in the Task List

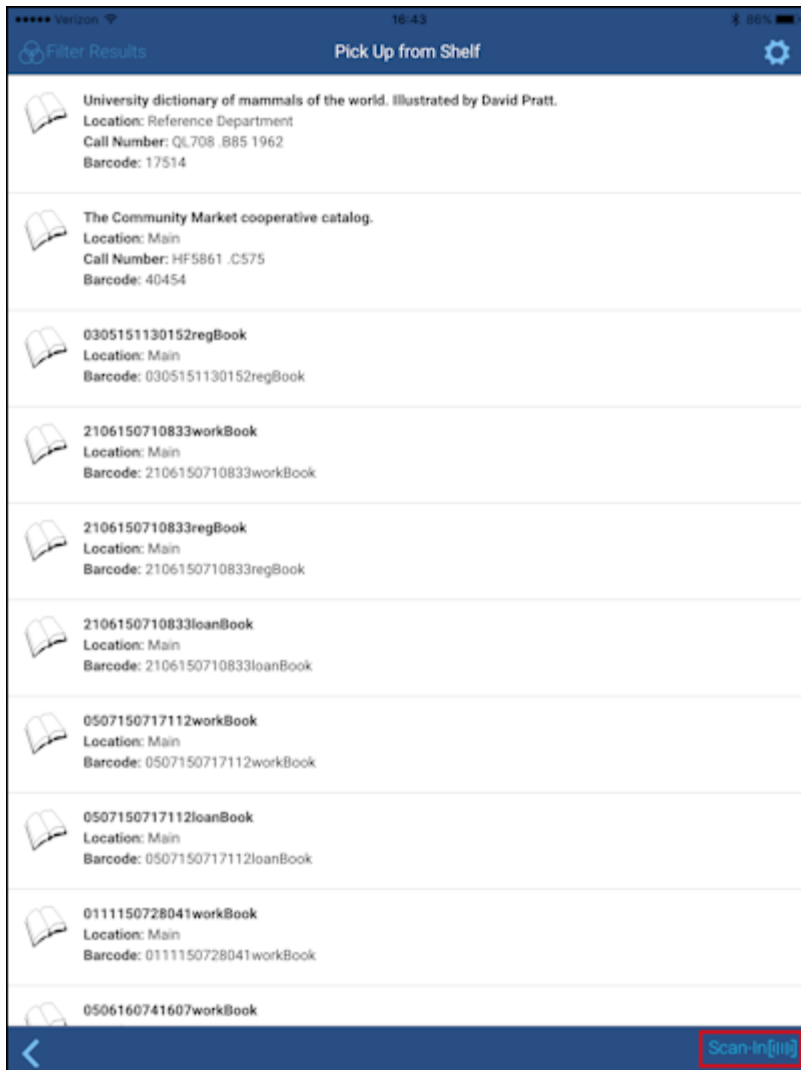
When you tap **Skip Location**, you are prompted with a confirmation message.



Skip Location Confirmation Message

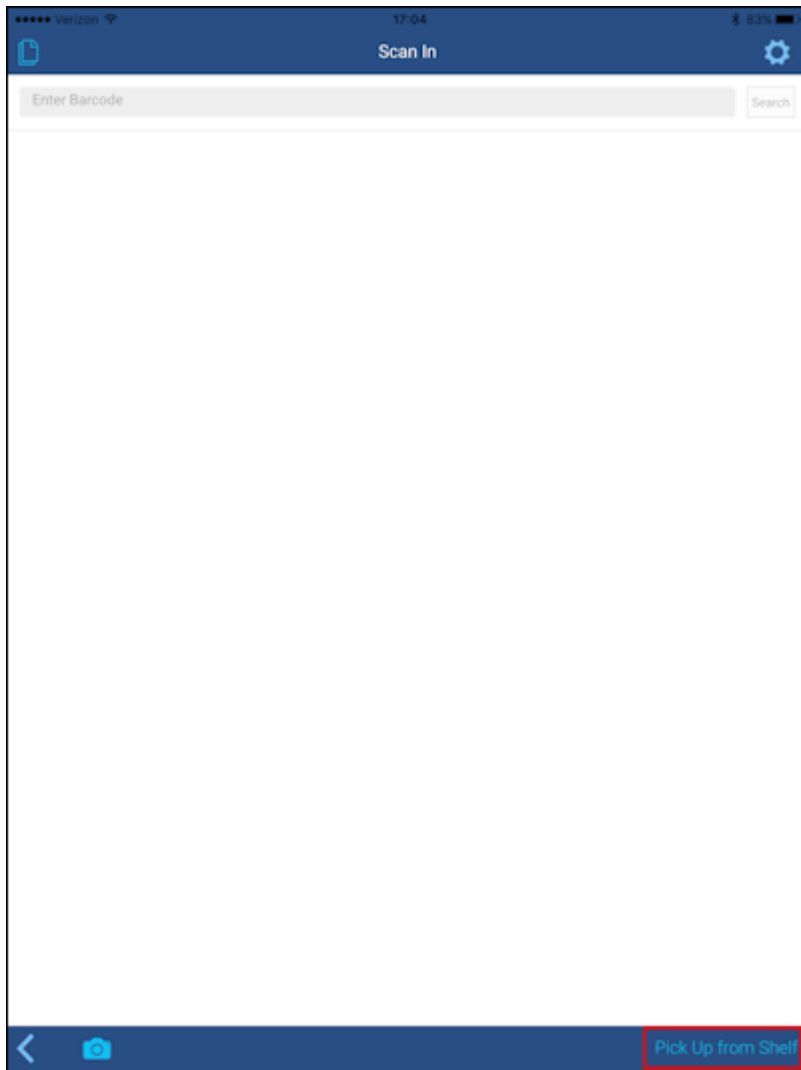
After the **Skip Location** request has been processed successfully, it no longer appears in the list from which you are working. Similar to the web-based version, the request is deactivated from the current location and will be attempted to be fulfilled by another location. It will appear in the Pick Up From Shelf request list for the other location.

6. After you locate an item in your list on the shelf, tap **Scan-In** to enter the barcode of the item and complete processing of this request.



Scan-In Toggle Button

From the Pick Up from Shelf page, Scan-In is a toggle button that easily allows you to switch between the Scan-In feature and the Pick Up from Shelf list.



Pick Up from Shelf Toggle Button

See [Working with Scan-In](#) for more information and to complete processing of the Pick Up from Shelf items.

Using Scan In

New for December!

The Scan-In feature in Alma Mobile enables you to enter barcode information in one of the following ways:

- Use the camera feature on your mobile device
- Use a bluetooth-enabled, hand-held scanner that you have paired with your mobile device
- Enter the barcode manually

After configuring your Scan-In settings, you can:

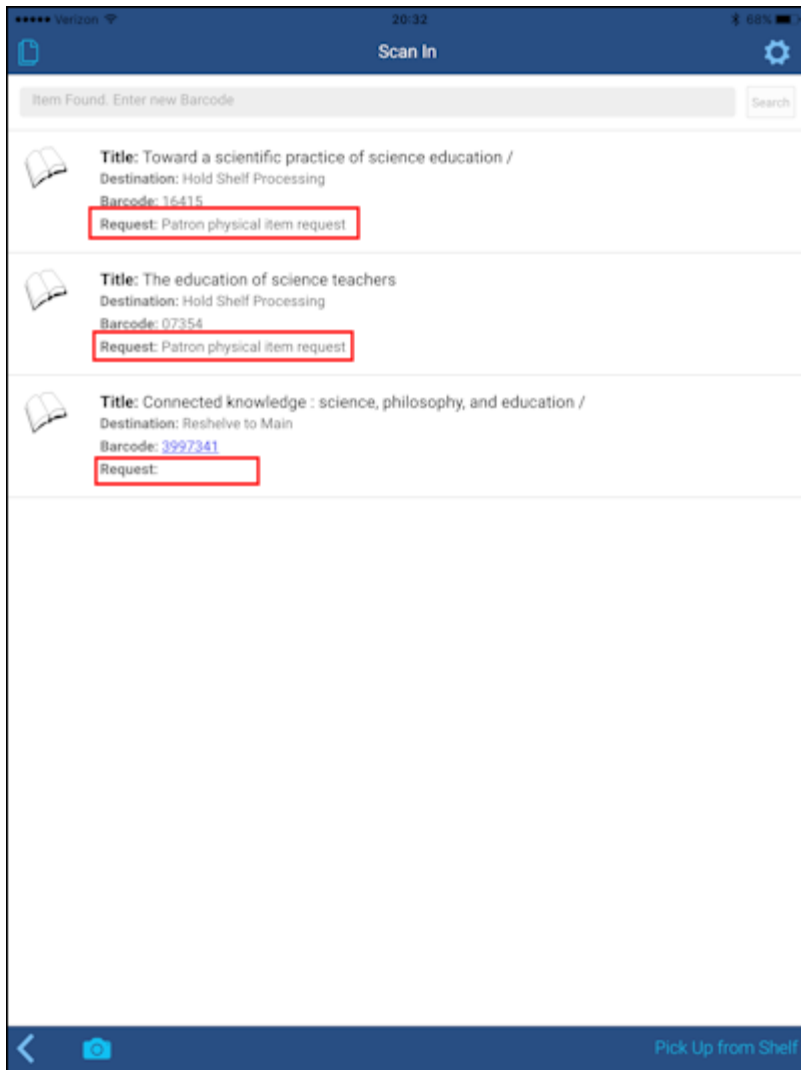
- Automatically have the system generate print slips for the items in your Pick Up from Shelf list (see [Using Pick Up from Shelf](#) for more information)
- Identify items used in-house
- Display more information for scanned items

Your configuration settings can be easily changed to dynamically meet the requirements that you have for the items that you are processing.

Configuring Scan-In Settings

Scan-In Settings provide the following options:

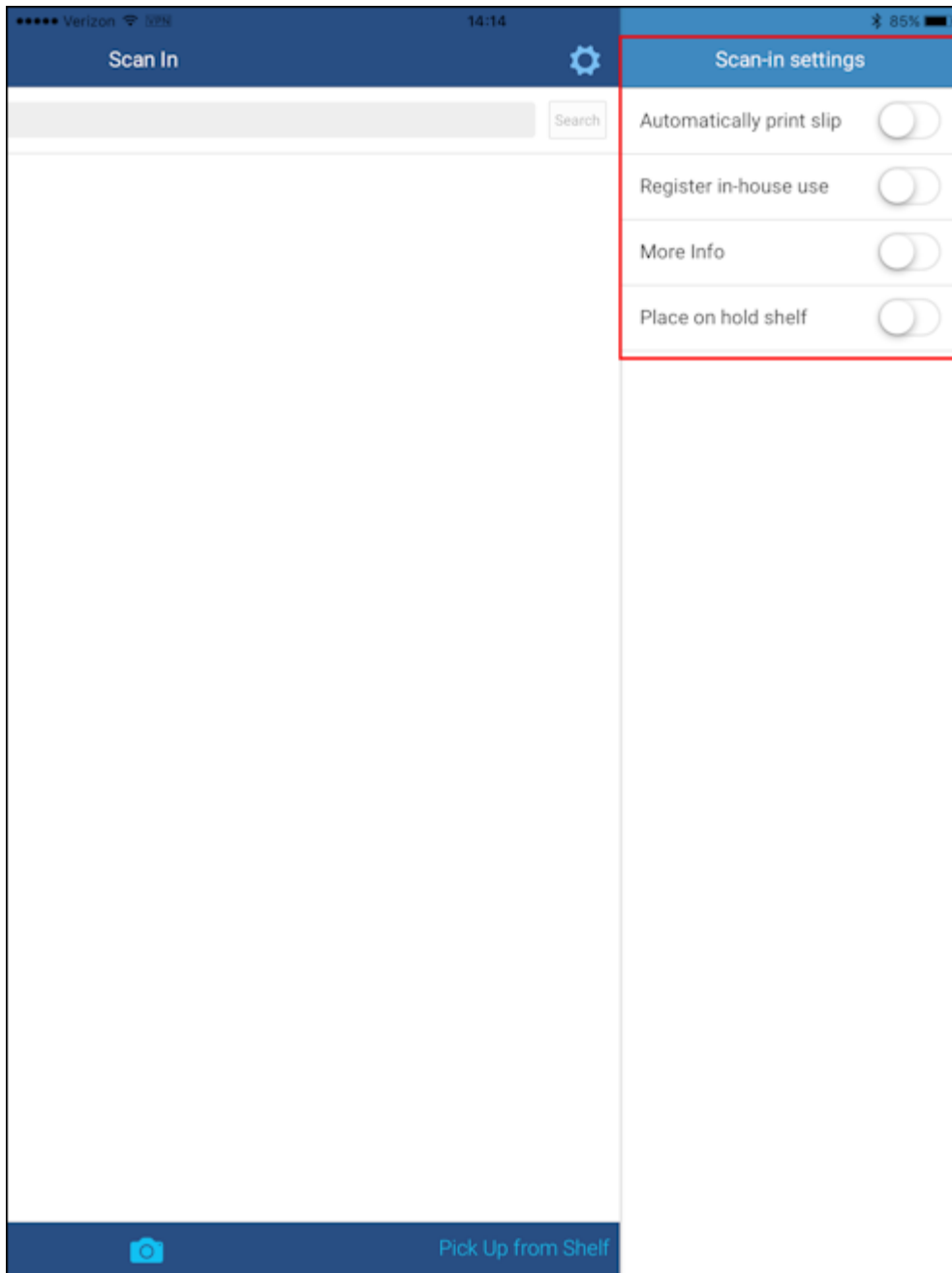
- Automatically print slip - When you scan the barcode, Alma creates a print slip automatically. This is commonly used with the Pick Up from Shelf capability on your mobile device.
- Register in-house use - Use this setting to identify items that have been browsed within the library when you scan the item's barcode.
- More Info - Select this setting to display the request information about the scanned items that appear in the Scan-In page list.



More Info Displayed in the Scan-In List

To configure Scan-In settings:

1. After you have logged in to the Alma Mobile app, tap the Scan-In icon. The Scan-In page appears.
2. Tap the gear icon. The Scan-In Settings pane appears.



Scan-In Settings Pane

3. Slide to turn on one or more of the following:
 - **Automatically print slip**
 - **Register in-house use**
 - **More Info**

■ Place on hold shelf

Similar to the Yes/No options for [Place directly on hold shelf](#) in the web-based version of Alma, turning on the **Place on hold shelf** option in Alma Mobile places the item on the hold shelf when scanned and a letter is sent to the patron indicating that the item is ready for pick up.

Turning off the **Place on hold shelf** option in Alma Mobile identifies the item for on hold shelf processing. After the hold shelf processing is complete, the item needs to be scanned again to be placed on the hold shelf (with the appropriate options selected).

NOTE:

The **Place on hold shelf** option in Alma Mobile is only presented when the circulation desk from which you are processing items is configured in the web-based version for **Has hold shelf processing**.

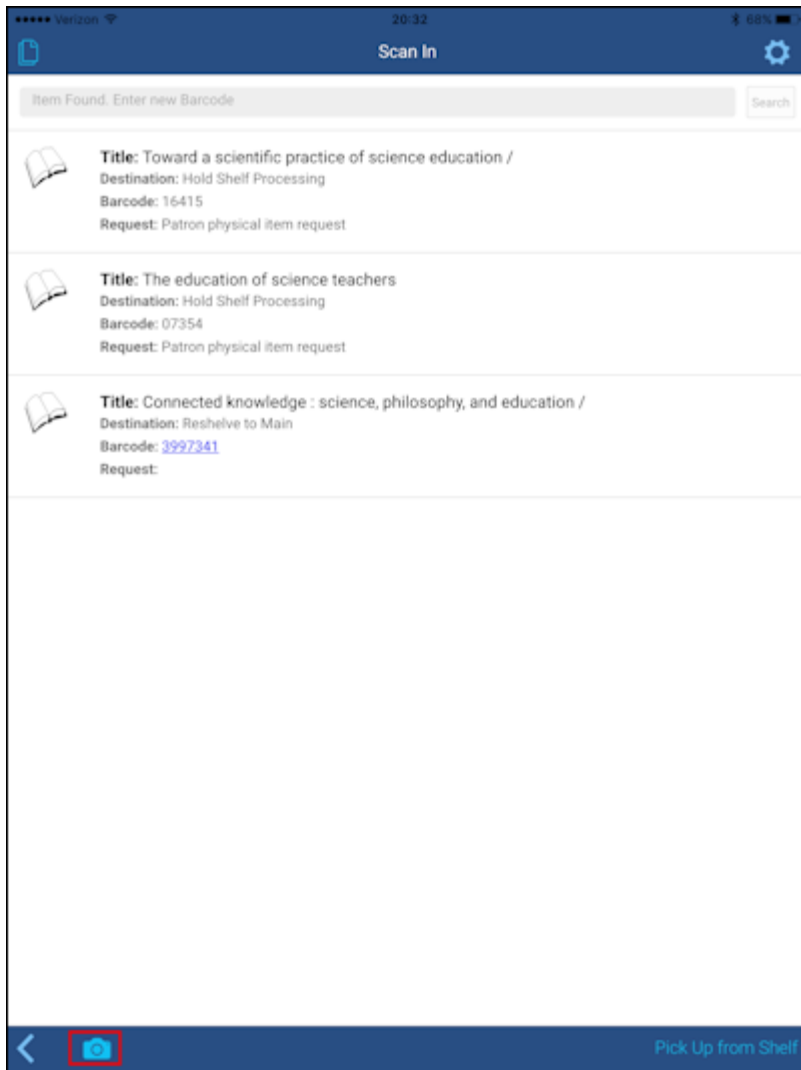
4. When you are finished, tap the gear icon or anywhere outside the Scan-In Settings pane to return to the Scan-In page.

Working with Scan-In

With the Alma Mobile Scan-In feature, you can scan (or enter) item barcodes and perform actions on the items that you have scanned into the Scan-In list.

To work with the Scan-In feature:

1. Scan a barcode.
 - a. Make the barcode field the focal point.
 - b. Use a bluetooth-enabled, hand-held scanner that has been paired with your mobile device or tap the camera icon to use your mobile device's camera to scan the barcode.



Camera Icon

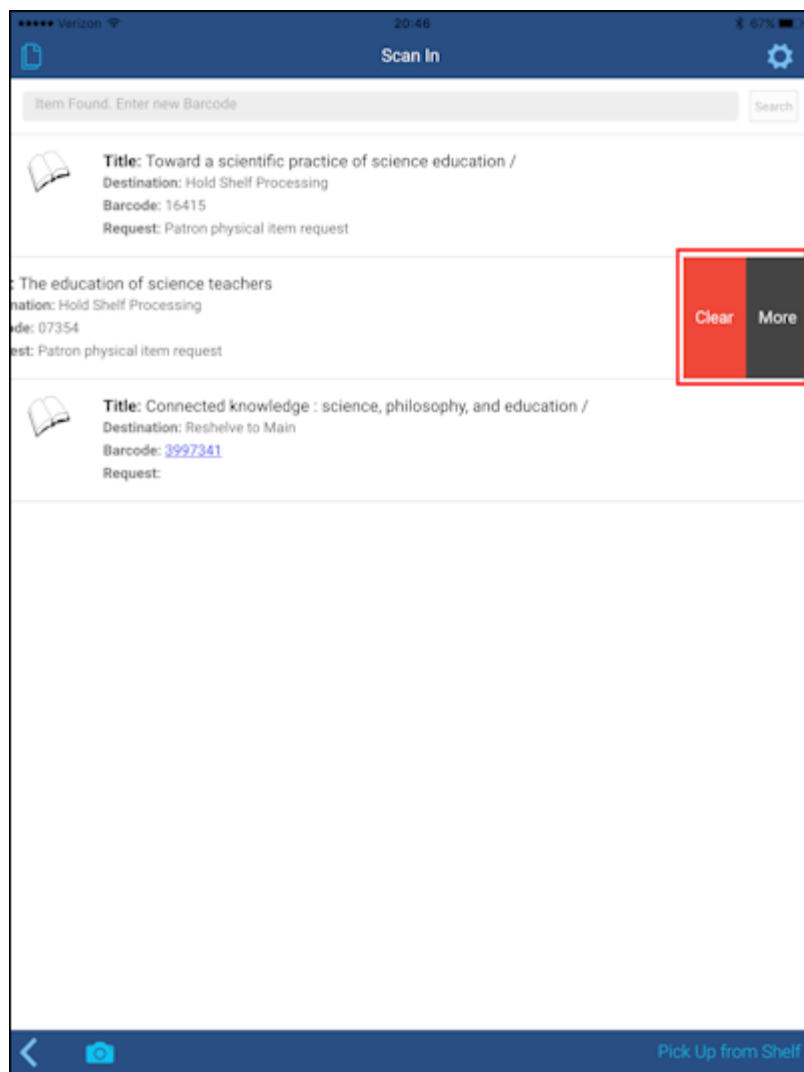
When you scan a barcode, the system automatically checks the database for the barcode and displays the item details that it finds or identifies the barcode as Not Found.

NOTE:

If you manually enter a barcode, you need to tap **Search** to have the system check the database for the barcode.

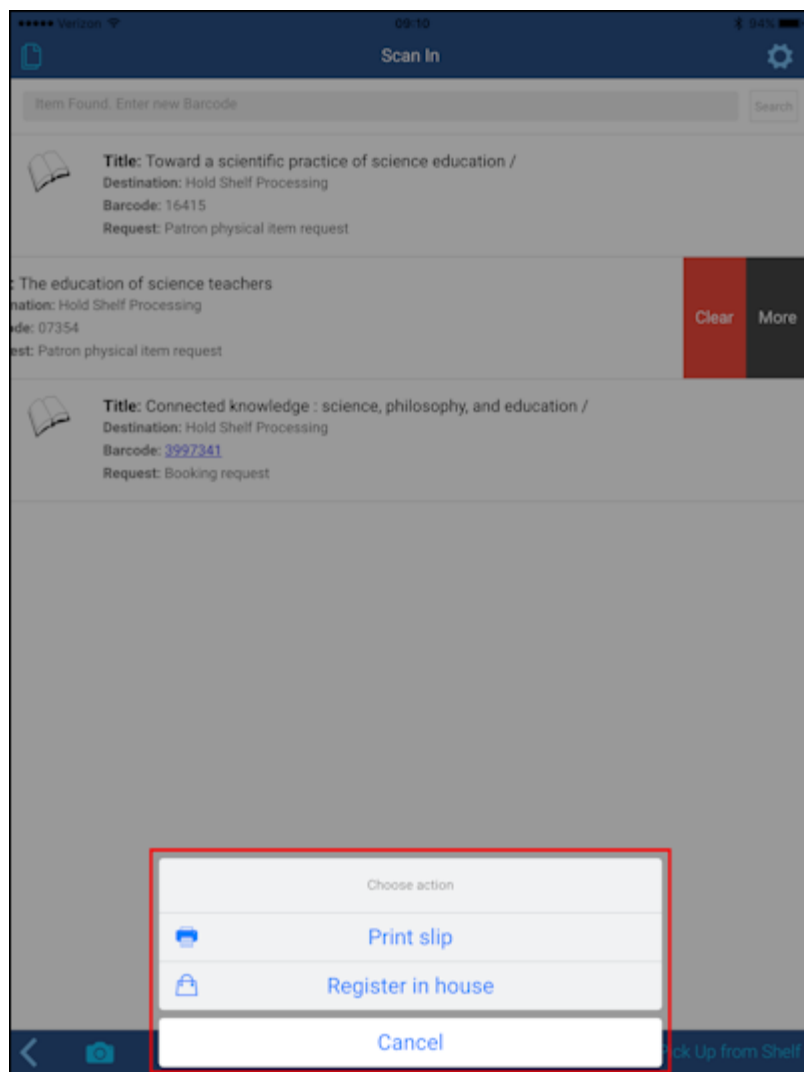
2. Perform item actions.

- a. In an item row, swipe at the right edge from right to left to display the actions that you can perform on individual items.



Item Actions

- b. Click **Clear** or **More** (to display additional actions). **More** displays actions from the Scan-In Settings options that you may not have already selected as a default action.



More Actions

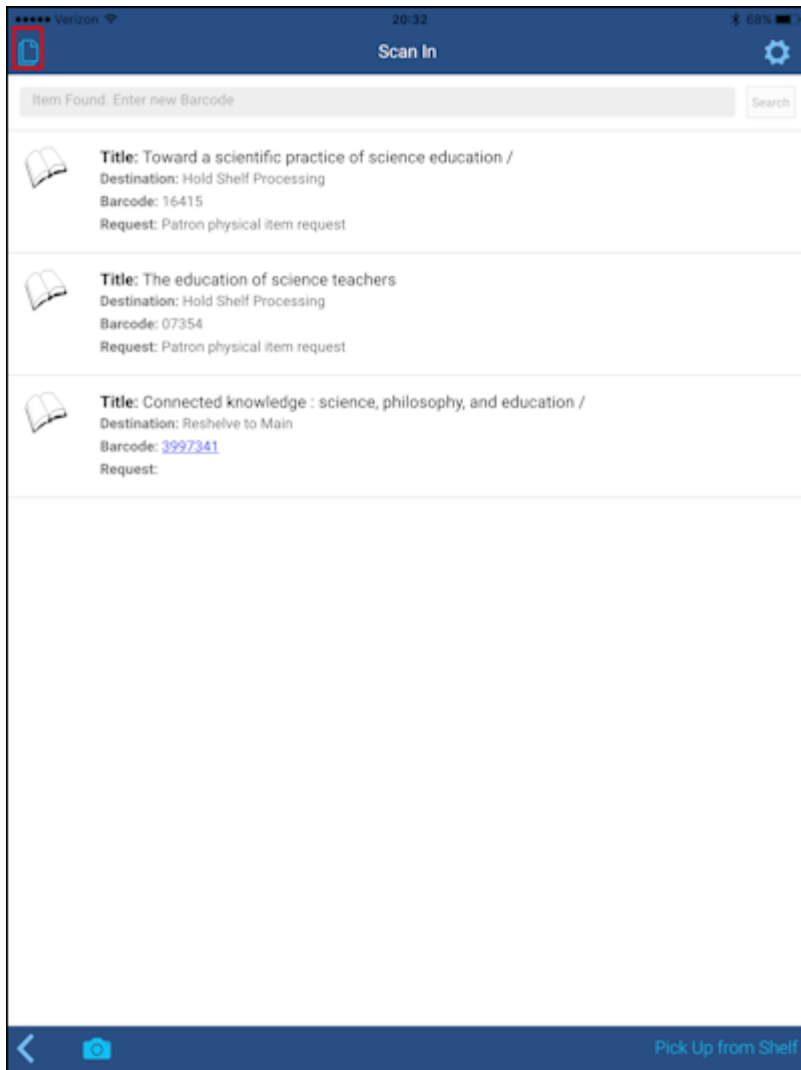
- c. Tap the action that you want to perform for the row item.
- d. If you choose to take no action, swipe the row from left to right to remove the action buttons.

Managing Your Scan-In List

With the Pages icon, you can selectively delete items from the Scan-In List or you can choose to delete all the items in the Scan-In list.

To manage your Scan-In list:

1. Tap the the Pages icon.

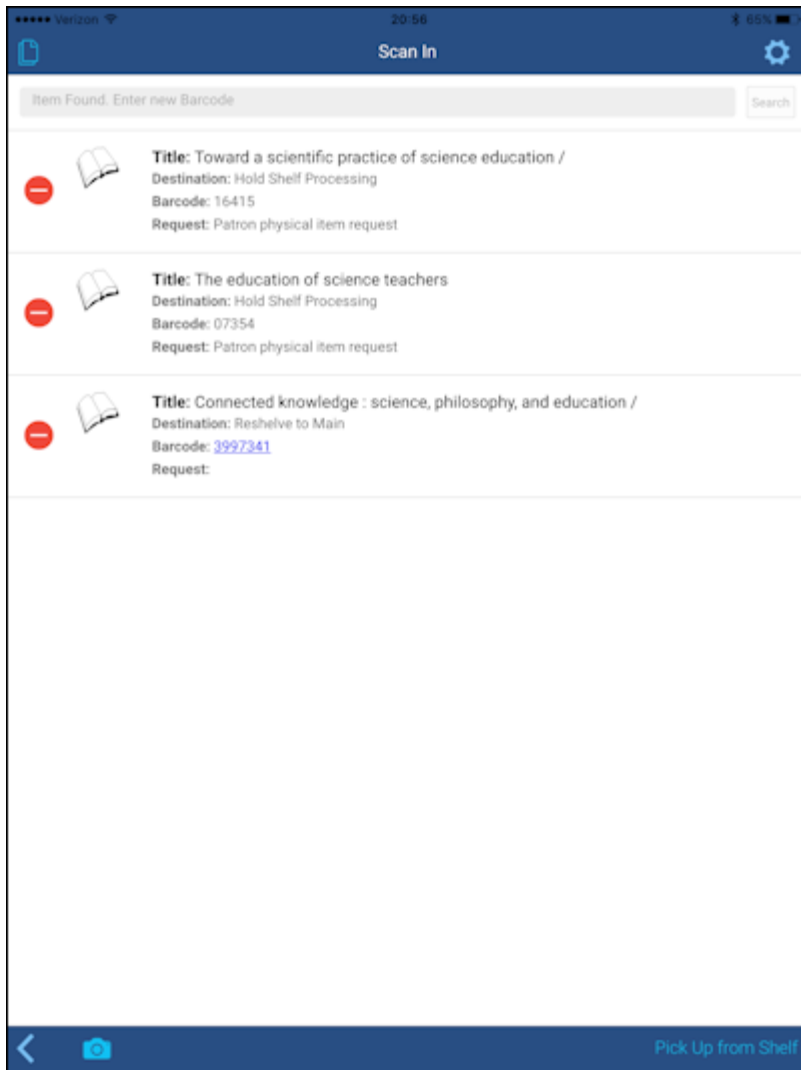


Pages Icon

2. Tap one of the following options:

- Selective Clear
- Clear All
- Cancel

When you tap **Selective Clear**, delete icons appear next to each item in the list.



Selective Clear

To remove the delete icons from the display, tap **Selective Clear**, again.

3. Delete items as needed.

Run a Job - Review and Confirm

1 2 3 4 5 Back Cancel Submit

General Information

Job Name Export Urls - CC Science Journal - 16/07/2016 05:30:14 AM IDT

Set Information

Set ID 189822610000301
Name CC Science Journal
Set Size 1

Scheduling

Schedule As soon as possible

Task Parameters: Export Urls

Physical format HTML
Number of records in file One File
Export into folder Private
FTP configuration -
Sub-directory (Path relative to ftp configuration) -
Include Bibliographic URL true
(856 \$\$u) if exists

+ API Information

Run a Job - Review and Confirm

8. Click **Submit** to run the job. The Monitor Jobs page appears and is open on the Running tab.
9. Click the **History** tab to view your results. See the **Viewing Exported URLs** section on the [Viewing Completed Jobs](#) page for more information.

Restoring Jobs

New for December!

You can restore records that were removed or changed by the following jobs:

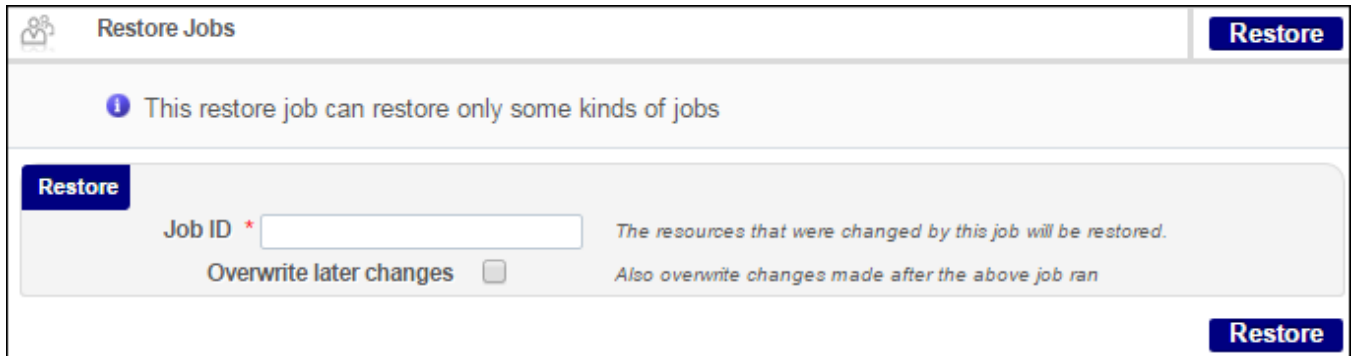
- Withdraw items
- Delete portfolios
- Delete bibliographic records
- KORMARC/Marc21/UNIMARC normalization
- Change holdings information
- Authorities-preferred term correction

The Restore Job functionality can currently restore up to 5000 records. This includes any related records. For example, holdings and item records are counted separately when restoring their bibliographic record.

IMPORTANT: Be careful when running the Restore Jobs functionality, as it is not possible to roll it back.

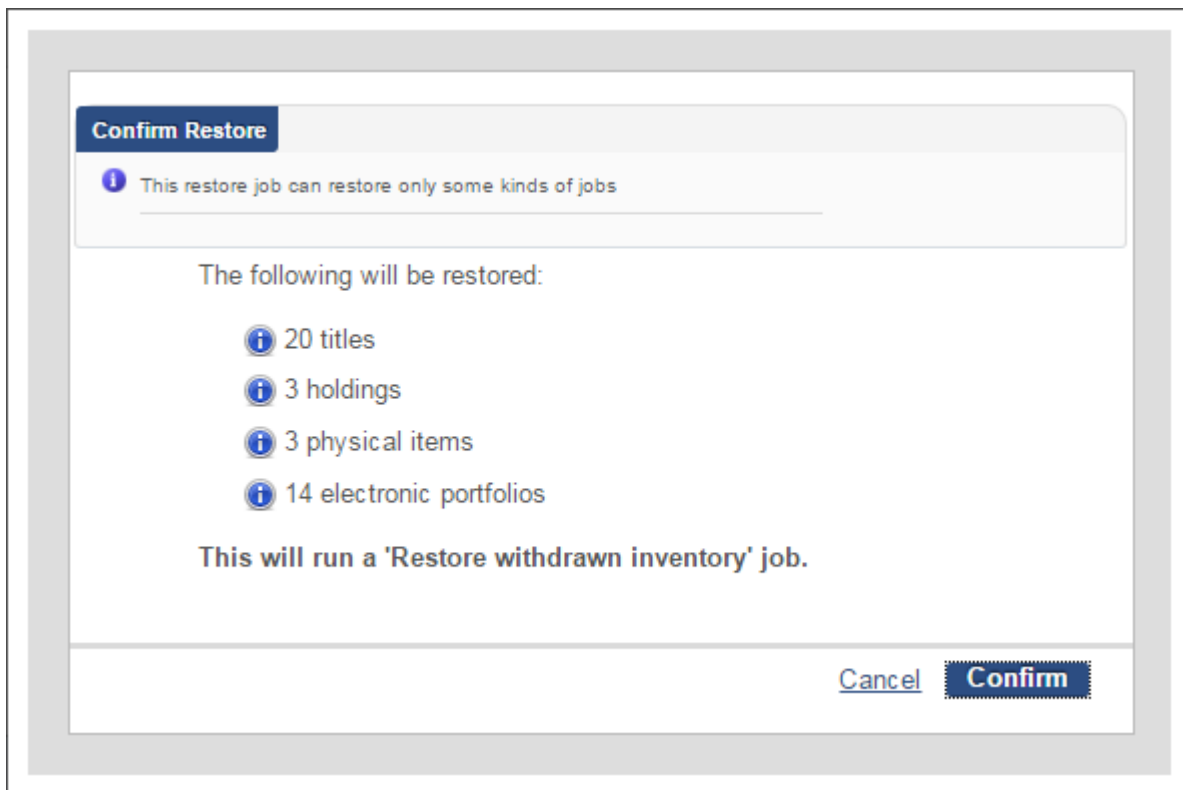
To restore records removed or changed by a job:

1. Select **Restore Jobs** from the Alma Main Menu ([Administration > Manage Jobs](#)). The following appears:



Restore Jobs

2. Enter the job ID of the job that removed or changed the records.
3. To overwrite changes made after the job ran, select **Overwrite later changes**.
4. Click **Restore**. The number and type of records to be restored appears. For example:



Confirm Restore

5. Click **Confirm**. The removed or changed records are restored.

You can view a report of the restored records from [Administration > Monitor Jobs](#).

ExLibris

Alma[®]
QA

Tasks

Analytics

Currently at: None

Help

Implementer, Ex ...

Job Report

Completed Successfully

Name Restore withdrawn inventory
Process ID 1159185950000521
Started on 2016/11/16 06:45:27 CST

Created by exl_impl (2016/11/16)
Total run time 8 Seconds
Finished on 2016/11/16 06:45:36 CST

Job Results Summary

Tools

1	Total records processed	74
2	Total records not restored	0
3	Total records restored	74

Restore Information

Tools

Description	Count
1 Total records processed	74

Download as CSV

Job Parameters

Tools

Name	Value
1 Name	Delete Bibliographic records - my set - 2016/11/16 06:42:03 CST
2 Job ID	1159182060000521
3 Start date	2016-11-16 06:42:12
4 Creator	exl_impl

Restored Records Report

Click **Download CSV** to see a report of records restored and those that failed to be restored.