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Alma January 2016 Release Highlights

Digital Asset Management

The January 2016 release sees the culmination of phase two of Alma's enhanced support for the management of digital resources.

This includes a focus on special collection workflows and processes. As part of this phase, Alma is now able to support staff bulk upload (ingest) scenarios. The mechanism for ingest supports different formats, with an initial focus on MARC- and CSV-based files – to be extended at a later point in time to Dublin Core.

Alma also provides easy-to-use wizards and upload utilities for staff to be able to create individual resources (for example, to "quick catalog" a new representation) and manage content that has already been uploaded by other means. These enhancements and developments go hand-in-hand with new discovery and delivery capabilities for the end user.

Documentation of the new digital asset management capabilities can be found in the *Alma Online Help*.

Resource Management

- ****Idea Exchange**: Multiple Item Record Withdrawal** – From the List of Items page, you can now withdraw multiple items in one action by selecting one or more check boxes and clicking **Withdraw Items**.
- **Forms for Editing UNIMARC Control Data Fields** – Alma, as a multi-format library solution, now supports UNIMARC form editing for 1XX fields for ease of use by cataloging staff.
- **Alma Link Resolver Validity Checking for EbscoHost Full-Text URLs** – As part of an ongoing effort to improve the Alma link resolver hit rate, Alma now supports the ability to check the validity of the full-text URL before presenting it to the end user through the View It services menu. This functionality is currently available for EbscoHost full-text URLs.

Collaborative Networks

- **Streamline the 'Distribute Central Resource Sharing' Job** – The Distribute Central Resource Sharing Configuration job was streamlined and its performance refined. The report now shows only records that were not distributed, rather than showing all records.

Primo

- **Display the Length of the Request Queue Before Submitting a Request** – The patron is now provided with more availability information before placing a request. The patron can view the number of requests that are linked to the holdings (for non-serials) or item (for serials). In addition, the requests list in the Primo My Account tab now includes the expiry date of hold shelf requests.

Administration

- **Patron Opt-Out for Selected Library Notices** – Patrons who do not want to receive library notices are now able to opt out of this service. The library can disable specific patrons from receiving specific notifications at the individual patron level, or groups of patrons via SIS feeds or bulk user updates, as per library policies. Future Primo enhancements will enable the library to allow patrons to opt out of specific notices through the Primo interface, without requiring library intervention.

Analytics

- **New Staff Operator Details Dimension for Fines/Fees Transactions** – A new, dedicated user dimension was created to capture the staff user information for fine/fee creation and processing.

Alma Usability

- **Session Timeout** – One minute before an Alma session times out, a warning message appears on the screen. You can cancel the timeout or log out. If you do not select either option, the session times out after one minute.
- ****NERS Enhancement Requests** :**
  - When exporting data using **Tools > Excel**, the standard animated loading image has been replaced by a progress bar.
  - After the January release, the limit to the number of lines that can be exported using **Tools > Excel** will be gradually increased from the current limit of 5,000 lines. The current limit will be reflected in the tooltip when you hover your mouse over the **Excel** option in the **Tools** menu.

Alma Show Me How and Videos

The following sections describe Alma Show Me How and videos for this release of Alma.

Alma Show Me How

Description

Alma Show Me How provides a menu-driven interface to prompt you through the steps of new or common tasks, or to point out new options, such as a check box, and direct you to the documentation that describes the new options in further detail.

Step-by-Step Instructions

Each Show Me How scenario may address different areas of Alma. The authorizations required to access the Show Me How scenarios are specific to the functional areas of the scenario.

To access Show Me How:

1. From the Alma home page, click **Show Me How**.

   The How Can We Assist You? pop-up window displays.

2. Select one of the processes in order to start the prompted step-by-step instructions.

Alma Videos

The following new videos are available from the Show Me How menu, and when you select **Help > What's New Videos** in Alma:

- **Patron Opt-Out for Selected Library Notices**
- **Enhanced Session Timeout Handling**

Making the Most of This Release

The following release note features require actions or decisions on the part of your institution in order to implement:

Action Items	
☐	Alma Link Resolver Validity Checking for EBSCOhost Full-Text URLs - Enable the Link Resolver Ebsco Plugin to improve the hit rate to EbscoHost full-text services.
☐	Patron Opt-Out for Selected Library Notices - From this release, you can fine tune Alma's notifications system to exactly match your patrons' requirements. You can configure exactly which notifications your patrons will receive and which notifications they will not. The configuration is possible at the specific patron level, or can be run in bulk to update groups of patrons with a list of preferred notifications.
☐	Does your consortium manage a shared catalog? Are their cases where you need to manage bibliographic records that are not shared? If this is the case, this new option can help you in your day-to-day operations by providing the ability to manage local records, while defaulting to use the shared catalog, thereby reducing the possibility of human errors.
☐	Display the Length of the Request Queue Before Submitting a Request - The existing queue of requesters in line for receiving a given resource is a very important piece of information, and your patrons want to know about it before they decide to place a request. With this new feature, they get this information in advance of placing the request, and can set their expectations for receiving the resource accordingly.

Acquisitions

The following enhancements were made in Acquisitions in this release of Alma.

- In order to improve the navigation while receiving physical material, the column **Receiving Note** was added to the Receive New Material page. This saves you from having to navigate to the Received Items List page to view the note.

  If a note is too long to appear in the column, hover your mouse over the column cell to view the complete note in a tooltip.

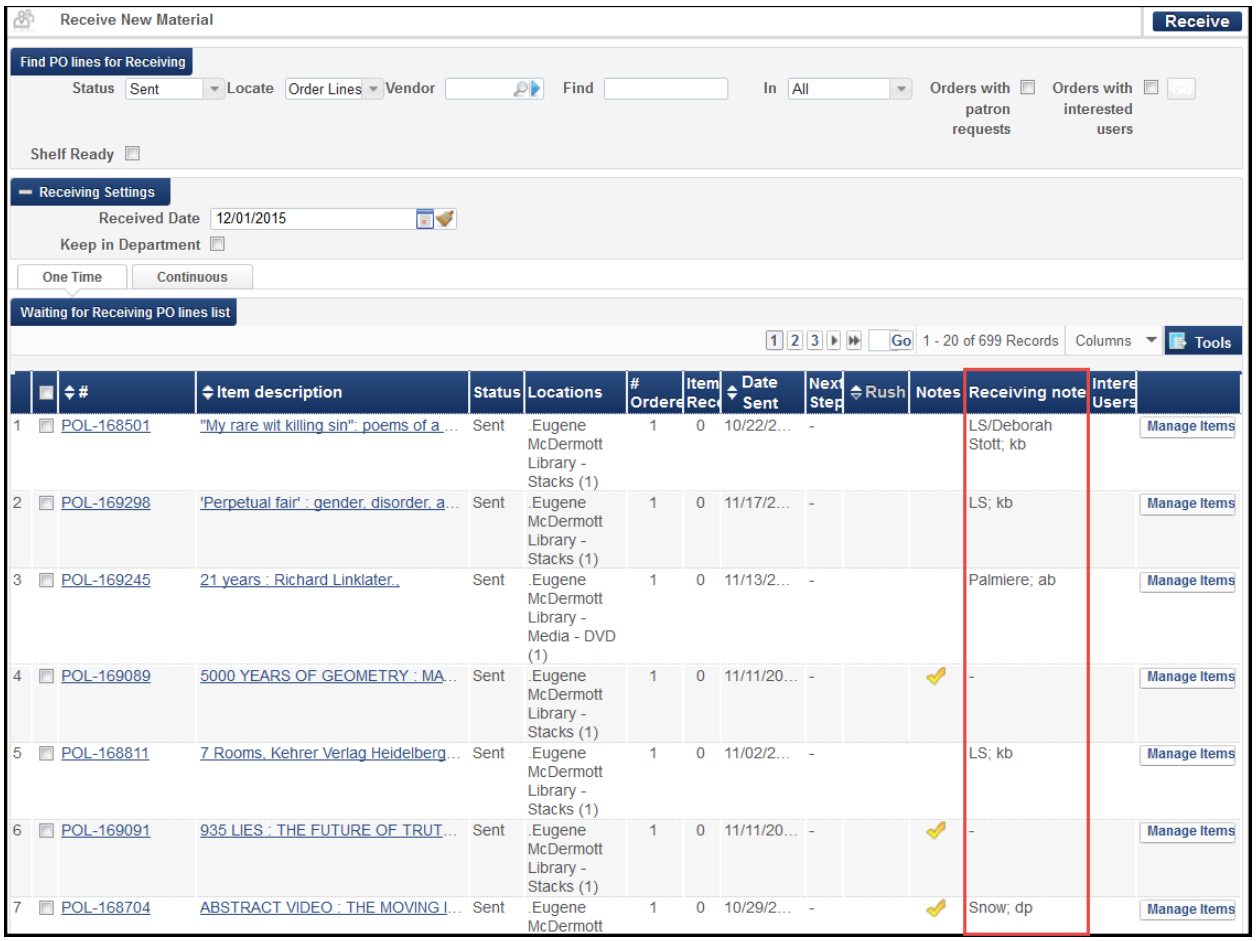

Figure 1 - Receive New Material Page

- **Alternative Call Number** was added as a column to the Received Items List page (**Acquisitions > Receiving and Invoicing > Receive**; click **Manage Item** in a PO line entry).

Received Items List

Back | Save | Save and Receive

Receiving Settings

Received Date: 12/08/2015

Keep in Department: ☑ Next Step: Analysis

Description: ANGEL PATRIOTS : THE CRASH OF UNITED FLIGHT 93 AND THE MYTH OF AMERICA., NEW YORK, NEW YORK UNIVERSITY PRESS, 2015, 9781479868452, ISBN, 99965037750

Vendor/Account: YBP LIBRARY SERVICES/ YBP LIBRARY SERVICES

Order/Line: 1286-16/ POL-169432

Status: Sent (2015-11-23)

Order line type: Physical - One Time

PO Line Owner: .Eugene McDermott Library

Sent Date: 11/23/2015

Bibliographic Information

Title: ANGEL PATRIOTS : THE CRASH OF UNITED FLIGHT 93 AND THE MYTH OF AMERICA.

Author: RILEY, ALEXANDER

Vendor's Title Number: 99965037750

Identifier: 9781479868452

Identifier Type: ISBN

Publication Place: NEW YORK

Publisher: NEW YORK UNIVERSITY PRESS

Publication Date: 2015

Edition: -

Series: -

Volume/Part/Number: -

Binding: -

Language: und

PO line Items

Receiving note: -

1 - 1 of 1 Records | Columns | Tools

		Copy Status	Library	Location	Temp Loc	Date Receiv	Reque	Call Number	Alternative Call Number	Barcode	Current Step	
1	☐	Not Received	.Eugene McDermott Library	Stacks	No	-	-	-	1234		-	Edit Inve

Back | Save | Save and Receive

Figure 2 - Received Items List

- **Payment Date** (the date that the invoice was paid) was added as a column on the Transactions page of a fund (**Acquisitions > Acquisitions Infrastructure > Funds and Ledgers**; edit an allocated fund and select the **Transactions** tab) and as a field in the **Transaction Details Section** of the Transactions Details page (click **View** beside a transaction on the Transaction page).

Transactions

Cancel | Delete | Activate | Save

You are in Main Ledger 2010/2011 > Main Summary > Materials > Schools

Fund name AH CLASSICS Fiscal period FY-2011 Code AHC

Available Balance -7,809.12 USD Cash Balance -7,809.12 USD

Summary | Transactions | Notes | Attachments

Filter : All Find : in : Amount Advanced Search

Add transaction 1 2 3 Go 1 - 20 of 471 Records Columns Tools

	Time	Type	Related record	Amount	Payment date	Reporting code	Transaction reference	Notes	
1	08/15/2011 03:20:31 CDT	Expenditure	PO Line:123453 Invoice Line: 553543: (145694)	40.96 USD	-	-	-		View
2	08/15/2011 01:38:08 CDT	Encumbrance	PO Line:123453	49.95 USD	-	AHC	-		View
3	08/15/2011 01:38:08 CDT	Disencumbr...	PO Line:123453	49.95 USD	-	-	-		View
4	08/12/2011 24:26:32 CDT	Expenditure	PO Line:123900 Invoice Line: CC235848918: (145639)	89.50 USD	-	-	-		View
5	08/02/2011 22:38:06 CDT	Expenditure	PO Line:123465 Invoice Line: 540310: (145544)	31.94 USD	-	-	-	✓	View
6	08/01/2011 01:40:49 CDT	Encumbrance	PO Line:123465	38.95 USD	-	AHC	-		View
7	08/01/2011 01:40:49 CDT	Disencumbr...	PO Line:123465	38.95 USD	-	-	-		View
8	07/26/2011 24:54:40 CDT	Encumbrance	PO Line:123900	89.50 USD	-	AHC	-		View
9	07/26/2011 24:54:40 CDT	Disencumbr...	PO Line:123900	89.50 USD	-	-	-		View
10	07/25/2011 03:05:28 CDT	Expenditure	PO Line:123733 Invoice Line: 533248: (145526)	110.70 USD	-	-	-	✓	View
11	07/25/2011 03:00:42 CDT	Expenditure	PO Line:123456	40.96 USD	-	-	-	✓	View

Figure 3 - Transactions Page

Transaction Details

Fund Afr. Stu. Center Fund Type Disencumbrance

Transaction Section

Transaction Amount

Amount 11.97 USD (VAT 0.00)

Related Records

Related record -

Transaction reference -

Fund Details Section

Funding

Fund Afr. Stu. Center Fund

Reporting code -

Transaction Details Section

Creation information

Transaction time 07/31/2015 11:23 AM

Transaction note -

Payment date -

Figure 4 - Transaction Details Page

- The user information icon now appears on the Rollover Ledgers and Rollover PO Lines pages.

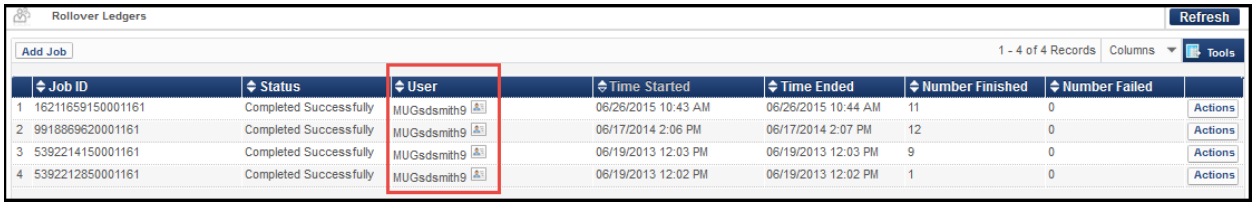

Figure 5 - Rollover Ledgers Page

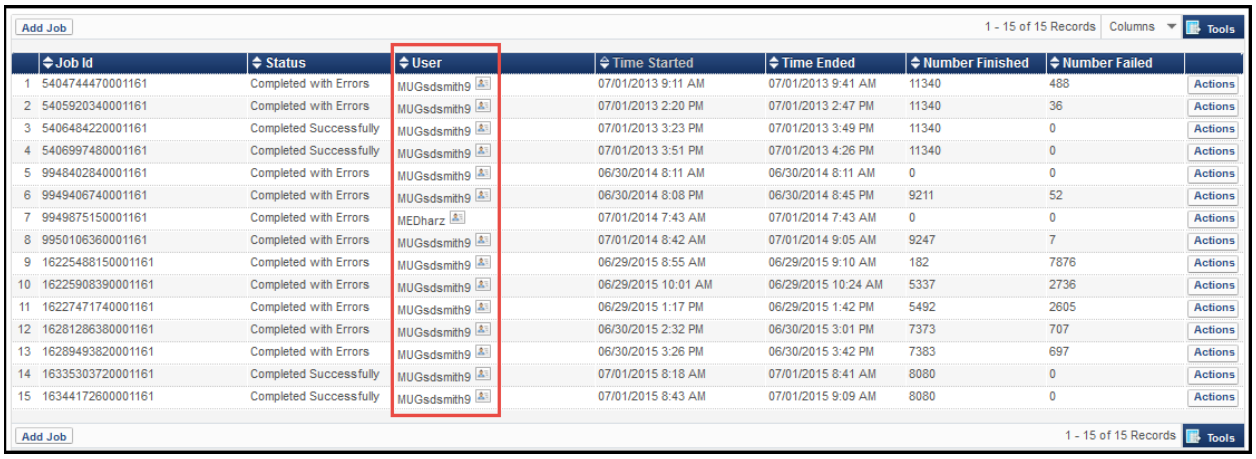

Figure 6 - Rollover PO Lines Page

- When importing an EDI shelf-ready order response, the library and location is now taken from the **LLO** field. The library and location are separated by a period "**.**". For example: `CW.MAIN:LLO` indicates library code `CW` and location code `MAIN`.

Resource Management

The following sections describe new or changed Resource Management features in this release of Alma.

Idea Exchange: Withdraw Multiple Items

From the List of Items page, you can now withdraw multiple items in one action by selecting one or more check boxes and clicking **Withdraw Items**. This works for items eligible to be withdrawn. As with any withdraw item request (**Actions > Withdraw**), Alma does not withdraw items with an active request, an active PO line, and so forth. Additionally, if you delete all the items for a holdings record, you are prompted to indicate whether you want to keep or delete the holdings record (similar to the current functionality).

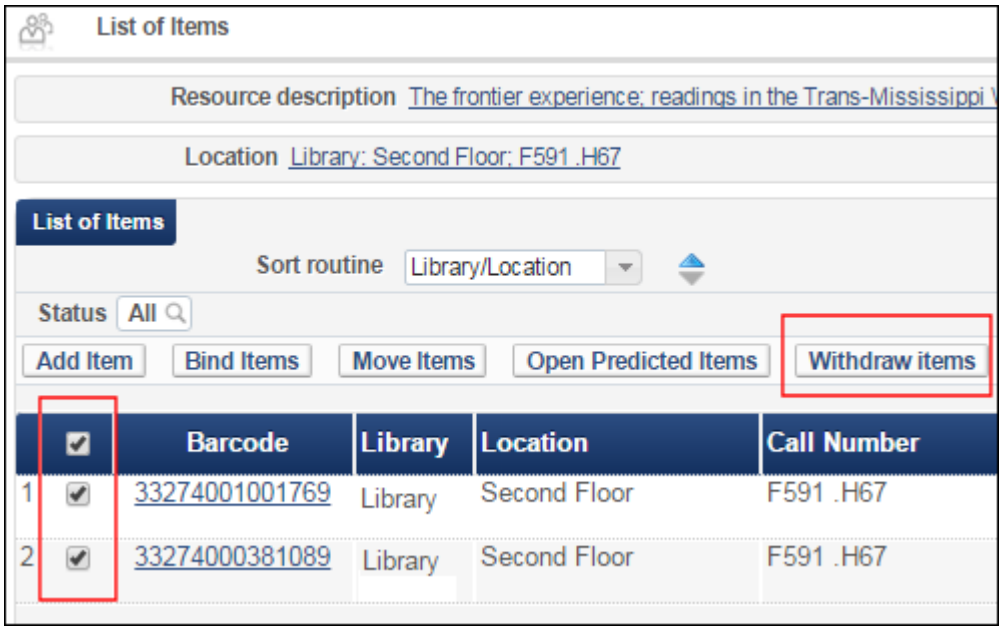

Figure 7 - Withdrawing Multiple Items in One Action

Withdraw Items appears on the List of Items page for a single holdings record. If there are multiple holdings records for a bibliographic record, you must first click **View all holdings** and select **Actions > View Items** for the specific holdings record (on the List of Holdings page) from which you want to withdraw multiple items.

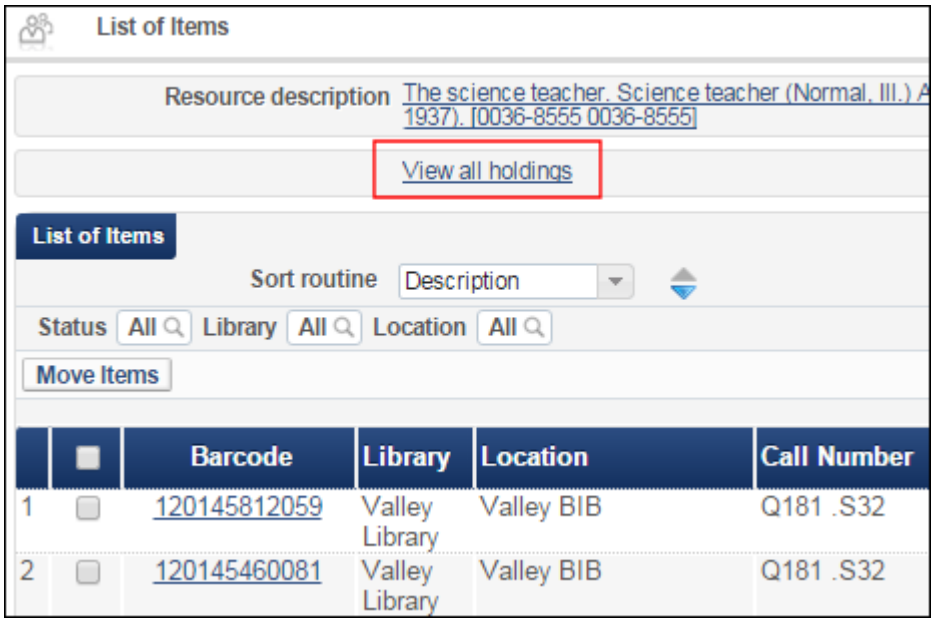

Figure 8 - Select View All Holdings When There Are Multiple Holdings Records

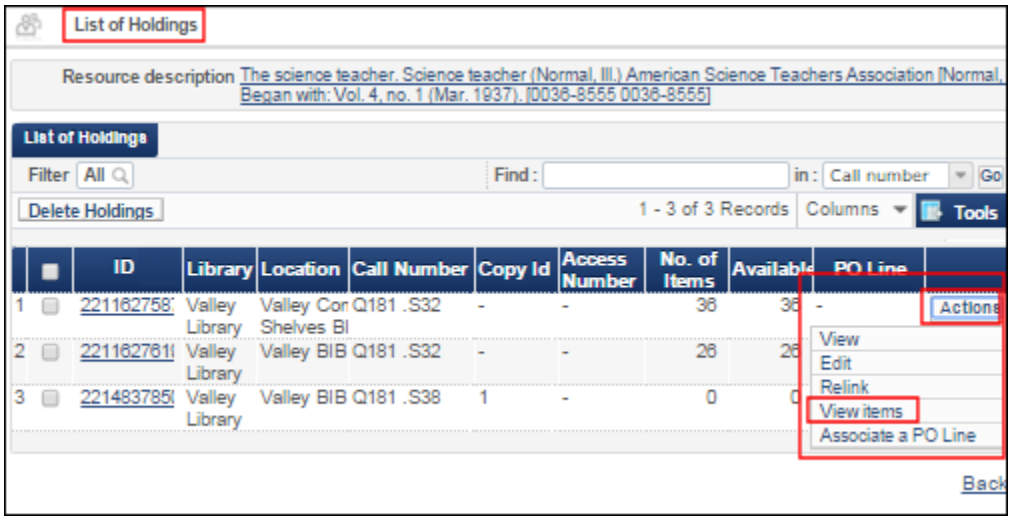

Figure 9 - Select Actions > View Items on the List of Holdings Page

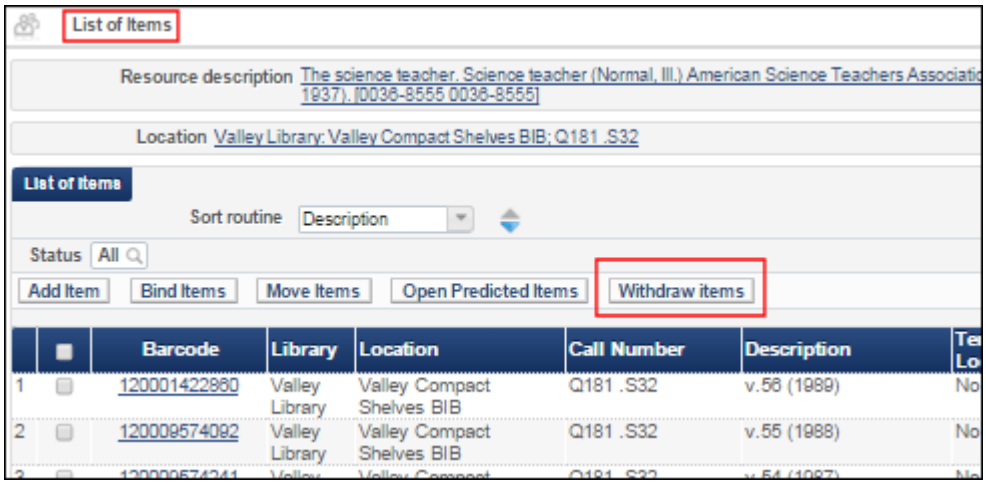

Figure 10 - Withdraw Items Button Appears

Note: This option currently appears only when there is a single holdings record.

Forms for Editing UNIMARC Control Data Fields

Alma as a multi-format library solution now supports UNIMARC form editing for 1XX fields for ease of use by cataloging staff.

Similar to the MARC 21 form in the MD Editor for editing the LDR control field, form editing capability is available for the following UNIMARC fields: 100, 105, 106, 110, 115, 116, 117, 120, 121, 122, 123, 125, 126, 130, 135, 140, and 141. When one of these fields is the active row in the MD Editor, press **Ctrl + f** to open the editing form and press **Esc** to close the form. See below for some form examples.

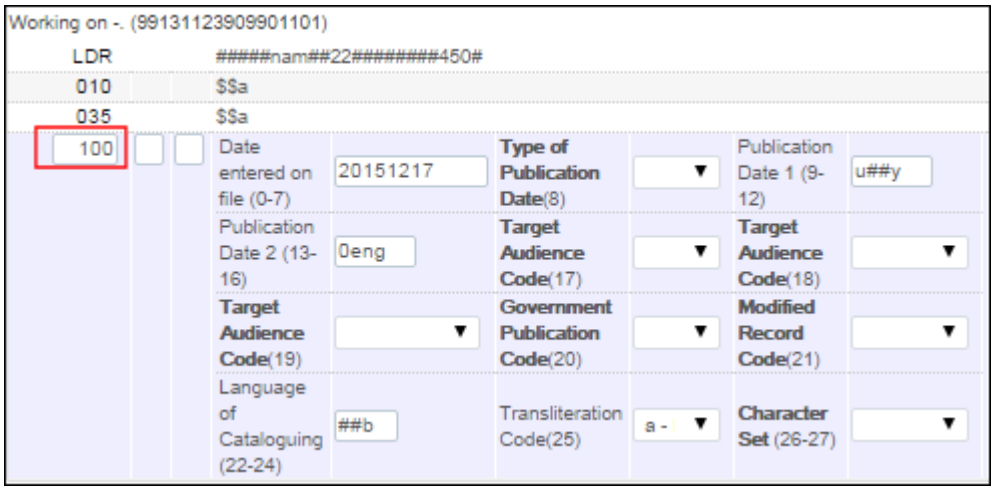

Figure 11 - UNIMARC MD Editor Form for Field 100

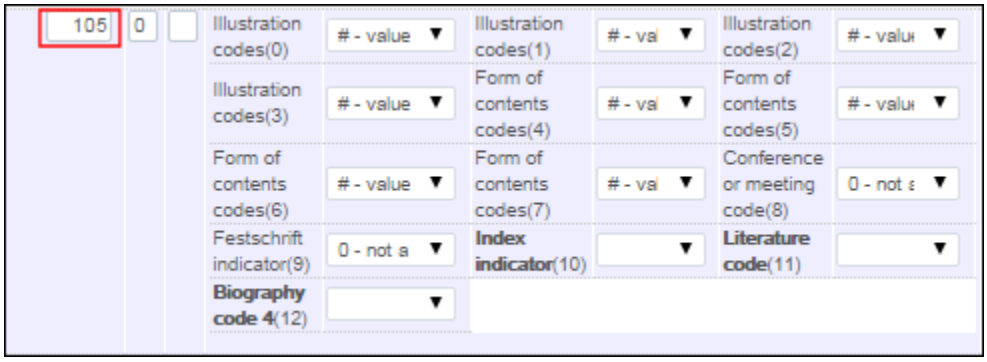

Figure 12 - UNIMARC MD Editor Form for Field 105

In some cases, the control field is specific to certain subfields and form editing is available only for those subfields. With field 123, for example, only $d, $e, and $f are control fields. In these cases, position your cursor in the specific subfield and press **Ctrl + f** to open the editing form. See the example below for 123 $d.

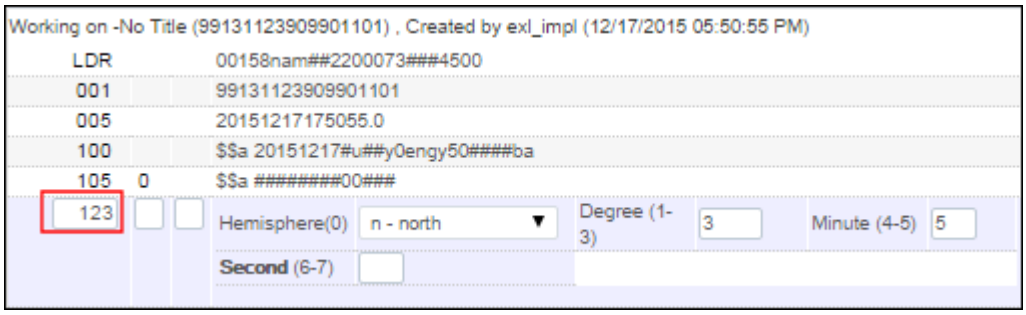

Figure 13 - UNIMARC MD Editor Form for 123 $d

Alma Link Resolver Validity Checking for EBSCOhost Full-Text URLs

Description

As an ongoing effort to improve the Alma link resolver hit rate, Alma now supports the ability to check the validity of the full-text URL before presenting it to the end user through the View It services menu. This functionality is currently available for EBSCOhost Full-Text URLs.

The EBSCO Link Resolver Plugin performs external checks using an API that determines the most accurate available URL for the full text.

Step-by-Step Instructions

The following role can configure the Link Resolver Plugin integration profile:

- General System Administrator

To create an integration profile to enable the link resolver plugin capability with EBSCO:

1. Click **Integration Profiles** in the **External Systems** section of the General Configuration page (**Administration > General Configuration > Configuration Menu**).
2. On the Integration Profile List page, click **Add Integration Profile**.
3. Select **Link Resolver Plugin** from the **Integration type** drop-down list.

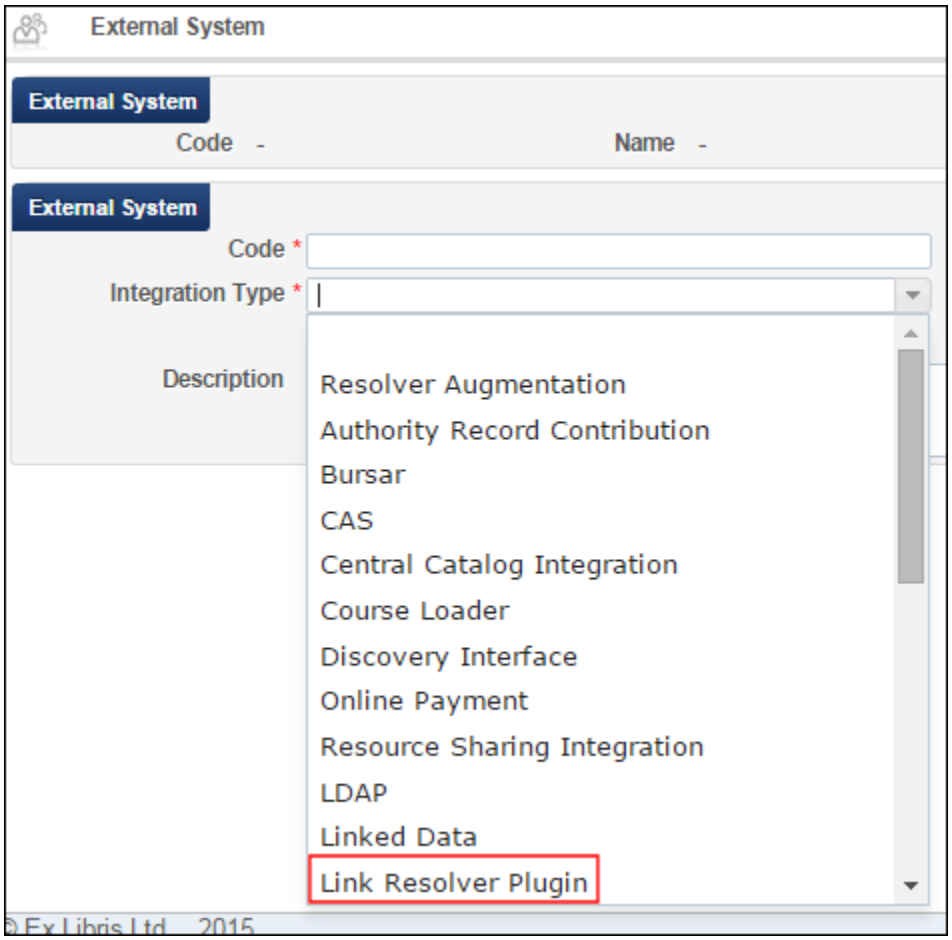

Figure 14 - Link Resolver Plugin Integration Type Option

4 Select **EBSCO** from the **Vendor** drop-down list.

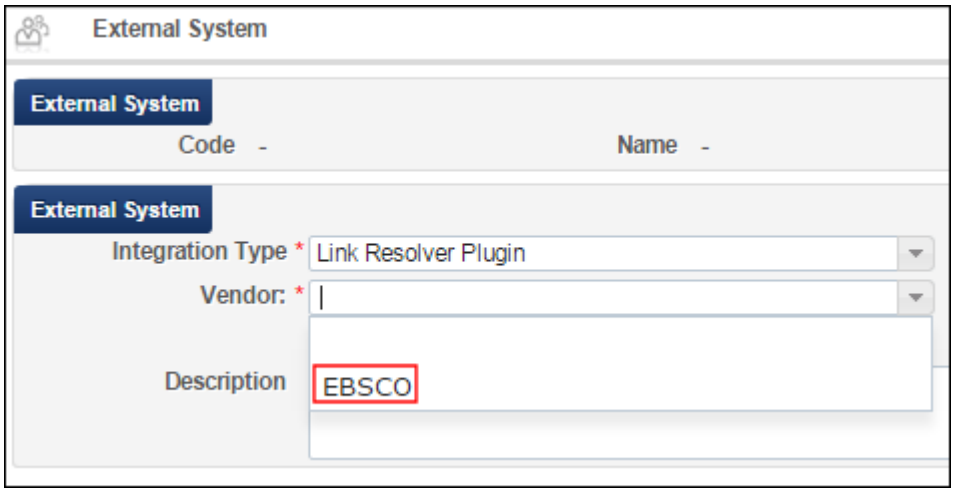

Figure 15 - Link Resolver Plugin Vendor Option

5 Click **Next**.

6 Select **Active** for the Status parameter and enter the **API User ID** provided to you by EBSCO. The **API User ID** is an EBSCO authentication string that is customer-specific and consists of three parts, separated by periods, **<custid>.<groupid>.<profileid>** where:

- **custid** is the EBSCO admin customer id
- **groupid** is the Group ID in EBSCOhost where the database resides
- **profileid** is the Profile ID in EBSCOhost where the database resides

The following example illustrates this format: **s123456.main.eit**.

The structure of this authentication string is identical to the **target information** for Z39.50 Connections.

Contact your EBSCO representative if you do not already have this information.

Note: Ex Libris uses the API User ID to retrieve the list of databases per customer. Therefore, the user ID should be the same profile used with EIT, and your EIT profile should include all the full-text databases.

More information about setting up an EBSCOhost API (EIT) account can be found at http://support.ebsco.com/eit/ws_admin.php.

More information about EBSCOhost API (EIT) can be found at http://support.ebsco.com/eit/ws_api_info.php#b.

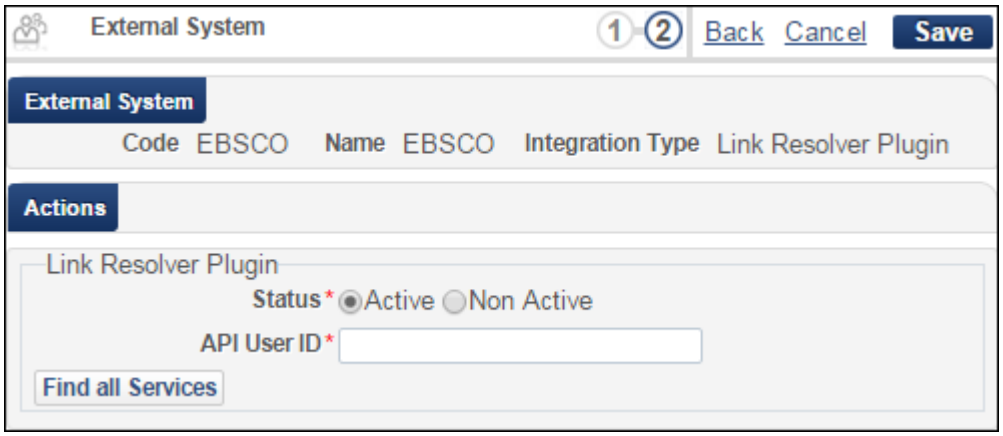

Figure 16 - Link Resolver Plugin Status and API User ID Parameters

In the Actions section, the **Find All Services** action does a repository search for all services that use the EBSCO Link Resolver Plugin.

Note: Relevant EBSCOhost collections will be updated to use the EBSCO Link Resolver as part of the CKB update for the January release.

7 Click **Save**.

Once you have configured the Link Resolver Plugin integration profile, the Link Resolver Plugin is used to validate the full-text link for those EBSCOhost collections that were defined by the CKB as applicable for the validation check.

Figure 17 - Link Resolver Plugin Service Information in the Linking Information Tab

From the Linking Information tab, you can also override the integration profile Link Resolver Plugin status by selecting either **Active** or **Non-Active** for the electronic collection.

Additional Usage Information and Considerations

- Local configuration – The Link Resolver Plugin parameter is provided as an option in the Linking Information tab of the Electronic Service Editor page when defining local electronic collections. Ex Libris expects that the services will be provided through the CKB and that use of this option locally will be limited and carefully/wisely used.
- Parser parameters DB specification – When the DB specified in the **Parser parameters** in the Linking Information tab (see below) does not match what is found through the Link Resolver Plugin API validation, the results are filtered contrary to current behavior in the Link Resolver View It tab.

Figure 18 - DB Specification in the Parser Parameters in the Linking Information Tab

However, in cases where there may be a service disruption and the Link Resolver Plugin API is unable to complete the validation with an external resource, the available DB specification is used and is not filtered for display in the Link Resolver View It tab.

- Consortial configuration – In a Network Zone environment, the Link Resolver Plugin integration profile must be created for the Network Zone and for all the member institutions.

Hebrew Language Support in the MD Editor

Description

Alma as a multi-lingual library solution now has enhanced support for cataloging in Hebrew when using the MD Editor.

Step-by-Step Instructions

The following role can activate the Hebrew language:

- General System Administrator

To activate Hebrew language support:

1. Click **Institution Languages** in the **General Configuration** section of the General Configuration page (**Administration > General Configuration > Configuration Menu**).
2. In the Hebrew language row of the mapping table, click **Customize** and select the check mark in the **Enabled** column.

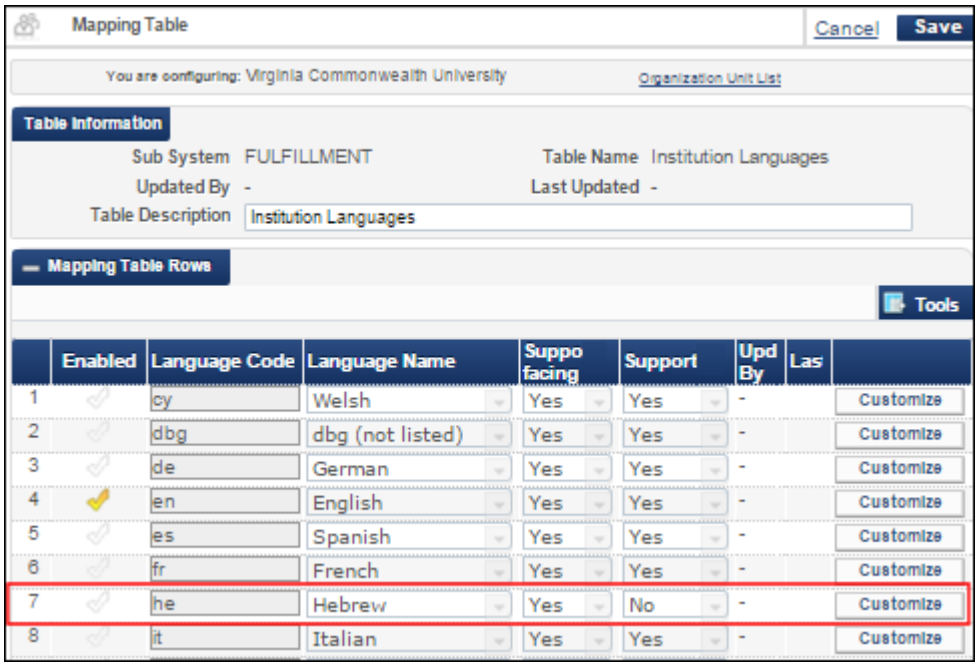

Figure 19 - Hebrew Institution Language Option

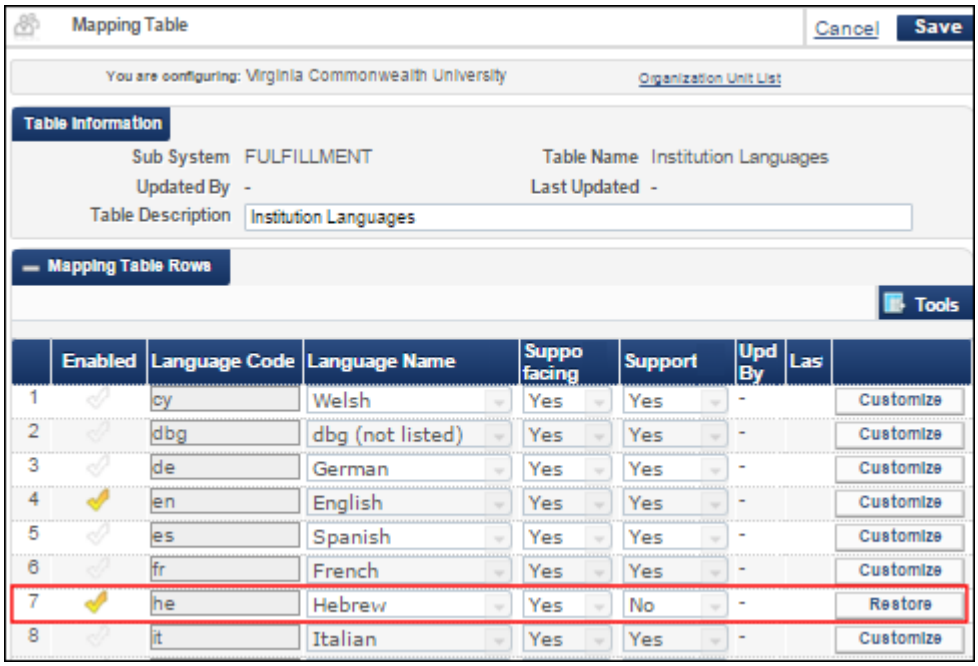

Figure 20 - Hebrew Institution Language Activation

3 Click **Save**.

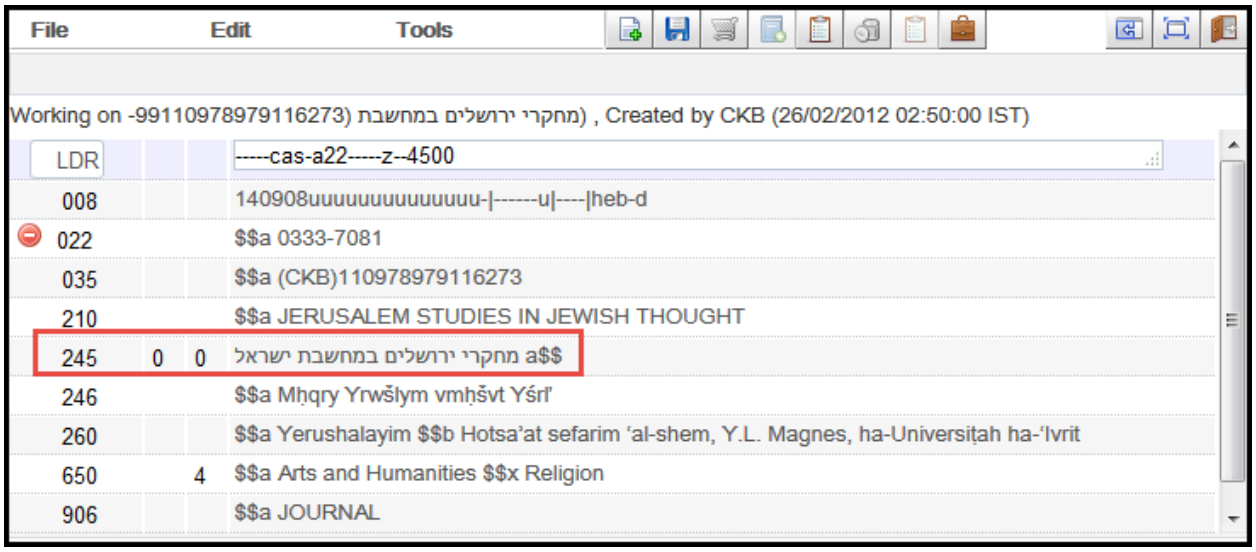

Figure 21 - Hebrew Language Configured for the MD Editor

Using Indication Rules in Import Profiles

In the **Normalization & Validation** tab when editing an import profile (**Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles**; click **Actions > Edit** beside an import profile), or when adding an import file (**Add New Profile**, step 3 of the wizard), you can now select an indication rule for the import profile. Records imported that match the logic of the indication rule are not imported as part of the import process.

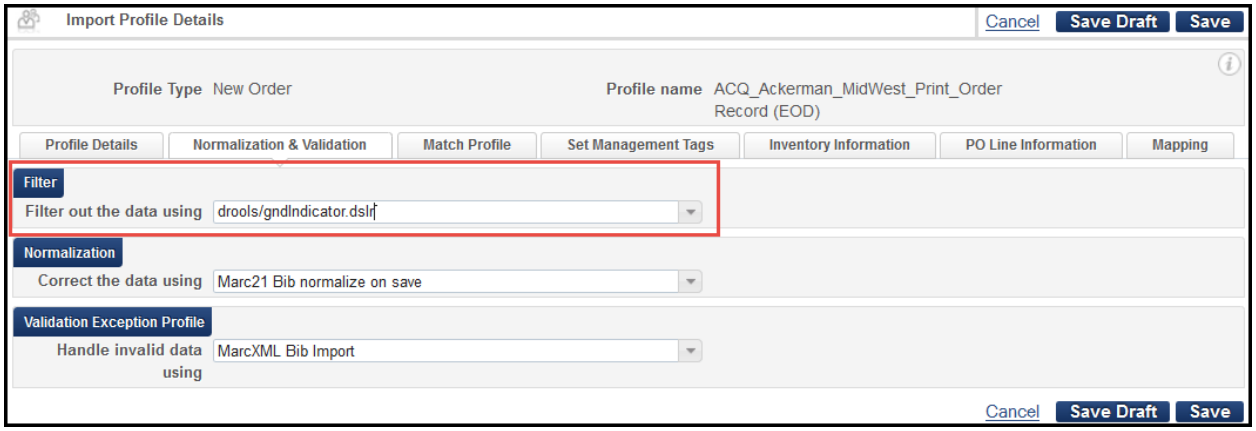

Figure 22 - Import Profile Details Normalization & Validation Tab

For more information about indication rules, including how to add new ones, see **Filtering Sets** in the *Alma Online Help*.

Other Resource Management Enhancements

- **Overwrite Originating System Version Value Process**: The following changes were made during the normalization process when changing the originating system information. On the Process Details page, when configuring an **Update Originating System Information** task in a normalization process:
  - The check boxes for updating the originating system and updating the originating system version now have labels.
  - If you select the new check box **Update existing originating system version values**, the originating system version you selected overwrites any existing version. Otherwise, the existing version remains as it is.

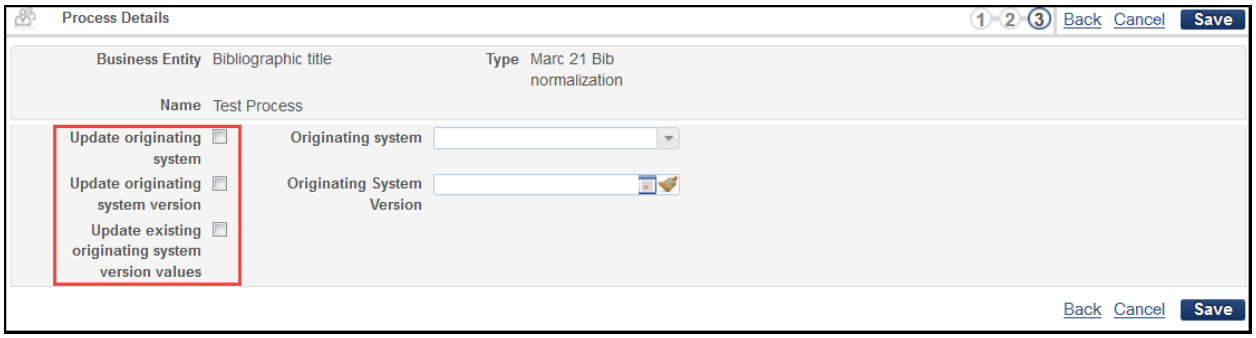

Figure 23 - Process Details Page with Update Originating System Information Task

You can see the Process Details page when adding or editing a process that has an **Update Originating System Information** task:

Adding a Process:

a Open **Resource Management > Resource Configuration > Configuration Menu > Cataloging > Metadata Management**.

b Click a bibliographic process.

c Select the **Normalization Processes** tab.

d Add a process.

e Add the **Update Originating System Information** task.

f Proceed to step 3 of the wizard.

Editing a Process

a Open **Resource Management > Resource Configuration > Configuration Menu > Cataloging > Metadata Management**.

b Click a bibliographic process.

c Select the **Normalization Processes** tab.

d Edit a process that has an **Update Originating System Information** task.

e Select the **Task Parameters** tab.

- The new drool **replaceSubFieldContents "{sourceElement}" with "{targetElement}"** replaces a subfield's contents with another subfield's contents. For example, to replace the subfield content of "830.b" with the content of "490.a":

```
rule "Copy sub field content from 490.a to 830.b"
     when
```

```
          (TRUE)
     then
          replaceSubFieldContents “830.b” with  “490.a”
end
```

- You can now add a period “`.`”to a subfield using a normalization rule by preceding it with four backslashes “`\\\\.`” For example:

```
rule "Replace 1 v. to Leaves $$a (unconditional)"
     when
          (TRUE)
     then
          replaceContents "300.a.1 v\\\\." with "Leaves"
end
```

- Draft records are now deleted if they have not been modified in the last 30 days.
- Alma can now parse a month spelled out in letters (and not only numbers; for example: `Feb`) returned from the CrossRef database as a result of OpenURL augmentation using DOI.
- When a date section returned from the CrossRef database as a result of OpenURL augmentation using DOI does not contain a media_type value, Alma uses **print** as the default value.
- When an OpenURL does not contain an identifier (ISSN or ISBN), Alma will first try to match using the title and author and then try to match using only the title (**title**, **btitle**, and/or **jtitle**).
- Using the **Withdraw Items** job you can now withdraw items that are linked to PO lines with **Closed** status (as well as any other status, except for **Active**).
- When editing an authority record in the Community Zone, if you click **Save** and receive an error message in a dialog box, you can now click **Yes** to reload the record and discard your changes or click **No** to return to the MD Editor and continue editing.

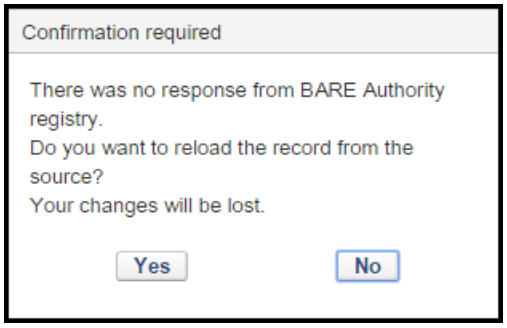

Figure 24 - Saving Authority Record Error Message Dialog Box

- The information pop-up icon was added to the **History** tab on the Physical Item Editor page for **Item Changes** and **Fulfillment Activities** report types.

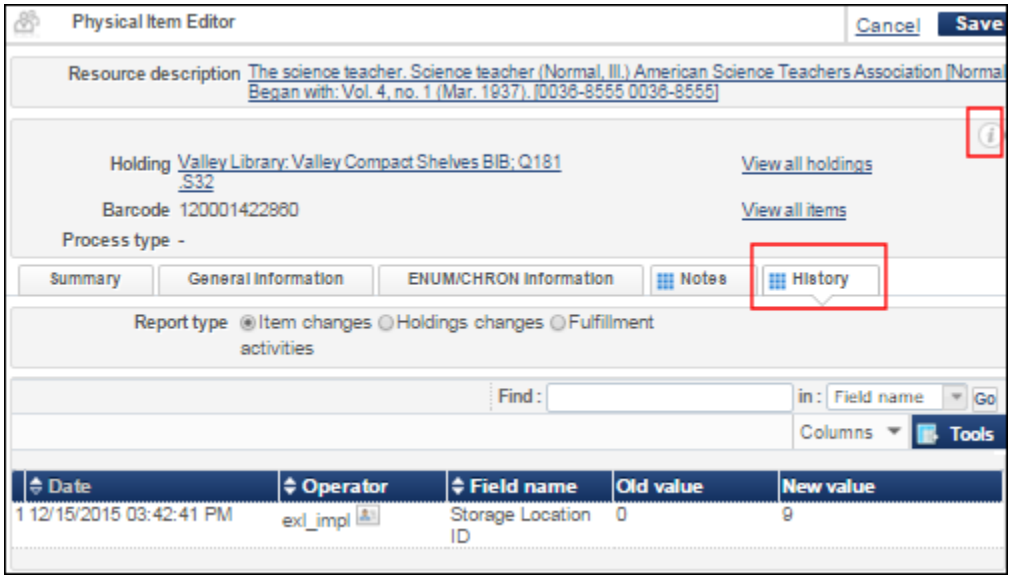

Figure 25 - Information Pop-Up Icon in the History Tab

- Alma now enforces scopes for physical inventory roles. When a user's physical inventory role is limited in scope, the user cannot perform the following functions for libraries outside his or her defined scope: edit or withdraw an item from the physical items results on the Repository Search page, or edit, withdraw, duplicate, toggle missing, open predicted items, or bind items from the Items List page. A role's scope has no effect on physical inventory manipulation performed by a batch job. As a result, at an institution level, you must ensure that the physical item changing jobs are run only by users with the appropriate privileges.

Fulfillment

The following sections describe new or changed Fulfillment features in this release of Alma.

Remove Format Type from Reading List Citations

In a reading list's citations list, the Physical/Electronic prefix was removed from the header. It now indicates only whether the citation is a book or an article. The citation type filter also displays only Book and Article. Both physical and electronic results are listed.

The Add Brief action still has an option to select the exact citation type to add to the reading list.

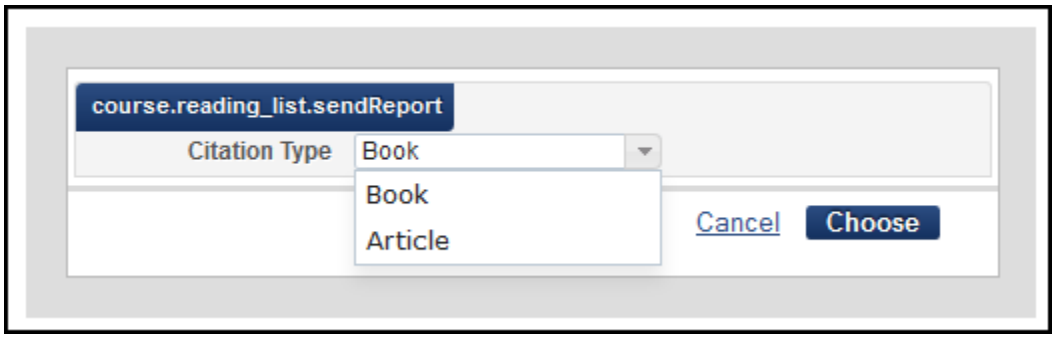

Figure 26 - Add Non-Repository Citation Pop-up

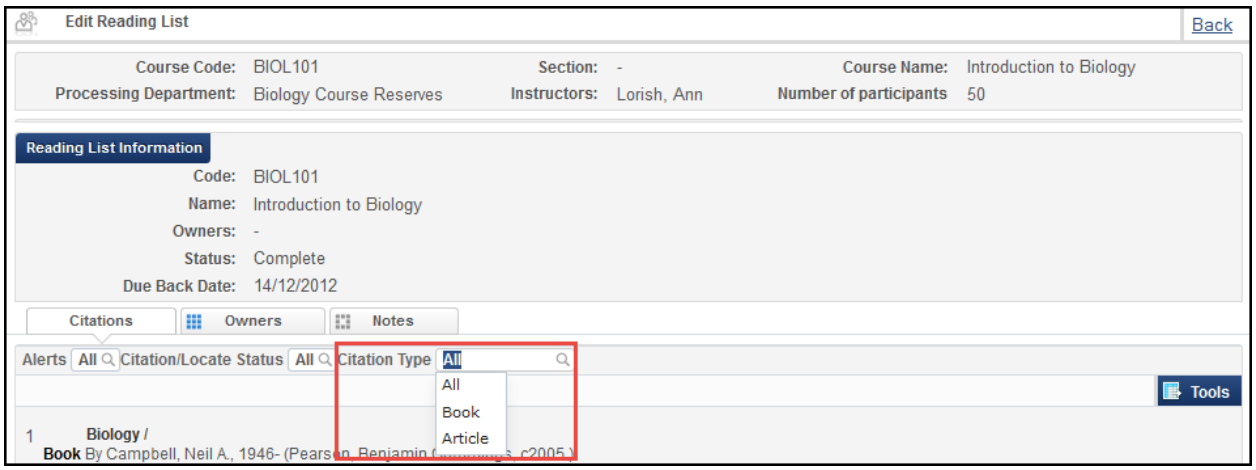

Figure 27 - Citation Type Filter on Reading List

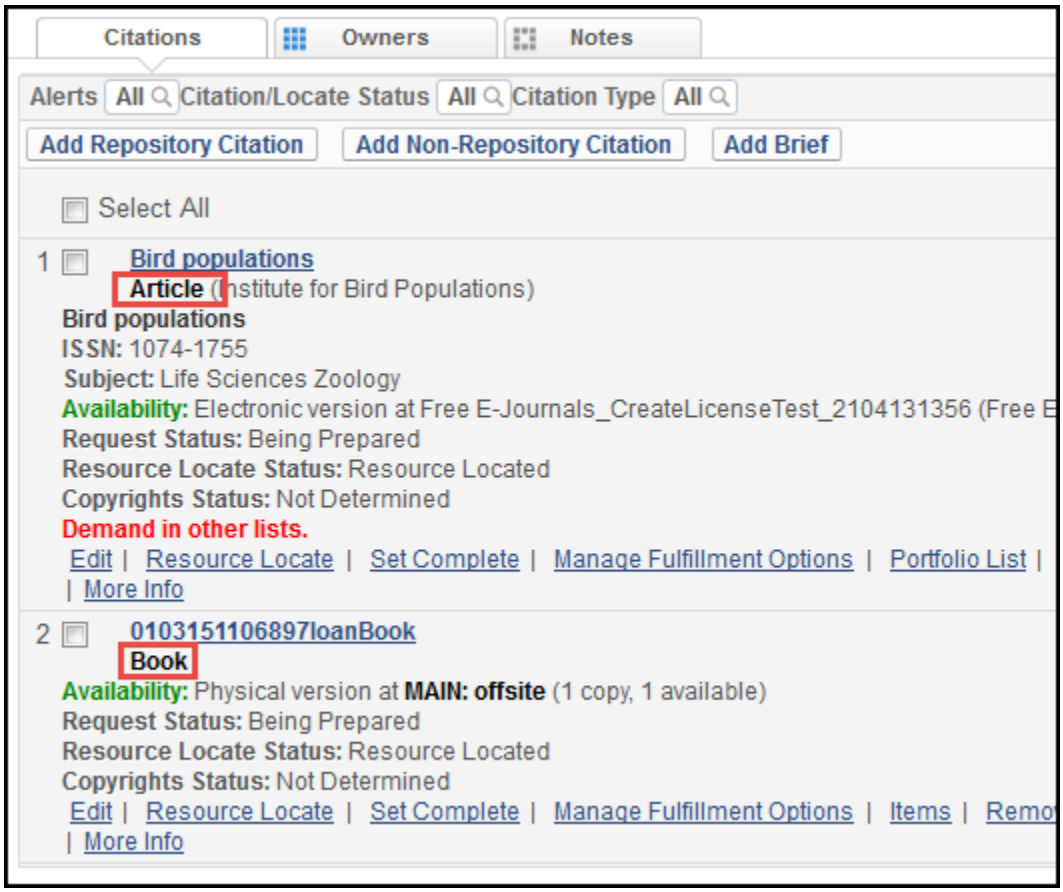

Figure 28 - Reading List

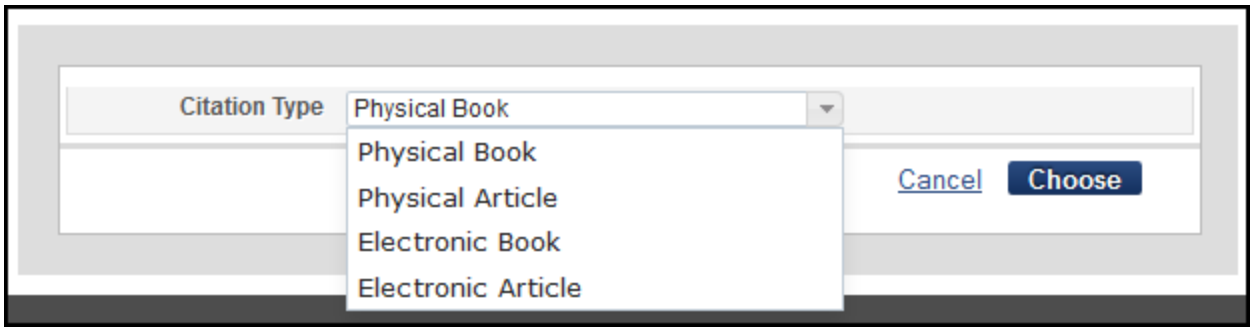

Figure 29 - Add Brief Pop-up

Embargo Criterion Added to Access Rights

Description

You can now use the Embargo criterion when creating access right rules. A common use of this criterion is to block access to patrons for an item for a certain number of years after the publication year.

Step-By-Step Instructions

The following roles can access this feature:

- General System Administrator
- Fulfillment Administrator

To access this feature:

1. Open the Access Rights Policy page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Digital Fulfillment > Access Rights** and click **Add Access Rights**). The Access Rights Rule page opens.
2. Click **Add Rule** and select the Embargo criterion:

Figure 30 – Embargo

3. Select a **Value**—for example, **Publication Year**, and an amount of time after which the access rights block expires.
4. Click **Add Expression** to add the access rights rule.

Other Fulfillment Enhancements

- The Fulfillment Administrator role now has the **PROCESS_MANAGE** privilege by default. This allows the role to run fulfillment-related processes, including the Close Lost Loans job.
- The requests list in the Primo My Account tab now includes the expiry date of on hold shelf requests, for example: `On Hold Shelf Until 03/04/15`.
- The new privilege, **VIEW_E_RESOURCE_FOR_COURSE,** was added by default to the Fulfillment Services Operator role. This privilege is required to enable the **Test Access** link on the Portfolio List page when viewing a reading list citation for which there is a locally activated electronic resource.
- On the Access Rights List page, the default access right **AR Everyone** was removed. It is no longer necessary, since access to items is now allowed by default.
- You can now sort fines and fees using the **Title** column in the **Fines/Fees** tab of the User Details page.
- The Resource Sharing task widget **Lending request with active general messages** was split into **Lending request with active general messages – unassigned** and **Lending request with active general messages – assigned to you**.

Collaborative Networks

The following collaborative network enhancements were made for this release of Alma:

Streamline the Distribute Central Resource Sharing Job

Description

The Distribute Central Resource Sharing Configuration job was streamlined and its performance refined. The report now shows only records that were not distributed, rather than showing all records. Only activities that have new data appear in the report. Report columns are **Created**, **Updated**, and **Deleted**. The **Actions** button shows only the failed records. The sections **Rota Assignment Rules** and **Sending Borrowing Request Rules** are combined into one section, **Resource Sharing Rules**.

This job now also contains a configurable failure threshold. If the job has a percentage of errors less than or equal to the threshold that has been set, the job runs with a warning.

Step-by-Step Instructions

The following roles can configure the failure threshold for the Distribute Central Resource Sharing Configuration report:

- General System Administrator
- Fulfillment Administrator

To configure the failure threshold:

1. Access **Fulfillment > Fulfillment Configuration > Configuration Menu > General > Fulfillment Jobs Configuration.**

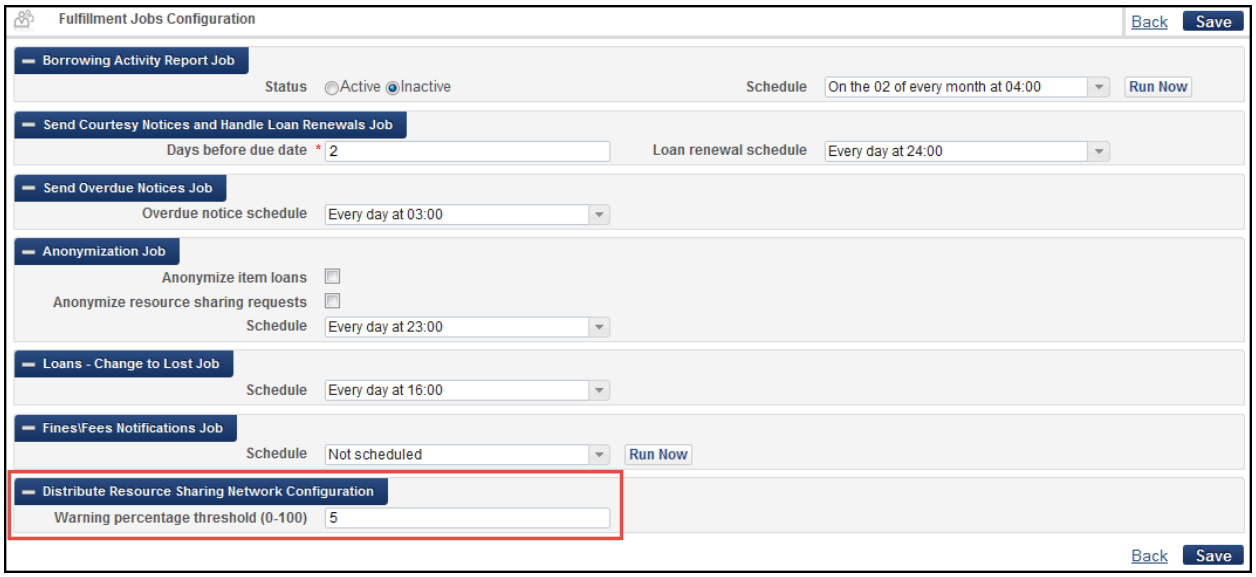

Figure 31 - Configure Failure Threshold

2 Enter the **Warning percentage threshold**.

3 Click **Save**.

To view the report:

1 Access **Administration > Manage Jobs > Monitor Jobs** and locate the report, **Distribute Central Resource Sharing Configuration**.

2 Click the report to view.

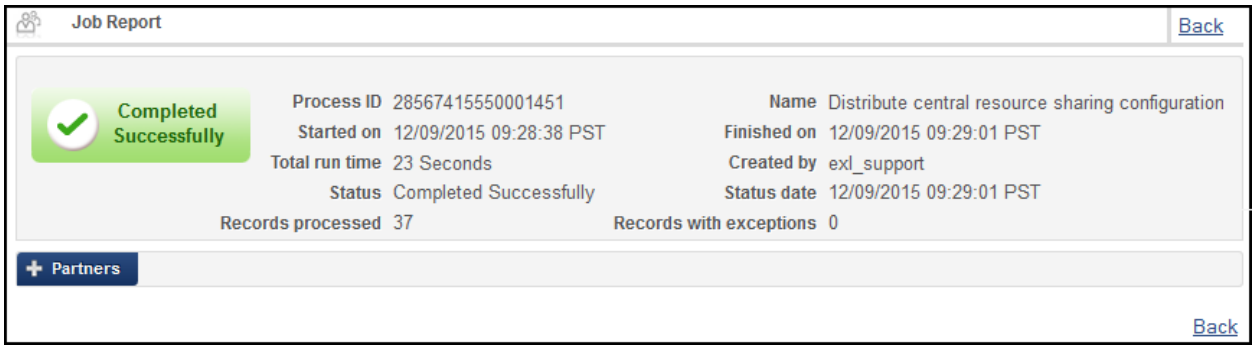

Figure 32 - View Distribute Central Resource Sharing Report

3 Expand the **Partners** section to view new columns.

Job Report

Back

Completed Successfully

Process ID	28567415550001451	Name	Distribute central resource sharing configuration
Started on	12/09/2015 09:28:38 PST	Finished on	12/09/2015 09:29:01 PST
Total run time	23 Seconds	Created by	exl_support
Status	Completed Successfully	Status date	12/09/2015 09:29:01 PST
Records processed	37	Records with exceptions	0

Partners

Tools

	Institution Name	Created	Updated	Deleted	
1	Clark College	1	0	0	View failed records
2	Chemeketa Community College Library	1	0	0	View failed records
3	Central Oregon Community College	1	0	0	View failed records
4	Concordia University	1	0	0	View failed records
5	Central Washington University	1	0	0	View failed records
6	Eastern Oregon University	1	0	0	View failed records
7	Evergreen State College	1	0	0	View failed records
8	Eastern Washington University	1	0	0	View failed records
9	George Fox University	1	0	0	View failed records
10	Lane Community College	1	0	0	View failed records
11	Lewis & Clark College	1	0	0	View failed records
12	Linfield College	1	0	0	View failed records
13	Mt Hood Community College	1	0	0	View failed records
14	Marylhurst University	1	0	0	View failed records
15	Oregon Health and Science University	1	0	0	View failed records
16	Oregon Institute of Technology	1	0	0	View failed records
17	Oregon State University	1	0	0	View failed records
18	Portland Community College	1	0	0	View failed records
19	Portland State University	1	0	0	View failed records
20	Pacific University	1	0	0	View failed records
21	Reed College	1	0	0	View failed records
22	Seattle University	1	0	0	View failed records
23	Southern Oregon University	1	0	0	View failed records
24	Seattle Pacific University	1	0	0	View failed records
25	Saint Martin's University	1	0	0	View failed records
26	University of Idaho	1	0	0	View failed records
27	University of Oregon	1	0	0	View failed records

Figure 33 - View Report Details

4 For information about failed records, click **View Failed Records**.

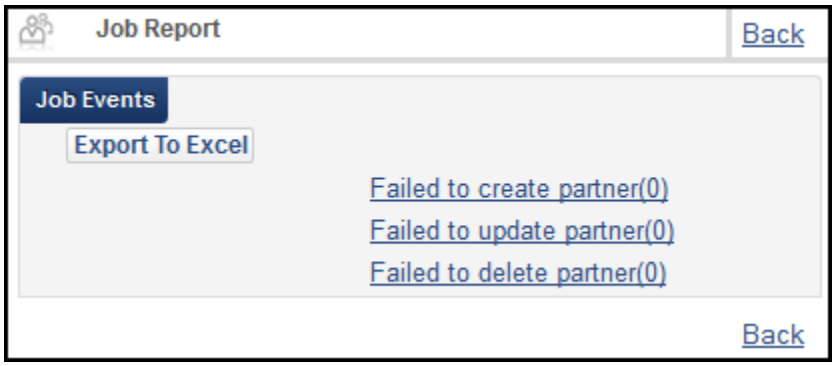

Figure 34 - View Failed Records

Other Collaborative Network Enhancements

- The Resource Management parameter **central_record_management** can now be set to the following options:
  - **enforce_network** – Record management is in the Network Zone. This functions in the same manner as the previous value of **true**.
  - **default_institution** – Record management is in the institution. The UI defaults to the institution in all locations, but you can select the Network Zone instead. This functions in the same manner as the previous value of **false**.
  - **default_network** – Record management is in the institution. The UI defaults to the Network Zone in all locations, but you can choose institution instead.

  For more information, see **Centralized Cataloging in the Network Zone** in the *Alma Online Help*.

- If your institution is using cross consortia identifiers and the **Change Institution** drop-down list in the Library/Desk Selector is enabled, the list now includes only institutions for which you actually have an account. Note that the Consortia Member Links widget continues to display all member institutions.

Primo

The following sections describe new or changed Primo features in this release of Alma.

Display the Length of the Request Queue Before Submitting a Request

The patron is now provided with more availability information before placing a request. The patron can now view the number of requests that are linked to the holdings (for non-serials) or item (for serials).

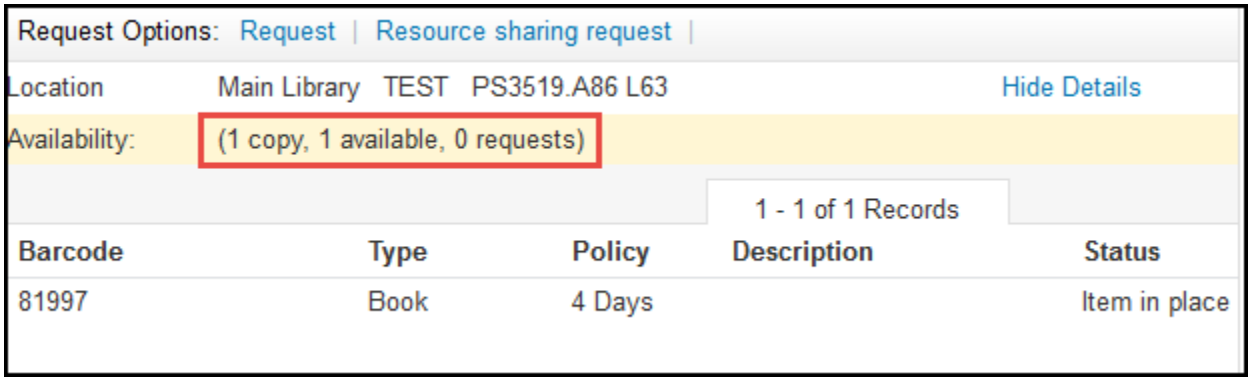

Figure 35 – Holdings with Availability

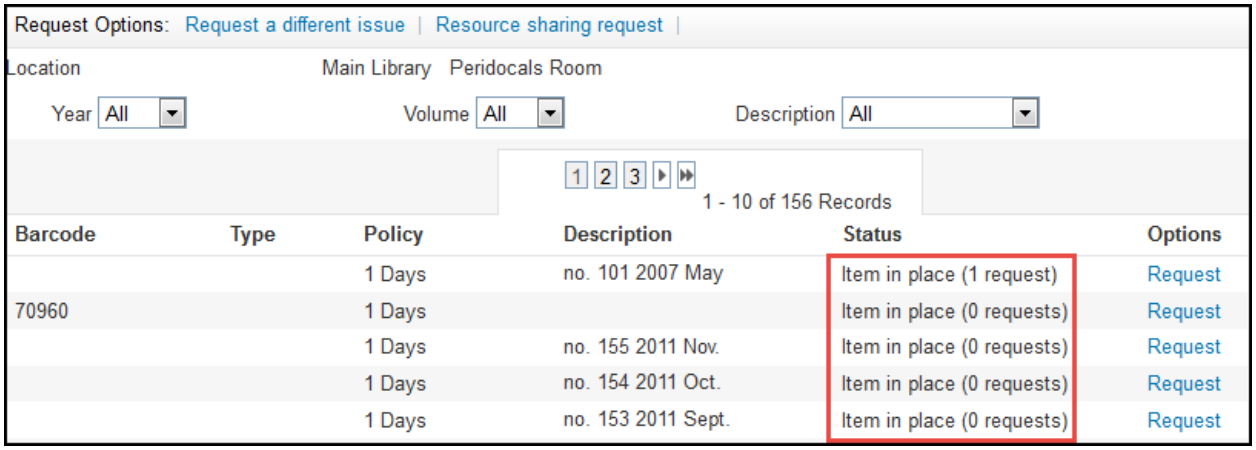

Figure 36 – Item Listing with Availability

Other Primo Enhancements

- With the January release, the Primo loan list now includes a maximum renew date.

Administration

The following sections describe new or changed Resource Sharing features in this release of Alma.

Patron Opt-Out for Selected Library Notices

Description

For patrons who do not want to receive certain library notifications, an administrator can now opt these patrons out of these notifications. You can disable these notifications at the individual patron level, or groups of patrons by SIS feeds or bulk user updates, according to library policies. In future releases, Ex Libris will enable the library to allow patrons to opt out of specific notices through the Primo interface, without library intervention.

The notifications from which a user can be opted out include:

- Activity Reports
- Courtesy Letters
- Loan Status Letters
- Recall Letters
- Recall Cancellation Letters
- Overdue Notices

Step-by-Step Instructions

The following roles can configure the notifications from which users can be opted out:

- User Administrator
- General System Administrator

The following roles can manage notifications for a user or groups of users:

- User Manager
- User Administrator

To configure which notifications it will be possible to opt out from receiving:

1 Open the Library Notices Opt In mapping table (**Administration > User Management Configuration > Configuration Menu > User Details > Library Notices Opt In**).

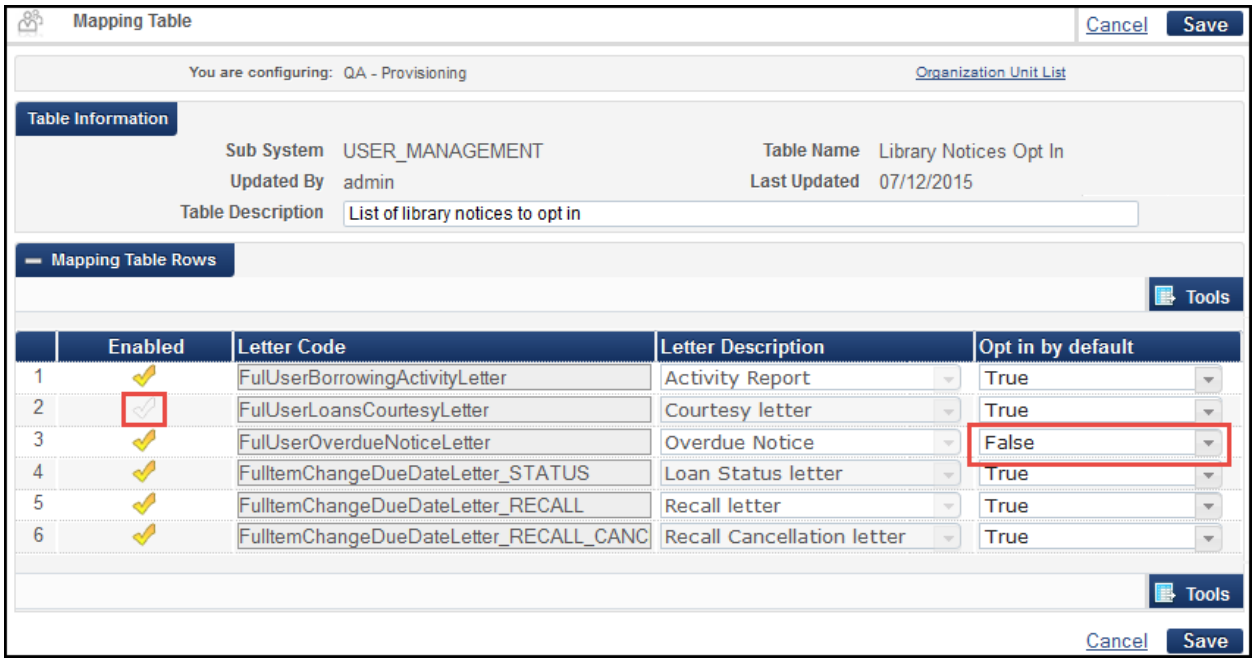

Figure 37 - Library Notices Opt In

2 Select or clear the **Enabled** check mark to enable or disable the ability of patrons to opt out of a notification. Disabling a row indicates that users cannot opt out of this notification.

3 Select **True** or **False** in the **Opt in by default** drop-down list. This determines whether or not the notice will be sent to patrons by default. All letters initially default to **True**.

Note: Changes to the opt-in default automatically affect new users only. To apply the change to an existing user, explicitly mark that patron's record, as described below.

To manage letter opt-ins for a user:

1 Access **Administration > User Management > Find and Manage Users**. Add or edit a user.

2 Click **Selected Patron Letters** in the **General Information** tab.

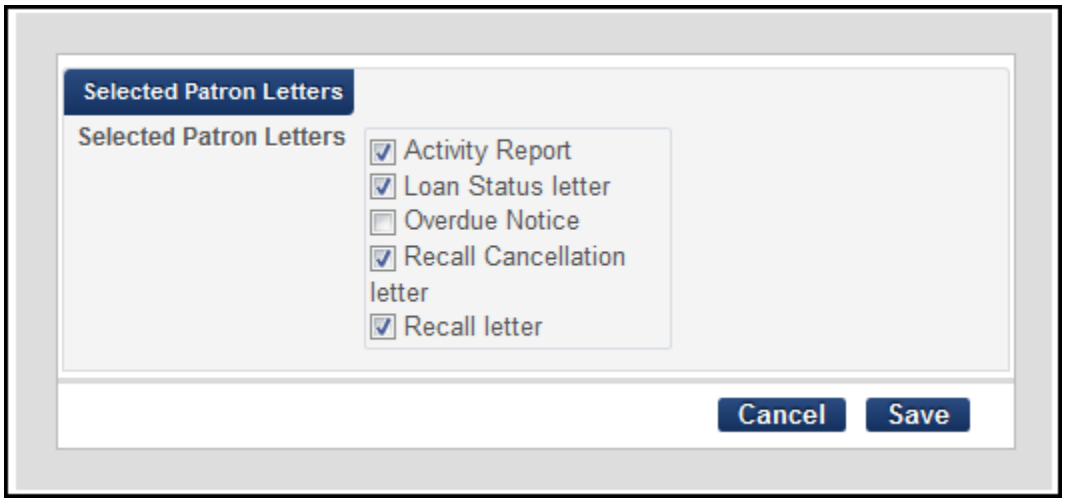

Figure 38 - Selected Patron Letters

3 Select or clear the check boxes next to the notification that you want to enable or disable for this user.

4 Click **Save** when you are done.

Note: The option for receiving a notification may also be updated in the SIS feed or using the **Update/Notify Users** job.

Other Administration Enhancements

- The following new HealthCheck Tool tests were added:
  - Resource Management
    - **Able to publish records to external sources** – Are you able to publish your records to external sources?
    - **Copy cataloging is available from external search resources** – Are you able to perform copy cataloging from all required external search resources?
  - Fulfillment
    - **Patrons can pay fines/fees** – Can you successfully process fines/fees payments?

Analytics

The following sections describe new or changed Analytics features in this release of Alma.

New Staff Operator Details Dimension for Fines/Fees Transactions

A new, dedicated user dimension was created to capture the staff user information for fine/fee creation and processing.

The dimension includes fourteen fields:

- Operator Primary Identifier
- Operator Type
- Operator Group
- Operator Record Type
- Operator Title
- Operator First Name
- Operator Last Name
- Operator Middle Name
- Operator Job Title
- Operator Job Description
- Operator Campus Code
- Operator Gender
- Operator Status
- Operator External ID

These fields allow Alma to correctly record information about the staff user who created and/or processed a fine/fee.

For example, in the Physical Items subject area, the Staff Operator Details dimension was added.

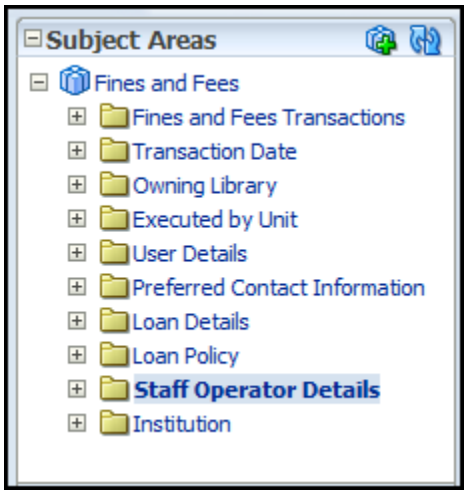

Figure 39 – Staff Operator Details Dimension

The following is an example report from a Network Zone:

Fine Fee Id	Fine Fee Type	Fine Fee Creator	Operator Type	Operator Title	Operator First Name	Operator Last Name	Operator Campus Code
103947030000521	Card renewal	Ex Libris Support	Internal		Ex Libris	Support	None
103947040000521	Claim return fee	Ex Libris Support	Internal		Ex Libris	Support	None
103947050000521	Document delivery service	Ex Libris Support	Internal		Ex Libris	Support	None
46754030000521	Card renewal	Ex Libris Support	Internal		Ex Libris	Support	None
46754040000521	Patron registration fee	Ex Libris Support	Internal		Ex Libris	Support	None
46754070000521	Other	Ex Libris Support	Internal		Ex Libris	Support	None
46754080000521	Card renewal	Ex Libris Support	Internal		Ex Libris	Support	None

Figure 40 – Staff Operator Details Dimension Report

Other Analytics Enhancements

- The ETL completion time now appears in the Analytics pop-up menu with the label **Data available as of:**

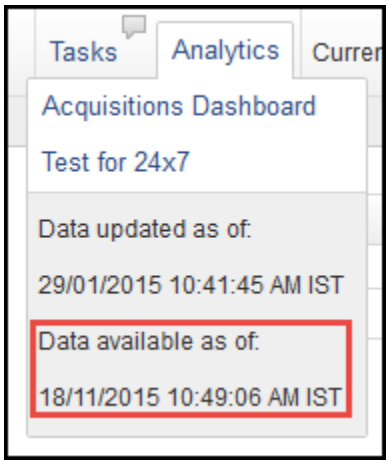

Figure 41 - Analytics Popup Menu

- The following new measurements were added to the Lending Request Details:
  - Number of Non Fulfilled Requests
  - Number of Canceled Requests
  - Number of Expired Requests
  - Number of General Messages
  - Days of Request

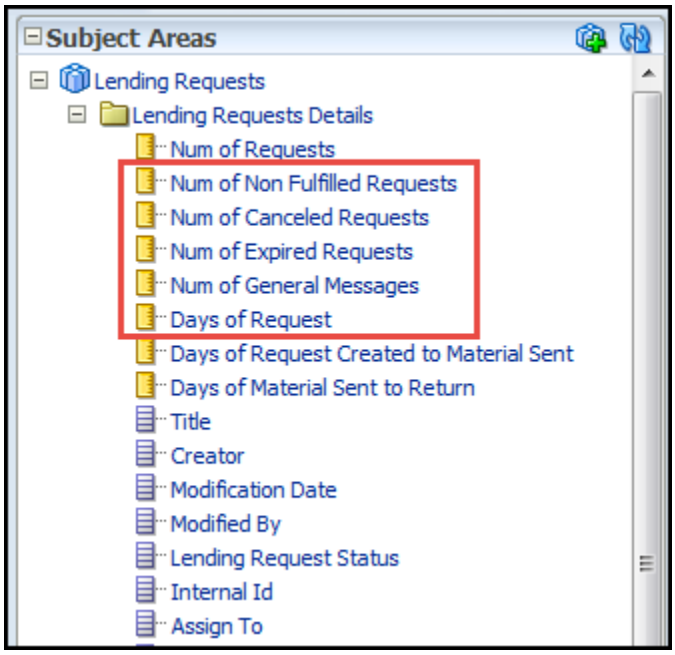

Figure 42 – Lending Request Details

Alma Usability

The following sections describe new or changed interface features in this release of Alma.

Enhanced Progress Bar for Exports (a NERS Request)

When exporting data using **Tools > Excel**, the standard animated loading image (above) was replaced by a progress bar:

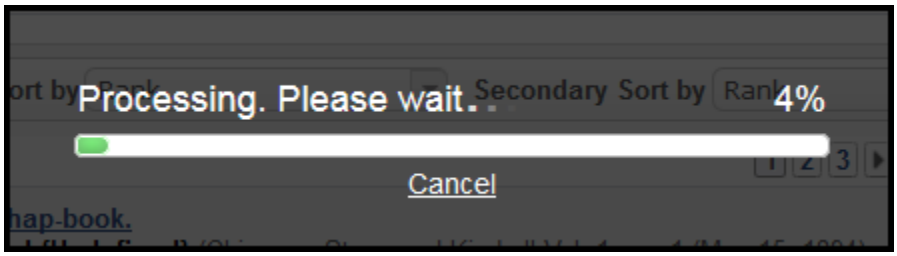

Figure 43 - Progress Bar

Downloads proceed in the foreground. While the download is in progress, you can click **Cancel** to cancel the download in progress.

Note: For some exports in Alma, if you do not want to wait for a download, you can instead create a set and run a job to export the set. For more information, see **Running Manual Jobs on Defined Sets** in the *Alma Online Help*.

After the January release, the limit to the number of lines that can be exported using **Tools > Excel** will be gradually increased from the current limit of 5,000 lines. The current limit will be reflected in the tooltip when you hover your mouse over the Excel option in the Tools menu.

Enhanced Session Timeout Handling

Alma now includes enhanced functionality to handle session timeout:

- One minute before an Alma session times out, a warning message appears on the screen. You can cancel the timeout or log out. If you do not select either option, the session times out after one minute.

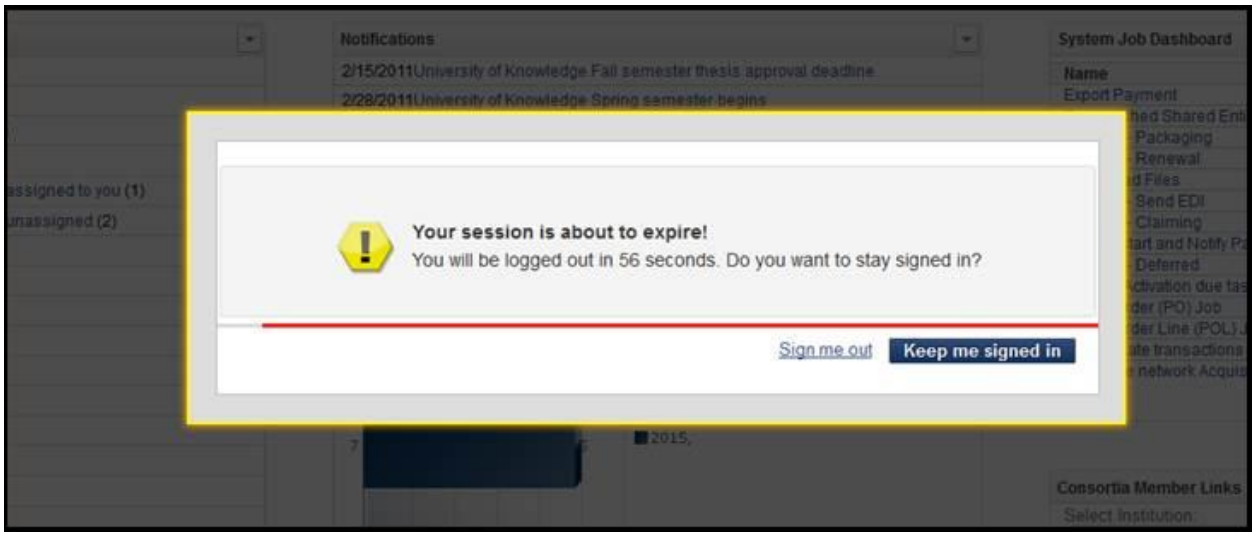

Figure 44 - Session Timeout Dialog Box

- After a session timeout, Alma refreshes to the Alma login page with a timeout message.

Figure 45 - Login Page After Session Timeout

- For institutions that use single sign-on (SSO): After Alma refreshes to the Alma login page, Alma checks the SSO server (for example, the SAML IDP or the CAS server) to see whether your login credentials are still valid. If they are, Alma refreshes back to the Alma home page and starts a new session.

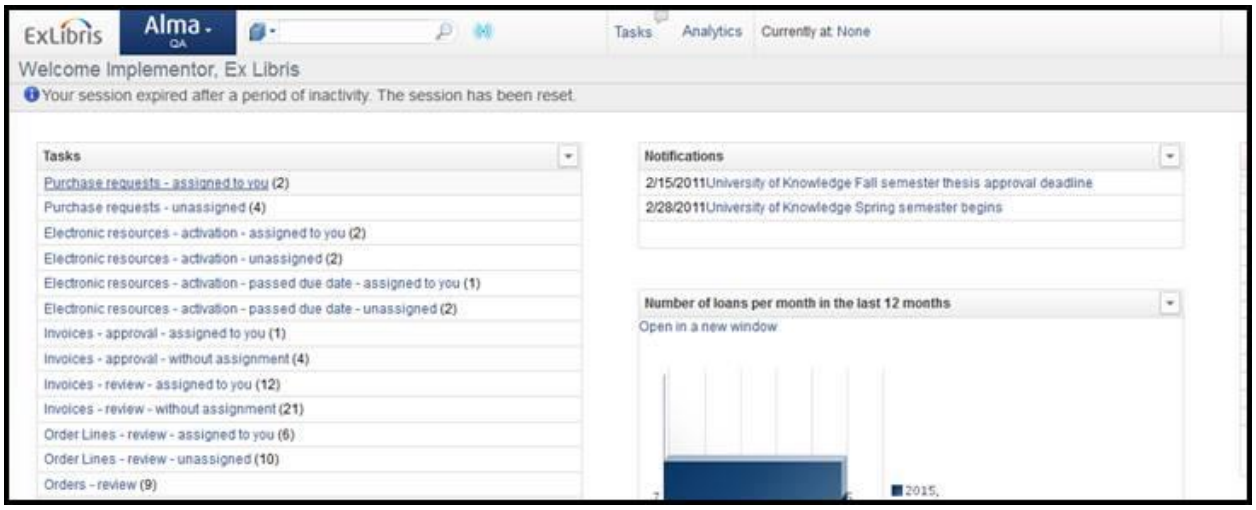

Figure 46 - Welcome Page After Session Timeout

Other Interface Enhancements

- The animated loading image that appears while navigating from page to page was changed. The new image is as follows:

- User passwords can now include diacritics.

Alma APIs

For this release, APIs were added, enabling the addition, update, or deletion of a collection:

```
POST /bibs/collections
PUT /bibs/collections/[COLLECTION_ID]
DELETE /bibs/collections/[COLLECTION_ID]
```

For detailed information, see https://developers.exlibrisgroup.com/alma/apis/bibs (and the relevant subpages).

Language Support

In addition to German, French, Spanish, Italian, and Korean, the full Alma user interface is now available in both **Welsh** and **Chinese**.

For patron-facing elements in Alma (email and SMS notifications, self-check machine messages, and Get It, View It, and My Account tabs in Primo), Norwegian Bokmål (language code: **nb**) is now supported.

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 they occur.
- Regarding the autocomplete/pop-up assistance being provided for several UNIMARC fields in the MD Editor, there is a known issue related to UNIMARC 327 $a and 327 $b. These subfields are based on the same functionality and as a result, the pop-up suggestions in the MD Editor suggests both subfields' values when entering content in either the 327 $a or the 327 $b.
- Fixed position fields cannot be modified using the extension loader (extension packs) at this time.
- When creating an OCLC Connexion import profile in a Network Zone member institution with the **Use NZ** option selected, the **Use NZ record** option is used upon finding a match. Currently, there is no possibility to select the **Merge**, **Overlay**, or **Do not import** options instead.

Data Services

The Alma December 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 December 4th through December 31st:

- Number of records updated: 1368
- Number of records added: 170
- Number of records deleted: 50

The following are the Library of Congress Name authority updates for the period of December 4th through December 31st:

- Number of records updated: 18291
- Number of records added: 24842
- Number of records deleted: 353

New Electronic Collections Added to the Alma CKB

The following packages were added to the Alma Community Zone from November 30th 2015 through January 3rd 2016:

- CCC Get It Now American Society for Pharmacology And Experimental Therapeutics
- CCC Get It Now American Society of Agricultural and Biological Engineers
- CCC Get It Now American Society of Health System Pharmacists
- CCC Get It Now Assn for the Advancement of Computing in Education
- CCC Get It Now HMP Communications

- CCC Get It Now Jannetti Publications Inc
- CCC Get It Now Royal Society
- CCC Get It Now Scrivener Publishing
- CRCnetBASE Complete
- ebrary Academic Complete Subscription UKI Edition
- ebrary Branded: Octavo Subscription
- ebrary College Complete Subscription
- ebrary Corporate: Business Complete Subscription
- ebrary Corporate: Chemical Engineering Subscription
- ebrary Corporate: Civil Engineering Subscription
- ebrary Corporate: Computing Subscription
- ebrary Corporate: Core Engineering Subscription
- ebrary Corporate: Electronics Engineering Subscription
- ebrary Corporate: Engineering & Industrial Management Subscription
- ebrary Corporate: Engineering Subscription
- ebrary Corporate: Environmental Engineering Subscription
- ebrary Corporate: Finance Subscription
- ebrary Corporate: Food Science Subscription
- ebrary Corporate: Leadership Subscription
- ebrary Corporate: Materials Engineering Subscription
- ebrary Corporate: Mechanical Engineering Subscription
- ebrary Corporate: Medical Technology Subscription
- ebrary Corporate: PennWell Subscription
- ebrary Corporate: Petroleum Engineering Subscription
- ebrary Corporate: Pharmaceuticals Subscription
- ebrary Corporate: Power Engineering Subscription

- ebrary Corporate: Sales & Marketing Subscription
- ebrary Education Subscription
- ebrary Law Subscription
- ebrary Literature & Language Subscription
- ebrary Public Library Complete Subscription
- ebrary Schools and Educators Complete Subscription
- ebrary Science & Technology Subscription
- ebrary University Press Subscription 2015
- ebrary: The Arts Subscription
- Gale Dictionary of literary biography
- HeinOnline American Bar Association Law Library
- IEEE Open Access Journals and Conferences
- IEEE SMPTE Journals
- IEEE STEM 10 PLUS Journals Collection
- IEEE STEM 25 PLUS Journals Collection
- IEEE STEM 45 PLUS Journals Collection
- IEEE Xplore All Power & Energy Standards
- IEEE Xplore National Electrical Safety Code (NESC)
- IEEE Xplore Smart Grid Research
- IEEE Xplore SMPTE Standards
- IEEE Xplore Standards Foundations for Smart Grid
- IEEE Xplore Standards Select
- JISC Collections Elsevier SD eBooks Collection 2015 plus 2011-2014
- JUSTICE Karger Online Journal Collection 2016
- man_Elsevier_lbw
- man_EZB: PsyJournals Complete

- man_EZB: AIAA Meeting Papers and Journals Archive 1963-2007
- man_EZB: American Society of Clinical Oncology: JCO
- man_EZB: BMJ Journals Online Archive
- man_EZB: EIU-Country Reports Archive
- man_EZB: EMS Journals Archive
- man_EZB: Endocrine Legacy
- man_EZB: IGI Publishing
- man_EZB: Karger eBooks Collection (Archive)
- man_EZB: Karger Journals (Archive)
- man_EZB: Kluwer Law Journals
- man_EZB: Mary Ann Liebert
- man_EZB: Pravda Digital Archive
- man_EZB: Psychiatry Legacy Collection
- man_EZB: Royal Society of Chemistry (Archive)
- man_EZB: Science Classic Archive 1880-1996
- man_EZB: The Nation Digital Archive
- man_EZB: The New Republic
- man_EZB: Trans Tech Publications Archive 1984-2008
- man_EZB: Universal Database of Social Sciences & Humanities (UDB-EDU)
- man_EZB: Vestnik Evropy
- man_EZB: Voprosy Istorii Complete Collection
- Ovid Lippincott Williams and Wilkins Total Access Collection 2016
- Palgrave Connect eBooks International Relations and Development Collection 2015
- Palgrave Connect eBooks Political Science Collection 2015
- ProQuest British Periodicals Collection 3 New Platform
- RIPM e-Library of Music Periodicals

- RIPM Online Archive of Music Periodicals
- Sage Open Access Journals
- SpringerLink Protocols 2014
- TAEBDC AiritiBooks 2013
- TAEBDC AiritiBooks 2014
- TAEBDC Books@Ovid 2013
- TAEBDC Books@Ovid 2014
- TAEBDC Columbia University Press eBooks 2013
- TAEBDC Columbia University Press eBooks 2014
- TAEBDC CRC netBase eBooks 2013
- TAEBDC CRC netBase eBooks 2014
- TAEBDC Elsevier ScienceDirect Books 2013
- TAEBDC Elsevier ScienceDirect Books 2014
- TAEBDC Emerald eBooks 2013
- TAEBDC Emerald eBooks 2014
- TAEBDC HyRead eBooks 2013
- TAEBDC HyRead eBooks 2014
- TAEBDC IGI Global InfoSci Books 2013
- TAEBDC IGI Global InfoSci EBooks 2014
- TAEBDC IOS eBooks 2013
- TAEBDC IOS eBooks 2014
- TAEBDC Karger eBooks 2013
- TAEBDC Karger eBooks 2014
- TAEBDC MyiLibrary eBooks 2013
- TAEBDC Oxford Scholarship Online eBooks 2013
- TAEBDC Oxford Scholarship Online eBooks 2014

- TAEBDC Palgrave Connect eBooks 2013
- TAEBDC Palgrave Connect eBooks 2014
- TAEBDC Project Muse eBooks 2013
- TAEBDC Project Muse eBooks 2014
- TAEBDC Springer eBooks 2013
- TAEBDC Springer eBooks 2014
- TAEBDC Wiley eBooks 2013
- TAEBDC Wiley eBooks 2014
- TAEBDC Woodhead eBooks 2013
- TAEBDC Woodhead eBooks 2014
- TAEBDC World Scientific eA6:A102Books 2014
- TAEBDC World Scientific eBooks 2013
- University of California Press Journals
- VETnetBASE

Note: No new external resources were added for the January release.