
Alma September 2016 Release Notes



Great Inventions Around the Alma World

Canada - Alfred J. Gross

The walkie-talkie

The Alma September 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.

What's New?

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

Acquisitions



- **Idea Exchange:** The Receiving note field was changed in the PO line Summary tab from a text field to a text area field. The field now enables you to enter multiple lines of text.

Resource Management

- [Linked Data Services](#) - Linked data elements associated with a bibliographic record are now shown in repository search results and the MD Editor.



Watch the [Linked Data Services](#) video

- [Profile Updates for MARC21, UNIMARC, and KORMARC](#) - Alma has been updated with the MARC 21 Update No. 21 from September 2015 and Update No. 22 from April 2016, and several additional fixes were implemented for MARC 21, UNIMARC and KORMARC profiles.
- [Connexion Crosswalk Support](#) - When importing records from OCLC with Connexion, you can now crosswalk records from the MARC 21 to UNIMARC format.
- [Additional Resource Management Enhancements](#)

Digital Resource Management

- [Dublin Core Format Support for Quick Cataloging](#) - You can now create bibliographic records in Dublin Core format for collections and when quick cataloging a new title record while adding representations.

NOTE: In the Alma December release, there will be a change to the publishing platform for the Dublin Core format. The `dc:identifier` field, automatically added to MARC records when published as Dublin Core (using the General publishing profile), will be expanded to include the institution code in addition to the `MMS_ID: <identifier>alma:{INSTITUTION CODE}/bibs/{MMS_ID}</identifier>`. This will serve to better align the identifier with its potential use in Alma RESTful APIs, and make the identifier field distinct for every institution. If you have an existing integration that uses the Dublin Core format, and specifically the `MMS_ID`, ensure that you make the necessary changes in the external system that uses the data. Please contact Ex Libris Support if you are unsure whether this change affects your current integration.

Fulfillment

- [Enhanced Citation Tag Configuration](#) - Alma administrators can now define public (visible to patrons in Leganto and Primo) and private tags to be used in citations.
- [Additional Fulfillment Enhancements](#)

Resource Sharing

- [Returns Print a Letter](#) - A new Return letter is now printable when returning a borrowing item to the lender.
- [Additional Resource Sharing Enhancements](#)

Collaborative Networks

- [Network Zone Management of Label Generation Rules](#) - You can now centrally manage the label generation rules of member institutions when implementing a Network Zone.
- [Add Network Zone Partners to Rota](#) - Institutions working with a Network Zone can now leverage the Network Zone to manually enrich the rota based on known holders of the requested resource.



Watch the [Add Network Zone Partners to Rota](#) video

Analytics

- [New Course Instructor Primary Identifier and Course Instructor with Primary Identifier Fields](#) - These new fields were added to the **Course Reserves** and **Requests** subject areas.
- [Network Inventory Group Added to Link Resolver Usage](#) - This new field allows you to filter and display link resolver usage by library or campus. This is relevant for institutions using inventory management groups.
- [Creation Date Dimension Added to Fines and Fees](#) - The **Creation Date** dimension was added to the **Fines and Fees** subject area.
- [Additional Analytics Enhancements](#)

Administration and Infrastructure

- [Publishing from Alma Premium Sandbox to Primo Sandbox](#) - You can now publish a select number of records (up to 10K) from your Alma premium sandbox directly to your Primo sandbox (premium or standard).
- [Additional Administration and Infrastructure Enhancements](#)

APIs

- The library code was added to the GET PO Lines API (GET /almaws/v1/acq/po-lines).

- The `conf/jobs` API now handles scheduled jobs as well as manual jobs. For detailed information, see <https://developers.exlibrisgroup.com/alma/apis/conf> and <https://developers.exlibrisgroup.com...-Alma-Jobs-API>.
- Dublin Core is now an accepted format for BIB APIs.
- The Resource Sharing Requests API now includes a new field, `willing_to_pay`
- The Linked Data API now uses the same type of hyphens that are included in the bibliographic record in the wikidata link ISBN field.
- XSD fields were changed to use `xs:string` instead of `xs:long` when representing ID values.

NOTE:

The API response that includes `mms_id` as numeric (`xs:long`) in the following XSDs:

- `rest_bib.xsd`
- `rest_holdings.xsd`
- `rest_item.xsd`
- `rest_user_resource_sharing_request.xsd`

was changed to text (`xs:string`).

This is due to a defect in some clients (mainly JavaScript-based) that causes long numbers to be rounded incorrectly. If you use the above APIs with XML, no change is visible. If you use them with JSON and parse the output using string manipulation such as RegEx, these fields now appear surrounded by apostrophes.

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.

Data Services

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



Resource Management - September 2016 Enhancements

Linked Data Services

Linked data elements are now available while using the Alma MD Editor and in repository search results for titles (All titles, Physical titles, Electronic titles and Digital titles) in the Institution Zone and the Network Zone. For an explanation of linked data, see https://developers.exlibrisgroup.com/alma/integrations/linked_data.

File Edit Tools

You have 4 warning(s) in four record

Working on -Cognitive science an (991152380000541) , Created by import (17/12/2011 22:43:24 PM IST)

LDR	00793nam#a20002538a#4500
001	36297
008	870220s1987####nju#####b####001#0#eng
010	\$\$a 87005362
020	\$\$a 0898597919
035	\$\$a ocm15316933
035	\$\$a (TrN)36297-train20072_c2db
040	\$\$a DLC \$\$c DLC \$\$d m/c \$\$d SHC
049	\$\$a SHCM
050	0 \$\$a QA11 \$\$b .C54 1987
082	0 \$\$a 510/.7 \$\$2 19
245	0 0 \$\$a Cognitive science and mathematics education / \$\$c Alan H. Schoenfeld.
260	\$\$a Hillsdale, N.J. : \$\$b Lawrence Erlbaum Associates, \$\$c 1987.
263	\$\$a 8705
300	\$\$a xvii, 291 p. : \$\$b ill. ; \$\$c 23 cm.
500	\$\$a Includes index.
504	\$\$a Bibliography: p.
590	\$\$a \$17.56 B&T 2-5-91 (Gift of Hannah Lide Coker in memory of James A. Rogers) MM
650	0 \$\$a Mathematics \$\$x Study and teaching.
650	0 \$\$a Cognition.

Info Alerts **Linked Data**

bibo:isbn10	http://www.isbnsearch.org/isbn/0898597919	0898597919
dct: subject	http://id.loc.gov/authorities/subjects/sh85027742 https://open-na.hosted.exlibrisgroup.com/resolver/wikidata/lc/sh85027742	Cognition.
dct: subject	http://id.loc.gov/authorities/subjects/sh85082157 https://open-na.hosted.exlibrisgroup.com/resolver/wikidata/lc/sh85082157	Mathematics Study and teaching.
dct: language	http://id.loc.gov/vocabulary/iso639-2/eng	
JSONLD version	/alma/QA_1_INST/bibs/991152380000541.jsonld	

Linked Data in the MD Editor

¹ [Cognitive science and mathematics education / Alan H. Schoenfeld.](#)
Book (Book - Physical) By Schoenfeld, Alan H. (Hillsdale, N.J. : Lawrence Erlbaum Associates 1987.)
 ISBN: 0898597919
 Subject: Mathematics--Study and teaching. Cognition. Language: English Record number: ocm15316933
Availability: Physical version at **MAIN: main; QA11 .C54 1987** (1 copy, 1 available)
[Edit](#) | [Order](#) | [Request](#) | [Resource sharing request](#) | [Document Delivery](#) | [Add to reading list](#) | [Holdings](#) | [Items](#) |
[Add to collection](#) | [Linked Data](#) | [More info](#)

Linked Data in the All Titles Search Results

For more information, see:

- [Using Linked Data While Working with Bibliographic Records](#)
- [Using Linked Data from the Repository Search Results](#)

Profile Updates for MARC 21, UNIMARC, and KORMARC

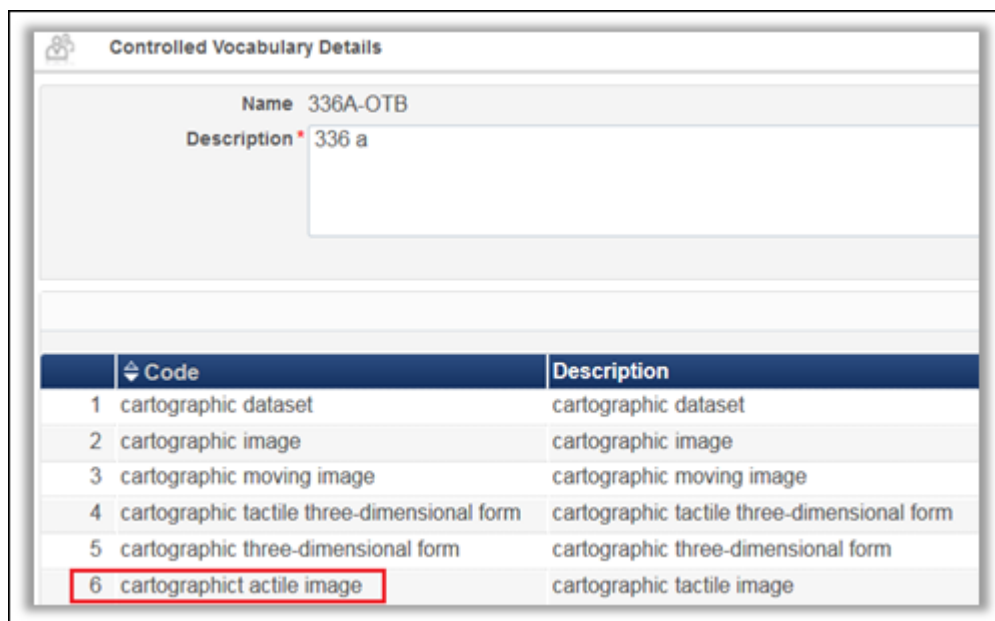
Alma profiles were updated with the MARC 21 Update No. 21 from September 2015 and the Update No. 22 from April 2016. In addition, several fixes were implemented for MARC 21, UNIMARC and KORMARC. The following list highlights these changes:

- MARC 21 bibliographic record changes

Resource Configuration > Configuration Menu > Cataloging section > Controlled Vocabulary Registry

- 336A-OTB

Changed the code to **cartographic tactile image**.



	Code	Description
1	cartographic dataset	cartographic dataset
2	cartographic image	cartographic image
3	cartographic moving image	cartographic moving image
4	cartographic tactile three-dimensional form	cartographic tactile three-dimensional form
5	cartographic three-dimensional form	cartographic three-dimensional form
6	cartographict actile image	cartographic tactile image

- 338A-OTB

Changed the code to **microfilm reel**.

Controlled Vocabulary Details

Name 338A-OTB

Description * 338 a

	Code	Description
24	microfiche	microfiche
25	microfiche cassette	microfiche cassette
26	microfil reel	microfilm reel

Resource Configuration > Configuration Menu > Cataloging section > Metadata Configuration > MARC21 Bibliographic Profile

All local fields 09X and 9XX were updated to have numeric subfields 0-9 defined (if they were not already defined).

Field Details
Cancel Save

Profile

MARC21 Bibliographic

Family

MARC21

Type

Bibliographic

Usage

BIB_MMS

Tag

999

Type

Variable

Repeatabe

Yes

Mandatory

☐ Yes
☒ No

Description

Local field

Help URL

Subfields

1 2 > < << >>

Go

1 - 20 of 36 Subfields

Columns

Tools

	SubField	Description	Mandatory	Repeatabe	Controlled Vocabulary
1	0	Local subfield	No	Yes	Assign Controlled Vocabula
2	1	Local subfield	No	Yes	Assign Controlled Vocabula
3	2	Local subfield	No	Yes	Assign Controlled Vocabula
4	3	Local subfield	No	Yes	Assign Controlled Vocabula
5	4	Local subfield	No	Yes	Assign Controlled Vocabula
6	5	Local subfield	No	Yes	Assign Controlled Vocabula
7	6	Local subfield	No	Yes	Assign Controlled Vocabula
8	7	Local subfield	No	Yes	Assign Controlled Vocabula
9	8	Local subfield	No	Yes	Assign Controlled Vocabula
10	9	Local subfield	No	Yes	Assign Controlled Vocabula

■ MARC 21 authority record change

In the MARC21 Authority profile, lowercase L replaced the number one (1) for field 377 in the Subfields section for Language term.

Field Details

Profile MARC21 Authority
Type Authority

Tag 377
Repeatable Yes
Mandatory ☐ Yes ☒ No
Description ASSOCIATED LANGUAGE
Help URL

Subfields

SubField	Description
1 1	Language term

■ **MARC 21 holdings record changes**

■ The following values were added to the 008:

■ Position 13

- No specific retention policy

■ Position 15

- No specific retention policy

■ The possible values from field 008 positions 08-11 Expected acquisition end date (Date element is not applicable) were removed. All values like in other date positions are allowed.

■ The following subfields were added to the 852:

■ \$s - Copyright article-fee code (R)

■ \$t - Copy number (NR)

■ \$x - Nonpublic note (R)

■ \$z - Public note (R)

■ \$u - Uniform Resource Identifier (R)

■ **UNIMARC bibliographic record changes**

■ LDR/08

Replaced the blank value with # so that it will show:

- (Blank) - Hierarchical Relationship Undefined

- LDR/17

Replaced the blank value with # so that it will show:

- (Blank) - Full Level

- 100/18 and 100/19

Added the following:

- blank

- 100/30-33

Split into the following two lists and shows the list of values as shown in 100/26-27 and 100/28-29:

- 100/30-31 – Additional Character Sets

- 100/32-33 - Additional Character Sets

- Field 205 first indicator

Instead of the current value of blank – not defined, it has the following value:

- undefined

- Field 512 second indicator

Instead of the current value of blank – not defined, it has the following value:

- undefined

- MARC 21 Update No. 21 (September 2015) changes:

- Field 336 - Content Type

Added the following subfield:

\$0 - Authority record control number or standard number (R)

- Field 337 - Content Type

Added the following subfield:

\$0 - Authority record control number or standard number (R)

- Field 338 - Content Type

Added the following subfield:

\$0 - Authority record control number or standard number (R)

- Field 348 - Format of Notated Music (R) added

This new field was added with the following:

- First Indicator

- Undefined

- Second Indicator

- Undefined

- Subfields as follows:

- \$a - Format of notated music term (R)

- \$b - Format of notated music code (R)

- \$0 - Authority record control number or standard number (R)

- \$2 - Source of term (NR)

- \$3 - Materials specified (NR)

- \$6 - Linkage (NR)

- \$8 - Field link and sequence number (R)

- MARC 21 Update No. 22 (April 2016) changes:

- Sound recording (007/00=s)

- 007/01 - Specific material designation

Added the following value:

r - Remote

- 007/03 – Speed

Added the following value:

n - Not applicable

- 007/01 - Specific material designation

Added the following value:

s - Standalone device

- Electronic resource (007/00=c)

- 007/01 - Specific material designation

Added the following value:

s - Standalone device

- 382 - Medium of Performance

- Updated the description of subfield e to the following:

Number of ensembles of the same type

- Added the following subfields:

- \$r - Total number of individuals performing alongside ensembles (NR)

- \$t - Total number of ensembles (NR)

- 753 - System Details Access to Computer Files

- Added the following subfields:

- \$0 - Authority record control number or standard number (R)

- \$2 - Source of term (NR)

Connexion Crosswalk Support

NOTE: This feature was developed for the Italian market.

The OCLC Connexion external integration profile was enhanced to include a format parameter enabling you to specify that records will be crosswalked from the MARC 21 format to the UNIMARC format upon import.

The screenshot shows the 'External System' configuration page for 'OCLC Connexion'. The 'Actions' tab is selected, and a dropdown menu for 'Format' is open. The dropdown menu lists three options: 'MARC21 Bibliographic', 'MARC21 Bibliographic', and 'UNIMARC Bibliographic'. The 'UNIMARC Bibliographic' option is highlighted. The 'Format' label is also highlighted. The 'Target format' label is also highlighted.

Code	CC	OCLC	Name	Integration Type
Connexion			OCLC Connexion	OCLC Connexion

General Information | Actions | Contact Info

Actions

Format: Target format: MARC21 Bibliographic

Normalization: MARC21 Bibliographic

Correct the data using: UNIMARC Bibliographic

New OCLC Connexion Format Parameter

See [Importing Records from OCLC Connexion](#) for more information.

Additional Resource Management Enhancements

- For the SRU integration profile, when the conversion from the original record's format to the requested format is unavailable, Alma now returns the original record.
- The ZDB matching method was removed when configuring an import profile. The 035 (Other System Identifier) method should be used instead.
- For a predefined list of sites (maintained by Ex Libris), administrators can disable compression for an FTP connection used by a general publishing profile. After selecting **FTP** and one of the defined sites, select **Disable file compression** on the Publishing Profile Details page. The **Compressed file extension** field is removed from the page (since the extension is not used for this profile).

The sites are `ftp.exlibris.co.il` and `scp.oclc.org`.

Publishing Profile Details

Profile Id - Profile Name -

Profile Name *

Profile Description

Status ☒ Active ☐ Inactive

Scheduling [Email Notifications](#)

Content

Set name *

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

Output format

Publishing Mode ☒ Incremental ☐ Full ☐ Date Range ☐ Republish Set

Publishing Protocol

FTP ☒

FTP configuration * Sub-directory

Disable file compression ☒

Single File Configuration

Physical format

Number of records in file

Output File Configuration

Use default file name ☐ No ☒ Yes

File name prefix *

Compressed file extension

OAI ☐

Z39.50 ☐

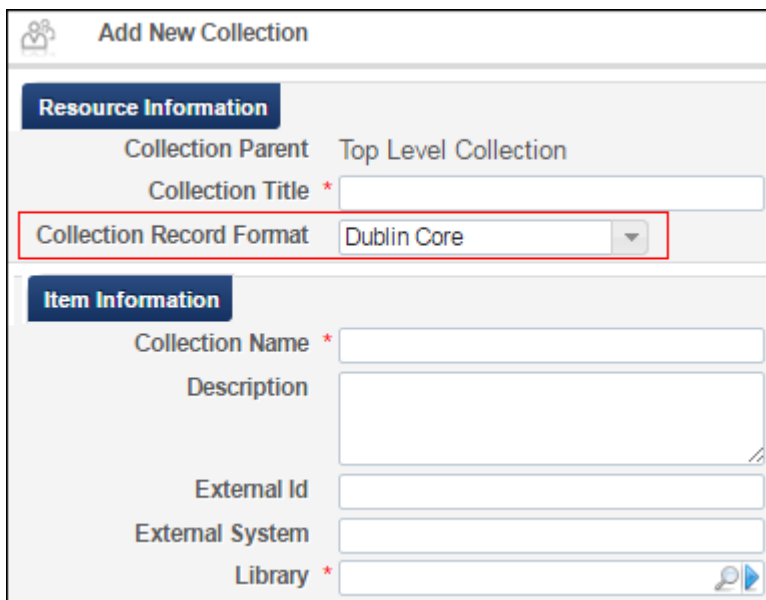
Publishing Profile Details Page

Digital Resource Management - September 2016 Enhancements

Dublin Core Format Support for Quick Cataloging

You can now create bibliographic records in Dublin Core format for collections and when quick cataloging a new title record when adding representations.

- When adding a collection (**Resource Management > Search and Sets > Manage Collections > Add New Collection**):



Add New Collection

Resource Information

Collection Parent: Top Level Collection

Collection Title *

Collection Record Format: Dublin Core

Item Information

Collection Name *

Description

External Id

External System

Library *

Collection Record Format

- When Adding a Representation (**Resource Management > Create Inventory > Add Digital Representation**):


Representation Details

Descriptive Information

☒ New ☐ Existing

Record Format Dublin Core

Title *

Creator

Description

Date

Type Interactive Resource

Collection *

Suppress from Discovery ☐

Representation Details

Remote ☒

Usage Type *

Library *

Label

Note

Public Note

Entity Type

Interactive Resource
 Interactive Resource
 Moving Image
 Still Image
 Dataset
 Event
 Service
 Text
 Software
 Sound
 Physical Object
 Image

Record Format

When selecting the Dublin Core record format, options relevant for digital files are available for the **Type** field.

Fulfillment - September 2016 Enhancements

Enhanced Citation Tag Configuration

Tagging for citations and reading list sections was enhanced. Note that section tags are relevant only for customers implementing Leganto (see more information about this new feature in [Leganto Release Notes September 2016](#)).

Librarians can configure any amount of public or library tags for both citations and sections in Alma. **Public citation** tags appear to patrons in Primo and Leganto; **public section** tags appear to patrons in Leganto. **Library tags** can be seen only by instructors and librarians in Leganto and Alma.

The Public and Library tables were combined into the Tags table. Use this table to add all of your tags. After adding tags, use the new table Tags to Tags Level and Visibility to add your tags as public or library tags that are visible on the citation or section level.

For more information, see [Configuring Citation and Section Tags](#).

To see how to configure citation tags, see [Adding Citation Tags](#).

To see what citations look like in Leganto, see [Section Tags](#) in the Leganto September 2016 Release Notes.

Additional Fulfillment Features

- The class **libraryName** was added to the HTML around the library name in the Get It tab. You can add an entry to mashup.css (see [Modifying a Skin](#)) to hide or modify this page element. For example:

Hide the library name:

```
.libraryName{  
  display:none;  
}
```

Change the library name's color:

```
.libraryName{  
  color:red;  
}
```

- In order to assist in the copyright clearance process when managing non-repository citations, **Filter by this Issue** on the Approve Requests List page (approving digitization requests) now includes in the results items with the same ISBN (whether ISBN/10 or ISBN/13) and items with the same ISSN/volume/issue. In the latter case, items with no issue but matching ISSN and volume, as well as items with no volume or issue but matching ISSN, are also included in the results.
- The **All** and **Completed** options of the **Status** filter on the Approval Requests List page now work.
- Four tasks were added to the Tasks List to take you to the Manage Reading Lists page (see [Managing Reading Lists](#) and [Tasks in the Tasks List](#) for more information):
 - Reading lists - unassigned
 - Reading lists - assigned to me - ready for processing
 - Reading lists - unassigned - citation has a new note
 - Reading lists - assigned to me - citation has a new note
- In the Primo Get It tab, if one bibliographic record has two holdings, one with items and the other with no items, the option to create a general hold request is shown for the holding with no item.

Resource Sharing - September 2016 Enhancements

Returns Print a Letter

A new return letter, **Resource Sharing Return Slip**, is now printable when returning a borrowing item to the lender. The letter is printed when:

- Scanning in an item triggers a return (including Managing Patron Services and Return Items menu option)
- Using the Return option in the task list

The letter is not relevant for NCIP transactions.

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

NOTE:

This letter is disabled by default. To enable it, access the **General Configuration > Letter Activity** menu (see [Enabling/Disabling Letters](#)).

Additional Resource Sharing Enhancements

- The resource sharing borrowing statuses (see [Adding a Resource Sharing Borrowing Task From a Search](#)) are now translated for patron-facing languages.
- When editing a Resource Sharing Borrowing Request rota, it is now possible to reposition a partner in the rota from being a pending partner to being the active partner by using the sort arrows. This can be done as long as the request is in the **Created Borrowing Request** or **Ready to Be Sent** status. For more information, see [Editing a Borrowing Request](#).
- A new date facet, **Up to Three Days Ago**, is now available on all pages that use date facets (that is, Resource Sharing Borrowing Requests, Resource Sharing Lending Requests Task List, Resource Request Monitoring, and so forth). As with the existing date-related facets, records that appear in the Yesterday facet do not appear in this new facet.
- When creating or editing a borrowing request, the **Send** button was separated from the **Save** button, in order to make it less likely for the user to mistakenly click the undesired option.

Resource Sharing Borrowing Request

[Cancel](#) [Dismiss Notes](#) [Go](#) [Send](#) [General Message](#) [Locate](#) [Save](#)

[General Information](#) [Audit](#) [Rota](#) [Parameters](#) [General Messages](#) [Notes](#) [Attachments](#)

[Resource Information](#)

Borrowing Request Buttons

Collaborative Networks - September 2016 Enhancements

Network Zone Management of Label Generation Rules

You can now centrally manage the label generation rules of member institutions when implementing a Network Zone. These rules can be used by the member institutions to auto-generate labels for digital representations.

For more information, see [Managing Label Generation Rules Using a Network Zone](#).

Add Network Zone Partners to Rota

Member institutions in a Network Zone can manually enrich the rota based on known holders of the requested resource by adding partners to existing borrowing requests from a Network Zone search. A new row action, **View Network Resources**, is visible for member institutions that are part of the Network Zone. For more information, see [Adding Network Zone Partners to Resource Sharing Rota](#).

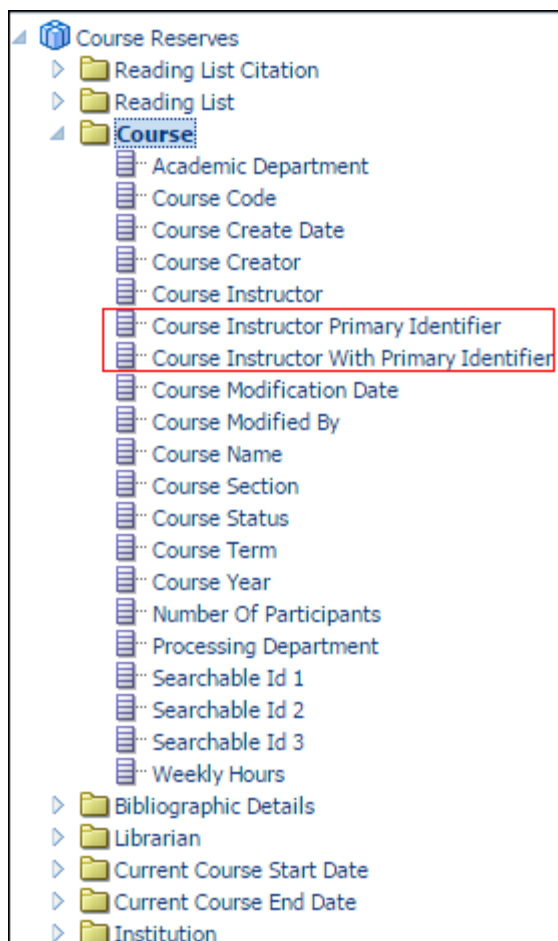
Analytics - September 2016 Enhancements

New Course Instructor Primary Identifier and Course Instructor with Primary Identifier Fields

The **Course Instructor Primary Identifier** and **Course Instructor with Primary Identifier** fields have been added to the following folders in Alma Analytics:

- Course Reserves > Course
- Requests > Request For Course

The **Course Instructor with Primary Identifier** field is useful when a course has more than one instructor. This field allows you to display the instructors together with their primary identifiers.



Course Instructor Primary Identifier and Course Instructor with Primary Identifier Fields

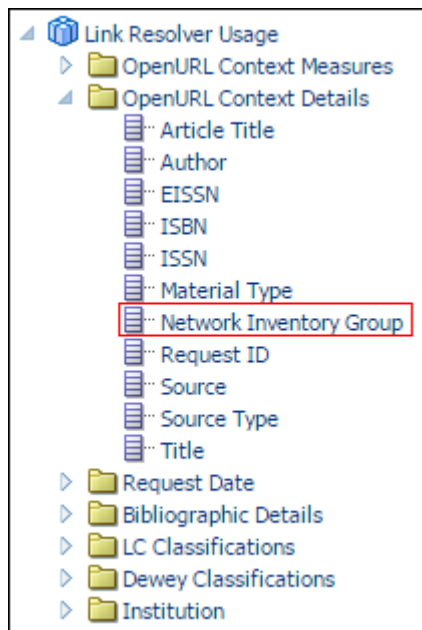
The following is an example report using the **Course Instructor Primary Identifier** and **Course Instructor with Primary Identifier** fields:

Course Instructor	Course Instructor Primary Identifier	Course Instructor With Primary Identifier
Abers, Robert	7652408784783294	7652408784783294 - Abers, Robert
Abson, Bobby	76522012340910	76522012340910 - Abson, Bobby
Ali, Ann	76529876015915	76529876015915 - Ali, Ann
Aljers, Athena	76526131566079	76526131566079 - Aljers, Athena
Alkan, Kelly	76524030009369	76524030009369 - Alkan, Kelly
Anderson, Stacy	76528353129724	76528353129724 - Anderson, Stacy

Course Instructor Primary Identifier and Course Instructor with Primary Identifier Fields Report

Network Inventory Group Added to Link Resolver Usage

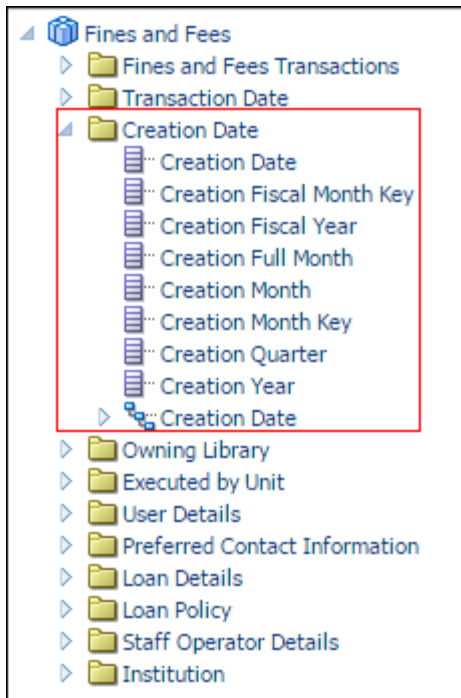
The **Network Inventory Group** field was added to the **OpenURL Context Details** dimension of the **Link Resolver Usage** subject area. This field allows you to filter and display link resolver usage by library or campus. This is relevant for institutions using inventory management groups.



Network Inventory Group

Creation Date Dimension Added to Fines and Fees

The **Creation Date** dimension was added to the **Fines and Fees** subject area. It contains the date fields that exist in all date dimensions in Analytics.



Creation Date

The following is an example report using the **Creation Date** field:

Table		
Creation Date	Transaction Amount	
1/3/2006	2	
1/4/2006	5	
1/5/2006	3	
1/6/2006	14	
1/7/2006	110	
1/9/2006	35	
1/10/2006	53	
1/11/2006	11	
1/12/2006	1	
1/13/2006	15	
1/14/2006	0	

Creation Date Report

Additional Analytics Enhancements

- The **Date Info** field in the **Portfolio** dimension of the **E-Inventory** subject area was enhanced. This field now displays the combined coverage date information of the **Alma From Month**, **From Day**, **Until Month**, and **Until Day** fields.

Administration and Infrastructure - September 2016 Enhancements

Publishing from Alma Premium Sandbox to Primo Sandbox

You can now publish a select set of records from the Alma premium sandbox directly to the Primo sandbox to test discovery of specific Alma records. This is limited to 10K records.

For more information these workflows and best practices for working with Alma sandbox and Primo sandbox, see the marked sections in [Alma Sandbox Environments](#).

Additional Administration and Infrastructure Enhancements

- Institutions can now configure S/FTP with public key encryption. For more information, see [Adding S/FTP Connections](#).
- The Contributor privilege was added to the Catalog Administrator, Catalog Manager, Cataloger, and Cataloger Extended roles. This privilege is required to contribute import profiles to the Community Zone.

Data Services - September 2016 Enhancements

The Alma August 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 July 29th through August 28th:

- Number of records updated: 82
- Number of records added: 207
- Number of records deleted: 25

The following are the Library of Congress Name authority updates for the period of July 29th through August 28th:

- Number of records updated: 17561
- Number of records added: 23479
- Number of records deleted: 491

The following are the Canadian name authority updates for the period of July 29th through August 28th:

- Number of records updated: 36
- Number of records added: 953
- Number of records deleted: 6

The following are the Library of Congress Genre/Form Terms (LCGFT) updates for the period of July 29th through August 28th:

- Number of records updated: 1
- Number of records added: 4

New Electronic Collections Added to the Alma CKB

The following collections were added to the Alma Community Zone from August 1, 2016 until August 28, 2016:

- Adam Matthew Digital Mass Observation Online
- Adam Matthew Digital Mass Observation Online 1
- Adam Matthew Digital Mass Observation Online 2
- Adam Matthew Digital Mass Observation Online 3
- Adam Matthew Digital Mass Observation Online 4
- Bacon CAIRN couperin revues ecosocpol
- Bacon CAIRN couperin revues general
- Bacon CAIRN couperin revues humanities
- Bacon CAIRN couperin revues psychology
- Bacon CAIRN global alljournals
- Bacon CAIRN global collectifs ecosocpol
- Bacon CAIRN global collectifs ecosocpol
- Bacon CAIRN global collectifs general
- Bacon CAIRN global collectifs humanities
- Bacon CAIRN global collectifs psychology
- Bacon CAIRN global ouvrages documentation hospitaliere
- Bacon CAIRN global ouvrages economics management
- Bacon CAIRN global ouvrages ecosocpol
- Bacon CAIRN global ouvrages education
- Bacon CAIRN global ouvrages general
- Bacon CAIRN global ouvrages history geography
- Bacon CAIRN global ouvrages humanities
- Bacon CAIRN global ouvrages law sciencespolitiques
- Bacon CAIRN global ouvrages letter language
- Bacon CAIRN global ouvrages philosophy religions
- Bacon CAIRN global ouvrages psychoanalysis
- Bacon CAIRN global ouvrages psychologiedelenfantetdeladolescent
- Bacon CAIRN global ouvrages psychology
- Bacon CAIRN global ouvrages public health
- Bacon CAIRN global ouvrages santementaleethandicap
- Bacon CAIRN global ouvrages sociologie
- Bacon CAIRN global ouvrages travailsocial

- Bacon CAIRN global poches economics management
- Bacon CAIRN global poches general
- Bacon CAIRN global poches history
- Bacon CAIRN global poches law sciencespolitiques
- Bacon CAIRN global poches letter
- Bacon CAIRN global poches marks
- Bacon CAIRN global poches philosophy
- Bacon CAIRN global poches psychology
- Bacon CAIRN global poches quesais je
- Bacon CAIRN global poches sciencesettech
- Bacon CAIRN global poches sociologie
- Bacon CAIRN global poches travailsocial
- Bacon CAIRN global revues documentationhospitaliere
- Bacon CAIRN global revues economiegestion
- Bacon CAIRN global revues ecosocpol
- Bacon CAIRN global revues education
- Bacon CAIRN global revues general
- Bacon CAIRN global revues humanities
- Bacon CAIRN global revues psychology
- Bacon CAIRN global revues public health
- Bacon CAIRN global revues shs
- Bacon CAIRN global revues travailsocial
- Bacon Jstor Global all titles
- Bacon Jstor Global arts and sciences i
- Bacon Jstor Global arts and sciences ii
- Bacon Jstor Global arts and sciences iii
- Bacon Jstor Global arts and sciences iv
- Bacon Jstor Global arts and sciences ix
- Bacon Jstor Global arts and sciences v
- Bacon Jstor Global arts and sciences vi
- Bacon Jstor Global arts and sciences vii
- Bacon Jstor Global arts and sciences viii

- Bacon Jstor Global biological sciences
- Bacon Jstor Global business i
- Bacon Jstor Global business ii
- Bacon Jstor Global business iii
- Bacon Jstor Global ecology and botany i
- Bacon Jstor Global ecology and botany ii
- Bacon Jstor Global health and general sciences
- Bacon Jstor Global Ireland
- Bacon Jstor Global language and literature
- Bacon Jstor Global life sciences
- Bacon Jstor Global mathematics and statistics
- Bacon Jstor Global music
- Bloomsbury Academic Collections series: Biblical Studies Landmark Texts
- Bloomsbury Academic Collections series: Economics Landmark Texts
- Bloomsbury Academic Collections series: History Landmark Texts
- Bloomsbury Academic Collections series: Japanese History Landmark Texts
- Bloomsbury Academic Collections series: Linguistics Landmark Texts
- Bloomsbury Academic Collections series: Literary Criticism Landmark Texts
- Bloomsbury Academic Collections series: Philosophy Landmark Texts
- Bloomsbury Academic Collections series: Shakespeare Studies Landmark Texts
- Bloomsbury Collections: Anthropology 2016
- Bloomsbury Collections: Biblical Studies 2016
- Bloomsbury Collections: Bloomsbury Open 2016
- Bloomsbury Collections: Business & Management
- Bloomsbury Collections: C.H. Beck Hart Nomos 2014
- Bloomsbury Collections: Classical Studies & Archaeology 2016
- Bloomsbury Collections: Education 2016
- Bloomsbury Collections: Film & Media Studies 2016
- Bloomsbury Collections: Geographers Biobibliographical Studies
- Bloomsbury Collections: Hart Publishing 2016
- Bloomsbury Collections: History 2016
- Bloomsbury Collections: Linguistics 2016

- Bloomsbury Collections: Literary Studies 2016
- Bloomsbury Collections: Philosophy 2016
- Bloomsbury Collections: Religious Studies 2016
- Bloomsbury Collections: Theology 2016
- Elsevier ClinicalKey Australia Books
- Elsevier ClinicalKey Australia Journals
- Elsevier ClinicalKey Nursing Australia Books
- Elsevier ClinicalKey Nursing Australia Journals
- Elsevier ScienceDirect eBooks Referex Chemical Engineering
- Elsevier ScienceDirect eBooks Referex Computer Science
- Elsevier ScienceDirect eBooks Referex Engineering
- Elsevier ScienceDirect eBooks Referex Materials Science
- Elsevier ScienceDirect eBooks Referex Miscellaneous
- Hogrefe eLibrary
- JSTOR Books Archaeology
- JSTOR Books Business And Economics
- JSTOR Books Education
- JSTOR Books Film Studies
- JSTOR Books History
- JSTOR Books Language And Literature
- JSTOR Books Law
- JSTOR Books Music
- JSTOR Books Philosophy
- JSTOR Books Political Science
- JSTOR Books Religion
- JSTOR Books Science And Technology
- JSTOR Books Sociology
- JSTOR Books Spanish Collection
- JSTOR Books Sustainability
- MDPI - Multidisciplinary Digital Publishing Institute
- Oxford Scholarly Editions Online
- Oxford Scholarly Editions Online Early Seventeenth Century Drama

- Oxford Scholarly Editions Online Early Seventeenth Century Poetry
- Oxford Scholarly Editions Online Early Seventeenth Century Prose
- Oxford Scholarly Editions Online Eighteenth Century Drama
- Oxford Scholarly Editions Online Eighteenth Century Poetry
- Oxford Scholarly Editions Online Eighteenth Century Prose
- Oxford Scholarly Editions Online Latin Drama
- Oxford Scholarly Editions Online Latin History
- Oxford Scholarly Editions Online Latin Poetry
- Oxford Scholarly Editions Online Latin Prose
- Oxford Scholarly Editions Online Nineteenth Century Poetry
- Oxford Scholarly Editions Online Nineteenth Century Prose
- Oxford Scholarly Editions Online Renaissance Drama
- Oxford Scholarly Editions Online Renaissance Poetry
- Oxford Scholarly Editions Online Renaissance Prose
- Oxford Scholarly Editions Online Restoration Drama
- Oxford Scholarly Editions Online Restoration Poetry
- Oxford Scholarly Editions Online Restoration Prose
- Oxford Scholarly Editions Online Romanticism Drama
- Oxford Scholarly Editions Online Romanticism Poetry
- Oxford Scholarly Editions Online Romanticism Prose
- Oxford Scholarly Editions Online Shakespeare
- ProQuest Accounting, Tax & Banking Collection (Alumni)
- ProQuest Arts Premium Collection
- ProQuest Asian & European Business Collection (Alumni)
- ProQuest Business Market Research Collection (Alumni)
- ProQuest Canadian Business & Current Affairs Database (CBCA) (Alumni)
- ProQuest ProQuest Central (Alumni)
- ProQuest ProQuest Historical Newspapers: Times of India
- ProQuest Research Library (Alumni)
- ProQuest Research Library Prep
- ProQuest Safari Academic Basic Tech and Business Library
- The Chemical Society of Japan Free

- The Chemical Society of Japan Subscribed
- Wiley Backlist AGU
- Wiley Backlist Business
- Wiley Backlist Chemistry
- Wiley Backlist Engineering
- Wiley Backlist German Language
- Wiley Backlist Health Science
- Wiley Backlist Humanities
- Wiley Backlist Life Earth Sciences
- Wiley Backlist Math Stat
- Wiley Backlist Social Science
- Wiley Backlist Veterinary
- Wiley Frontlist All Obook 2014-2016
- Wiley Frontlist All Obook 2015
- Wiley Frontlist All Obook 2016
- Wiley Frontlist Obook Business
- Wiley Frontlist Obook Business 2015-2016
- Wiley Frontlist Obook Chemistry
- Wiley Frontlist Obook Chemistry 2015-2016
- Wiley Frontlist Obook Engineering
- Wiley Frontlist Obook Engineering 2015-2016
- Wiley Frontlist Obook Health Science
- Wiley Frontlist Obook Health Science 2015-2016
- Wiley Frontlist Obook Humanities
- Wiley Frontlist Obook Humanities 2015-2016
- Wiley Frontlist Obook Life Science
- Wiley Frontlist Obook Lifescience 2015-2016
- Wiley Frontlist Obook Math Stat
- Wiley Frontlist Obook Math Stat 2015-2016
- Wiley Frontlist Obook Social Sciences
- Wiley Frontlist Obook Social Sciences 2015-2016
- Wiley Frontlist Obook Vet

- Wiley Frontlist Obook Vet 2015-2016
- Wiley UBCM Agriculture
- Wiley UBCM All Online Books
- Wiley UBCM Business
- Wiley UBCM Chemistry 1999
- Wiley UBCM Chemistry 2000
- Wiley UBCM Earth Environmental
- Wiley UBCM Engineering
- Wiley UBCM Humanities
- Wiley UBCM Life Science
- Wiley UBCM Math Stat
- Wiley UBCM Medicine
- Wiley UBCM Online German Language Collection
- Wiley UBCM Physical Science
- Wiley UBCM Psychology
- Wiley UBCM Social Behavioral
- Wiley UBCM Vet Science

New External Search Resources

The following external resource was added to Alma for the September release:

- ArticleFirst (OCLC) - Requires a fee to access

List of Items
Receiv...

Items have been successfully bounded into new volume with barcode MC11000 (Item pid: 236060000000121)

Resource description [Shalom Yoel 1971- 2010](#)

Holding [Main Library: Asian Collection:](#)
[View all holdings](#)

List of Items

Sort routine Library/Loca

Status All
Find :

Add Item Bind Items Move Items
1

☐	Barcode	Library	Location	Call Number	Description	Temporary Location	Status	Process type	Access Nu
☐	MC10101	Main Library	Asian Collection	-	-	No	Item in place	-	-
☐	MC10100	Main Library	Asian Collection	-	-	No	Item in place	-	-
☐	MC11000	Main Library	Asian Collection	-	-	No	Item not in place	Restoration	-

List of Items Page - Bound Item

Using Linked Data from the Repository Search Results

New for September!

Accessing linked data elements is available from the Alma Repository Search results for the following types of searches:

- All titles
- Physical titles
- Electronic titles
- Digital titles

For more information regarding linked data, see https://developers.exlibrisgroup.com/alma/integrations/linked_data.

To access linked data elements from your Repository Search results:

1. Complete a titles search for the resource for which you want to access the linked data elements.
2. In the search results, click the **Linked Data** link.

1 [Cognitive science and mathematics education / Alan H. Schoenfeld.](#)
Book (Book - Physical) By Schoenfeld, Alan H. (Hillsdale, N.J. : Lawrence Erlbaum Associates 1987.)
 ISBN: 0898597919
 Subject: Mathematics--Study and teaching. Cognition. Language: English Record number: ocm15316933
 Availability: Physical version at **MAIN: main; QA11 .C54 1987** (1 copy, 1 available)
[Edit](#) | [Order](#) | [Request](#) | [Resource sharing request](#) | [Document Delivery](#) | [Add to reading list](#) | [Holdings](#) | [Items](#) |
[Add to collection](#) | [Linked Data](#) | [More info](#)

Linked Data Link

The Linked Data List page appears.

Linked Data List [Back](#)

Linked Data [Tools](#)

bibo:isbn10	http://www.isbnsearch.org/isbn/0898597919	0898597919
dct: subject	http://id.loc.gov/authorities/subjects/sh85027742	Cognition.
-	https://open-na.hosted.exlibrisgroup.com/resolver/wikidata/loc/sh85027742	-
dct: subject	http://id.loc.gov/authorities/subjects/sh85082157	Mathematics Study.
-	https://open-na.hosted.exlibrisgroup.com/resolver/wikidata/loc/sh85082157	-
dct: language	http://id.loc.gov/vocabulary/iso639-2/eng	-
JSONLD version	/alma/QA.1 INST/bibs/991152380000541.jsonld	-

[Tools](#)

Linked Data List Page

The Linked Data List page displays the following information:

■ Vocabulary field

This is pulled according to context. The default context is <https://open-na.hosted.exlibrisgroup.com/alma/contexts/bib>.

If there is an active Linked Data integration profile (see [Linked Data](#)) with a path to a context, this context is used.

NOTE:

A Linked Data integration profile does not need to be created in order to access linked data from the Alma Repository Search results. However, one is required to expose linked data in the JSONLD format (see [Linked Data](#) for more information).

■ Linked data URI

■ Label

For ISBN, ISSN, and OCLC, the field content is displayed. For creator and subject, the value of the heading is displayed.

3. Click the link of interest from the Linked Data List page to access the linked data, or click **Tools** to download the Linked Data List page results to an Excel spreadsheet.
-



For more information, see the [Linked Data Services](#) video (1:50 min.).

See [Using Linked Data While Working with Bibliographic Records](#) for more information regarding linked data in the MD Editor.

Sometimes, you may find it helpful to modify your records with tools external to Alma. Use the **Tools** feature in your search results that allows you to export records to an Excel spreadsheet. See [The Portfolio List](#) for a description of the options **Extended Export** (to Excel) and **Excel (current view)**.

Deleting Sets of Bibliographic Records

PERMISSIONS: To run a batch delete job on bibliographic records, you must have one of the following roles:

- Cataloger Administrator
 - Cataloger Manager
-

You can batch delete bibliographic records that are not connected to orders or other records in the database (optional), and, for collaborative network-managed records, are not linked to local member institution records. You can also choose whether you want to delete the inventory associated with these records.

Sets for the batch delete job can be saved from an **All titles** repository search.

To delete sets of bibliographic records:

Run the **Delete bibliographic records** job. Records that cannot be deleted due to one of the conditions described above are identified in the job report.

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

Using Linked Data While Working with Bibliographic Records

New for September!

While working with bibliographic records in the MD Editor, the record's link data element information is available in the lower pane of the editor.

You have 4 warning(s) in four record

Working on -Cognitive science an (991152380000541) , Created by import (17/12/2011 22:43:24 PM IST)

LDR		
001		36297
008		870220s1987####nju#####b####001#0#eng
010		\$\$a 87005362
020		\$\$a 0898597919
035		\$\$a ocm15316933
035		\$\$a (TrN)36297-train20072_c2db
040		\$\$a DLC \$\$c DLC \$\$d m/c \$\$d SHC
049		\$\$a SHCM
050	0	\$\$a QA11 \$\$b .C54 1987
082	0	\$\$a 510/.7 \$\$2 19
245	0 0	\$\$a Cognitive science and mathematics education / \$\$c Alan H. Schoenfeld.
260		\$\$a Hillsdale, N.J. : \$\$b Lawrence Erlbaum Associates, \$\$c 1987.
263		\$\$a 8705
300		\$\$a xvii, 291 p. : \$\$b ill. ; \$\$c 23 cm.
500		\$\$a Includes index.
504		\$\$a Bibliography: p.
590		\$\$a \$17.56 B&T 2-5-91 (Gift of Hannah Lide Coker in memory of James A. Rogers) MM
650	0	\$\$a Mathematics \$\$x Study and teaching.
650	0	\$\$a Cognition.
700	1	\$\$a Schoenfeld, Alan H.

Info Alerts **Linked Data**

bibo:isbn10	http://www.isbnsearch.org/isbn/0898597919	0898597919
dct: subject	http://id.loc.gov/authorities/subjects/sh85027742	Cognition.
	https://open-na.hosted.exlibrisgroup.com/resolver/wikidata/ic/sh85027742	
dct: subject	http://id.loc.gov/authorities/subjects/sh85082157	Mathematics Study and teaching.
	https://open-na.hosted.exlibrisgroup.com/resolver/wikidata/ic/sh85082157	
dct: language	http://id.loc.gov/vocabulary/iso639-2/eng	
JSONLD version	/alma/QA_1_INST/bibs/991152380000541.jsonld	

Linked Data Tab

For more information regarding linked data, see https://developers.exlibrisgroup.com/alma/integrations/linked_data.

The Linked Data List page displays the following information:

■ Vocabulary field

This is pulled according to context. The default context is <https://open-na.hosted.exlibrisgroup.com/alma/contexts/bib>.

If there is an active Linked Data integration profile (see [Linked Data](#)) with a path to a context, this context is used.

NOTE:

A Linked Data integration profile does not need to be created in order to access linked data from the Alma Repository Search results. However, one is required to expose linked data in the JSON-LD format (see [Linked Data](#) for more information).

■ Linked data URI

■ Label

For ISBN, ISSN, and OCLC, the field content is displayed. For creator and subject, the value of the heading is displayed.

Click the URI link of interest to access the linked data.



For more information, see the [Linked Data Services](#) video (1:50 min.).

See [Using Linked Data from the Repository Search Results](#) for more information regarding linked data in Repository Search.

Code Table

Cancel
Customize

You are configuring: University of Texas at Dallas
[Organization Unit List](#)

Table Information

Sub System

FULFILLMENT

Table Name

Match by Fields

Updated By

-

Updated on

-

Table Description

Table code

MatchByFields

Match by Fields

Tools

	Enabled	Display	Order	Code	Description	Default Value	Updated By	Last Updated
1				Title	Title		-	-
2				Author	Author		-	-
3				Edition	Edition		-	-
4				ISSN/ISBN	ISSN/ISBN		-	-
5				OCLC	OCLC Number		-	-
6				LCCN	LCCN(010)		-	-

Tools

Cancel
Customize

Match by Fields Code Table

To add or remove fields as required matching criteria:

Click the gray or yellow checkmarks in the rows. Click **Customize** when you are done. The display order and default value features on this page are not enabled.

Configuring Citation and Section Tags

NOTE: Sections (and section tags) are only relevant for Leganto.

In addition to attributes, citations and reading list sections can use an expanded tagging system.

- Librarians can configure any amount of public or library tags for both citations and sections in Alma. Public citation tags appear to patrons in Primo and Leganto; public section tags appear to patrons in Leganto. Library tags can be seen only by instructors and librarians in Leganto and Alma.
- Librarians can view and remove citation tags to/from citations in Alma. The tags assigned to citations appear in each citation section on the Edit Reading List page (**Fulfillment > Course Reserves > Reading Lists**; select **Actions > Work On** in the reading list row).
- New for September** Defining tags is a two-step process:
 - Define the tag in the Tags table.
 - Configure the tags as citation/section and as public/library on the Tags to Tags Level and Visibility table.

To define tags:

1. To define public tags, open the Tags code table (**Fulfillment > Fulfillment Configuration > Configuration Menu > Courses > Tags**).

Code Table Cancel Save

You are configuring: Virginia Commonwealth University [Organization Unit List](#)

Table Information

Sub System: FULFILLMENT
 Updated By: admin
 Table Description:
 Customization mode: Entire table needs to be customized

Table Name: Tags
 Updated on: 08/04/2016
 Table code: Tags

Tags Import Tools

	Enabled	Display	Order	Code	Description	Default Value	Updated By	Last Updated	
1				john	John		admin	08/04/2016	Delete
2		▲		mary	Mary		admin	08/04/2016	Delete
3		▲		sue	Sue		admin	08/04/2016	Delete
4		▲		steve	Steve		admin	08/04/2016	Delete

Create a New Code Table Row

Quick Add

Code: Description: Default Value: Add Row

Cancel Save

Public Tags Code Table

Make any required changes:

- To add a tag, enter the new information in the **Quick Add** area, including a code (any unique value) and description (how it appear in Leganto and Primo), and click **Add Row**.
Note that the **Default Value** field currently has no effect.
 - To change a tag's description, edit the value in the tag's row.
 - To enable/disable a tag, click the gray/yellow checkmark in the tag row.
 - To reorder how the tags appear in the dropdown list in Leganto, click the up or down arrows in the **Display** and **Order** columns.
 - To delete a tag, click **Delete** in the tag row.
2. When you are done, click **Customize** to save your changes. To discard your changes, click **Cancel**.
 3. Open the Tags to Tags Level and Visibility table (**Fulfillment > Fulfillment Configuration > Configuration Menu > Courses > Tag Levels**).

Mapping Table
 Cancel Save

You are configuring: Virginia Commonwealth University
 Organization Unit List

Table Information

Sub System FULFILLMENT

Table Name TagsToTagsLevelAndVisibility
 Updated By admin
 Last Updated 08/04/2016

 Table Description The table maps the relevant tag to the tag level and visibility
 Customization mode: Entire table needs to be customized

Mapping Table Rows
Tools

	Level	Tags	Visibility	Updated By	Last Updated	
1	Citation	John	Public	admin	08/04/2016	Delete
2	Citation	Mary	Library	admin	08/04/2016	Delete
3	Section	Steve	Public	admin	08/04/2016	Delete
4	Section	Sue	Library	admin	08/04/2016	Delete

Create a New Mapping Row

Quick Add

Level
Citation
 Tags
John
 Visibility
Library
 Add Row

Cancel Save

Public Tags Code Table

Make any required changes:

- To add a tag as a citation/section tag and as a library/public tag, enter the new information in the **Quick Add** area, and click **Add Row**. You can add the same tag multiple times with different values.
 - To change a tag's values, select new values in the tag's row.
 - To remove a tag's configuration, click **Delete** in the tag row.
4. When you are done, click **Save** to save your changes. To discard your changes, click **Cancel**.

Managing Label Generation Rules Using a Network Zone

New For September! You can create label generation rules (see [Configuring Representation Label Templates](#)) in a Network Zone and distribute them to member institutions. Each member can then configure whether to use its own rule or the Network Zone's rule. When configured to do so, the Network Zone label generation rules are used by the member institution when auto-generating labels.

To manage label generation rules using a Network Zone:

1. In the Network Zone, create a label generation template rule. For information, see [Configuring Representation Label Templates](#).
2. Click (**Resource Management > Advanced Tools > Distribute Network Configuration**) to run the **Distribute Network Zone resource management changes to member** job that distributes the label generation rules to member institutions.

You can also run this job on the Republish Shared Entities page; see [The Republish Shared Entities Page](#).

3. In the member institution, set the **network_label_template_rules_precedence** parameter to `true` to use the Network Zone's label generation rules instead of the locally defined rules (if any).

Adding Network Zone Partners to Resource Sharing Rota

New for September!



For more information about adding network zone partners to the rota, see the [Add Network Zone Partners to Rota](#) video (3:32 mins).

Member institutions in a Network Zone can manually enrich the rota based on known holders of the requested resource by adding partners to existing borrowing requests from a Network Zone search. The row action, **View Network Resources**, appears on a borrowing request of member institutions.

Resource Sharing Borrowing Requests

[Cancel](#)
Automatic renew
Change Status
Remove Requests

Limit results to:

Status

[Created borrowing request \(1\)](#)
[Ready to be sent \(1\)](#)

Active Partner

[Northwest Consortium \(1\)](#)
[USA SHARE \(1\)](#)

Creation Date

[Today \(2\)](#)

Update Date

[Today \(2\)](#)

Requested Format

[Physical \(2\)](#)

Supplied Format

[Undefined \(2\)](#)

Activity Status: Active

Find: in: Author

Go

Add Refresh

1 - 2 of 2 Records

Tools

☐ Select All

1 ☐ [Admiral of the blue : the life and times of Admiral John Child Purvis, 1747-1825 /](#)

Book By Gordon, Iain. (Pen & Sword Maritime 2005.)

ISBN: 1844152944 LCCN: 2006389355 OCLC Number: 60513885

External identifier: TRAININGMEMBER1CLEAN0000002 Internal Identifier: 156229190000502

Request Status: Created borrowing request Partner: Northwest Consortium

Requested Media: Any Requester: Team, Documentation

Pickup At: Resource Sharing Library

Creation Date: 08/31/2016 Update Date: 08/31/2016

[Edit](#) | [Duplicate](#) | [Send](#) | [Send query to patron](#) | [Receive](#) | [Reject](#) | [Locate Resource](#) | [View Local Resources](#) | [View Network Resources](#) | [Recalculate Rota Assignment](#) | [More details](#)

2 ☐ [Earth science](#)

Book By Lounsbury, John F., (Harper & Row [1969])

LCCN: 69010398

External identifier: TRAININGMEMBER1CLEAN0000001 Internal Identifier: 156227560000502

Request Status: Ready to be sent Partner: USA SHARE

Requested Media: Any Requester: Team, Documentation

Pickup At: Main Library

Creation Date: 08/31/2016 Update Date: 08/31/2016

[Edit](#) | [Cancel](#) | [Duplicate](#) | [Send](#) | [Send query to patron](#) | [Receive](#) | [Reject](#) | [Locate Resource](#) | [View Local Resources](#) | [View Network Resources](#) | [Recalculate Rota Assignment](#) | [More details](#)

Borrowing Requests Task List

Selecting the row action opens the network search results list. The search parameters are the same as they are for **View Local Resources**.

Repository Search [Back](#)

Current Search: All Titles where All titles (LC Control No. contains keywords "2006389355" and Tag Suppressed equals "false") [Change query](#)

Limit results to:

Inventory

Collection
Electronic title
Digital title
Physical title

Material Type

Book (1)

Language

English (1)

Publication Year

2005 (1)

Resource Type

Book - Physical (1)

Primary Sort by Rank Secondary Sort by Rank

1 - 1 of 1 Records [Tools](#)

1 **Admiral of the blue : the life and times of Admiral John Child Purvis, 1747-1825 / Iain Gordon.**
Book (Book - Physical) By Gordon, Iain. (Barnsley, South Yorkshire : Pen & Sword Maritime 2005.)
 ISBN: 1844152944
 Subject: Purvis, John Child,--1747-1825, Admirals--Great Britain--Biography. Great Britain--History, Naval--18th century, and others
 Language: English Record number: (OCoLC)ocm60513885
 Held by: [My Institution](#), [Training - Member 2 - Clean](#)

[Back](#)

Network Search Results List

If a query cannot automatically be created (for example, the **locate by** field OCLC does not exist in the request), a query will run with a single condition of **Tag Suppressed equals false**.

When selecting one of the institutions from the **Held By** line, click the **Add Partner** row action to add the partner to the bottom of the rota. The partner added is the partner that is configured with an Institution Code that matches the selected Held By institution. If the partner record has a Holding Code, it is added if the Holdings Code matches the library or campus code of the selected Held By holdings record.

'Held By' Details [Rota](#) [Back](#)

Title Admiral of the blue : the life and times of
Admiral John Child Purvis, 1747-1825 /
Iain Gordon.
Institution Training - Member 2 - Clean

Held by Institutions

My Institution (Training -
Member 1 - Clean)
Training - Member 2 - Clean

Holdings (1) Portfolios (0) Representations (0) Electronic Collections (0) Orders (0)

1 Library: Memorial Library
Location: Collections
Call Number: DA87.1.P87 G67 2005
No. of Items: 1
Available: 1
[Add Partner](#)

[Add Partner](#)

[Rota](#) [Back](#)

Held By Details

An **Add Partner** drop-down box and button also appear at the bottom of the **Held By Details** page, even if there are not any holdings. The list in the drop-down box is split into two sections:

- Held By - Partners that cover the holdings in the holdings list.
- Not Held By - The rest of the institution's partners that do not cover the holdings.

On all tabs aside from the **Holdings** tab, the **Add Partner** drop-down box lists all partners in an unsorted list.

Click **Rota** to view the rota tab of the request.