

Alma February 2017 Release Notes



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



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

Make the Most of This Release

Action Items

☐ [Library Scopes for Ledger Manager and Fund Manager](#) – This new capability will allow institutions to distribute the management of ledgers and funds to the library level. This extends and complements the already existing library-level use of funds for ordering and invoicing.

☐ [Unlink Records from the Network Zone](#) – To better support the maintenance and cleanup process in your institutional catalog, you can now unlink records from the Network Zone.

☐ [77X/78X Fields Available as Local Fields](#) – If you work with a Network Zone, you often need to record relations between records that are local to your institution. As of this release, you will be able to use the 77x/78x fields as local extensions.

Action Items

- ☐ [ProQuest KnowledgeBase Electronic Collections Added to the Community Zone](#) – Before locally creating an electronic collection for databases, search the Community Zone for it. The Alma Community Zone is now enriched with electronic collections representing databases, including descriptive information and access to native interfaces.

What's New

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

Acquisitions

- [Library Scopes for Ledger Manager and Fund Manager](#) – Ledger Manager and Fund Manager now have optional library scopes. Changes were made to ledger and fund workflows to utilize this new feature.
- [Importing COUNTER Data to Alma: Release Information and Enhancements](#) – Information regarding the COUNTER data general release was updated. In addition, various improvements were made to the COUNTER data feature in Alma for the select customers already using this feature.
- [Additional Acquisitions Enhancements](#)

Resource Management

- [GND Authority Profile](#) – A new GND authority profile is now available.
- [Accession Number Functionality Extended](#) – The accession number sequencing functionality was extended to include institution-level sequencing for holdings records.
- [Configurable Statistics Notes for Physical Items](#) – Statistics notes in the Physical Item Editor are now configurable.



- **An Idea Exchange Enhancement:** [Batch Deletion of Holdings Records](#) – A new batch job is now available for deleting holdings records with no items.



Watch the [Batch Deletion of Holdings Records](#) video.

- [Additional Resource Management Enhancements](#)

Digital Resource Management

- [Assigning a Digital Title to a Collection from the MD Editor](#) – You can now assign a title to a collection from the MD Editor.
- [Deposit Using SWORD](#) – The Deposit functionality was enhanced with the ability to deposit using SWORD.
- [Additional Digital Resource Management Enhancements](#)

Fulfillment

- [Course-Related Enhancements](#)
- [Additional Fulfillment Enhancements](#)

Resource Sharing

- [Adding a Note on Query to Patron](#) – A note field was added to the Query to Patron letter.
- [Notifying a Broker About a Recall Request](#) – Alma now sends an NCIP **RecallItem** message to notify a broker that an item is requested for recall.
- [Map Levels of Service for BLDSS](#) – It is now possible to assign a requested level of service for requests sent to the British Library using the BLDSS API. The level of service is mapped to the Service/Speed element of the Create Order BLDSS message.
- [Additional Resource Sharing Enhancements](#)

Collaborative Networks



- **An Idea Exchange Enhancement:** [Unlink Records from the Network Zone](#) – A new batch job is available for unlinking records from the Network Zone.



Watch the [Unlink Records from the Network Zone](#) video.

- [77X/78X Fields Available as Local Fields](#) – When cataloging records in the MD Editor, the 77X and 78X fields can now be added as local fields.

Analytics

- [New Titles Subject Area](#) – The new Titles subject area was added to Alma Analytics.
- [Holding Lifecycle Field Added to Holdings Details](#) – The **Holding Lifecycle** field was added to the Holdings Details dimension of the Physical Items subject area.
- [Additional Analytics Enhancements](#)

Administration and Infrastructure

- [Managing Sets Unified on One Page](#) – The Manage Sets pages previously found under Acquisitions, Resource Management, and User Management were unified into one page.
- [Twitter Added as a Social Login Provider](#) – An option to use Twitter as a new social authentication system was added to the social authentication integration profile.
- [Additional Administration and Infrastructure Enhancements](#)

APIs

- Alma is now able to send a webhook (for general information on webhooks in Alma, see <https://developers.exlibrisgroup.com/alma/integrations/webhooks>) when the following letters are sent: FulCancelRequestLetter, FulUserBorrowingActivityLetter, FullItemChangeDueDateLetter, FulPlaceOnHoldShelfLetter. Webhooks can be activated in the Letter Activity code table (**Administration > General Configuration > Configuration Menu > General Configuration > Letter Activity**). For detailed information on these webhooks, see <https://developers.exlibrisgroup.com...ifications.xsd>.
- An API was added to retrieve electronic collections. For more information, see <https://developers.exlibrisgroup.com...pis/electronic>.
- A new filter, **set_type**, was added to the Retrieve Sets API for both itemized and logical sets, enabling you to retrieve the subset of set data that you want.
- The Retrieve Course API now includes the following new fields:
 - **created_by**
 - **created_date**
 - **last_modified_by**
 - **last_modified_date**

Content Operations (formerly Data Services)

- [ProQuest KnowledgeBase Electronic Collections Added to the Community Zone](#) – As part of our efforts to incorporate the ProQuest KnowledgeBase in the Alma Community Zone, we have begun including approximately 9,000 ProQuest KnowledgeBase electronic collections in the Community Zone.
- [Library of Congress Authorities Community Zone Updates](#)
- [New Electronic Collections Added to the Alma CKB](#)
- No new external search resources were added for the February release.

Known Issues

The following known issues were identified for the February release:

- The counts for the **Number of Electronic Collections (All, Active, and Deleted)** Title measures in the new Titles subject area are currently not accurate. This issue will be fixed for the March release.

Next Release Sneak Preview

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

Acquisitions - February 2017 Enhancement

Library Scopes for Ledger Manager and Fund Manager

Alma now includes optional scopes for Ledger Manager and Fund Manager. Ledgers and funds are now owned by the institution or a library; additional changes were made to the ownership and availability workflow for funds and ledgers. For more information, see [Ledger and Fund Ownership and Availability](#).

Importing COUNTER Data to Alma: Release Information and Enhancements

COUNTER Data Release Information

In the May 2017 release, all Alma institutions will be able to import COUNTER data directly to Alma and use all COUNTER features. For Alma customers already using UStat, all previously loaded COUNTER data and defined subscribers in UStat will be imported to Alma with the May release. As of the May release, all live Alma institutions should no longer use UStat.

Beginning with the current, February release, all existing Alma institutions with UStat data can configure SUSHI accounts and test the account connection to the vendor from within Alma. Providing this ability now will ensure that these institutions have ample time to enter their required configuration information manually, in anticipation of the full COUNTER functionality that will be available in May. This is required, since there is no clear relationship between Alma vendors and UStat SUSHI accounts. Since the number of SUSHI accounts and definitions in UStat are typically small, Ex Libris is providing a clear Excel report from UStat to assist in this process. You should enter the SUSHI account information into Alma over the next couple of months.

- For existing Alma institutions with UStat data (or those that will have Alma before the May release), subscribers from UStat should already be configured in Alma. It is recommended not to create any new subscribers or SUSHI accounts in UStat until after the May release. Instead, re-create your SUSHI account configurations in Alma based on the instructions below.

Starting from February 5th, log in to UStat to download a Microsoft Excel file containing your SUSHI account data, as follows:

- a. Log in to UStat.
- b. Navigate to **Administration > Uploaded Files**.

- c. Filter by **All Files**, **alma sushi details**, and **All Uploaded**.

Home > Administration > Uploaded Files					
Uploaded Files Missing Data SUSHI Accounts SUSHI Harvest History					
Filter : All Files alma sushi details All Uploaded					
Upload File					
File Name	Upload Date	Uploading User	Subscriber	Status	
1 R.USTAT.csv	27 Nov 2016 22:00:00	ExlibrisSupport	alma sushi details	Fully processed	Details File Delete

- d. Click **File** and download the file. Enter the information in Alma, as described in [Managing COUNTER-Compliant Usage Data](#).

- Existing institutions currently implementing Alma, that are already testing their UStat data in Alma but are not "going live" before the May release, can continue to use UStat until they "go live." These institutions will have their UStat COUNTER data and subscriber information imported to Alma during the Alma cutover process. Note that any COUNTER data added to Alma during the implementation process will be overwritten by the UStat data at that point.
- Existing Alma institutions that do not use UStat will have full COUNTER functionality, including the ability to configure SUSHI accounts and subscriber information, as of the May release.
- Institutions that implement Alma in the future may choose to migrate COUNTER data from UStat or 360 Counter/Intota Assessment as part of their premium migration services.

COUNTER Data Feature Enhancements

Several enhancements were made to the new COUNTER data in Alma feature (available to select customers already working with COUNTER data in Alma):

- When creating a SUSHI account, the available report types now include **BR1**, **BR2**, and **DB1**.
- The time when the SUSHI harvesting job runs was changed from Saturday at 05:00 to Saturday at 03:00.
- The table columns **Vendor SUSHI Account** and **Data For** (indicating the year and month) were added to the SUSHI job report, and the **Status** column may now include the vendor's error message, if any. You can click **Preview records** in a report row to see the response from the vendor.
- To manage reports received from the vendor, select **View**, **Download**, or **Delete** from the **Actions** menu in the report row on the Usage Data Loader page or the **Usage Data** tab of the Vendor Details page.
- When viewing history of a SUSHI account (**Actions > View History**), the **Description** column now contains data and you can view the response/report by clicking **File Details** in the report row.
- The **Vendor** and **Report Type** filters were added to the Usage Data Loader page.

- On the **Missing Data** tab of the Usage Data Loader page, when possible, separate measurements for PDF, HTML, or combined usage are available.

Additional Acquisitions Enhancements

- Clicking a fund on the PO line Summary page, the Invoice Details page, or the Invoice Line Details page now opens the **Transactions** tab (rather than the **Summary** tab) of the fund, with the relevant PO line or invoice line used as a filter by default.
- The Discovery Interface Labels Custom code table (**Acquisitions > Acquisitions Configuration > Configuration Menu > Licenses > Discovery Interface Labels Customized**) displays customer-added license terms, if any. This read-only table was made visible so that you can see, in one place, all of the licenses that appear in Primo and their display names. See [Viewing User-Created License Terms that Appear in Primo](#).
- The field **ISBN** (for a book) or **ISSN** (for a journal) is now mandatory on the Purchase Request page when creating a purchase request. See [Creating a Purchase Request](#).
- You can now delete a patron purchase request after it was approved (and not only after it was rejected). See [Approving or Rejecting a Patron Purchase Request](#).
- The **VIEW_PO_POLINE** and **VIEW_ALL_VENDORS_DATA** privileges were added to the General System Administrator and Acquisitions Administrator roles. This fixes an issue that these roles had in working with PO line sets.

Resource Management - February 2017 Enhancements

GND Authority Profile

A new GND Authority profile is available. This is of particular interest to institutions cataloging and contributing records to the GND. While cataloging GND authority records in the Alma MD Editor, the GND Authority profile assists with GND contributions by having:

- All the GND fields defined, including mandatory definitions
- GND controlled vocabularies in place
- Specific normalization rules

For more information, see [Working with the GND Authority Profile](#).

In conjunction with these changes, the authority search indexes have been updated. See the [Authority Keyword Search Indexes – GND](#) table for GND in the [Keyword Search Indexes - MARC 21](#) section.

Accession Number Functionality Extended

In addition to library- and location-level sequencing functionality, you can now configure accession numbers in Alma to generate institution-level sequences for holdings records. See [Configuring Accession Numbers](#) for more information.

Configurable Statistics Notes for Physical Items

Statistics notes that are currently available when using the Physical Item Editor to edit item records can now be configured to manage specific statistical information. See [Statistics Notes](#) for more information.

Batch Deletion of Holdings Records

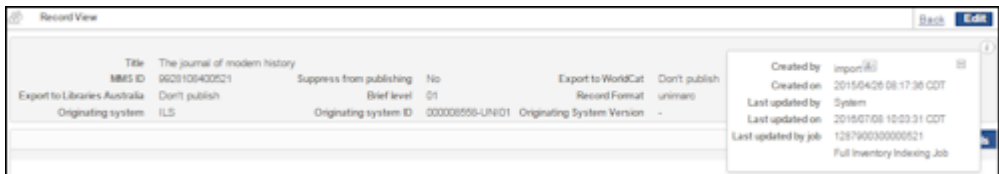
A new batch job is now available for deleting holdings records with no items. See [Delete holdings records with no items](#) on the [Running Manual Jobs on Defined Sets](#) page for more information.

Additional Resource Management Enhancements



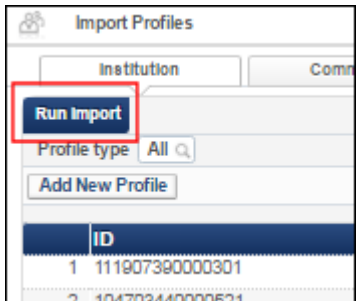
- **A NERS Enhancement:** MMS-ID was added to the Electronic Resource Activation Task List. It appears as a column on the page and when exporting the page to Microsoft Excel format.
- Electronic services can now be deleted as a batch job. See the [Additional Information tab – Services section](#) rows of the [Electronic Collection Editor Tabs and Fields](#) table on the [Managing Electronic Resources](#) page for more information.
- The holdings default template available in the MD Editor can now be used outside the MD Editor such as when placing orders through Acquisitions. This capability is enabled with the [temp_use_marc_record_holdings_template](#) customer parameter. See [Working with Templates](#) for more information.
- User interface changes were made to the simple Record View page and the Import Profile configuration pages.

On the simple Record View page, the heading summary information was rearranged to place the Title first. An information icon was added.



Simple Record View UI Changes

On the Import Profiles page, the Run Import section was removed.



Import Profiles Page - Removed Run Import Section

In the Automatic Multi-Match Handling section on the Import Profile Details page, the Unresolved Records section was removed and the **Skip and do not import** option was re-labeled **Skip and do not import unresolved records**.

Automatic Multi-Match Handling

Disregard matches for bibliographic CZ linked records

☐

Disregard invalid/canceled system control number
identifiers

☐

Prefer record with the same inventory type
(electronic/physical)

☐

Skip and do not import unresolved records

☐

Skip and Do Not Import Unresolved Records Parameter Re-labeled

- The UNIMARC, CNMARC, and KORMARC jobs have been added to the Run a Job - Select a Job to Run page (**Administration > Manage Jobs and Sets > Run a Job**). See [Running Manual Jobs on Defined Sets](#) for more information.
- A Friday scheduling option was added to the Upload Electronic Holdings integration profile.

Digital Resource Management - February 2017 Enhancements

Assigning a Title to a Collection from the MD Editor

You can now assign a title to a collection from the MD Editor. For more information, see [Viewing and Assigning Digital Collections](#).

Deposit Using SWORD

The Deposit functionality was enhanced with the ability to deposit using the SWORD protocol. For more information, see the [Developers Network](#).

Additional Digital Resource Management Enhancements

- The value of the **dc:identifier** field for Dublin Core records now appears in the repository search results as the **Record Number**.
- The following changes were made to the repository search results for digital files:
 - The **Label** field was added.
 - The file size is displayed in KB/MB.
 - The **Creator** and **Publisher** fields were removed.

Fulfillment - February 2017 Enhancements

Course-Related Enhancements

- Additional options are available for **On rollover copy copyright approvals** when configuring a course loader integration profiles. See [Configuring Course Loading](#).
- Once a reading list is associated with a course, copyright records may be fully or partially locked for accounting purposes. For more information, see [Automatically Managing a Citation's Copyright Status](#).
- The columns **Approval Reason**, **Date Available To**, and **Date Available For** were added to the Approval Requests List. These columns are initially hidden. The date columns refer to the dates that the material are requested be available for a citation in a course. For more information on this page, see [Digitization Processing](#).

Additional Fulfillment Enhancements

- After selecting **Automatically approved** when configuring a digitization profile rule, you can select the approval reason. For more information, see [Adding a Digitization Profile Rule](#).

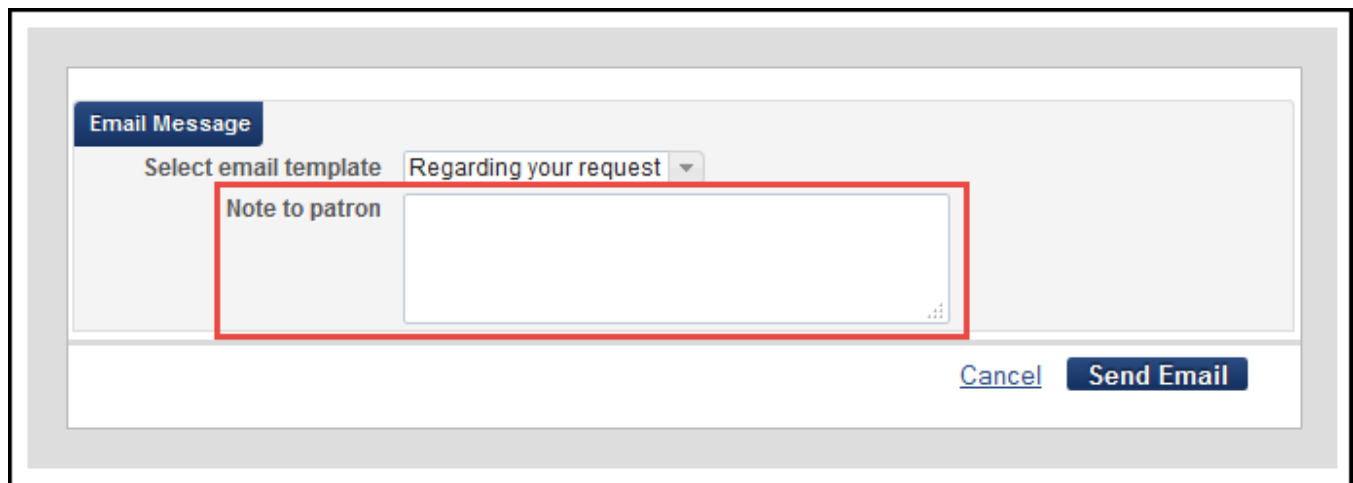


- **An Idea Exchange Enhancement:** A new customer parameter, **check_for_expired_account**, can be used in order to prevent fulfillment activities in case of an expired user. When set to true, the parameter will prevent patron requests or resource sharing requests from expired patrons. An override warning is displayed in Alma for resource sharing requests. The parameter is set to false by default. See [Configuring Other Settings](#).
- It is now possible to disable roles that could previously change the loan status to **Claimed Returned**. To disable these roles, contact Ex Libris Support.
- When changing the due date option in Manage Patron Services, the due date is now revised to match the expiry date of the patron (this already happens when loaning or renewing an item). When this happens a warning message appears to inform the user that the due date has been changed. See [Loaning Items](#).

Resource Sharing - February 2017 Enhancements

Adding a Note on Query to Patron

The Query to Patron letter can be sent from a resource sharing borrowing request. A note field was added to this letter. The query to patron window is invoked from the **Send query to patron** link on the **Resource Sharing Borrowing Requests** task list (see [Managing Resource Sharing Borrowing Requests](#)).



The screenshot shows a web interface for sending an email. At the top, there's a tab labeled 'Email Message'. Below it, a dropdown menu 'Select email template' is set to 'Regarding your request'. A red rectangular box highlights a new field labeled 'Note to patron' with a large text input area. At the bottom right, there are two buttons: 'Cancel' (a link) and 'Send Email' (a button).

Query to Patron

The note field is available when using the new format of the Query to Patron letter. Note that you must set **send_query_to_patron_use_xsl** to **true** to use the new format (see [Configuring Other Settings](#)).

The note appears in the **QueryToPatronLetter**.

Regarding your request

Dear Sir/Madam,

Regarding your request:

Format: Book
Title: tree
Date: 19/08/2015
Request Format: Physical

Query to patron:

[Please enter your query here]

[Please enter your query here]

[Please enter your query here]

«Note to patron»

Sincerely

Resource Sharing Library

Shimoni

Jerusalem

auto_tester_mail@gmail.com

Query to Patron Letter

Notifying a Broker About a Recall Request

Alma now sends an NCIP **RecallItem** message to notify a broker that an item is requested for recall. The message includes item information and the desired due date. The message is sent for all NCIP partners, regardless of their system types. Additionally, the **RenewItem** message is now sent for all NCIP partners, regardless of their system types.

You must configure the **Broker System NCIP URL** in the partner record to successfully send this message.

For more information, please see [Broker Based Resource Sharing - Lending](#).

Map Levels of Service for BLDSS

The **Create Order** message for BLDSS (British Library) borrowing requests includes a service/speed attribute to indicate the delivery speed requested. The Alma levels of service are now mapped to the Service/Speed element. The mapping levels are:

BLDSS Message Mapping

BLDSS Message	Alma Message(s)
Immediate Download	Express (Local)
2 Hours	Rush (Local) Rush (Extended)

BLDSS Message	Alma Message(s)
24 Hours	Priority (Local) Priority (Extended)
Within 4 days	Normal (Full) Normal (Local) When Convenient

For more information on Alma levels of service, see [Configuring Levels of Service](#).

For more information on the BLDSS levels of service, see [Resource Sharing Partners](#).

Additional Resource Sharing Enhancements



- **A NERS Enhancement:** MMS-ID appears in the Excel export from the Resource Sharing Lending Requests Task List and the Resource Sharing Borrowing Requests Task List. The new column, **MMSID**, appears as the last column in the export.
- The title for the receiving items pop-up window changed to **Receive Items**. The title for the shipping multiple items pop-up window changed to **Ship Multiple Items**.
- When a resource sharing request or a message (**Cancel**, **Recall**, **Reject**, **Renew**, **Request Renew** and **Return**) fails to be sent to ISO or email partners, the resource sharing message is now attached to the request (in the **Attachments** tab), an audit message is added, and a note is added to activate the request notes.
- A new parameter, **Requested Format**, with possible values of **Digital**, **Physical**, and **Physical non-returnable**, was added to the Sending Borrowing Request Rules (**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Sending Borrowing Request Rules**) page. See [Adding Sending Borrowing Request Rules](#).
- Search attributes for lending and borrowing requests now include **Other Standard ID** and **Remote Record ID**.
- Two new statuses have been added to the status list for lending requests: **Lost** and **Damaged**.

Collaborative Networks - February 2017 Enhancements

Unlink Records from the Network Zone

A new batch job is available for unlinking records from the Network Zone. See [Unlink a set of records from the Network](#) on the [Running Manual Jobs on Defined Sets](#) page for more information.

77X/78X Fields Available as Local Fields

When cataloging records in the MD Editor, the 77X and 78X fields can now be added as local fields (in addition to the previous method as shared fields with other members). Relations are created for these fields as usual, regardless of whether the cataloger chooses to enter the 77X/78X fields as local or shared. See [Adding Local Extensions to Bibliographic Records in the Network Zone](#) for more information.

Analytics - February 2017 Enhancements

New Titles Subject Area

The new Titles subject area was added to Alma Analytics. It allows you to create reports and dashboards that indicate duplicate titles for physical and electronic items in your repository. For more information, see [Titles](#).

The following out-of-the-box reports are now available under **Shared Folders > Alma > Titles > Reports**:

- Overlap P and E – prompt by LC Classification Code
- Overlap P and E – prompt by title range
- Overlap P and E – prompt by word from subject
- Overlap P and E – prompt by word from title

The **Overlap Analysis** reports are now available under **Shared Folders > Alma > Titles > Reports**. You can run these reports. The **Title Level Overlap Analysis** dashboard under **Shared Folders > Alma > Titles > Dashboards** will be available in March. The following is an example of a Titles report:

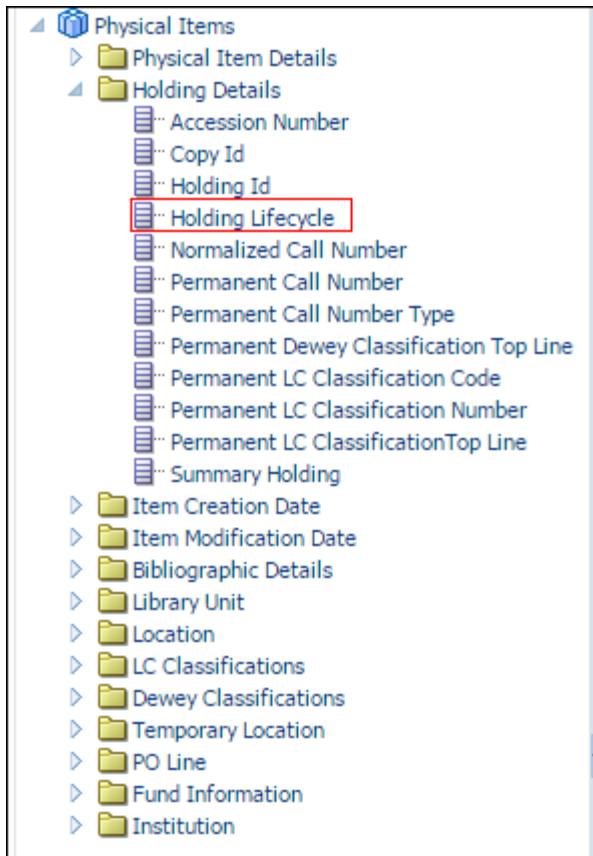
Overlap P and E - Prompt by Dewey Number

Title (Normalized)	Author	MMS Id	Electronic Inventory	Physical Inventory
american journalism		99 000 1060 1021 5407	0	18
		99 000 1290 1021 9057	2	0
black white and red all over a cultural history of the radical press in its heyday 1900 1917	Lumsden, Linda J., 1953-	99 310 1376 1021 6348	0	1
		99 260 1376 1021 6138	1	0
cables crises and the press the geopolitics of the new international information system in the americas 1866 1903	Britton, John A., author.	99 000 1369 1021 6176	1	0
		99 000 1374 1021 4787	0	1
directory of poetry publishers		99 000 1247 1021 6059	0	2
		99 000 1277 1021 5487	1	0
engaged journalism connecting with digitally empowered news audiences	Batsell, Jake, author.	99 710 1376 1021 7599	1	0
		99 270 1376 1021 7659	0	1
global muckraking 100 years of investigative journalism from around the world		99 640 1376 1021 5817	1	0
		99 940 1376 1021 6312	0	1
great conspiracy against our race italian immigrant newspapers and the construction of whiteness in the early twentieth century	Vellon, Peter G.	99 400 1376 1021 7355	0	1
		99 160 1376 1021 7264	1	0
invention of news how the world came to know about itself	Pettegree, Andrew, author.	99 510 1376 1021 5348	0	1
		99 010 1376 1021 5090	1	0
joc week		99 000 1203 1021 0536	0	11
		99 000 1292 1021 6452	7	0
journal of the history of collections		99 000 1108 1021 3929	0	9
		99 000 1274 1021 1188	1	0
journalism communication monographs		99 000 1041 1021 8927	0	10
		99 000 1264 1021 6768	3	0
journalism mass communication quarterly		99 000 1105 1021 0615	0	37
		99 000 1274 1021 9084	4	0
museum international		99 000 1097 1021 6644	0	15
		99 000 1266 1021 1846	2	0
		99 000 1305 1021 8686	2	0

Titles Report

Holding Lifecycle Field Added to Holdings Details

The **Holding Lifecycle** field was added to the **Holdings Details** dimension of the **Physical Items** subject area. It can be used to filter for active or deleted holdings records.



Holding Lifecycle

Additional Analytics Enhancements

- The **Overdue Sent Date** field was added to **Lending Requests > Lending Request Details**. It indicates the date the last overdue message was sent.
- The **ISBN (Normalized)** field was added to the shared **Bibliographic Details** dimension. It is the same as the ISBN and was added for uniformity with the **Title (Normalized)** and **ISSN (Normalized)** fields.
- The three out-of-the-box reports in the **Physical Item Usage for Weeding** dashboard no longer include withdrawn (deleted) items.

Administration and Infrastructure - February 2017 Enhancements

Managing Sets Unified on One Page

The Manage Sets pages previously found under Acquisitions, Resource Management, and User Management were unified into one page, located under **Administration > Manage Jobs and Sets**. The types of sets that you can create on this page depend on your user role. For more information, see [Managing Search Queries and Sets](#).

Twitter Added as a Social Login Provider

An option to use Twitter as a new social authentication system was added to the social authentication integration profile. For more information, see [Social Login](#).

Additional Administration and Infrastructure Enhancements

- Course and reading list names are now translatable.
- Copyright notices can now be configured in any language that is set up as the preferred language.



- **An Idea Exchange Enhancement:** When paying patron fines and **All Fines** is selected, the total outstanding balance is displayed in the **Payment Amount** field. For more information, see [Receiving Payment for Fines and Fees](#).

Content Operations - February 2017 Enhancements

ProQuest KnowledgeBase Electronic Collections Added to the Community Zone

As part of our efforts to incorporate the ProQuest KnowledgeBase in the Alma Community Zone, we have begun including approximately 9,000 ProQuest KnowledgeBase electronic collections in the Community Zone. These e-collections represent databases with no titles, including descriptive records and URL access to the native interfaces. Having these e-collections as part of the Community Zone will eliminate the need to create local e-collections representing these databases as part of the acquisitions process. As with any other e-collections, these new e-collections can be activated and made publicly available in your discovery system.

Examples of such e-collections include:

- GeoRef - <http://search.proquest.com/georef>
- ulrichsweb.com - <http://ulrichsweb.serialssolutions.com>
- Gale Archives Unbound - <http://infotrac.galegroup.com/itweb/locid?db=GDSC>
- Britannica Online Academic Edition - <http://academic.eb.com/>

Library of Congress Authorities Community Zone Updates

The following are the Library of Congress subject authority updates for the period of December 28th through January 19th:

- Number of records updated: 54
- Number of records added: 207
- Number of records deleted: 20

The following are the Library of Congress name authority updates for the period of December 28th through January 19th:

- Number of records updated: 8711
- Number of records added: 11370
- Number of records deleted: 195

The following are the Canadian name authority updates for the period of December 28th through January 19th:

- Number of records updated: 41
- Number of records added: 693
- Number of records deleted: 1

The following are the Library of Congress Genre/Form Terms (LCGFT) updates for the period of December 28th through January 19th:

- Number of records updated: 9
- Number of records added: 19

New Electronic Collections Added to the Alma CKB

The following collections were added to the Alma Community Zone from January 5th through January 22nd:

- Bacon Elsevier Couperin Cellpress
- Bacon Elsevier Couperin Complete Freedom Collection
- Bacon Elsevier Global Cellpress Open Access
- Bacon Taylor & Francis France Istexebooks
- CAUL Taylor & Francis Journals
- CRKN Taylor & Francis Additional Titles 2017
- CRKN Taylor & Francis Medical 2017
- CRKN Taylor & Francis Science And Technology 2017
- CRKN Taylor & Francis Social Science And Humanities 207
- Ebook Central Business - International
- Ebook Central Canada - Canadienne
- Ebook Central College Complete International
- Ebook Central Education - International
- Ebook Central Health & Medicine - International
- Ebook Central History - International
- Ebook Central Law - International
- Ebook Central Literature & Language - International
- Ebook Central Religion & Philosophy - International
- Ebook Central Science & Technology - International

- Ebook Central Social Sciences - International
- Ebook Central The Arts - International
- Hogrefe eLibrary Perpetual
- IEEE Xplore MIT Press eBooks 2016
- KB+ JISC Collections Association For Computing Machinery Digital Library 2017-2019
- KB+ JISC Collections Institute Of Physics IOP Science Extra 2017-2019
- KB+ JISC Collections Sage IMechE Journals 2017-2018
- KB+ JISC Collections Sage The Royal Society Of Medicine 2017-2018
- Ovid Lippincott Williams & Wilkins Nursing Health Professions Premier 2017
- Ovid Nursing Community College Basic Journal Collection
- Oxford Research Encyclopedias
- Royal Society of Chemistry eBook Collection 2016
- Sage Reference Online 2016 Encyclopedia Collection
- Society for Applied Anthropology
- SpringerLink Books Behavioral Science and Psychology 2017
- SpringerLink Books Biomedical and Life Sciences 2017
- SpringerLink Books Business And Economics 2017
- SpringerLink Books Business and Economics German 2017
- SpringerLink Books Business And Management 2017
- SpringerLink Books Chemistry and Materials Science 2017
- SpringerLink Books Computer Science And Engineering German 2017
- SpringerLink Books Computer Science Without Lecture Notes 2017
- SpringerLink Books Earth and Environmental Science 2017
- SpringerLink Books Economics and Finance 2017
- SpringerLink Books Education 2017
- SpringerLink Books Energy 2017
- SpringerLink Books Engineering 2017
- SpringerLink Books History 2017
- SpringerLink Books Humanities Social Sciences and Law 2017
- SpringerLink Books Law and Criminology 2017
- SpringerLink Books Lecture Notes In Computer Science 2017
- SpringerLink Books Lecture Notes In Physics 2017

- SpringerLink Books Life Science and Basic Disciplines German 2017
- SpringerLink Books Literature Cultural and Media Studies 2017
- SpringerLink Books Medicine 2017
- SpringerLink Books Medicine Dutch 2017
- SpringerLink Books Medicine German 2017
- SpringerLink Books Physics and Astronomy Without Lecture Notes 2017
- SpringerLink Books Political Science and International Studies 2017
- SpringerLink Books Professional And Applied Computing 2017
- SpringerLink Books Psychology German 2017
- SpringerLink Books Religion and Philosophy 2017
- SpringerLink Books Social Science and Law German 2017
- SpringerLink Books Social Sciences 2017
- SpringerLink Books Springer Reference De German 2017
- TAEBDC ABC-Clio eBooks 2015
- TAEBDC AiritiBooks 2015
- TAEBDC Cambria eBooks 2015
- TAEBDC CRC netBase eBooks 2015
- TAEBDC Gale eBooks 2015
- TAEBDC HyRead eBooks 2015
- TAEBDC IG Publishing eBooks 2015
- TAEBDC IGI Global InfoSci EBooks 2015
- TAEBDC IOS eBooks 2015
- TAEBDC Jstor Books 2015
- TAEBDC L&B eBooks 2015
- TAEBDC Sage eBooks 2015
- TAEBDC Springer eBooks 2015
- TAEBDC Taylor & Francis eBooks 2015
- TAEBDC Thieme eBooks 2013
- TAEBDC World Scientific eBooks 2015
- UDN eBooks 電子書

New External Search Resources

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

Next Release Sneak Preview

Resource Management



- **A NERS Enhancement:** Enhance Lists with MMS ID – The MMS ID will be added to staff search options such as Titles (all, physical, electronic, digital), Electronic collections, and Physical items.
- Improved Authority Headings Display (F3) – Additional display elements will be added to the Authority Headings display. The specific subfields will be predefined in the system, but you will be able to choose which subfields to display in the list.

Digital Resource Management

- Check Access Rights by Callout to a Local DAM System – Alma will be able to call an external system to check allowed access rights. This is being implemented initially with Rosetta.

Fulfillment



- **A NERS Enhancement:** Improved Renew Options – Alma will now be able to save and display a **Last Renew Status** and **Last Renew Date**. Every renew attempt on a loan will populate this information on the loan record, which can then be displayed in the loan list.
- Change of Location When Loaning a Reading Room Loan – It will be possible to configure a reading room desk with a location, so that when an item is loaned at the desk it is automatically moved temporarily to this location.

Resource Sharing

- Print Slip Option to Receive Interface – A check box will enable automatically printing a receive slip for every checked-in item. It will also be possible to separately configure the slip that is triggered for a resource sharing received item.

Administration

- Social Login - Option to Disconnect Account – A menu option will enable staff to disconnect a logged in user from his/her social account, thereby removing the social network ID from the list of IDs.

APIs

The following APIs will be introduced:

- New GET APIs for retrieving electronic services and electronic portfolios
- An API to change a logical set to an itemized set
- New APIs enhancing the real-time ordering integration with vendor systems such as Coult's OASIS:
 - The GET funds API will be able to take into account an additional amount to be encumbered, as an optional parameter.
 - In the New Order API integration profile, there will be a new section **Validation of Order Information**, with a subsection **Do not create the order in case of** that will deal with fund-related issues.

- An *encumbrance* indicates money that is expected to be paid out, as the result of a PO line. This decreases its available balance. The encumbrance is closed if there is an equal disencumbrance linked to the same PO line.
- An *expenditure* subtracts money from the fund, decreasing its available balance. Adding an expenditure lined to a PO line increases the value of the disencumbrance linked to that PO line.
- A *disencumbrance* is added or increased when adding an expenditure linked to the same PO line as an encumbrance. There is never more than one disencumbrance for any encumbrance. For example:
 - If a fund has a \$100 encumbrance for a PO line. An invoice for \$50 linked to that PO line is received. The encumbrance remains \$100, an expenditure of \$50 is added, and a disencumbrance of \$50 is added.
 - After receiving another \$50 invoice for the PO line, there are now two expenditures (each for \$50), an encumbrance of \$100, and a disencumbrance of \$100. The encumbrance is now considered fully paid and is closed.
- A fund's *available balance* is its allocated balance, less (encumbrances minus disencumbrances) and less expenditures.
- A fund's *cash balance* is its allocated balance less expenditures.
- A fund's *allocated balance* is its total allocation, not counting any expenditures or encumbrances/disencumbrances.
- A fund's *encumbered balance* is the sum of its encumbrances minus disencumbrances.
- A fund's *expenditure balance* is its the sum of its expenditures.

Ledger and Fund Ownership and Availability

New for February

A ledger is owned by either the institution or a library. Any funds added to the ledger are owned by the same entity that owns the ledger.

When creating the ledger, you can set the ownership of the ledger to a library (the institution is selected by default). A user with a role with an institution scope can later change the ownership of a ledger from the library to the institution, but not the reverse (the user cannot change the ledger from being owned by the institution to now being owned by a library). Changing the ownership of the ledger changes the availability scope of the ledger and the ownership of all of its funds, but does not change the availability scope of the funds.

When creating the ledger or fund, you can restrict the availability of the ledger or fund to one or more libraries within the institution. To view or manage a ledger or fund available to a particular library, a user must have the role Ledger Manager or Fund Manager with a scope of institution or that library.

A user with a role with an institution scope can change the availability of a ledger or fund to include more or less libraries. When you remove the availability of a ledge from one or more libraries, the associated funds are also

made unavailable to these libraries. When you add availability to a ledger for one or more libraries, the funds remain unavailable to the libraries unless you add them as well.

When transferring funds between ledgers, you can only move the fund to a ledger with the exact same availability as the one from which you are moving the fund.

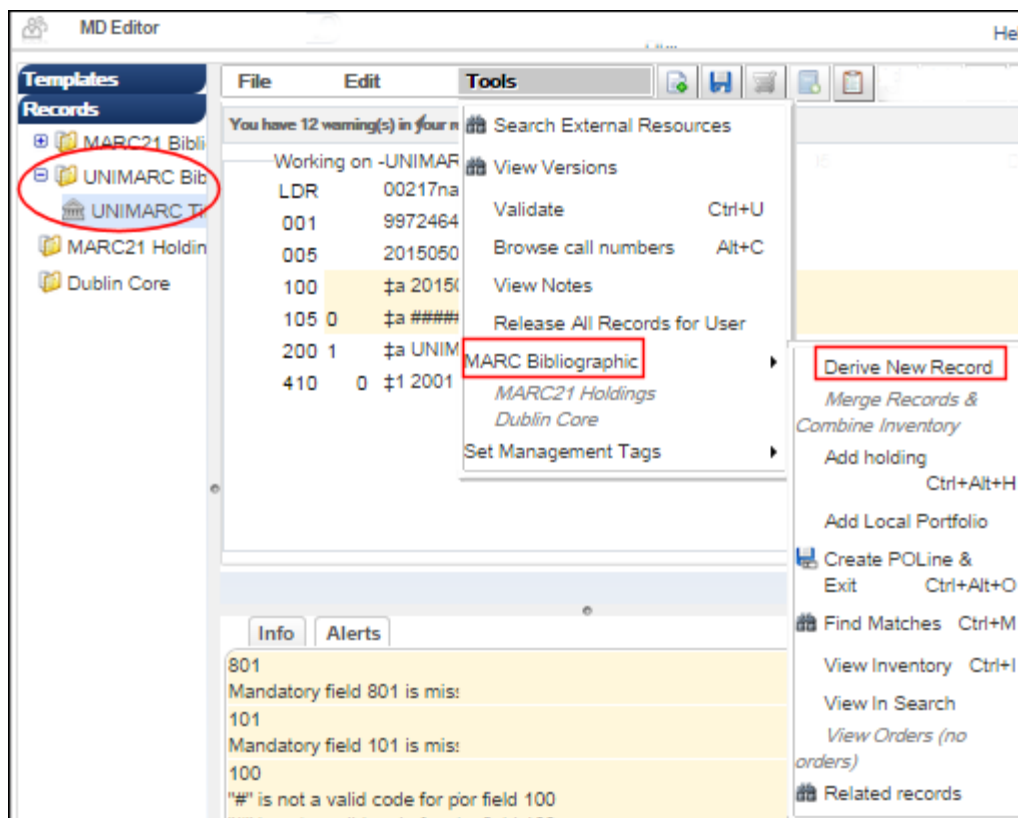
Exchange Rate Handling in Funds

When a PO line creates an encumbrance in a currency that is different than the fund's currency, the available balance is calculated based on the exchange rate between the two currencies. The exchange rates and calculated values of open encumbrances in a foreign currency are recalculated weekly by the **Recalculate Exchange Rate Based on Current Date** job (see [Viewing Scheduled Jobs](#)). The exchange rate and exchange rate date of a disencumbrance are always the same as its related encumbrance.

In the following example, a purchase is made in USD on Thursday, and the invoices are received on Sunday and Tuesday. The fund is in EUR and its available balance was 1,000 (one thousand) EUR before the purchase. The available balance is always its total allocation less (calculated encumbrances minus calculated disencumbrances) and less expenditures.

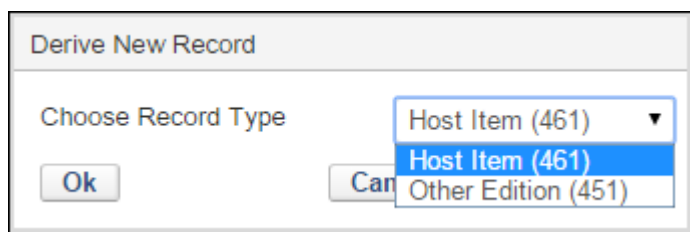
Exchange Rate Recalculation Example

Date	Events	Exchange Rate EUR/USD	Encumbrance	Expenditures	Disencumbrance	Available Balance
Thursday	A USD 100 PO Line is sent, to be paid from a EUR fund	0.91	Value: 100 USD Calculated: EUR 91 Exchange Rate Date: Thursday Status: Open			909 EUR: 1000 - 91 encumbrance
Friday		0.92	Value: 100 USD Calculated: EUR 91 Exchange Rate Date: Thursday Status: Open			909 EUR: 1000 - 91 encumbrance
Saturday	The recalculation job runs	0.93	Value: 100 USD Calculated: EUR 93 Exchange			907 EUR: 1000



Derive New Record Option

The **Derive New Record** dialog box appears.



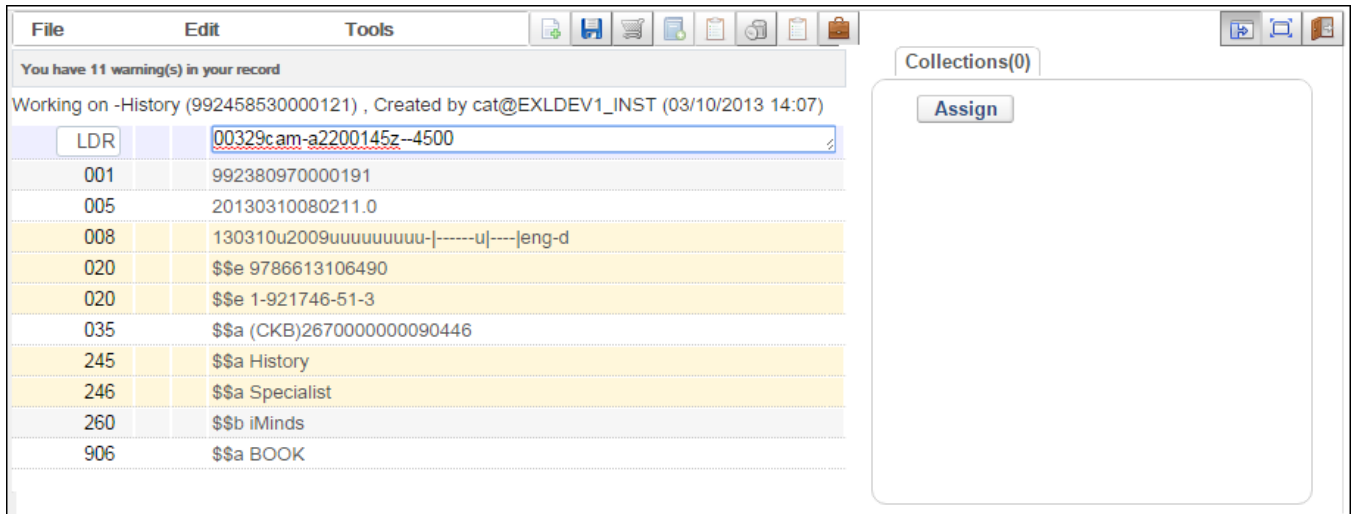
Derive New Record Dialog Box

Viewing and Assigning Collections

You can view the collections to which a record is assigned and assign and unassign a record to a collection.

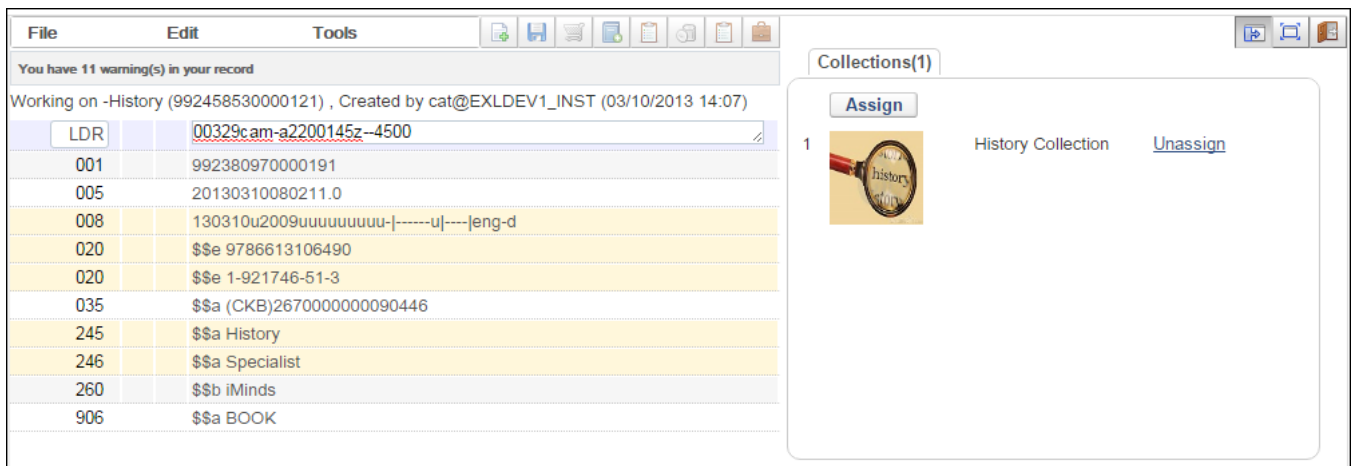
To assign a record to a collection:

1. Edit a record (MARC or Dublin Core) in the MD Editor and select **Tools > View Collections**. The Collections pane is displayed:



Collection Pane

2. Click **Assign** and select a collection to which you want to assign the digital record. The collection is displayed in the Collections pane.



Assign Collection

To unassign a collection, click **Unassign**.

NOTE: Digital records must be assigned to at least one collection, so the Unassign link does not appear for digital records that are assigned to only one collection.

For more information on collections, see [Managing Collections](#).