
Alma March 2017 Release Notes



The Soul of Alma Streamlined Workflows

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

☐ [Authority Headings Display Options](#) – If you find that the information displayed for the F3 lookup of an authority heading is not sufficient to clearly determine the correct heading, you can now customize and enhance the heading display.

☐ [Changing Location for a Reading Room Loan](#) – Reading room loans often require management processes that are different than those of regular loans, such as processes for managing courtesy letters and overdue loans. If you have been looking for easy ways to implement reading room processes, check out the new option to automatically change the location of items that are loaned at the reading room.

Action Items

☐ [Automatic Print Slip Option on the Receiving Items Page](#) – Resource sharing borrowers now have an easy way to print temporary barcodes and other borrowed item information at receive time. Configure your receive slip (or activate the out-of-the-box one), and start printing receive slips with no additional effort.

☐ [New Licenses Subject Area](#) – As part of the March release the new Alma Analytics Licenses subject area includes a wide array of information pertaining to the license. The information contained here comes from the license header as well as the license terms. Retrieval can be performed not only on the names of the terms but also on the values, allowing for the institution to maintain a close appraisal of the status and contents of the various licenses.

What's New

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

Acquisitions

- [Acquisitions Enhancements](#) – Several enhancements were made to the Acquisitions functional area for the March release.

Resource Management

- [Authority Headings Display Options](#) – Authority headings display results for preferred/nonpreferred records (using F3) can be expanded with new configurable options to provide greater detail.



Watch the [Authority Headings Display Options](#) video.

- [Additional Resource Management Enhancements](#)

Digital Resource Management

- [Support for Access Rights for Remote Digital Repositories](#) – You can now configure Alma to check access rights policies in a remote repository. This was implemented with Rosetta and can be used for other digital asset management systems that support this type of real-time check.
- [Additional Digital Resource Management Enhancements](#)

Fulfillment



- **NERS Enhancement (Request ID 4661):** [Renewal Enhancements in Manage Patron Services](#) – Two new columns were added in the Loans list in Manage Patron Services in order to better manage the **Renew Selected** and **Renew All** actions.
- [Keep Old Values When Overwriting or Rolling Over Courses](#) – When editing or rolling over a course and a field is marked for overwrite, you can instruct the job to keep the old values in the course loader integration profile.
- [Integration with the Digital Content Store \(UK\)](#) – You can now attach items to the CLA's Digital Content Store (UK only).
- [Changing Location for a Reading Room Loan](#) – A library now has the option to temporarily change the location of an item that is loaned at a reading room.
- [Additional Fulfillment Enhancements](#)

Resource Sharing



- **Idea Exchange:** [Automatic Print Slip Option on the Receiving Items Page](#) – Print slips may now be set to automatically print from the Receiving Items page.
- [Additional Resource Sharing Enhancements](#)

Collaborative Networks

- [Templates for Externally Managed Authority Records](#) – Templates can now be created in the Network Zone for externally managed authority records.

Analytics



- **Idea Exchange:** [New Licenses Subject Area](#) – The new **Licenses** subject area was added, allowing you to create Analytics reports concerning license information.

- [Digital Usage Fields Added to Link Resolver Usage](#) – Several fields were added to the **Link Resolver Usage** subject area to support the reporting of digital usage.
 - [Additional Analytics Enhancements](#)
-

Administration and Infrastructure

- [Option to Disconnect a Social Login Account](#) – Options have been added to disconnect a user logged into Alma with a social account.
 - [Additional Administration and Infrastructure Enhancements](#)
-

APIs

- Running Student Information System (User) jobs using the Jobs API is now supported.
- **available_balance** was added as a field to the GET Funds API.
- An API was created to change a logical set to an itemized one.
- The reading list's visibility and publishing status were added to the reading list API. These fields are relevant for Leganto customers.



- **Idea Exchange:** Full text links can now be retrieved using an API. The links are included in the **resolution_url** field in the CTO API: https://developers.exlibrisgroup.com/alma/integrations/discovery/services_page
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Content Operations

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

There are no known issues for the March 2017 release.

Next Release Sneak Preview

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

Acquisitions - March 2017 Enhancements

- An additional section, **Validation of Order Information**, was added to the New Order API integration profile. This section enables you to not create an order if the fund information is incorrect or the funding is incomplete. For more information, see [Defining an Integration profile with your preferred match rule](#) on the Developer Network.
- In the **EDI Information** tab on the Managing Vendors page, **Swets** was removed as an option in the **EDI vendor format** drop-down list, and **ProQuest** was added. Nevertheless, the **ProQuest** option is reserved for future use. For more information, see [Electronic Data Interchange \(EDI\)](#).
- Support was added for COUNTER report types DB1 (using SUSHI harvesting) and JR1 GOA (using either manual upload or SUSHI harvesting). See [Managing COUNTER-Compliant Usage Data](#).
- A new role, **Fund-Ledger Viewer**, was added. Users with this role can search for funds, and can view (but not edit) funds and ledgers.

Resource Management - March 2017 Enhancements

Authority Headings Display Options

Authority headings display results for preferred/nonpreferred records (using F3) can be expanded with new configurable options to provide greater detail. In cases where the standard authority headings results display a limited amount of information, it can be difficult to determine which record to select when more than one record appears with the same information in the authority headings results list. With this new capability, more detail can be displayed, eliminating the need to click **View** for multiple headings records in order to make the correct choice/selection. See [Working with Authority Headings Rules](#) for more information.

Additional Resource Management Enhancements



■ **NERS Enhancement (Request ID 4615):** MMS IDs have been added in the following locations:

- Data exported to a Microsoft Excel spreadsheet (**Tools > Excel**) from repository search results for All titles, Physical titles, Electronic titles, Digital titles, Digital files, Physical items, Electronic Portfolio, Collection, Electronic Collection, and the List of Items page (opened, for example, using the **Items** link on the Physical Titles results page)

	A	B	C	D	E	F	G	H
1	title	Creator/Publisher	Update ID	Language	Medium Type	Record number	Availability	MMS ID
2	Cognitive science and math Book By Schoenfeld, Alan			English		[TrN]36297-train20072_c2c	Availability Physical version	9952760000541
3	Philosophy of science : an i Book By Bechtel, William J			English		[TrN]36301-train20072_c2d	Availability Physical version	9952760000541
4	Nanocoherence : the unit Book By Banbridge, William			English		[TrN]64267-train20072_c2c		9952760000541
5	The mind's new science : a Book By Gardner, Howard			English		[TrN]34323-train20072_c7c	Availability Physical version	9952760000541

MMS ID Export to Excel - Physical Titles Example

- Data exported to a Microsoft Excel spreadsheet (**Tools > Excel**) from the Community Zone Updates Task List page (**Resource Management > Manage Inventory > Community Zone Updates Task List**)
- Data displayed on the Electronic Resource Activation Task List page (**Resource Management > Manage Inventory > Manage Electronic Resource Activation**)
- Data displayed on the Top Level Collections page (**Resource Management > Search > Manage Collections**)

- The **AuthorityGenerateControlNumberSequence** task was added to the Process List Pool for all authority metadata configuration profiles. See [Working with Normalization Processes](#) for more information.
- When adding a new import profile, the **Profile type** summary information now also includes the **Profile name** and was moved to start on the Import Profile Details page of the wizard that contains the Filter, Normalization, and Validation Exception Profile sections. The **Profile type** information no longer appears on the wizard page with the Profile Details section.

Summary Information Moved in the Import Profile Wizard

- Entering Hebrew text in the MD Editor was corrected so that:
 - When the text in a field aligns at the right, one can continue editing with the first subfield versus the cursor being positioned at the end of the last subfield when there are multiple subfields opened in a new field.
 - The space added between the first and second Hebrew letter in a subfield upon **Save** no longer occurs.
- New subfields are now available in the AVA field when using the Retrieve Bib or Retrieve Bibs APIs and SRU. The holdings record MMS ID is provided in \$\$8 and the textual holdings information in the 868, 867, and/or 868 \$\$a is provided in \$\$t (a repeatable field) of the AVA field.

```

▼<datafield ind1=" " ind2=" " tag="AVA">
  <subfield code="0">999507969484702202</subfield>
  <subfield code="8">22137258750002202</subfield>
  <subfield code="a">47BIBSYS_NB</subfield>
  <subfield code="b">0030100</subfield>
  <subfield code="c">NB Oslo</subfield>
  <subfield code="d">NA/A q 8912</subfield>
  <subfield code="e">available</subfield>
  <subfield code="f">1</subfield>
  <subfield code="g">0</subfield>
  <subfield code="j">g00005</subfield>
  <subfield code="k">8</subfield>
  <subfield code="p">2</subfield>
  <subfield code="q">Publikumstjenesten</subfield>
  <subfield code="t">2005 June 10-20</subfield>
  <subfield code="t">2008 July 3-5</subfield>
  <subfield code="t">2013 Aug. 4-21</subfield>
</datafield>

```

New AVA Subfields 8 and t

For more information, see [Retrieve Bib](#), [Retrieve Bibs](#), and [SRU](#) in the Developer Network. For additional information regarding AVA published fields, see [The Format of Published Data](#) section.

Digital Resource Management - March 2017 Enhancements

Support for Access Rights for Remote Digital Repositories

You can now configure Alma to check access rights policies in a remote repository and enforce the access rights when a user searches for the digital resource in Alma. This was implemented with Rosetta and can be used for other digital asset management systems that support this type of real-time check. To activate this option, select the new **Check access rights** check box when configuring the remote repository. For more information, see [Delivery \(Wizard Step 3\)](#).

Additional Digital Resource Management Enhancements



- **NERS Enhancement (Request ID 4615):** The **MMS ID** now appears in the Excel file when exporting digital collections, titles, and files from the repository search results.

Fulfillment - March 2017 Enhancements

Renewal Enhancements in Manage Patron Services



NERS Enhancement (Request ID 4661): Two new columns were added to the **Loans** list in **Manage Patron Services**. The columns, **Last Renew Date** and **Last Renew Status**, are hidden by default. They are accessed from the **Columns** button above the list. Once the columns are visible, they display the most recent status and date for the item if any renewal has been attempted. For more information, see [Managing Patron Services](#).

The screenshot shows the 'Patron Services' interface. At the top, there's a header with 'Patron Team, Documentation', 'ID DocId:34567890', 'User group Staff', and 'Active balance 0.00 USD'. Below this is a 'Loans' tab. The main area displays a table with columns: Title, Due Date, Barcode, Fine, Loan Date, and Loan Status. A single record is visible: 'Modern science /', '2017/02/01 17:00:00 CST', '123456', '-', '2017/02/01', and 'Normal'. To the right of the table, a 'Columns' menu is open, showing a list of columns that can be displayed. The columns 'Last Renew Date' and 'Last Renew Status' are highlighted with a red box, indicating they are the new enhancements. Other columns include Title, Due Date, Barcode, Fine, Loan Date, Loan Status, Item Policy, Library, Call Number, Accession Number, and Alternative Call Number. The bottom of the interface shows 'Ex Libris, a ProQuest Company, 2017'.

Patron Services Hidden Columns

The possible statuses for the **Last Renew Status** column are:

- Renewed successfully
- Item is not renewable
- The item status is "Claim returned" and cannot be renewed
- The item status is "Recalled" and cannot be renewed
- The item status is "Lost" and cannot be renewed
- User does not have a patron role or the role has expired
- Renewing the loan conflicts with a booking request and the due date must be shortened
- The item cannot be renewed since there is a request for this item
- Item renew period exceeded

Keep Old Values When Overwriting or Rolling Over Courses

When editing a course and a field is marked for overwrite, or when rolling over a course, entering a plus sign (+) in the field instructs the job to keep the old value for this field (as if overwrite was not selected). Any other value (including an empty value) is used in place of the old value.

For searchable IDs and instructors, when editing or rolling over a course, if a + is entered in any of the fields, any values added in these columns are merged with any existing values in the course.

For more information, see the note in [Configuring Course Loading](#).

Integration with the Digital Content Store (UK)

This feature is relevant for UK customers only.

The [Digital Content Store](#) (DCS) is a web-based platform that combines a searchable repository of digitized book and journal extracts with an online workflow management tool. The platform is managed by the UK's [Copyright Licensing Agency](#) (CLA). Library staff create reading lists in the DCS in order to manage and process the digitization and copyright clearance process in that system. At the end of the process, and after copyrights clearance for the materials is approved, the library staff receives a licensed URL that links to the digitized contents stored in the DCS.

You must configure a new integration profile, **Digital Content Store**, to automatically retrieve citation URLs from the CLA. See [Integrating with the UK's Digital Content Store \(DCS\)](#).

After adding the profile, you can manage citations' attachments to DCS items. For more information, see [Managing Citations](#).

Changing Location for a Reading Room Loan

A library now has the option to temporarily change the location of an item that is loaned at a reading room for the duration of the loan so that the library can apply special rules to the item for as long as it is on a reading room loan, based on its temporary location. The item automatically reverts to its original permanent location when a final check-in is made. The library configuration is optional and per reading room desk. If the configuration is not performed, reading room loans function as before. The temporary change of location automatically expires when the item is returned as a final return. The item is then put in transit back to its permanent location where scanning it in sets the item to be reshelfed. For more information, see [Adding a Circulation Desk](#).

Additional Fulfillment Enhancements

- When duplicating a reading list, its section and citation tags and public notes are also duplicated.
- You can now add more than three searchable IDs on the Manage Course Information page. See [Managing Courses](#). In addition, when using the course loader integration profile, you can add multiple searchable IDs in the third searchable IDs field, separated by commas (similarly to adding multiple instructors in the last instructors column). See [Configuring Course Loading](#).
- Additional, optional criteria can be used to limit the citations processed by the Citation Inventory Enrichment job (see [Matching Reading List Citations to Inventory in Bulk](#)). The additional criteria include:
 - A specific course
 - Reading lists with a specific status
 - Citations with a specific status
- The last person to modify a reading list now appears in the **Reading List Information** of the Edit Reading List page. For more information about this section, see [Managing Reading Lists](#).
- The **Creative Commons License** field was moved from the **Copyright Attributes** to the **Citation Parameters** section on the Edit Reading List Citation page. In addition, **Citation License Type** was removed as a clause when adding a digital profile rule.
- The **Library** section heading on the fulfillment configuration menu has been changed to **Library Management**. The ability to click the heading to invoke the Organization Unit Details page is replaced by a new link, **Library Details**, on the fulfillment configuration menu in the Library Management section. The link is active only when configuring a library.

Resource Sharing - March 2017 Enhancements

Automatic Print Slip Option on the Receiving Items Page



Idea Exchange: Print slips may now be set to automatically print from the Receiving Items page using the **Automatically print slip** radio button. The option defaults to **No**. The selection is remembered for the duration of the session. When **Automatically print slip** is set to **Yes**, if multiple items are being scanned, a print slip is generated for each barcode. For more information, see [Receiving Items](#).

Receive Items

Title

Experiencing science /

External identifier

TRAINING10000012

Automatically print slip

☐ No
☒ Yes

Multiple items

☐

Temporary barcode *

Test123456

Item policy

Three Day Loan

Location

Borrowing Resource Sharing

Fulfillment note

Due date

Internal note

Shipping cost

0.00 USD

Patron Receive Cost

0.00 USD

Patron Request Cost

0.00 USD

For Reading-Room Use Only

☐

No records were found.

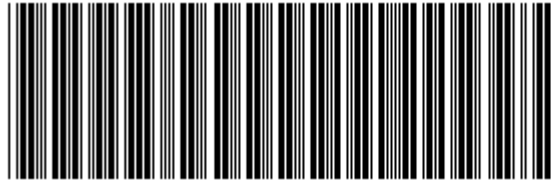
Cancel

Save

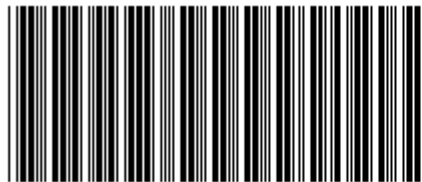
Receive Items Page

A new print slip, **Resource Sharing Receive Slip Letter** (see [Configuring Alma Letters](#)), has been created for this option. In order to use the letter, it must be activated from the Letter Activity page. The letter is unavailable from the Scan-In Items page.

Resource Sharing Receive Slip Letter 06/02/2017



Item Barcode: 01BC0000025TEMP



Request No: 01BC0000025

Title: Title321

Author: Author321

Patron Name: Implementer, Ex Libris

Request Date: 06/02/2017

Material Arrival Date: 06/02/2017

Pickup Location: Resource Sharing Library

Circulation Note:

Cost: 1.00 EUR

Sincerely

Resource Sharing Library

Alma University

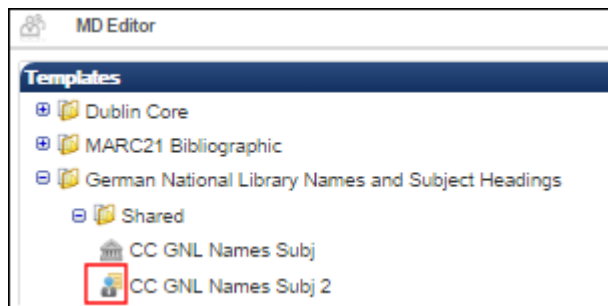
Additional Resource Sharing Enhancements

- Two changes were made to the **Receiving Items** page. When receiving a single item from a borrowing request, the received item now appears in the scanned items table on this page. Additionally, the email icon in the **Requester** column was removed, as it is no longer relevant.

Collaborative Networks - March 2017 Enhancements

Templates for Externally Managed Authority Records

Templates can now be created in the Network Zone for externally managed authority records. Templates created in the Network Zone automatically appear in the Templates list of member institutions, and they are identified with the Network Zone icon.



Member Institution Template List with Network Zone Icon

In cases where externally managed authority records are required to have certain fields included, use standard authority record templates that are created in the Network Zone and automatically shared with all the member institutions to make creating authority records more expedient. To create an authority record template in the Network Zone, open the MD Editor and create an authority record with the fields you want and click **Save as Template**. The template you saved appears under the Templates tab in the Network Zone and in the member institutions. In the Network Zone, the template appears with the local institution icon; and in the member institutions, the same template appears with the Network Zone icon. For more information about creating templates, see **Creating Templates in the Network Zone** section on the [Network-Managed Records in a Network Zone](#) page and [Working with Templates](#).

Analytics - March 2017 Enhancements

New Licenses Subject Area



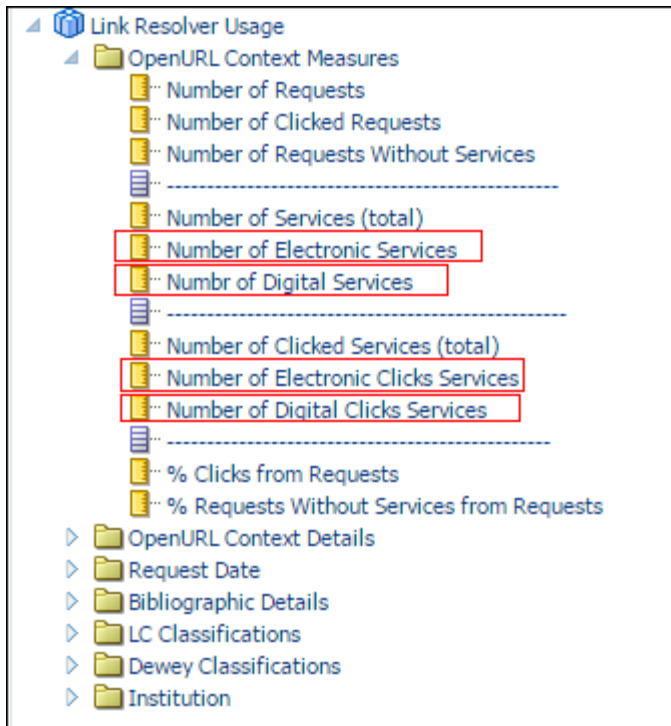
Idea Exchange: The new Licenses subject area was added, allowing you to create Analytics reports concerning license information. For detailed information, see [Licenses](#).

Digital Usage Fields Added to Link Resolver Usage

The following fields were added to the **Open URL Context Measures** dimension of the **Link Resolver Usage** subject area to support the reporting of digital usage:

- Number of Digital Services – the number of digital representations that appear when a user clicks **View It**.
- Number of Electronic Services – the number of electronic services that appear when a user clicks **View It**.
- Number of Digital Clicked Services – the number of digital representations a user clicks from the **View It** menu.
- Number of Electronic Clicked Services – the number of electronic services a user clicks from the **View It** menu.

In addition, the **OpenURL Context Measures** folder was reorganized and reordered for better clarity.



Digital Usage Fields

Additional Analytics Enhancements



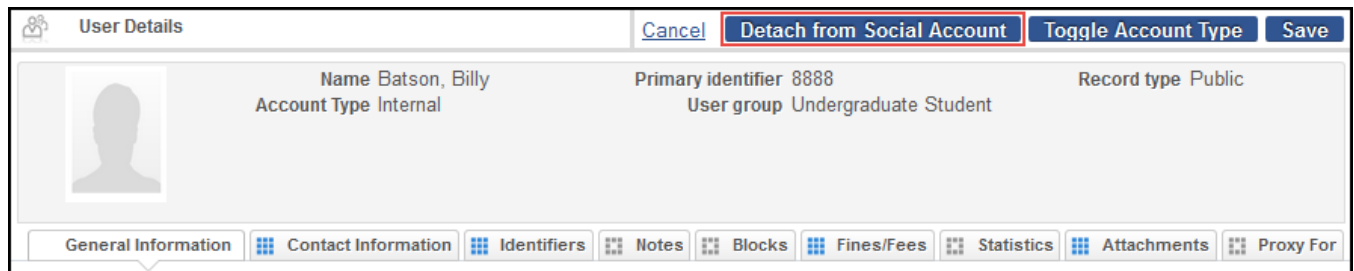
- **Idea Exchange:** The **Public Note** field was added to the **Physical Item Details** dimension of the **Physical Items** subject area. It displays the public note that appears in the **Notes** tab of the Physical Item Editor.

Administration and Infrastructure - March 2017 Enhancements

Option to Disconnect a Social Login Account

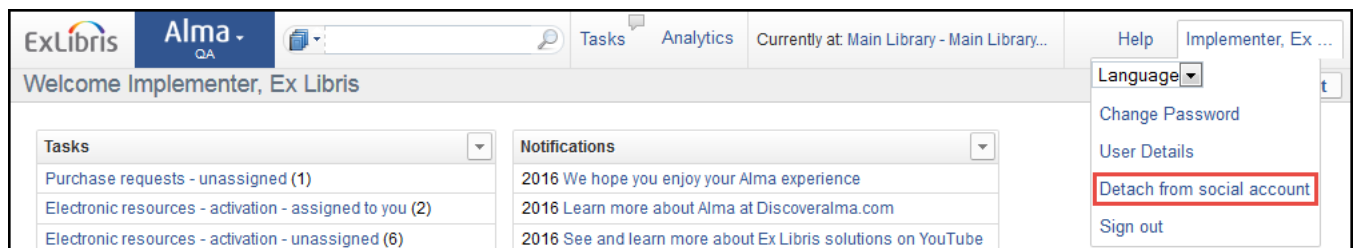
Options have been added to disconnect a user logged into Alma with a social account, effectively removing the social network ID from the list of IDs.

If the patron has a social account attached, a button will display at the top of the **User Details** page, **Detach from Social Account**. Clicking this button disassociates the social login from the patron. For more information, see [Editing Users](#).



User Details Page

For an operator to disassociate a social login from their own user account, the **Detach from social account** option is found on the persistent user menu. For more information, see [The Persistent Menu](#).



Persistent User Menu

Additional Administration and Infrastructure Enhancements

- Patron-facing language support was added for Basque and Catalan. For information on enabling these languages to be used in Alma patron-facing functions, see [Configuring Institution Languages](#).
- Created and updated fields in the code and mapping table page headers were removed, and an info icon with this information was added to these pages. See [Info Icon](#).

Content Operations - March 2017 Enhancements

Library of Congress Authorities Community Zone Updates

The following are the Library of Congress subject authority updates for the period of January 20th through February 16th:

- Number of records updated: 261
- Number of records added: 136
- Number of records deleted: 18

The following are the Library of Congress name authority updates for the period of January 20th through February 16th:

- Number of records updated: 19752
- Number of records added: 22387
- Number of records deleted: 573

The following are the Canadian name authority updates for the period of January 20th through February 16th:

- Number of records updated: 169
- Number of records added: 1115
- Number of records deleted: 11

The following are the Library of Congress Genre/Form Terms (LCGFT) updates for the period of January 20th through February 16th:

- Number of records updated: 1

New Electronic Collections Added to the Alma CKB

The following collections were added to the Alma Community Zone from January 23rd through February 19th:

- ACM Books
- American Society of International Law Publications

- Association for Science Education Journals
- Central Eastern European Online Library ceeol ebooks
- Chadwyck Acta Sanctorum
- Chadwyck Teatro Español del Siglo de Oro
- Digital Commons Online Journals
- JHA SpringerLink Health & Hospitals Books
- JHA SpringerLink Health & Hospitals Books
- JHA SpringerLink Health & Hospitals Journals
- JHA SpringerLink Health & Hospitals Journals
- KB+ JISC Collections American Institute of Physics Complete Collection with extended backfile 2017-2019
- KB+ JISC Collections American Institute of Physics Complete Collection 2017-2019 (35 titles)
- KB+ JISC Collections Cell Press 2017-2019
- KB+ JISC Collections Elsevier ScienceDirect Freedom Collection 2017-2021
- KB+ JISC Collections SAGE Premier 2017
- KB+ WHEEL Oxford University Press Journals Collection 2015 (including 25 new titles) 2017
- KB+ WHEEL SAGE Premier 2017
- Mineralogical Society of America
- Nutrition Care Manual
- Pediatric Nutrition Care Manual
- PierOnline Books
- ProQuest Asian Newsstream Alumni
- ProQuest European Newsstream Alumni
- ProQuest Global Newsstream
- ProQuest Global Newsstream Alumni
- ProQuest Historical Newspapers: Atlanta Daily World
- ProQuest Historical Newspapers: Chicago Defender
- ProQuest Historical Newspapers: Chicago Tribune
- ProQuest Historical Newspapers: Cleveland Call and Post
- ProQuest Historical Newspapers: Dayton Daily News
- ProQuest Historical Newspapers: Detroit Free Press (1831-1922)
- ProQuest Historical Newspapers: Hartford Courant
- ProQuest Historical Newspapers: Indianapolis Star

- ProQuest Historical Newspapers: International Collection
- ProQuest Historical Newspapers: Los Angeles Sentinel
- ProQuest Historical Newspapers: Los Angeles Times
- ProQuest Historical Newspapers: Louisville Courier Journal
- ProQuest Historical Newspapers: Midland Newspapers
- ProQuest Historical Newspapers: Minneapolis Star Tribune
- ProQuest Historical Newspapers: Minneapolis Tribune
- ProQuest Historical Newspapers: New York Amsterdam News
- ProQuest Historical Newspapers: New York Tribune
- ProQuest Historical Newspapers: New York Tribune / Herald Tribune
- ProQuest Historical Newspapers: Newsday
- ProQuest Historical Newspapers: Norfolk Journal and Guide
- ProQuest Historical Newspapers: Philadelphia Tribune
- ProQuest Historical Newspapers: Pittsburgh Courier
- ProQuest Historical Newspapers: Pittsburgh Post-Gazette
- ProQuest Historical Newspapers: San Francisco Chronicle
- ProQuest Historical Newspapers: The Arizona Republican
- ProQuest Historical Newspapers: The Atlanta Constitution
- ProQuest Historical Newspapers: The Austin American Statesman
- ProQuest Historical Newspapers: The Baltimore Afro-American
- ProQuest Historical Newspapers: The Baltimore Sun
- ProQuest Historical Newspapers: The Christian Science Monitor
- ProQuest Historical Newspapers: The Cincinnati Enquirer
- ProQuest Historical Newspapers: The Globe and Mail
- ProQuest Historical Newspapers: The Guardian and The Observer
- ProQuest Historical Newspapers: The Irish Times and The Weekly Irish Times
- ProQuest Historical Newspapers: The Jerusalem Post
- ProQuest Historical Newspapers: The Jewish Exponent
- ProQuest Historical Newspapers: The Nashville Tennessean
- ProQuest Historical Newspapers: The New York Times
- ProQuest Historical Newspapers: The New York Times with Index
- ProQuest Historical Newspapers: The Philadelphia Inquirer

- ProQuest Historical Newspapers: The Scotsman
- ProQuest Historical Newspapers: The Wall Street Journal
- ProQuest Historical Newspapers: U.S. Jewish Newspaper Collection
- ProQuest Historical Newspapers: U.S. Major Dailies
- ProQuest Historical Newspapers: U.S. Metro Collection
- ProQuest Historical Newspapers: Zeeland Record
- ProQuest International Newsstream Alumni
- ProQuest Latin American Newsstream
- ProQuest Military Newsstream
- ProQuest The Washington Post
- ProQuest The Washington Post (1987 - current)
- ProQuest U.S. Hispanic Newsstream
- ProQuest U.S. Midwest Newsstream
- ProQuest U.S. Newsstream
- ProQuest U.S. Newsstream Alumni
- ProQuest U.S. North Central Newsstream
- ProQuest U.S. Northeast Newsstream
- ProQuest U.S. Northeast Newsstream Alumni
- ProQuest U.S. South Central Newsstream
- ProQuest U.S. Southeast Newsstream
- ProQuest U.S. West Newsstream
- Schattauer ebooks
- Sports Nutrition Care Manual

New External Search Resources

The following new external search resources were added for the March release:

- Cardiff Metropolitan University
- Melinda
- Scuola Normale Superiore UNIMARC
- University of South Wales

Next Release Sneak Preview

As many of you already know the Alma development periodically needs to take a back seat, and maintenance, cloud infrastructure and other important tasks need to be handled to ensure that Alma meets the highest standards of performance and high availability. The April 2017 Release is devoted to such tasks. Following are some general updates as well as a few sneak previews of some good things to come.

- **Benchmark Analytics** - We continue to gather data from our customer base in order to build robust benchmark capabilities, with a planned rollout for the April release.
- **Alma UX Project** – The Alma team is busy incorporating feedback from the UX workshop and preparing for the initial rollout of the new Alma UI to the early access group in Q2 2017.
- **Regional Updates**
 - **China** – We are improving and enhancing Alma's support of CNMARC for the Chinese market.
 - **German speaking countries** – We are providing enhanced community-level support for RVK and GND.
 - **Italy** – We are in the certification process for integration with SBN.
- **Data Centers** – New Data Centers were recently opened in Canada and China.
- **Authentication Focus Group** – As part of the input from the Authentication Focus Group, we are working on new authentication options. A new feature—**Sign In with Email**—will be released in May.
- **Alma Digital** – The May release will see the long-awaited functionality enabling end user deposits.

Working with Authority Headings Rules

New for March!

PERMISSIONS: To work with authority headings rules, you must have the following role:

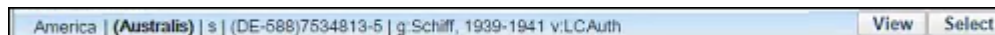
- Catalog Administrator
-

Authority headings display results for preferred/nonpreferred records (using F3 in the MD Editor) can be expanded with configurable options to provide greater detail. In some cases, the standard authority headings results display a limited amount of information as shown in the figure below making it difficult to determine which record to select when more than one record appears with the same information in the authority headings results list.



Standard Authority Headings Results Display

With authority headings rules, the same results can be expanded to display more details as shown in the figure below making it easier for the cataloger to determine which record to select.



Expanded Authority Headings Results Display Configured

For more information about working with preferred and nonpreferred authority headings, see [Managing Authority Records in the MD Editor](#).

The authority headings rules used to expand your authority headings results are created in the MD Editor from the Rules tab.



Authority Headings Rules in the MD Editor

Authority headings rules use drools-type logic to specify the content and format of the expanded authority headings display. The syntax used for authority headings rules is described in [Authority Headings Rules Syntax and Examples](#).



For more information, see the [Authority Headings Display Options](#) video (4:33 mins).

Implementing Authority Headings Rules

In order to work with expanded authority headings display results in the MD Editor, complete the following steps:

- Create one or more authority headings rules to identify the content and format of the expanded authority headings display. See [Creating Authority Headings Rules](#) for more information.
- Select an authority headings rule for each vocabulary that you want to be able to expand that you have configured on the Metadata Configuration List page in the Authority Vocabularies section (**Resource Management > Resource Configuration > Configuration Menu > Cataloging section > Metadata Configuration**). Since clicking F3 for preferred/nonpreferred headings invokes authority records for a specific vocabulary to be displayed, the authority headings rule needs to be associated with a specific authority vocabulary (managed locally or in the community). Select **Actions > Set authority heading rule**, select a rule, and click **Submit** to associate a rule with a specific vocabulary.

Metadata Configuration List Back

Active Profiles

Profile	Family	Type
1 GND Authority	MARC21	Authority
2 MARC21 Authority	MARC21	Authority
3 MARC21 Bibliographic	MARC21	Bibliographic
4 MARC21 Holding	MARC21	Holding
5 Qualified Dublin Core	DCMI	Bibliographic
6 UNIMARC Authority	UNIMARC	Authority
7 UNIMARC Bibliographic	UNIMARC	Bibliographic

Tools

Authority Vocabularies

Add local Authority

Vocabulary Name	Code	Type	Family	Description	Managed Locally	Managed in Community	Authority Heading Rule	
1 BARE	BARE	NAMES_AND_...	MARC21	-	☒	☒	-	Actions
2 BNF	FRBNF	NAME	UNIMARC	-	☒	☒	-	Actions
3 CSH	CSH	SUBJECT	MARC21	Canadian Subject Headings (CSH)	☒	☒	-	Actions
4 FAST	FAST	SUBJECT	MARC21	FAST (Faceted Application of Subject Terminology) - OCLC	☒	☒	-	Actions
5 German Classification Method	RVK	CLASSIFICATI...	MARC21	Regensburg Classification System (RVK), includes parts of the shelf marks which individualizes a giv...	☒	☒	CC GND Rule	Actions
6 German National Library Names and Subject...	GND	NAMES_AND_...	MARC21	Subject and Names headings for books, serials, and other types of material in the German National Li...	☒	☒	-	Actions

Set authority heading rule
View hidden

Select Authority Heading Rule

Setting an Authority Headings Rule

See [Configuring Cataloging](#) for more information about the Metadata Configuration List page.

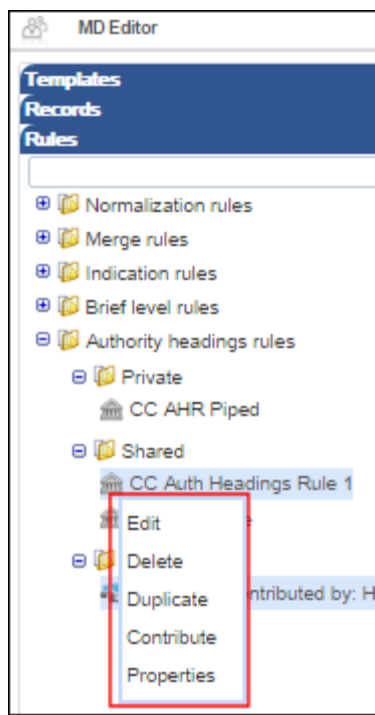
Creating Authority Headings Rules

Authority headings rules are created in the MD Editor and appear under the Rules tab in the **Authority headings rules** folder. Where applicable, you can **Duplicate** or **Copy** authority headings rules and modify them to create new rules.

To create an authority headings rule:

1. Open the MD Editor page (**Resource Management > Cataloging > Open Metadata Editor**).
2. Select **File > New > Authority headings rules** and enter your authority headings rule properties in the Normalization Rule Properties dialog box.
3. Click **Save**. The rules editor opens.

4. Enter your rule details. For information on the syntax to be used, see [Authority Headings Rules Syntax and Examples](#).
5. Click **Save**. The saved authority headings rule appears in the Rules tab.



Saved Authority Headings Rules Options

Saved authority headings rules can be edited, deleted, duplicated (to create new rules), or contributed (to the Community for others to access). You can also modify the rule properties.

Authority Headings Rules Syntax and Examples

The authority headings rules follow a specific syntax. See below for an example.

```
rule "Expand Headings"
when
not preferred
then
add to text displayValue
add to text " | "
add to text preferredDisplay
add to text " | "
add to text from "079.b" if (exists "079.b")
add to text " | "
add to text from "035.a" if (exists "035.a.*588*")
add to text " | "
```

```
add to text from headingSourceField "[9,w]"
end
```

For a description of the authority headings rules syntax, see the table below; and refer to the [Conditions Supported for Authority Headings Rules](#) section for the list of supported conditions. Conditions and actions apply to record elements, such as the MARC record, fields (one or more), indicators, subfields (one or more), and field/subfield contents.

Authority Headings Rules Syntax

Expression	Meaning
when not preferred then	Perform the action only if the heading is the nonpreferred heading.
when preferred then	Perform the action only if the heading is the preferred heading.
when (exists/not exists "<element>") then	The when condition can be used to check for fields (exists/non exists) in the authority record (like regular normalization rules). Example: when (not exists "100.d") then
add to text preferredDisplay	This adds the preferred heading to the display. It shows the preferred heading that matches the format of the record such as MARC21 or UNIMARC and so forth.
add to text displayValue	This adds the displayed headings value.
add to text "<hard coded value>"	This concatenates a hard-coded value to the text such as a pipe character (). Example:

Expression	Meaning
	add to text " "
add to text from "<element>"	This adds a value from the record. This can include field/subfield specifications and conditions. For a list of supported conditions, see the Conditions Supported for Authority Headings Rules section for more information. For repeating fields, you can use the first occurrence syntax (<code>onlyfirst</code>) to display only the first instance of the repeating fields. For concatenated subfields, you can use the <code>delimited by</code> syntax to add delimiters between subfields. Examples: <pre>add to text from "005" if (not existsControl "005.{0,2}.19")</pre> <pre>add to text from "005" if (existsControl "005.{0,2}.19")</pre> <pre>add to text from "005.{0,4}" if (not existsControl "005.{0,2}.19")</pre> <pre>add to text from "005.{0,4}" if (existsControl "005.{0,2}.19")</pre> <pre>add to text from "005"</pre> <pre>add to text from "005.a"</pre> <pre>add to text from "005.{0,4}"</pre> <pre>add to text from "400.a" if (not exists "400.d.1808*")</pre> <pre>add to text from "400.a" if (exists "400.d.1808*")</pre> <pre>add to text from onlyfirst "035.a" if (not exists "035.a")</pre> <pre>add to text from onlyfirst "035.a" if (exists "035.a.(OCoLC)*")</pre> <pre>add to text from "400.a" delimited by "; "</pre>
add to text from headingSourceField	This adds the text from the authority headings source field.

Expression	Meaning
	Example: add to text from headingSourceField "[a-z]"
add to text from headingSourceField excluding "<field.subfield>"	This adds the text from the authority headings source field and excludes the fields specified. Example: add to text from headingSourceField excluding "[0-9] e E"

Conditions Supported for Authority Headings Rules

The following conditions are supported for authority headings rules:

- preferred
- not preferred
- existsControl "{element}"
- not existsControl "{element}"
- exists "{element}"
- not exists "{element}"
- existsMoreThanOnce "{element}"

Integrating with the UK's Digital Content Store (DCS)

PERMISSIONS: To configure the Digital Content Store integration profile, you must have one of the following roles:

- Fulfillment Administrator
 - General System Administrator
-

This feature is relevant for UK customers, only.

The Digital Content Store (DCS) is a workflow tool for librarians in higher education institutions to help with the process of sourcing and clearing digitization requests required for course packs and reading lists. Documents are stored in DCS as PDF files. When a request is completed, the CLA publishes a URL that allows authorized users at the institution to access the content. Each content URL is specified by course and requires the student to authenticate to access the content. The DCS API enables Ex Libris to publish the content links and associated metadata on a course by course basis. The CLA creates the client system credentials within the DCS so that administrators of the institution's accounts can let the students subscribe to their courses.

Before configuring integration with the DCS, CLA must be enabled (set **display_CLA_info_in_alma** to **true**, see [Configuring Other Settings](#).) and you must obtain an HEI (higher education institution) code from the CLA. After configuring this integration profile, additional options are available when managing citations; see [Managing Citations](#).

To configure integration with the DCS:

1. Ensure that you have obtained an HEI code from the CLA.
2. On the Integration Profile List page (**Administration > General Configuration > Configuration Menu > External Systems > Integration Profiles**), click **Add Integration Profile**. The External System page appears.

External System

Code	Name	Integration Type

External System

Code *

Integration Type *

Default ☐

Description

Digital Content Store Integration Profile: Page 1 of the Wizard

3. In the Integration type field, select **Digital Content Store** from the drop down list. The page refreshes with some of the fields removed.
4. Optionally enter a description and click **Next**. Page 2 of the wizard appears.

Integration Profile 1 2 Back Cancel Save

Name	Code	Integration Type
DCS	DCS	Digital Content Store

Actions

DCS Definitions

HEI *

DCS Url Override

DCS URL https://api.cla.co.uk/dcs-sandbox

Back Cancel Save

Digital Content Store Integration Profile: Page 2 of the Wizard

5. Enter your institution's **HEI** code.
6. The DCS URL appears on the page. You can optionally enter a test URL in **DCS URL Override**, which Ex Libris will use in place of the displayed URL.
7. Click **Save** to save the integration profile.

Licenses

New for March!

Using the Licenses subject area, you can create reports/dashboards relating to Licenses and answer the following types of business questions:

- What is the number of portfolios and collections per license?
- What are the total expenditures for PO lines with specific licenses for specific fiscal years?



Star Diagram – Licenses

Field Descriptions

The following fields are available in Licenses.



Licenses – Field Descriptions

License Measures

The License Measures table is a fact table that stores all measures relating to licenses, such as number of licenses and number of license terms.

License Measures

Field	Description	Additional Information
Number of Licenses	The number of licenses	
Number of License Terms	The number of license terms	

License Header

The License Header table is a dimension table that stores information about the license such as the license ID, the license name, and the license creator.

License Header

Field	Description	Additional Information
License ID	The ID of the license	
License Code	The code of the license	
License Name	The name of the license	
License Begins	The date the license begins	

Field	Description	Additional Information
License Ends	The date the license ends	
License Note	The note of the license	
License Originating Licensors Key	The licensors key of the license	
License Originating Parent Code	The originating parent code of the license	
License Parent ID	The parent ID of the license	
License Review Status	The renewal status of the license	
License Signed By	The user who signed the license	
License Signed On	The date the license was signed on	
License Second Party Signed By	The second party who signed on the license	
License Second Party Signed On	The date the second party signed on the license	
License Status	The status of the license	
License Storage Location	The storage location of the license	
License Type	The type of the license	
License URI	The URI of the license	

License Terms

The License Terms table is a dimension table that stores information about the license terms such as the license term section, the license term create date, and the license term modification date.

License Terms		
Field	Description	Additional Information
License Term	The term of the license	
License Term Section	The term section of the license	

Field	Description	Additional Information
License Term Create Date	The create date of the license term	
License Term Modification Date	The modification date of the license term	
License Term Value	The value of the license term	

License Vendor

The License Vendor table is a dimension table that stores information about the license vendor such as the Vendor code and the Vendor name.

License Vendor

Field	Description	Additional Information
Vendor Code	The vendor code	
Vendor Name	The vendor name	
Additional Code	The additional code	
ERP Code	The ERP code	

License Agent

The License Agent table is a dimension table that stores information about the license agent such as the agent code and agent name.

License Agent

Field	Description	Additional Information
Agent Code	The agent code	
Agent Name	The agent name	
Additional Code	The additional code	
ERP Code	The ERP code	

License Library Unit

The License Library Unit table is a dimension table that stores information about the license library unit such as the Library Code and Library Description.

Library Unit		
Field	Description	Additional Information
Library Code	Stores the library code	
Library Description	Stores the library description	
Library Name	Stores the library name	
Unit Type	Store the type of organization unit	Values can be Institution/Library

License Creation Date

The License Creation Date table is a dimension table that stores details about the license creation date. Key fields are used whenever calculations are required. Description fields may be used for formatting the display of the report. Alma stores the following types of fields:

- **Calendar Fields** – These are date fields as they display in the calendar.
- **Fiscal Date Fields** – These are date fields that match the institution's fiscal period. In the examples below, the fiscal period of the institution is for fiscal year 2012 that starts June 1, 2011 and ends May 31, 2012.

Using this dimension, the user may drill down from year to month to the specific date on which the license was created. The number of the license is accumulated to the relevant level in the hierarchy.

License Creation Date		
Field	Description	Additional Information
License Creation Date	Stores the license creation date in a date format such as 2/29/2014.	
License Creation Month Key	Stores the month of the date in number format such as 2 for February	This field is useful when you want to sort by the month, which does not work properly when using the alphabetical field.

Field	Description	Additional Information
License Creation Month	Stores the month of the date in month description format such as February	
License Creation Full Month	Stores the month and the year of the date in a display format such as Feb 12	This field is useful when comparing data on a month basis between years.
License Creation Quarter	Stores the quarter of the date in a display format such as Q1	
License Creation Year	Stores the year of the date in number format such as 2012	
License Creation Fiscal Month Key	Stores the fiscal month of the date in number format such as 2 for February	This field is useful when you want to sort by the month, which does not work properly when using the alphabetical field.
License Creation Fiscal Year	Stores the fiscal year of the date in a string format such as 2012.	If the fiscal year description is stored in the institution fiscal period configuration table. This value is taken from there.

License Modification Date

The Modification Date table is a dimension table that stores details about modification of licenses.

NOTE: The License Modification date is the date of the last change to the title.

Key fields are used whenever calculations are required. Description fields may be used for formatting the display of the report. Alma stores the following types of fields:

- **Calendar Fields** – These are date fields as they display in the calendar.
- **Fiscal Date Fields** – These are date fields that match the institution's fiscal period. For the examples below, the fiscal period of the institution is for fiscal year 2012 that starts June 1, 2011 and ends May 31, 2012.

Using this dimension, the user can drill down from year to month to the specific date on which the license was created.

License Modification Date

Field	Description	Additional Information
License Modification Date	Stores the item modification date in a date format such as 2/29/2014.	
License Modification Month Key	Stores the month of the date in number format such as 2 for February	This field is useful when you want to sort by the month, which does not work properly when using the alphabetical field.
License Modification Month	Stores the month of the date in month description format such as February	
License Modification Full Month	Stores the month and the year of the date in a display format such as Feb 12	This field is useful when comparing data on a month basis between years.
License Modification Quarter	Stores the quarter of the date in a display format such as Q1	
License Modification Year	Stores the year of the date in number format such as 2012	
License Modification Fiscal Month Key	Stores the fiscal month of the date in number format such as 2 for February	This field is useful when you want to sort by the month, which does not work properly when using the alphabetical field.
License Modification Fiscal Year	Stores the fiscal year of the date in a string format such as 2012.	If the fiscal year description is stored in the institution fiscal period configuration table, this value is taken from there.

License Negotiation (Network Inst.)

The License Negotiation table is a dimension table that stores information about the license negotiation such as the License Negotiation Member and License negotiation Start Date.

License Negotiation (Network Inst.)

Field	Description	Additional Information
License Negotiation Contact Email	The license negotiation contact email	

Field	Description	Additional Information
License Negotiation Currency	The license negotiation currency	
License Negotiation End Date	The license negotiation end date	
License Negotiation ID	The license negotiation ID	
License Negotiation Member	The license negotiation member	
License Negotiation Price	The license negotiation price	
License Negotiation Renewal Cycle	The license negotiation renewal cycle	
License Negotiation Start Date	The license negotiation start date	

Institution

The shared Institution dimension allows the network institution to view reports according to institution. It is available in every subject area. It contains the following fields:

Institution		
Field	Description	Additional information
Institution Code	The code of the institution.	
Institution Name	The name of the institution.	

If an analytics report is run from a member institution in a collaborative network implementing a Network Zone, all member institutions are included in the report for Institution Code and Institution Name.

If an analytics report is run from an institution that is not part of a collaborative network implementing a Network Zone, only the single institution from which the report is run is included in the report for Institution Code and Institution Name.

NOTE: Reports involving data across a collaborative network implementing a Network Zone may take longer to run than reports within one institution.
