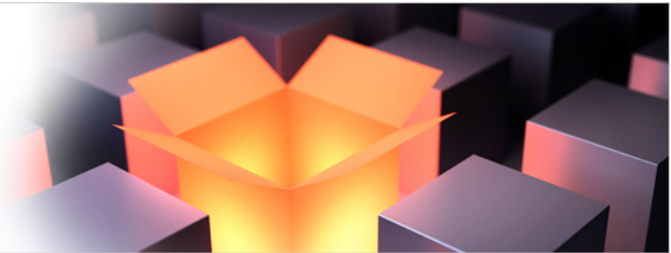


Alma May 2017 Release Notes

The Soul of Alma Open



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

- ☐ [Set Creation with New File Upload Options](#) – If you are working with itemized sets, note that you can now use standard identifiers to look up items and add them to a set.
- ☐ [Separate Requestability/Availability Check on a Locate Profile](#) – The resource sharing rota can now be made even more accurate than before. With this new feature, you can set the rota to include lenders that have requestable items even if the items are not currently available.
- ☐ [Email Attachment Retention/Purge](#) – This new feature enhances patron privacy in the system by allowing you to set the retention period for patron notifications, after which stored notifications are automatically purged from the system.

Action Items

☐ [New Patron Deposit Interface](#) – In addition to Alma's SWORD API support, Alma now includes built-in, easy-to-use end user deposit workflows. Your institution's deposit needs can now be met with minimal configuration and you can link to the deposit from your library and faculty web sites.

☐ [Display Copyrights by Default](#) – This new option for access rights enables you to view the copyright statement before viewing the resource, supporting improved copyright compliance.

What's New

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

Acquisitions

- [COUNTER Enabled for All Customers](#) – All Alma institutions can now import COUNTER data directly to Alma and use all COUNTER features.
- [Additional Acquisitions Enhancements](#)

Resource Management



- **Idea Exchange:** [Set Creation with New File Upload Options](#) – New identifier types such as ISBN, OCLC ID and others are now supported when creating itemized sets using a file.



Watch the [Create Itemized Sets by Uploading List of Identifiers](#) video.



- **NERS Enhancement (Request ID 4683):** [Publishing Bound-With Records to OCLC](#) – Publishing to OCLC was improved for handling related records.



- **NERS Enhancement (Request ID 4683):** [Publishing Bound-With Records to Libraries Australia](#) – Publishing to Libraries Australia was improved for handling related records.
- [Automatic Authority Record ID Update in Bibliographic Records](#) – For institutions configured for ID-based authority control and that have implemented a direct ID prefix in their metadata configuration, Alma now updates the bibliographic records with the new authority record ID (replacing the old ID) when a new authority record replaces an existing authority record.
- [Improvements for Externally Managed Authority Records](#) – For institutions managing authority records that are contributed to externally managed systems such as GND and BARE, MD Editor improvements provide cataloger level assignments upon **Save and contribution** and check for the current record version.
- [TSVCC \(Traditional, Simplified, and Variant Chinese Characters\)](#) – The Hong Kong Innovative Users Group (HKIUG) TSVCC (Traditional, Simplified, and Variant Chinese Characters) standard Version 1.0. released on 18 July 2006 was implemented.
- [RVK Indexes/Restructure](#) – The most current RVK classification records (RVK March 2016 release) are being loaded into Alma's Community Zone beginning with the May 2017 production release.



- **NERS Enhancement (Request ID 4615):** [MMS IDs Added to Lists and Excel Files](#) – MMS IDs were added to Excel files that are generated from repository search results, the physical items list of items, and the Community Zone Updates Task List.
- [Multiple Access Points for CNMARC 6XX Fields](#) – Alma now supports a single CNMARC 6XX field to be split into several segments where each segment is an access point for F3 and authority control.
- [240 Field and Uniform Title Bibliographic Headings](#) – Uniform title bibliographic headings support was enhanced to include support for the MARC 21 240 field.
- [GND Uniform Title Authority Headings Include 5XX](#) – Suggested uniform title headings may now utilize data provided by the 5XX fields.
- [Additional Resource Management Enhancements](#)

Digital Resource Management

- [New Patron Deposit Interface](#) – Library patrons can now use a built-in, standalone interface to submit digital files for deposit to Alma.



- **Idea Exchange:** [Display Copyrights by Default](#) – You can now configure the Alma Viewer to display the copyrights page of a digital image by default before the image is displayed.



Watch the [Display Copyrights by Default](#) video.

- [Additional Digital Resource Management Enhancements](#)
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Fulfillment

- [Manage All Citations on a Single Page](#) – You can now manage all citations on a single page.
 - [End User, Item Level Requesting](#) – Institutions can now configure Primo to generate all end user requests as item level requests in the Primo Get It tab.
 - [Item Policy and Barcode in the Z39.50 OPAC Syntax](#) – Barcode is now reported in **ItemId**. For items that have an item policy, this policy is now reported in the **availableThru** element.
 - [Additional Fulfillment Enhancements](#)
-

Resource Sharing

- [Separate Requestability/Availability Check on a Locate Profile](#) – You can now manage the requestability and availability separately to determine the success of a locate process.
 - [Additional Resource Sharing Enhancements](#)
-

Analytics

- [New Digital Usage Subject Area](#) – A new subject area that supports analyzing digital usage of the Alma viewer, separate from the Link Resolver Usage subject area.
- [Enhancements to the Licenses, E-Inventory, and Fund Expenditure Subject Areas](#) – The Licenses, E-Inventory, and Fund Expenditure subject areas were enhanced to allow the creation of joint reports using fields from the Licenses and E-Inventory subject areas, and the Licenses and Fund Expenditure subject areas.
- [Digital Usage Fields Added to the Link Resolver Usage Subject Area](#) – Several fields were added to the **Open URL Context Measures** dimension of the Link Resolver Usage subject area to support the reporting of digital usage.

- [Support Added for Additional Types of COUNTER Reports](#) – Several fields were added to the **Usage Data Details** dimension of the **Usage Data** subject area to support additional types of COUNTER reports.
 - [Material Type Indicator Filter Added to the Usage via COUNTER Report Dashboard](#) – The **Material Type Indicator** filter was added to the **Trends by Month** tab of the **Usage via COUNTER Report** dashboard. You can use this new feature to filter the report results by material type.
 - [Additional Analytics Enhancements](#)
-

Administration and Infrastructure



- **Idea Exchange:** [Email Attachment Retention/Purge](#) – You can now define the retention of letter attachments for each letter individually.
 - [Additional Administration and Infrastructure Enhancements](#)
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APIs

- There are new APIs for retrieving both electronic portfolios and electronic services. For details, see <https://developers.exlibrisgroup.com/alma/apis/electronic>.
- The **collection ID**, **portfolio ID**, and **portfolio availability** fields were added to the AVE section of the Retrieve Bib API and SRU responses.
- There are new APIs for creating, updating, and deleting collections (of bibliographic records). For details, see <https://developers.exlibrisgroup.com/alma/apis/bibs>.



- **Idea Exchange:** The Retrieve Library API now returns the following additional three fields: **campus**, **proxy**, **default location**
- Running the General publishing profile using the Jobs API is now supported.
- The institution code was added to the Webhooks XSD.

Content Operations

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

Known Issues

There are no known issues for the May 2017 release.

Next Release Sneak Preview

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

Acquisitions - May 2017 Enhancements

COUNTER Enabled for All Customers

All Alma institutions can now 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 were imported to Alma. All live Alma institutions should no longer use UStat.

For Alma institutions that had UStat data before this release, subscribers from UStat should already be configured in Alma. If you have not already done so, re-create your SUSHI account configurations in Alma as described in the [February release notes](#).

NOTE:

- Starting from May 5, do not upload any manual reports or do any manual changes in your UStat accounts. These changes may not be migrated to Alma.
- If you have more than one active instance in UStat, or you have an active instance in UStat that was not migrated to Alma (you do not see it in Analytics), contact Ex Libris to migrate any missing data..
- For Elsevier, **Requester ID** is `SUSHI-ALMA`. If you previously used UStat, this ID is different from the one your institution used in UStat, which was `SUSHI-ExLibris`. Ex Libris changed the ID for all existing customers for this release. For institutions currently setting up Alma SUSHI accounts while still working in UStat (customers still implementing Alma), contact Elsevier customer support to ensure that your SUSHI-ALMA account is active. For these customers, **Test Connection** does not work for Elsevier, because Elsevier only supports one active account per institution and the UStat account is still active.

See the [COUNTER documentation](#) and the [February release notes](#) for more information.

Additional Acquisitions Enhancements

- **Accession Number** was added as a column to the Received Items List page (**Acquisitions > Receiving and Invoicing > Receive**; click **Actions > Manage Items** for one of the titles). The column is initially hidden. For more information on this page, see [Receiving Physical Material](#).

- A [Find/in Filter](#) was added to the Usage Data Loader page and the **Uploaded Files** section of the **Usage Data** tab on the Vendor Details page. The filter provides a means to search for files by:

- **File Name**
- **Load File ID**
- **Upload Method**
- **Uploading User**

For more information on this page, see [Manually Uploading COUNTER Data](#).

- A ["Has Content" Icon](#) was added to the **Usage Data** tab on the Vendor Details page.
- Ebook Central was added as a SUSHI-certified vendor.

Resource Management - May 2017 Enhancements

Set Creation with New File Upload Options



Idea Exchange: When creating itemized sets using .xlsx, .xls, .txt, or .csv input files, the following (bibliographic record) identifier types are now supported for the uploaded file:

- ISSN
- ISBN
- OCLC number
- 035 field

See [Creating Itemized Sets](#) for more information.

Publishing Bound-With Records to OCLC



NERS Enhancement (Request ID 4683): Publishing to OCLC was improved for handling related records. Holdings information for bibliographic records that are part of a bound-with relationship is now properly published to provide an accurate representation of the inventory at the holdings library.

For more information, see the [Publishing Related Records to OCLC](#) section on the [Publishing to OCLC](#) page.

Publishing Bound-With Records to Libraries Australia



NERS Enhancement (Request ID 4683): Publishing to Libraries Australia was improved for handling related records. Holdings information for bibliographic records that are part of a bound-with relationship is now properly published to provide an accurate representation of the inventory at the holdings library.

For more information, see the [Publishing Related Records to Libraries Australia](#) section on the [Publishing to Libraries Australia](#) page.

Automatic Authority Record ID Update in Bibliographic Records

For institutions configured for ID-based authority control and that have implemented a direct ID prefix in their metadata configuration, Alma now updates the bibliographic records with the new authority record ID (replacing the old ID) when a new authority record replaces an existing authority record. This is true for both local and Community Zone authority records.

This change incorporates automatic relinking of the bibliographic record to the new proper authority record and performs preferred term correction based on the new authority record. In addition, the Authority Control Task List was enhanced to report these ID changes.

For more information, see the [Updating the Authority Record ID Automatically in Bibliographic Records](#) section on the [Working with Authority Records](#) page.

NOTE:

This change affects bibliographic records beginning with the May release and subsequent new authority record replacements.

Improvements for Externally Managed Authority Records

For institutions managing authority records that are contributed to externally managed systems such as GND and BARE, cataloging levels can be selected and assigned in the MD Editor. In addition, upon opening the record for editing, Alma automatically checks the external system for the most current version and alerts the Alma cataloger if a more current version is available and provides the option to download the current version from the external system into the MD Editor.

See [Cataloging Externally Managed Authority Records](#) for more information.

TSVCC (Traditional, Simplified, and Variant Chinese Characters)

The Hong Kong Innovative Users Group (HKIUG) TSVCC (Traditional, Simplified, and Variant Chinese Characters) standard Version 1.0. released on 18 July 2006 was implemented in Alma. As a result, in addition to

handling the traditional and simplified Chinese characters as Alma has done in the past, Alma now also handles the variant Chinese characters when searching in Alma's repository and searching for users in Alma. The TSVCC Chinese character handling is available for institutions that have the Alma searching language parameter set for Hong Kong. Contact Ex Libris Support if you need to have this institution parameter enabled.

For the complete HKIUG TSVCC table (UNICODE version), see http://hkiug.ln.edu.hk/unicode/hkiug_tsvcc_table-UnicodeVersion-1.0.html. Also, see [Searching for Special Characters](#) for more information.

RVK Indexes/Restructure

The most current RVK classification records (RVK March 2016 release) are being loaded into the Alma authority repository in the Community Zone beginning with the May 2017 production release. This may take a few days to complete.

See the [Classification Search Indexes](#) section on the [Search Indexes](#) page for details regarding the classification tags that have been indexed. This indexing includes the updated RVK record structure that utilizes the 153 \$c and \$h (in addition to \$a and \$j that have already been implemented), and the 7XX fields (with all its subfields except \$0, \$2, \$3, \$6, and \$8). With this new structure, the 453 and 553 fields were eliminated from the March 2016 RVK file and the 7XX fields were added.

MMS IDs Added to Lists and Excel Files



NERS Enhancement (Request ID 4615): MMS IDs were added to the List of Items page, the Community Zone Updates Task List, and to Excel files that are generated from repository search results. See the following for more information:

- [Working with the List of Items](#)
- [Working with the Community Zone Updates Task List](#)
- [Performing Actions on the Repository Search Results Page](#)

Multiple Access Points for CNMARC 6XX Fields

Alma now supports a single CNMARC 6XX field to be split into several segments where each segment is an access point for F3 and authority control. Alma provides a configuration option where you can define which 6XX fields have multiple access points. See [Using Multiple Access Points for CNMARC 6XX Fields](#) for more information.

240 Field and Uniform Title Bibliographic Headings

Uniform title bibliographic headings support is being enhanced to include support for the MARC 21 240 field. Contact Ex Libris Support to configure this capability for your institution.

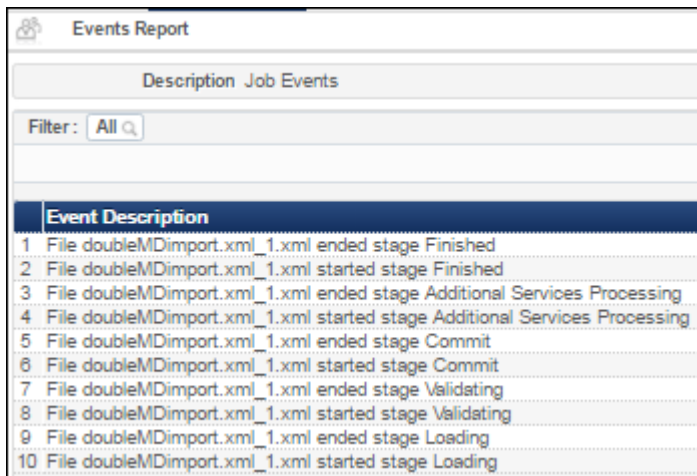
See [Working with the 240 Field and Uniform Title Bibliographic Headings](#) for more information.

GND Uniform Title Authority Headings Include 5XX

Suggested uniform title headings may now utilize data provided by the 5XX fields. See [Working with Uniform Title Headings for GND Records](#) for more information.

Additional Resource Management Enhancements

- The events information provided in Monitor and View Import Jobs (**Resource Management > Import > Monitor and View Imports**) was improved to focus only on error messages that occur and eliminate superfluous messages like start and end messages.



The screenshot shows a web interface titled "Events Report". It has a table with two columns: "Description" and "Job Events". Below the table is a filter box labeled "Filter: All". The table contains 10 rows of event descriptions, all starting with "File doubleMDimport.xml_1.xml". The descriptions are: 1. ended stage Finished, 2. started stage Finished, 3. ended stage Additional Services Processing, 4. started stage Additional Services Processing, 5. ended stage Commit, 6. started stage Commit, 7. ended stage Validating, 8. started stage Validating, 9. ended stage Loading, 10. started stage Loading.

	Description	Job Events
Filter:	All	
	Event Description	
1	File doubleMDimport.xml_1.xml ended stage Finished	
2	File doubleMDimport.xml_1.xml started stage Finished	
3	File doubleMDimport.xml_1.xml ended stage Additional Services Processing	
4	File doubleMDimport.xml_1.xml started stage Additional Services Processing	
5	File doubleMDimport.xml_1.xml ended stage Commit	
6	File doubleMDimport.xml_1.xml started stage Commit	
7	File doubleMDimport.xml_1.xml ended stage Validating	
8	File doubleMDimport.xml_1.xml started stage Validating	
9	File doubleMDimport.xml_1.xml ended stage Loading	
10	File doubleMDimport.xml_1.xml started stage Loading	

Superfluous Event Messages Eliminated

- For institutions that have the searching language parameter set to German, improvements were made to correctly sort results using the DIN 5007-1/2, section 6.1.1.4.1/2 standard. For repository search results, user search results, and fulfillment request search results, the following special German language characters are now sorting per the standard:
 - Ä,ä is sorted as AE,ae
 - Ö,ö is sorted as OE,oe
 - Ü,ü is sorted as UE,ue

- ß is sorted as ss

In addition, hyphens are ignored when search results are sorted.

NOTE:

For existing records, this change to enable sorting will be implemented gradually starting with the May release and will be completed as part of the semi-annual Alma re-indexing process scheduled for July.

See [Searching for German Language Characters](#) for more information.

- A new hourly schedule was added to the General publishing profile. See the [Publishing Profile Details Page - Wizard Step 1](#) table for more information.
- New merge rule syntax is available for replacing a position in a control field. See [Working with Merge Rules](#) for more information.
- Browse Shelf Listing support now includes results for browsing where the source is specified by \$2 for the Alternative call number and Temporary call number levels. See [Browsing the Shelf Listing](#) and [Location Information](#) and [Temporary Location Information](#) in the [Updating Item-Level Information](#) section for more information.
- The **include_representation_services**, **shareDigitalResources**, and **viewit_max_representations_displayed** parameters in Resource Management Other Settings (**Resource Management > Resource Configuration > Configuration Menu > General > Other Settings**) were removed.
- The **cataloging_level_user_preferences** and **generate_unique_barcode_max_retries** parameters were added to the Resource Management Other Settings. For information on these parameters, see [Configuring Other Settings \(Resource Management\)](#).

Digital Resource Management - May 2017 Enhancements

New Patron Deposit Interface

Patrons can submit digital content to Alma to be added to the repository using a standalone interface. For detailed information, see [Patron Deposits](#).

Display Copyrights by Default



Idea Exchange: You can now configure the Alma Viewer to display the copyrights page of a digital image by default before the image is displayed. To support this new functionality, the **Obtrusive copyrights** check box was added to the **Access Rights Policy** page.



Access Rights Policy [Cancel](#) [Save](#)

Details

Name *

Copyrights **Obtrusive Copyrights** ☐

Description

Denied Note

Rules

Filter [Add Rule](#)

No records were found.

If no match Deny Access

[Cancel](#) [Save](#)

Obtrusive Copyrights

For more information, see [Adding an Access Rights Policy](#).

Additional Digital Resource Management Enhancements

- Digital files can now be requested by calling a URL. For more information, see the [Developer's Network](#).
- The following digital resource management customer parameters were removed:
 - `include_representation_services`
 - `viewit_max_representations_displayed` parameters
 - `shareDigitalResources`
- You can now restrict digital access based on a reverse DNS lookup of the user's IP address.

 Access Rights Rule

Policy Name

General Deposit Profile

If no match

Deny Access

Details

Name *

Description

Expressions

No records were found.

Criterion	Operator	Value
DNS	Matches	

Add Expression

Cancel

Save

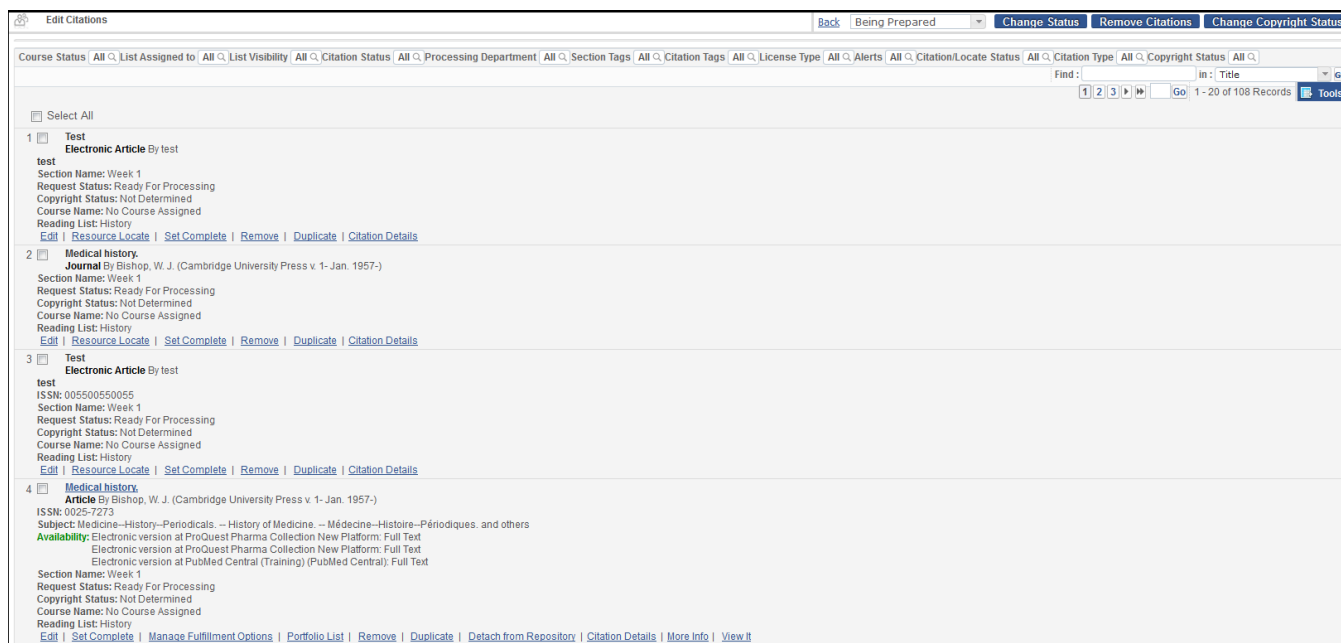
Restrict Access Rights By DNS

For more information, see [Adding an Access Rights Policy](#).

Fulfillment - May 2017 Enhancements

Manage All Citations on a Single Page

You can now manage all citations from all reading lists simultaneously on the Edit Citations page ([Fulfillment > Course Reserves > Citations](#)). This page contains more filters, but fewer actions, than appear on the Edit Reading List page. For more information, see [Managing Citations](#).



Edit Citations Page

End User, Item Level Requesting

End users can now place item requests in the Primo Get It tab. When this option is configured, the item request replaces title-level requesting, meaning that non-serial items that don't have a description field are also requestable in the Primo Get It tab only at the item level. Set the **item_level_requesting** customer parameter to **True** in order to set items without descriptions to be requestable from the item-level link. See [Request Options](#).

Item Policy and Barcode in the Z39.50 OPAC Syntax

Barcode is now reported in the **ItemId** element of the Z39.50 OPAC syntax **Present** response. For items that have an item policy, the item policy is now reported in the **availableThru** element.

Additional Fulfillment Enhancements

- An additional fifty new course terms are available to customize on the Course Terms code table page. See [Configuring Course Terms](#).



- **A NERS Enhancement (Request ID 4615):** MMS-ID now appears in the Excel export from the Manage In Process Items, Approve Digitization Requests, Expired/Active Hold Shelf, and Reading List - Citations pages. The new column, **MMSID**, appears as the last column in the export.



- **Idea Exchange:** New column options are available to display call number, library, and location in the Requests tab of **Manage Patron Services**. See [Managing Patron Services](#).



- **Idea Exchange:** The repository search now displays the due time in addition to the due date for checked out items.
- A new output parameter is now available in the Request Pickup Configuration rules. This allows the number of days before a request is expired to be calculated for open days only. For instance, if the rule is 7 days but the calculated date is a closed day and the rule is set to **True**, the Pick From Shelf task will expire on the next open day. If the rule is set to **False** (which is the default), the Pick From Shelf task will expire on the closed day. For more information, see [Request Pickup Rules](#).


Request Pickup Configuration
Cancel Save

Request Pickup Configuration

Name *
Description
Created By Ex Libris Created On 2017/03/29
Updated By Ex Libris Updated On 2017/03/29

Input Parameters

No records were found.

Name	Operator	Value

Possible Value> Add Parameter

Output Parameters

Consider as missing when expired
Show in 'Pick From Shelf' list
Expiry time for 'Pick From Shelf' (in days) Calculate expiry time in open days ☐

Cancel Save

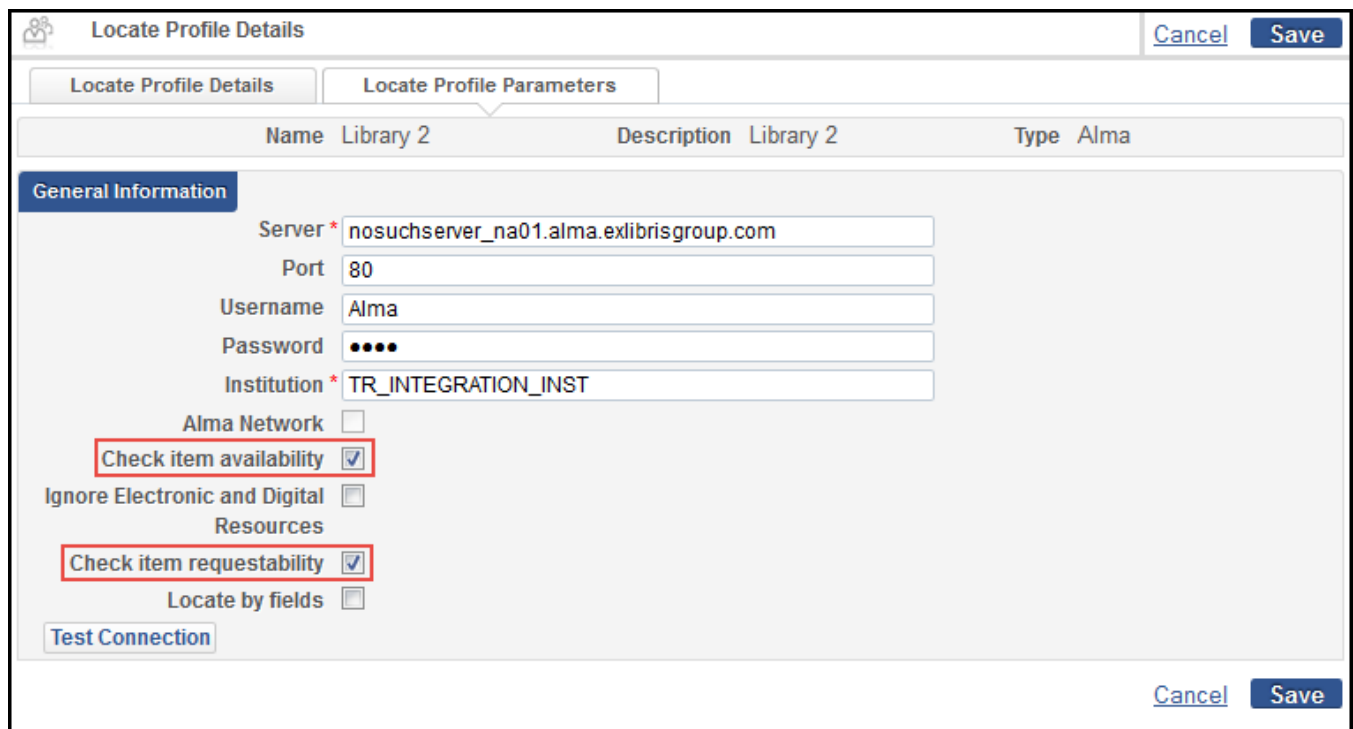
Request Pickup Configuration

- A new code table, Currency Symbols, defines the currency symbol exposed to the Primo user in Fine & Fees under My Account. The table is empty by default and can be customized according to the institution's enabled languages. For more information, see [Configuring Primo Fines & Fees Currency Symbols](#).

Resource Sharing - May 2017 Enhancements

Separate Requestability/Availability Check on a Locate Profile

The locate process now checks the requestable and loanable statuses separately, instead of considering the locate action a success only if both statuses are true.



Locate Profile Details

Cancel Save

Locate Profile Details Locate Profile Parameters

Name	Library 2	Description	Library 2	Type	Alma
------	-----------	-------------	-----------	------	------

General Information

Server * nosuchserver_na01.alma.exlibrisgroup.com

Port 80

Username Alma

Password

Institution * TR_INTEGRATION_INST

Alma Network ☐

Check item availability ☒

Ignore Electronic and Digital Resources ☐

Check item requestability ☒

Locate by fields ☐

Test Connection

Cancel Save

Locate Profile

For more information, see [Adding Locate Profiles](#).

Existing profiles that have the **Check Availability/Requestability** check box selected will automatically have both new parameters selected.

The resource sharing library can also be configured to automatically reject incoming requests when the items are neither requestable nor loanable.

Organization Unit Details
Cancel
Save

Organization Unit Name Resource Sharing Library
Organization Unit Type Library
Code RES_SHARE
Path TRAIN_1.TRAINING_1_INST.RES_SHARE
Description Temporarily manages inventory that is sent to or received from resource sharing partners

Summary
Contact Information
Calendar Management
IP Definitions

General Details

Organization unit name * Resource Sharing Library
Code RES_SHARE
Path TRAIN_1.TRAINING_1_INST.RES_SHARE
Base Url -
Description Temporarily manages inventory that is sent to or received from resource sharing partners
Default location for acquisition
Campus
Proxy

Resource Sharing Information

Is resource sharing library
Itemless
Symbol TRAINING_1_INST
Borrowing Setup
Cancel request on locate failure
Automatically activate locate profile
Default location Borrowing Resource Sharing Request
Default pickup location
Lending Setup
Automatically locate resource
Reject request when locate fails
Reject request when no available items
Reject request when no requestable items
Reject request when only electronic available
Ignore electronic resources
Automatic creation
Default location Lending Resource Sharing Request
Locate by fields
Default printer

Cancel
Save

Resource Sharing Library Summary

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

Additional Resource Sharing Enhancements

- The Primo resource sharing form can be customized so that the **Maximum Fee** field won't contain currency. This is done by setting the **rs_add_currency_to_mashup_form** customer parameter to **false**. For more information, see [Customizing Primo Resource Sharing Request Forms](#).
- A new customer parameter, **rs_display_items_not_requestable**, can be configured to display or suppress items that are not requestable in the physical services list in **Manage Fulfillment Options** of lending requests. The default value of this customer parameter is **true**. See [Configuring Other Settings \(Fulfillment\)](#).
- Checked in items are now displayed in the **Items** tab of the lending request after they are checked in with a process type of **Checked In**.
- A new check box, **Ignore Lender Shipping Cost**, was added to the resource sharing partner parameters for ISO partners. When it is selected, the borrower's set cost will be used. When it is not selected, the lender-side costs override the borrower's cost. Note that when the check box is not selected, the borrowing institution's cost is overridden even if the lender has not communicated a cost value—that is, it will be considered as if a value of 0 is communicated to the borrower. See [ISO Parameters](#).

Resource Sharing Partner

Partner Code: Lib2 Partner Name: Library 2

General Information Contact Information Parameters Notes

Alternative Delivery Address
Supports ADD Address ☐

General Information

Server* na01.alma.exlibrisgroup.com

Port* 9001

Symbol* TR_INTEGRATION_INST

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

Send Requester Information ☐

Shared Barcodes ☐

Ignore Lender Shipping Cost ☐

Resending Overdue Days Interval

Cancel Save

Resource Sharing Partner Parameters Page

Analytics - May 2017 Enhancements

New Digital Usage Subject Area

Using the new **Digital Usage** subject area, you can create reports and dashboards that support analyzing digital usage of the Alma viewer. For detailed information, see [Digital Usage](#).

Enhancements to the Licenses, E-Inventory, and Fund Expenditure Subject Areas

The Licenses, E-Inventory, and Fund Expenditure subject areas were enhanced to allow the creation of joint reports using fields from the Licenses and E-Inventory subject areas, and the Licenses and Fund Expenditure subject areas.

To support this development, the following fields were added:

- To **E-Inventory > Portfolio License** and **E-Inventory > Electronic Collection License**:
 - License Note
 - License Second Party Signed By
 - License Second Party Signed On
 - License URI
 - **License Signed** was renamed **License Signed On**
- To **Licenses > License Header**:
 - License Creator
 - License Modified By
- To Funds Expenditure, the **PO Line License** dimension was added with the same fields as **Licenses > License Header**.

In addition, the **Licenses Analysis** dashboard was added. You can use the drop-down lists to filter the results.

Licenses Analysis

Portfolio Licenses

Portfolio Names by License

Electronic Collection Licenses

License Terms

Funds Expenditure

Licenses which will expire before date

License Filters

License Name

--Select Value--

License Code

--Select Value--

License Term

--Select Value--

License Term Value

--Select Value--

License Status

Active

License Type

License

License Begins

<= 03/28/2017

License Ends >=

03/28/2017

License Signed By

--Select Value--

License Second Party Signed By

--Select Value--

License Review Status

Accepted

License URI

--Select Value--

Apply

Reset

8,447

No. of Portfolio (In Repository)

License Code	License Name	License Begins	License Ends	No. of Portfolio (In Repository)
1	License_Name1	1/2/2002	1/2/2099	6
2	License_Name2	7/1/2002	1/1/2099	4
3	License_Name3	5/12/2006		4
4	License_Name4	2/14/2007		1
5	License_Name5	3/2/2008		1
6	License_Name6	1/2/2009	1/2/2099	2
7	License_Name7	1/1/2011		5
8	License_Name8	6/1/2012		958
9	License_Name9	6/2/2012		6,533
10	License_Name10	10/6/2012		322
11	License_Name11	5/24/2013		50
12	License_Name12	9/17/2013		1
13	License_Name13	3/4/2014		1
14	License_Name14	4/23/2014		0
15	License_Name15	5/12/2014		51
16	License_Name16	5/16/2014		1
17	License_Name17	6/20/2014		4
18	License_Name18	8/27/2014		1
19	License_Name19	9/3/2014		1
20	License_Name20	9/4/2014		4
21	License_Name21	9/12/2014		1
22	License_Name22	9/18/2014		1
23	License_Name23	9/19/2014		1
24	License_Name24	9/24/2014		100
25	License_Name25	10/23/2014		7
26	License_Name26	10/25/2014		7
27	License_Name27	11/22/2014		242
28	License_Name28	12/3/2014		1
29	License_Name29	12/5/2014		98
30	License_Name30	12/6/2014		28

Licenses Analysis

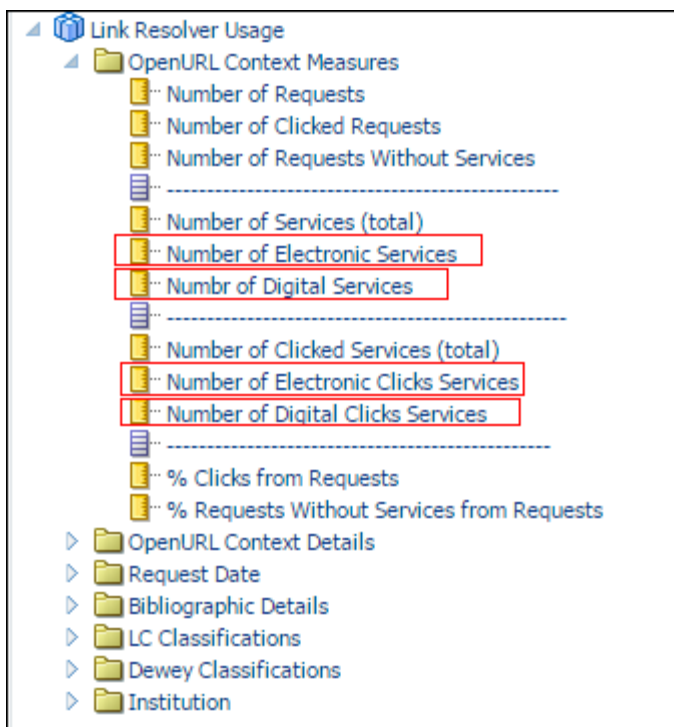
Digital Usage Fields Added to the Link Resolver Usage Subject Area

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

Support Added for Additional Types of COUNTER Reports

The following fields were added to the **Usage Data Details** dimension of the **Usage Data** subject area to support additional types of COUNTER reports:

- Support for COUNTER report BR3 was added:
 - BR3 - Title Access Denied (license limit exceeded)
 - BR3 - Title Access Denied (item not licensed)
- Support for COUNTER report JR1 GOA was added:
 - JR1 GOA - Journal Usage Counter Gold Open Access (total)
 - JR1 GOA - Journal Usage Counter Gold Open Access (html)
 - JR1 GOA - Journal Usage Counter Gold Open Access (pdf)

- Existing measure “BR1 – Book Success Title Requests was renamed BR1 – Book Success Title Requests (total):
 - Support for COUNTER report BR1 already existed. A measure for BR1 reports BR1 - Book Success Title Requests (html) was added.
 - Support for COUNTER report BR1 already existed. A measure for BR1 reports BR1 - Book Success Title Requests (pdf) was added.
- Existing measure BR2 – Book Success Title Requests was renamed BR2 – Book Success Title Requests (total)
 - Support for COUNTER report BR2 already existed. A measure for BR2 reports BR2 - Book Success Title Requests (html) was added.
 - Support for COUNTER report BR2 already existed. A measure for BR2 reports BR2 - Book Success Title Requests (pdf) was added.

The following figure illustrates the new fields:

April release	May release
- Usage Data Details - Title Identifier Count - Usage Measures Total - BR 1 - Book Success Title Requests - BR 2 - Book Success Section Requests - DB 1 - DB Federated Searches - DB 1 - DB Federated Sessions - DB 1 - DB Records Views - DB 1 - DB Result Clicks - DB 1 - DB Searches - DB 1 - DB Sessions - JR 1 - Journal Usage Counter - JR 1a- Journal Usage Counter Archive - PR 1 - Platform Federated Searches - PR 1 - Platform Regular Searches - PR 1 - Platform Records Views - PR 1 - Platform Result Clicks - Load File ID - Material Type Indicator	- Usage Data Details - Title Identifier Count - Usage Measures Total ----- - BR 1 - Book Success Title Requests (total) - BR 1 - Book Success Title Requests (html) - BR 1 - Book Success Title Requests (pdf) - BR 2 - Book Success Section Requests (total) - BR 2 - Book Success Section Requests (html) - BR 2 - Book Success Section Requests (pdf) - BR 3 - Title Access Denied (license limit exceeded) - BR 3 - Title Access Denied (item not licensed) ----- - DB 1 - DB Federated Searches - DB 1 - DB Federated Sessions - DB 1 - DB Records Views - DB 1 - DB Result Clicks - DB 1 - DB Searches - DB 1 - DB Sessions ----- - JR 1 - Journal Usage Counter - JR 1a- Journal Usage Counter Archive - JR 1 GOA - Journal Usage Counter Gold Open Access (total) - JR 1 GOA - Journal Usage Counter Gold Open Access (html) - JR 1 GOA - Journal Usage Counter Gold Open Access (pdf) ----- - PR 1 - Platform Regular Searches - PR 1 - Platform Federated Searches - PR 1 - Platform Records Views - PR 1 - Platform Result Clicks ----- - Load File ID - Material Type Indicator

New Usage Data Details Fields

Material Type Indicator Filter Added to the Usage via COUNTER Report Dashboard

The **Material Type Indicator** filter was added to the **Trends by Month** tab of the **Usage via COUNTER Report** dashboard. You can use this new feature to filter the report results by material type.



Material Type Indicator Filter

Additional Analytics Enhancements

- The **Leganto Image Included** field was added to the **Citation Copyright** dimension of the Course Reserves subject area. It indicates whether an image was included in a Leganto digitization request.
- The **Citation License Type** field was added to the **Reading List Citation** dimension of the Course Reserves subject area. This is an internal parameter that indicates the type of the citation license—for example: SIPX, Creative common, and DCS.
- The following date fields were added to the **Reading List Citation** dimension of the Course Reserves subject area:
 - Leganto Citation Visibility Start Date
 - Leganto Citation Visibility End Date
 - Leganto Citation Material Visibility Start Date
 - Leganto Citation Material Visibility End Date

In addition, the **Section Visibility** field was added to the **Leganto Reading List Section** dimension. It indicates whether the section is hidden from students outside of the section dates.

- The **Copyright Status** field was added to the **Citation Copyright** dimension of the Course Reserves subject area.

This field was also added to the following default reports in the `/shared/Alma/Course Reserves/Reports` directory:

- Copyright - CLA Reporting Template - UK
 - Copyright - Reporting Template - Australia
- The following out-of-the-box reports were added to `/shared/Alma/Requests/Reports`:
 - All items in acquisition technical services and have an active patron physical item request
 - All items with both an active binding request and an active external digitization request
 - The **Number of Mobile Activities** and **Number of Non-Mobile Activities** fields were added to the **Reading Lists** dimension of the Leganto Student Usage subject area. These fields can be used to create reports that display the percentage of usage from non-mobile and mobile devices.
 - The **Invoice Line Reporting Code** and **Invoice Line Reporting Code Description** fields were added to the **Invoice Line** dimension of the Funds Expenditure subject area. This was done for consistency with the fields of the **PO Line** dimension.
 - The **Partner Request Status** field of the **Borrowing Request Details** dimension of the Borrowing Requests subject area was renamed **Partner Request Status (to be deprecated)**. This change was made because the data that appears in this field is dependent on the flow of the resource sharing request, which in many cases does not get updated. The field will be removed in a future release.

Administration and Infrastructure - May 2017 Enhancements

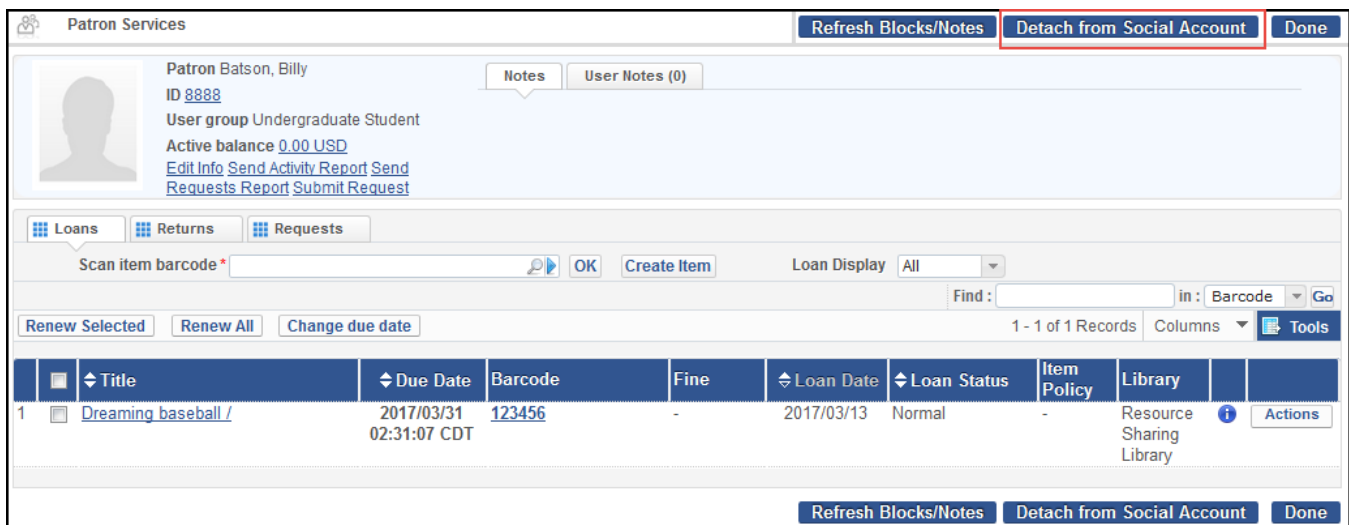
Email Attachment Retention/Purge



Idea Exchange: Letter attachments are retained in Alma for a certain length of time; this length may now be defined per letter. After the defined retention period, an attachment is permanently deleted. The mapping table **Letter Retention Configuration** was added to the General Configuration menu. The table lists letters and the number of days the letter is retained before auto-deletion. A weekly job deletes all attachments for the listed letters that were created prior to the retention date. For more information, see [Setting Letter Retention Periods](#).

Additional Administration and Infrastructure Enhancements

- The Manage Patron Services page now includes an option to detach a user's account from their social account. For more information, see [Managing Patron Services](#).



Patron Services

Refresh Blocks/Notes Detach from Social Account Done

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

Notes User Notes (0)

Loans Returns Requests

Scan item barcode * OK Create Item Loan Display All

Find : in : Barcode Go

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

	Title	Due Date	Barcode	Fine	Loan Date	Loan Status	Item Policy	Library	
1	Dreaming baseball /	2017/03/31 02:31:07 CDT	123456	-	2017/03/13	Normal	-	Resource Sharing Library	Actions

Refresh Blocks/Notes Detach from Social Account Done

Manage Patron Services

- When running a manual job, the Parameters step now appears only when there are parameters to define. In addition, the Schedule step was removed, since manual jobs are always run immediately. The ability to rename the job was moved to the Review and Confirm step. The number of entities that will be affected by the job appears in the Review and Confirm step, in addition to the Parameters step. See [Running Manual Jobs on Defined Sets](#).

Content Operations - May 2017 Enhancements

Library of Congress Authorities Community Zone Updates

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

- Number of records updated: 135
- Number of records added: 232
- Number of records deleted: 42

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

- Number of records updated: 20928
- Number of records added: 28769
- Number of records deleted: 590

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

- Number of records updated: 163
- Number of records added: 1971
- Number of records deleted: 44

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

- Number of records updated: 4
- Number of records added: 23

New Electronic Collections Added to the Alma CKB

The following collections were added to the Alma Community Zone from March 20th through April 23rd:

- Abraham Lincoln Association Serials
- Accessible Archives Complete

- Agriculture Collection
- AMA Manual of Style
- American Medical Association (EIRA)
- American Medical Association (EIRA)
- Automotive News
- BEP 2010 Digital Library
- Biodiversity Heritage Library
- BMJ Journals (EIRA)
- Business Economics & Theory Collection
- Cabell's Directory of Publishing Opportunities
- Cambridge Journals Online Archives (EIRA)
- Chinese Electronic Periodical Services Engineering
- Chorus America
- Diversity Studies Collection
- Environmental Studies & Policy
- Federal Reserve Bank of Chicago Economic Research Publications
- Free Medical Journals
- Gale Directory Library
- Gender Studies Collection
- HeinOnline Slavery in America and the World: History, Culture & Law
- Hellenic Academic Libraries Link
- Kids InfoBits
- LiebertOnline Archives (EIRA)
- Literature Criticism Online
- LWW Archive (EIRA)
- LWW Health Library - Premium Basic Science Collection
- Mary Ann Liebert Online - Open Access
- MIT Sloan Management Review
- New England Journal of Medicine (EIRA)
- NRC Research Press Journals
- Oxford Journals Archive (EIRA)
- Oxford Journals Collection (EIRA)

- Physical Therapy & Sports Medicine Collection
- PhysicsWorld Archive
- ProQuest Central Essentials
- Research In Context
- Routledge Handbooks Online Archaeology & Classics
- Routledge Handbooks Online Asian Studies
- Routledge Handbooks Online Business & Economics
- Routledge Handbooks Online Communication, Journalism, Media and Culture
- Routledge Handbooks Online Complete
- Routledge Handbooks Online Criminal Justice & Criminology
- Routledge Handbooks Online Development Studies
- Routledge Handbooks Online Education
- Routledge Handbooks Online Environment & Sustainability
- Routledge Handbooks Online Foreign Languages
- Routledge Handbooks Online Geography
- Routledge Handbooks Online Health and Social Care
- Routledge Handbooks Online History
- Routledge Handbooks Online Law
- Routledge Handbooks Online Linguistics
- Routledge Handbooks Online Literature
- Routledge Handbooks Online Middle East Studies
- Routledge Handbooks Online Music
- Routledge Handbooks Online Performance
- Routledge Handbooks Online Philosophy
- Routledge Handbooks Online Planning
- Routledge Handbooks Online Politics
- Routledge Handbooks Online Psychology
- Routledge Handbooks Online Religion
- Routledge Handbooks Online Security Studies
- Routledge Handbooks Online Sociology
- Routledge Handbooks Online Sport & Leisure
- Routledge Handbooks Online Tourism, Hospitality and Events Management

- SAGE Business Researcher
- Sage Journals Archives (EIRA)
- SBRnet
- ScienceDirect (EIRA)
- ScienceDirect Archives (EIRA)
- Slavery and Anti-Slavery: A Transnational Archive Part I
- Small Business Collection
- Small Business Resource Center
- Something About The Author Online
- Springer eBooks (EIRA)
- Springer Journals (EIRA)
- Springer Journals (Swiss National License)
- SpringerLink Books J.B. Metzler Humanities German 2017
- SpringerLink Books Mathematics and Statistics Without Lecture Notes 2017
- SpringerLink Lecture Notes in Mathematics 2017
- U.S. History Collection
- Wanfang Med Online Journals
- WARC.com
- Westlaw RIA Checkpoint
- Wiley Online Library (EIRA)
- World History Collection

New External Search Resources

The following new external search resources were added to the Community Zone for the May release:

- FENNICA - The National Bibliography of Finland
- Catálogo Colectivo del Patrimonio Bibliográfico (CCPB)

Next Release Sneak Preview

Resource Management

- Browse Call Number – It will be possible to filter Browse Call Numbers by library and location. It will also be possible to open the Browse Shelf Listing from within the Physical Item Editor.
- Enhanced Inventory Enrichment for the Publishing Process – Additional item and holdings details, such as creation and update dates of holdings and items, will be added to export profiles.
- Display Relevant Call Numbers in Resource Management Pages – The relevant call number will display in a number of Resource Management pages, such as List of Items and List of Holdings page ([Staff Search > Physical titles > Items](#)).
- Enrich Primo Publishing with Call Number Preferred/Non Preferred Data – The current Publish bibliographic records to Primo profile will be enhanced with a new content option: **Classification Enrichment**.
- Authority Control Task List Improvements – When an authority record is deleted, manual handling may be needed. This type will now appear in the Review tab (instead of in the All tab). In addition, two new options—by title and by bibliographic heading—will be added for searching the Authority Task List.
- Authority Partial Redirection – There is a need to be able to identify when an authority record is updated (for example, with the death date of an author) or when an authority record is split. These changes will now be reported in the Authority Control Task List.
- German Language-Related Issues – The search index of relevant Community Zone data (such as German authorities) will support both English and German language variations.

Fulfillment

- New Parameters in the Fines/Fees Notification Profile – Two new parameters in the Fines/Fees Notification profile will allow for skipping patrons that have active loans and for skipping patrons whose expiry date is in the past and whose status is inactive.
- New Configuration Option for Overdue and Lost Loan Profiles – Currently the Overdue and Lost Loan Profile creates a fine for every loan that is included in the notice to the patron. It will now be possible to trigger a fee per notice rather than per loan.

- Sort Pick From Shelf List – Pick from Shelf lists will have options for sorting by location and call number. This sorting will also be available by API.

Resource Sharing



- **Idea Exchange:** Add Assignment Tab to the Borrowing Request Task List – Currently resource sharing lending requests can be assigned to a staff user, but borrowing requests cannot. It will now be possible to assign borrowing requests as well.
- Fulfillment Network Pickup Option – A new resource sharing option will be introduced that will support the integration of direct requesting within the fulfillment network. This will be visible in the request form, which will have new options for preferred pickup institution and library.

Analytics

- Add Linked Account Institution to Users Subject Area – Adding linked account institution information to the Users subject area will make it easier for fulfillment networks to create reports of fulfillment network activity.



- **Idea Exchange:** Update to Bibliographic Details Shared Folder - **Brief Level**, **Originating System**, and **Originating System ID** fields will be added to the Bibliographic Details shared folder.

Administration



- **Idea Exchange:** Audit Trail/History for User Record Changes – A user record will include an audit trail of who made changes to the user record and when these changes were made. This will apply to any segment of the user record (including roles).

APIs

- The expected receiving date will be added as a filter on the Get PO Lines API.
- Create, Update, and Delete APIs will be available for electronic collections and services.
- Export User information - Webhook support will be available for user creation, deletion, and update.
- The Set Members API's **id_type** parameter will be enhanced to support additional IDs for creating sets.

Working with Uniform Title Headings for GND Records

New for May!

For GND authority records, headings are created from the 1XX and 4XX fields. In addition, for uniform title authority records, headings are also created from the 5XX fields when the GND authority record contains:

- 079 \$b u
- 130 field and a 500, 510, or 511 with \$9 that contains one of the following:
 - 4:auta
 - 4:koma
 - 4:regi
 - 4:kuen

As a result, when editing records in the MD Editor and using F3, suggested headings may provide results based on headings created from the 5XX fields. See [Linking an Authority Record to a Bibliographic Record](#) for more information about working with F3.

Starting with the May 2017 release, the capability for utilizing 5XX data is being implemented gradually. Initially, this capability is available for new uniform title authority records and, ultimately, will be available for all GND records.

Working with the 240 Field and Uniform Title Bibliographic Headings

New for May!

NOTE:

To use this capability, Ex Libris Support needs to configure this feature to create uniform title bibliographic headings for the 240 fields for your institution. Contact Ex Libris Support if this has not been enabled for your institution.

Uniform title bibliographic headings support includes support for the MARC 21 240 field. With this feature, you can configure the option to have uniform title bibliographic headings created from the 240 field and link them to uniform title authority records. As a result, you can press F3 from the 240 field for uniform title bibliographic headings information.

Generating Author Numbers Automatically

With Alma cataloging, you can automatically generate the author number in MARC 21 bibliographic records. For example, you can automatically generate the Chinese author call number for the 905 local call number field in a MARC 21 bibliographic record. The 905 local call number field consists of the following:

- 905 \$d - Created by copying the 093 \$a using an Alma normalization rule

Using Multiple Access Points for CNMARC 6XX Fields

New for May!

Alma supports a single CNMARC 6XX field to be split into several segments where each segment is an access point for F3 and authority control. Alma provides a configuration option where you can define which 6XX fields have multiple access points. See [Configuring Multiple Access Points for CNMARC 6XX Fields](#) for more information.

After you have configured the 6XX headings control fields, the 6XX headings control fields are formatted in multiple rows in the MD Editor. The rows or segments of the 6XX fields are determined by the a, j, x, y, and z subfields. These subfields are used as delimiters that identify where new segments (rows) begin for the 6XX fields. See an example below.

606	0	\$\$\$a 电影 \$A dian ying
	0	\$\$x 叙述
	0	\$\$x 研究
	0	\$\$y 中国

606 Headings Control Field Example in the MD Editor

However, in the simple Record View, the 6XX headings control fields continue to appear in a single row.

606	0_ a 电影 A dian ying x 叙述 x 研究 y 中国
-----	---

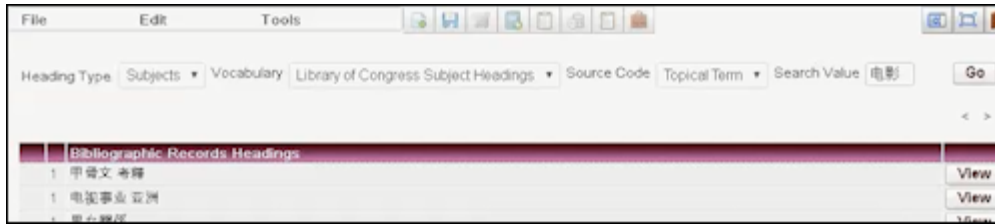
Simple Record View of the 6XX Field as a Single Row

For each row of the 6XX field, you can press F3 to check for authority headings and link bibliographic records. See [Creating a MARC 21 Bibliographic Record](#) and [Linking an Authority Record to a Bibliographic Record](#) for more information about using F3.

The screenshot shows a web interface with a menu bar (File, Edit, Tools) and a toolbar. A message box states: "Alma has attempted to link the bib headings to authority records while loading the record. Loading the record was therefore slower. You have 8 warning(s) in your record". Below this, it says "Working on - 华语电影叙事的文化身份 == Cult (9910756137203406), Created by ex_limpl (21/03/2017 18:16:20 HKT)". The main area displays a 606 field with subfield 0 and the text "\$\$a 电影 \$A dian ying". To the right of the field is a button labeled "Create Authority Record". At the bottom are "Expand" and "Cancel" buttons.

Linking CNMARC 6XX Bibliographic Records to Authority Records

You can also use Browse Bibliographic Headings to browse each segment of the 6XX field independently.



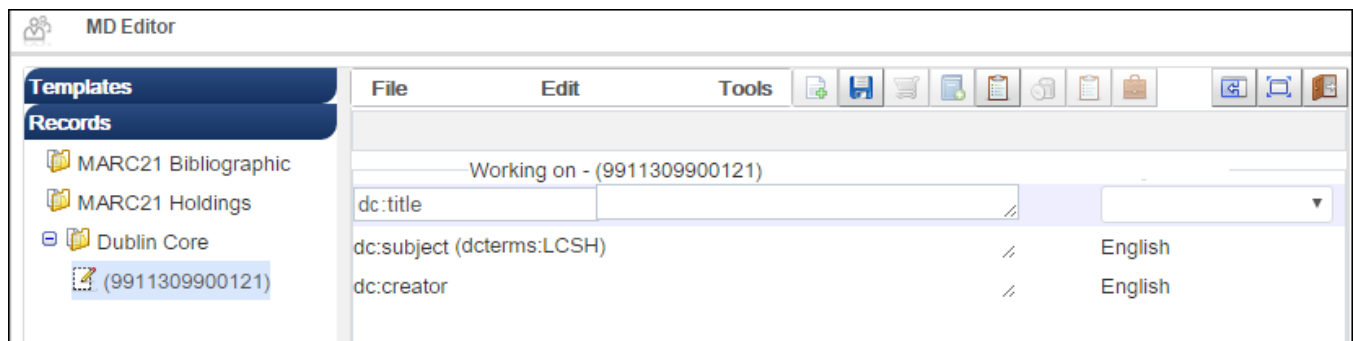
Browse Bibliographic Headings

Creating a Dublin Core Bibliographic Record

To create a Dublin Core bibliographic record:

1. From the Alma main menu, click **Open Metadata Editor**.
2. Click **File > New > Dublin Core**.

The MD Editor opens a template for entering your Dublin Core record.



New Dublin Core Record

3. Enter the data for your Dublin Core record. Refer to the section MD Editor Menu and Toolbar Options for additional information regarding working with the MD Editor.

NOTE: Contact Ex Libris to set the Active Registry mapping in your system for Dublin Core support. By default, MARC 21 Bibliographic is set as the Activated and Preferred registry.

Merging Bibliographic Records

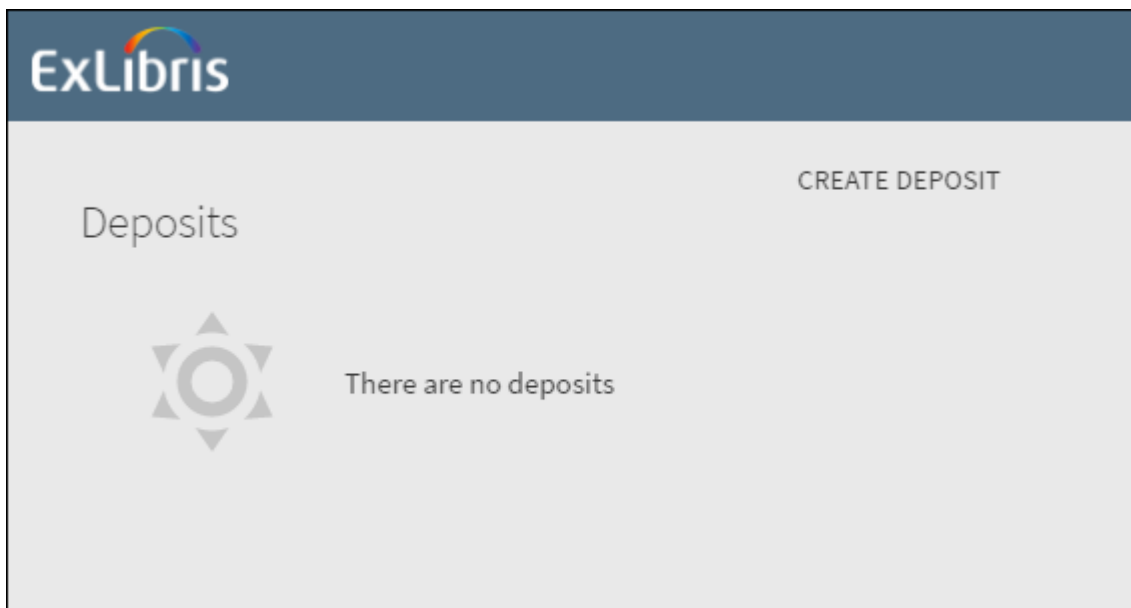
Alma provides the ability to merge two bibliographic records (not linked to the Community Zone) in the MD Editor. This is especially helpful when catalogers identify duplicate bibliographic records in the catalog that they want to combine into one bibliographic record. The merge is handled by selecting one of the merge rules from a list of

Patron Deposits

Patrons can submit digital content to Alma to be added to the repository using the Deposit interface.

To submit a deposit using the interface:

1. Log on to the patron deposit interface The following appears:



Create Deposit

2. Click **Create Deposit**.
3. Select a deposit profile. (For information on configuring deposit profiles, see [Configuring Deposits](#).) The following appears:

Deposit Details

Please upload up to three files

★ Title

Abstract

Drag files here to upload
or click to browse a file

Note

Terms and Conditions ▼

☐ I have read and agree to the Terms and Conditions

CANCEL SAVE AS DRAFT SUBMIT

Deposit Details

- Enter a title, abstract, and note for the deposit.
- Drag and drop the files to be deposited into the gray area or click the gray area and select the files.
- Click **Terms and Conditions** to display the Terms and Conditions, and select the check box to indicate that you have read and agree to them.
- Click **Submit** to submit the deposit or **Save as Draft** to save the deposit as a draft.

The deposit appears in the list of deposits.

Deposits			Sort by ▼	CREATE DEPOSIT	⌵
2 deposits					
1	Images of Doves	Draft Updated on: 04/02/2017	EDIT	/	WITHDRAW ▼
2	Star Image	Submitted Updated on: 03/27/2017			▼

Deposits List

You can click **Edit** to edit draft deposits and click **Withdraw** to withdraw them and remove them from the list of deposits.

Depending on the deposit profile configuration, deposits may need staff approval before they are submitted to the repository. For more information on Deposits, see [Deposit](#).

After the staff member reviews your deposit, you receive an email indicating if the deposit is **Approved**, **Returned**, or **Declined**. The status of the deposit is indicated in your List of Deposits.

Deposits		CREATE DEPOSIT		
2 deposits				
1	Images of Doves 	Submitted	Updated on: 04/05/2017	
2	Star Image 	Returned	Updated on: 04/05/2017	
		 EDIT	/	 WITHDRAW

Deposit Returned

If a deposit is declined, you cannot resubmit an image with the request. If the deposit is returned, you can click **Withdraw** to withdraw it or click **Edit**, attach a different image, and click **Submit** to resubmit it.

You can view Approver notes by clicking **Edit > Previous Notes**.

Deposit Details

Please upload up to three files

Title

★ Star Image

Abstract

Drag files here to upload
or click to browse a file

digital_Usage_star_diagram.png

digital_Usage_star_diagram



Note

[Previous Notes](#) ▲

¹ Deposit Returned. Reason:Missing mandatory files.
admin1, 2017-04-05 15:49:08

² Deposit Submitted
admin1, 2017-04-05 15:45:22

CANCEL

SAVE AS DRAFT

SUBMIT

Previous Notes

Digital Usage

New for May!

Using the Digital Usage subject area, you can create reports and dashboards relating to digital usage and answer the following types of business questions:

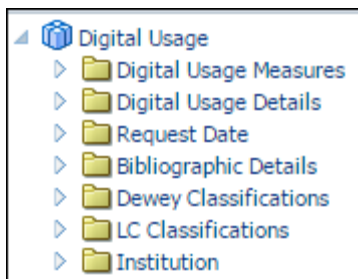
- How many times was the digital representation viewed?
- How many times was the digital representation shared?
- How many times was the digital representation access denied?
- How many and which of the digital files were downloaded?
- How many and which of the digital files were viewed?



Star Diagram – Digital Usage

Field Descriptions

The following fields are available in Licenses.



Digital Usage – Field Descriptions

Digital Usage Measures

The Digital Usage Measures table is a fact table that stores all measures relating to digital usage, such as number of digital representation views and number of digital file views.

Field	Description	Additional Information
Number of digital representation views	The number of digital representation views	
Number of digital representation shares	The number of digital representation shares	
Number of digital representation access denied	The number of digital representation access denied	
Number of digital file views	The number of digital file views	
Number of digital file downloads	The number of digital file downloads	

Digital Usage Details

The Digital Usage Details table is a dimension table that stores additional details about digital usage.

Field	Description	Additional Information
Request ID	The request ID	
Representation ID	The representation ID	
File ID	The file ID	

Field	Description	Additional Information
Usage level	The usage level	
Creator	The creator	

Request Date

The Request Date table is a dimension table that stores information about the digital request date.

Field	Description	Additional Information
Request Date	Stores the item creation date in a date format such as 2/29/2014.	
Request Month Key	Stores the month of the date in number format such as 2 for February	
Request Month	Stores the month of the date in month description format such as February	
Request Full Month	Stores the month and the year of the date in a display format such as Feb 12	
Request Quarter	Stores the quarter of the date in a display format such as Q1	
Request Year	Stores the year of the date in number format such as 2012	
Request Fiscal year	Stores the fiscal year of the date in a string format such as 2012.	
Request Date Filter (Under Construction)	Used to filter the request date. NOTE: The functionality of this field may change in the future, so this field should not be used for saved reports.	

Bibliographic Details

The Bibliographic Details table is a dimension table that stores the bibliographic details of the digital usage. The primary key of the table is `MMS_ID`.

The field descriptions can be found in the Bibliographic Details shared dimension.

Bibliographic Details

Field	Source in Alma (for Internal Reference)	Mapping from MARC
Title	Taken from display.title in the display section of the operational record	MARC 245 subfields a,b
Author	Taken from display.author in the display section of the operational record	List values, delimiter is (;) ■ MARC 100 excluding Numeric subfields ■ MARC 110 excluding numeric subfields ■ MARC 111 excluding numeric subfields
ISBN	Taken from search.isbn in the search section of the operational record	List values, delimiter is ; MARC 020 a,e,z
ISSN	Taken from search.issn in the search section of the operational record	List values, delimiter is ; MARC 022 a,y,e,z
Publisher	Taken from display.publisher_const_b in the display section of the operational record	MARC 260 b MARC 264 b Remove special characters and replace spaces.
Publication Date	Taken from display.date_of_publication in the display section of the operational record	MARC 260 c
Publication Place	Taken from display.place_of_publication in the display section of the operational record	MARC 260 a
Place Code	Taken from display.place_code in the display section of the operational record	For MARC21 this is taken from 008 pos. 15-17
Material Type	Taken from search.material_type in the search section of the operational record	MARC control LDR Material Type
Begin Publication Date	Taken from display.begin_pub_date in the search section of the operation	For MARC21 this is taken from 008 pos. 7-10

Field	Source in Alma (for Internal Reference)	Mapping from MARC
End Publication Date	Taken from display.end_pub_date in the search section of the operation	For MARC21 this is taken from 008 pos. 11-14
Category of Material	Taken from display.category_of_material in the display section of the operational record	Position 0 of the 007 field of the bibliographic record
Bibliographic Level	Taken from display.bib_level in the display section of the operational record	Position 7 of the LDR field of the bibliographic record
Bibliographic ID	Taken from display.bib_id in the display section in the operational record	MARC 010 excluding numeric subfields
Network Number	Taken from search.other_system_number in the search section of the operational record	This field is called "other system number" in Alma List values. The delimiter is ; MARC 035 excluding numeric subfields
Edition	Taken from display.complete_edition in the display section of the operational record	MARC 250 subfields a,b
Language Code	Taken from display.language in the display section in the operational record	For MARC21 this is taken from 008 pos. 35-37
Series	Taken from display.series_small in the display section in the operational record	List values, delimiter is ; ■ MARC 830 subfields a,x,v ■ MARC 800 excluding numeric subfields ■ MARC 810 excluding numeric subfields
Subjects	Taken from display.subjects in the display section of the operational record	List values, delimiter is ; MARC 6XX excluding numeric
Type of Date	Taken from display.type_of_date in the search section of the operational record	For MARC21 this is taken from 008 pos. 6
Uniform Title	Taken from display.uniform_title in the display section of the operational record	MARC 240 excluding numeric subfields MARC 130 subfields a,p

Field	Source in Alma (for Internal Reference)	Mapping from MARC
Resource Type	Constructed based on existing bibliographic fields such as the LDR and 008. For more information, see Working with the Resource Type Field .	

The following table describes other fields in the shared dimension (taken from Alma and not MARC):

Bibliographic Details	
Field	Source in Alma (for Internal Reference)
Active Course Code	The code of an active course.
Active Course Name	The name of an active course.
MMS ID	Stores the MMS ID of the item
LC Classification Top Line	Stores the combined LC code and classification numbers until the first period followed by a letter such as NB933 when the lc_class_number is NB933.F44
Dewey Classification	Stores the Dewey Classification
Dewey Classification Top Line	Stores the first 3 digits of the Dewey Classification
Local Param1	This field allows you to enrich the bibliographic information exported to Analytics with additional information stored in MARC 9XX local fields in Alma. In order to make use of this field, you must contact Ex Libris Support and supply them with a three-digit MARC field code (for example, 901). Following configuration of this field by Ex Libris Support, its value will be available in analytics.
Local Param2	See the description above.
Local Param3	See the description above.
Local Param4	See the description above

Field	Source in Alma (for Internal Reference)
Local Param5	See the description above
Creator	Stores the name of the user that created the record
Creation Date	Stores the creation date
Modified By	Stores the user name that modified the record
Modification Date	Stores the modification date
Suppressed from Discovery	Indicates whether the record is suppressed from external discovery systems
Bibliographic Lifecycle	The Lifecycle of the item. Possible values are Deleted and In Repository. This allows you to filter reports by In Repository/Deleted items.
Network ID	This field is used by institutions implementing a Network Zone. It is the same as the MMS ID of the bibliographic record in the Network Zone and can be used to create reports that show the MMS ID in the member institution (using the existing MMS ID), as well as the corresponding MMS ID in the Network Zone.
Title (Normalized)	The normalized Title. This field is useful when you want to use the normalized title from one subject area to compare with a report with fields from a different subject area.
ISSN (Normalized)	The normalized ISSN. This field is useful when you want to use the normalized ISBN from one subject area to compare with a report with fields from a different subject area.
ISBN (Normalized)	The ISBN. Created for uniformity with Title (Normalized) and ISSN (Normalized).

Dewey Classifications

Books can be classified with Dewey Classifications.

In Dewey Classifications, topics are ordered in a hierarchy that is indicated by a three digit number. The highest level of the hierarchy is indicated by a number with one significant digit followed by two zeros, such as 600. The second level in the hierarchy is indicated by a number with two significant digits followed by one zero, such as 630. The third level in the hierarchy is indicated by a number with three significant digits such as 636.

Note that the Dewey number is taken from the 852 subfield h of the holdings record and not from the 082 of the bibliographic record.

The field descriptions can be found in the Dewey Classifications shared dimension.

Dewey Classifications		
Field	Description	Additional information
Dewey Number	Holds the first 3 digits of the Dewey Classification.	
Group1	Stores the name of the first level.	
Group2	Stores the name of the second level.	
Group3	Stores the name of the third level.	
Dewey Classifications	Stores the Hierarchy column that allows the user to drill down from the first level of the Dewey Classification to the third level. Using this column provides the user with the option to view the accumulative measures (loans or returns) in each level of the hierarchy.	

LC Classification

Using this dimension, the user can drill down from Group1 to Group4. In each level, the user may see measures accumulated to the relevant group and see the number of items grouped by classification.

The field descriptions can be found in the LC Classifications shared dimension.

LC Classifications		
Field	Description	Additional information
Start Range	Stores the start range of the group such as PS501	
End Range	Stores the end range of the group such as PS689	
Classification Code	Stores the letters in the beginning of the range such as PS	
Start Range Number	Stores the numbers that come after the letter in the start range	
End Range Number	Stores the numbers that come after the letter in the end range	

Field	Description	Additional information
Group1	Stores the name of the first level	
Group2	Stores the name of the second level	
Group3	Stores the name of the third level	
Group4	Stores the name of the fourth level	
Classifications	Stores the Hierarchy column that allows the user to drill down from the first level of the classification to the fourth level. Using this column provides the user with the option to view the accumulative measures	

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.
