

Alma September 2017 Release Notes

The Soul of Alma
Institutional Value



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

☐ [Manually Deleting COUNTER Data Files By File ID](#) – Until now, it has been possible to delete only COUNTER usage data that was loaded in Alma. This meant that COUNTER usage data that was originally loaded in UStat or another system and then migrated to Alma could not be deleted. It is now possible to delete COUNTER usage data regardless of whether it was loaded in Alma or migrated from another system. This is particularly useful when you discover that a vendor has sent you erroneous or duplicate data for a specific period in the past. It can now easily and simply be removed.

☐ [Analytics Tab Added to Vendor Information](#) – It is now possible to quickly and easily analyze the efficiency of a vendor when the vendor record is open in the Alma user interface. Just switch to the new **Analytics** tab and you will see a detailed report of the vendor performance in the last year. This greatly assists you in choosing which vendor to use for PO lines being created in Alma.

☐ [Assign Imported Digital Titles to Collection Based on MARC Record](#) – Streamline your digital loads and reduce manual work using rules to automatically assign objects to a collection when importing digital content into Alma. Assignment is based on the collection defined in the MARC 787 field.

☐ [Pushing Persistent Blocks to Member Institutions](#) – If you are a fulfillment network member, you may be interested in blocking patrons from borrowing at member institutions if their accounts have been blocked at the home institution. Now you can achieve this with just a couple of configuration steps.

☐ [Secondary and Tertiary Reporting Codes in PO Lines and Invoices - Analytics](#) – Until the August release, it was possible to add only one reporting code to the invoice line and the PO line. This meant that the reporting capabilities used with the reporting code were limited. In many cases, institutions needed to add many codes to the list of reporting codes, some of which were actually combinations of existing codes. With this new feature, a total of three reporting codes can be added to both the invoice line and the purchase order line. Each list of reporting codes can

Action Items

be independently created, allowing for greater granularity. All three of the reporting codes are now also reflected in Alma Analytics.

☐ [New Counter Types in Analytics](#) – As libraries increasingly realize the significance of measuring usage data, they have begun to load more COUNTER reports. The report types BR4 (Book Report 4), BR5 (Book Report 5), and MR1 (Multimedia Report 1) are increasingly being used by many libraries, and are now also supported by Alma. Institutions can take advantage of the rich out-of-the-box reports supplied in the Alma directory of Alma Analytics or create their own.

☐ [View Only Fulfillment and User Administrator Role](#) – Access to system configurations is useful for many library operators, but the ability to change these configurations must obviously be restricted. You can now give staff view only access to certain configuration areas. The Fulfillment and User Administrator roles are the first roles that are enabled in a read-only mode. More roles will follow in future Alma releases.

☐ [Webhooks Logs](#) – If you use or plan to use the Alma [Webhooks](#), this new tool will make it much easier to build your integration, enabling you to use rich Alma-generated logs to help analyze how your webhooks are working.

What's New

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

New Alma User Interface

The new Alma UI is now being officially released. This means that as of August 20th, Alma's new UI can be enabled (turned on) for all institutions on sandbox environments, and as of September 3rd, the new UI can be enabled (turned on) for all institutions on production environments, although it is not turned on by default on these environments. Each institution can decide whether to:

- turn on the new UI as the default for all users
- leave it turned off for all users, enabling individual users to turn on the new UI themselves

For information on enabling the new Alma UI, see [Enabling Alma's New UI for Your Institution](#).

For general information on Alma's new user interface, see [What's New in Alma's New User Interface](#), as well as the training videos available at [Introduction to the New Alma User Interface](#).

Note

There is a button on the top of the online help pages that allows you to toggle between documentation for the new UI and the classic UI. If you are in Alma's new UI and select **Help > Help for This Page**, you will be sent to the new UI version of the help page. If you are in Alma's classic UI and select **Help > Help for This Page**, you will be sent to

the classic UI version of the help page. Note that most help pages are available for the new UI, although some are still being worked on by the documentation team and will be ready later this year.

Acquisitions

- [Manually Deleting COUNTER Data Files By File ID](#) – You can now manually delete uploaded COUNTER data files according to their file ID.
 - [Additional Acquisitions Enhancements](#)
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Note

As announced in the June 2017 release notes, we are planning to deactivate UStat accounts for institutions that have been live with Alma for at least three months as of September 2017. Institutions that are not yet live with Alma or that have been live with Alma for less than three months will have their UStat accounts deactivated after they have been live with Alma for three months.

Resource Management



- **Idea Exchange:** [Manage Direct Linking for Journal OpenURLs](#) – Configuration options are now available to disable direct linking for journal OpenURLs.
- [Alt+N Shortcut](#) – When you are working with records in the MD Editor, **Alt+N** can now be used as a shortcut to quickly navigate to the options for a new record (**File > New**).
- [Configure Fixed Fields for Form Editing Only](#) – Fixed fields that provide a form option in the MD Editor can now be configured to require form use.
- [Bibliographic Record Redirections Support](#) – The Alma import process now extends the support for automatic management of bibliographic record additions and deletions, including inventory and related record re-linking.
- [880 Hanzi to Pinyin Transliteration Handling of Personal Names for Hong Kong](#) – When you use the Add Hanzi to Pinyin Transliterations normalization task and your institution is configured with the Hong Kong searching language configuration, personal names located in \$a of the 100, 600, 700, and 800 fields are handled in a special manner.
- [UDC Call Number Normalization](#) – The UDC (Universal Decimal Classification) call number normalization was enhanced to arrange the numbers decimally (including those in quotation marks, brackets, and so forth) when using the Browse Shelf Listing feature for the holdings call number level and selecting a UDC call number type.
- [GND Authority Changes](#) – Changes were implemented in Alma to align with the GND MARC 21 formatting changes that are scheduled for 12 September 2017.
- [Additional Resource Management Enhancements](#)

Digital Resource Management

- [History Information Available for Digital Resources](#) – A history of actions performed now appears under a new **History** tab in the Collection Resource Editor and Digital Representation Resource Editor.
- [Status Update Email for Deposits](#) – You can configure the new Deposit Activity Report job to send an email to depositors that indicates the status of their active deposits.
- [Assign Imported Digital Titles to Collection Based on MARC Record](#) – To configure an import profile to have Alma automatically assign imported digital titles to a collection according to the value of the 787 field of the MARC record, you must now activate a normalization process that contains the new **addBibToCollectionNormalizationTask**.

Fulfillment

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

Resource Sharing



- **Idea Exchange:** [Level of Service Facet](#) – The level of service on a borrowing or lending request was added as a facet to borrowing and lending request lists.
- [New Borrowing Requests Activity Status Filter Options](#) – The borrowing requests task list filter now includes new values that can be used to filter the Active view.
- [Additional Resource Sharing Enhancements](#)

Collaborative Networks

- [Pushing Persistent Blocks to Member Institutions](#) – A library may now copy a user's existing blocks from the user's source account and use them in a linked account.
- [Network-Managed Authority Templates Available to Member Institutions](#) – Templates created in the Network Zone for locally managed authority records (such as LC Name, LC Subject, and so forth) are automatically available to member institutions that work with the same local authority records.
- [Additional Network Zone Staff Search Fields](#) – In the Network Zone, you can specify additional local fields for staff search display and distribute them to member institutions.

Analytics

- [New Leganto Instructor Usage Events Subject Area](#) – The new Leganto Instructor Usage Events subject area was added, enabling you to create reports concerning the instructor usage of Leganto.
- [New Physical Items Historical Events Subject Area](#) – The new Physical Items Historical Events subject area was added, enabling you to create reports on historical events of physical items.
- [New Analytics Administrator Role](#) – The configuration permissions available with the Design Analytics role were transferred to the new Analytics Administrator role.
- [Additional Analytics Enhancements](#)

Administration and Infrastructure



- **Idea Exchange:** [View Only Fulfillment and User Administrator Roles](#) – Institutions can now provide users with a "view only" version of the Fulfillment and User Administrators roles (available in the new UI only), providing these users with the ability to view, but not edit, Fulfillment configuration settings.
- [Additional Administration and Infrastructure Enhancements](#)

APIs

- The BIBs API was enhanced with normalization and validation options. For detailed information, see <https://developers.exlibrisgroup.com/alma/apis/bibs>.
- Secondary and tertiary additional reporting codes were added to the PO line and invoice APIs in order to align the APIs with the Alma UI in these areas. For an explanation of the secondary and tertiary reporting codes that were added to the Alma UI in the August release, see the [August 2017 release notes](#).
- Generic reminders are now supported in Alma APIs. For information on reminders, see [Working with Reminders](#).
- The following changes were made to the Get Requested Resources API (`/almaws/v1/task-lists/requested-resources`):
 - It now returns the `requests` element for all types of requests.
 - It now includes the storage ID.
- The Webhooks integration profile now enables access to a log of webhook events. This log can be accessed by selecting the **View Log** action for the Webhooks integration profile. The URL and payload elements of the table may then be searched.

Alma-Summon Integration

The following improvements were made to Alma-Summon patron-facing pages:

- The security of emails sent from the Services Page was improved. This enhancement includes the following modifications:
 - Only signed-in users are permitted to add a note to the email.
 - Signed-in users can specify 1 to 10 email addresses (which must be separated by a semicolon), but un-signed users are limited to a single email address. As an email address is added, the system validates its format.
 - The subject of the email cannot be modified.
- As part of our ongoing commitment to accessibility, this release includes numerous accessibility enhancements, such as improvements for the JAWS screen reader.

Content Operations

- [Library of Congress Authorities Community Zone Updates](#)

- [New Electronic Collections Added to the Alma CKB](#)
 - No new external search resources were added for the September release.
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Known Issues

No known issues were identified for the September release.

Next Release Sneak Preview

The October release sees a time when Alma development periodically needs to take a back seat. Maintenance, cloud infrastructure, and other important tasks need to be handled to ensure that Alma meets the highest standards of performance and high availability.

Stay tuned for a more detailed update next month.

Acquisitions - September 2017 Enhancements

Manually Deleting COUNTER Data Files By File ID

You can now manually delete uploaded COUNTER data files according to their file ID. This is helpful when usage data was migrated to Alma and appears (with its file ID) in Analytics. Another use case is when a vendor changes the platform name but continues to send usage data for the same period under two different platform names.

See [Manually Uploading and Deleting COUNTER Data](#).

Alma deletes the data using the new job Delete Usage Data. The job report lists the number of delete data entries. See [Viewing Completed Jobs](#) for more information about viewing job reports.

Job Report			
Delete Usage Data			
Completed Successfully	Process ID: 12954840000071	Started on: 2017/07/31 09:05:03 CDT	
	Finished on: 2017/07/31 09:05:04 CDT	Total run time: 0.902 Seconds	
	Status: Completed Successfully	Status date: 2017/07/31 09:05:04 CDT	
	Records processed: 0	Records with exceptions: -	
Statistics			
Total number of deleted entries: 55			

Delete Usage Data Job Report

Additional Acquisitions Enhancements



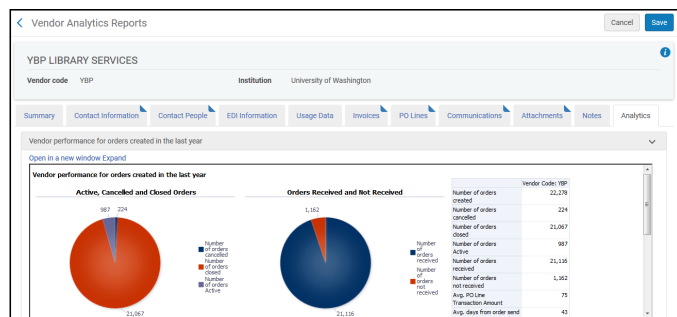
- **Idea Exchange:** The role **License Viewer** was added. This role can view (but not edit) licenses.



- **Idea Exchange:** You can now add users as administrators to a license. This is for informational purposes only. See [Managing Licenses and Amendments](#).
- You can now add multiple contact people to member institutions working with a Network Zone associated with a negotiation license. See [Adding a Negotiation License](#).
- You can now print a license or amendment. The letter used to print the license is the License Printout Letter; see [Configuring Alma Letters](#). Printing an amendment includes only the Terms of Use of the Amendment, not its parent license. Printing a negotiation license includes the negotiation details. See [Printing Licenses or Amendments](#).
- The JR1 report now includes measures for **Reporting Period HTML** and **Reporting Period PDF**, in addition to **Reporting Period Total**. This change can be seen in Analytics and the Missing Data page (see [Managing COUNTER-Compliant Usage Data](#)).
- The parameter **invoice_high_total_price** defines when an invoice price is considered high. Invoices received above this price are assigned the assertion code **High total price** (see [Configuring Invoice Review Rules](#)). However, this parameter ignores the currency of the invoice. For example, if the value of the parameter is 2500, the assertion is triggered if the invoice is 2600 GBP or even 2600 JPY.

If you set the new parameter **invoice_high_total_use_currency** to **true**, then the invoice's value is first converted to the institution's default currency before it is compared to the value in **invoice_high_total_price**. In this case, 2600 GBP triggers the assertion but 2600 JPY (which is around 19 GBP) does not. See [Configuring Other Settings](#).

- On the Funds and Ledgers page, the **Library** facet was changed to **Available For** and the **Owner** facet was added.
- A new tab, **Analytics**, was added to vendor information (the Vendor Analytics Report page). On this tab, you can view analytics information about the vendor. See [Adding a Vendor and Vendor Account](#).



Vendor Analytics Report Page

- In the new UI, you can now click **View vendor** to view the licensor or licensing agent on the License Details page.

AMAZON License type1

Creation date: 2011/03/06 Created by: connie.braun License type: License

Summary License Terms Inventory PO Lines Amendments Administrators History Notes Attachments

Name: AMAZON License type1 License code: AMAZON_1

License status: Active Licensor: ASP View vendor

Signed by: Signed on: Second party's Signed on: End date: License review status: Accepted Licensing agent: ASP View vendor

License Details Page

Resource Management - September 2017 Enhancements

Manage Direct Linking for Journal OpenURLs



Idea Exchange: Configuration options are now available to disable direct linking for journal OpenURLs. Some patrons can be confused when a View It link to a discovery result, opens to a journal instead of directly into an article. With the new discovery configuration options, you can prevent the journal from displaying. See [Configuring Direct Linking](#) for more information.

Alt+N Shortcut

When you are working with records in the MD Editor, **Alt+N** can now be used as a shortcut to quickly navigate to the options for a new record (**File > New**). Similar to using other shortcuts, the **Alt+N** function works when you have another record open in the MD Editor. This can be used for bibliographic, holdings, and authority records. See [MD Editor Menu and Toolbar Options](#) for more information.

Note

There is a known issue with **Alt+N** when using the IE browser. Only the File menu opens with **Alt+N**. The submenu listing the **File > New** formatting options does not automatically appear.

Configure Fixed Fields for Form Editing Only

Fixed fields that provide a form option in the MD Editor can now be configured to require form use and thereby improve the chances that these fields are cataloged properly. See [Editing Fields](#) for more information.

Bibliographic Record Redirections Support

The Alma import process now extends the support for automatic management of bibliographic record additions and deletions including inventory and related record re-linking. For institutions that manage their Alma catalog based on input from an external catalog, the Alma import profile provides options for managing bibliographic record changes in the Alma database that are determined by the external catalog. See [Handling Record Redirection](#) for more information.

880 Hanzi to Pinyin Transliteration Handling of Personal Names and Capitalization of All Transliterated MARC 21 Fields for Hong Kong

When you use the Add Hanzi to Pinyin Transliterations normalization task and your institution is configured by Ex Libris with the Hong Kong searching language configuration, personal names located in \$a of the 100, 600, 700, and 800

fields are handled in a special manner. This is a continuation of the enhancements described for the Add Hanzi to Pinyin Transliterations normalization task in the August 2017 release.

In addition, all MARC 21 fields that begin with a Chinese character and are transliterated, the first transliterated character is capitalized.

For more information, see [Add Hanzi to Pinyin Transliterations](#).

UDC Call Number Normalization

The UDC (Universal Decimal Classification) call number normalization was enhanced to arrange the numbers decimally (including those in quotation marks, brackets, and so forth) when using the Browse Shelf Listing feature for the holdings call number level and selecting a UDC call number type. This is now consistent with the UDC standard described in http://www.udcc.org/index.php/site/page?view=about_structure. See [Browsing the Shelf Listing](#) for more information.

GND Authority Changes

Changes were implemented in Alma to align with the GND MARC 21 formatting changes that are scheduled for 12-September-2017 (see <http://www.dnb.de/SharedDocs/Downloads/EN/DNB/service/rundschreiben20170712AenderungMarc21Normdaten.html>). The GND MARC 21 formatting changes affect the following changes in Alma:

- Updated GND Authority metadata configuration profile
- Updated search indexes
- Updated headings processing (Alt+F3)
- Updated validation and normalization

The current indexing and headings will remain in place in Alma until the new GND format is implemented so that current processes will continue to work. When the GND formatting change occurs, Alma will enable the indexing and headings function to align with the GND change. After the GND formatting change, new GND authority records imported into the Community Zone will be in the new format with the new field arrangement and indexing. All the existing GND authority records stored prior to the GND formatting change will remain in the old format initially. Over time, existing GND records will be reloaded for the new format.

See the following for more information:

- [Working with the GND Authority Profile](#) – The GND Authority metadata configuration profile has already been updated with the new fields identified in the 12-September change.
- [GND Authority Search Index Mapping](#) section – Refer to the tables with **(effective after the 12-September-2017 change)** in the table heading.
- [GND Bibliographic Control Fields Used with Alt+F3](#) – The **Entity Type of the GND Authority Record Identified in the 079 \$b** changed to **Entity Type of the GND Authority Record Identified in the 075 \$b**.

Additional Resource Management Enhancements



- **Idea Exchange:** The Manage Deleted Repository page was reorganized. See [Restoring Deleted Records](#).
- The **All** option was removed from the [secondary search box](#) options (or the **Find/in** drop-down list in the classic UI) on the Import Profiles page.

- A **Refresh** function has been added to the Services section on the Additional Information tab of the Electronic Collection Editor. See the [Electronic Collection Editor Tabs and Fields](#) table for more information.

Digital Resource Management - September 2017 Enhancements

History Information Available for Digital Resources

A history of actions performed now appears under a new History tab in the following areas:

- Collection Resource Editor
- Digital Representation Resource Editor

The screenshot shows the 'Collection Resource Editor' window. At the top, there are 'Cancel' and 'Save' buttons. Below the title bar, there's a section for 'History Collection1' with a folder icon and an information icon. It displays the PID '8124259730000121', Library 'Main Library', and Title 'History Collection1'. The Description is 'collection for history'. Below this, there are tabs for 'General Information', 'Sub-collections (0)', 'Title List', and 'History'. The 'History' tab is selected and highlighted with a red box. Below the tabs, it shows '1 - 6 of 6' records. A table displays the history of changes:

Date	Operator	Field Name	Old Value	New Value
1 07/26/2017 16:12	ex_limpl	Description	history of collections	collection for history
2 07/26/2017 08:58	ex_limpl	Library	Physics Library	Main Library
3 07/26/2017 08:37	ex_limpl	Description	collection to demonstrate history tab	history of collections
4 07/26/2017 08:37	ex_limpl	External ID	1234	1235
5 07/26/2017 08:37	ex_limpl	External System	sys_404	sys_405
6 07/26/2017 08:37	ex_limpl	Library	Main Library	Physics Library

History Tab

Note

- Adding titles to collections or files to representations are not included in the History tab.
- For collections and representations in the repository at the time of the release (September 2017), an additional change is needed in order to display the change in the history tab.

Status Update Email for Deposits

You can configure the new Deposit Activity Report job to send an email to depositors that indicates the status of their active deposits. In addition, the email contains a link to the Deposits interface where the depositor can view the status of the deposits and edit them if required. The job is configured from **Configuration > Resources > General > Resource Management Jobs Configuration**.

Deposit Activity Report Job

Status

☒ Active
☐ Inactive

Scheduler

Not scheduled

Run Now

Deposit Activity Report Job

Assign Imported Digital Titles to Collection Based on MARC Record

To configure an import profile to have Alma automatically assign imported digital titles to a collection according to the value of the 787 field of the MARC record, you must now activate a normalization process that contains the new **addBibToCollectionNormalizationTask**. The new, out-of-the-box **Add BIB to Collection** process contains this task and can be selected from the **Correct the data using** drop-down list on the Normalization and Validation tab when configuring digital import profiles.

Note

Existing digital profiles already have this functionality available.

< Import Profile Details

General profile

Profile Type

Digital

Filter

Filter out the data using

Normalization

Correct the data using

Add BIB to Collection

Validation Exception Profile

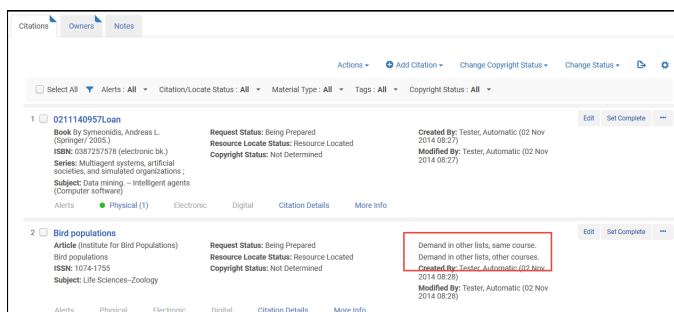
Handle invalid data using

MarcXML Bib Import

Add BIB to Collection

Fulfillment - September 2017 Enhancements

- **Course Code** was added to the list of fields appearing on the Edit Citations page. The course code was also added as a column in the export file when exporting the page to Microsoft Excel. See [Managing Citations](#).
- You can now edit a course's code. See [Managing Courses](#).
- Citation notes now remain active by default. To deactivate the notes, select **Dismiss Notes**; to reactivate the notes, click **Activate Notes**. See [Managing Courses](#).
- When viewing citations in the Edit Reading List page, demand in other lists was split into two entries: **Demand in other lists, same course** and **Demand in other lists, other courses**.



- Additional columns (initially hidden) were added to the Reading List Tasks List (see [Managing Reading Lists](#)). The new columns are: **Course Code**, **Course Section**, **Course Terms**, **Visibility** (Leganto customers only), **Creation Date**, and **Modification Date**.

Reading Lists Task List

Assigned to Me Unassigned Assigned to Others

1 - 20 of 311 All Alerts: All

Code	Name	Status	Assignee	Owner's	Due Back Date	Code	Name	Status	Assignee	Owner's	Due Back Date
1	f13bussolo2	OPRE 3333	Being Prepared	-	-	12/20/2013					
2	f13cogan	MATH 1306	Being Prepared	-	-	12/20/2013					
3	f13files	ACCT 3331	Being Prepared	-	-	12/20/2013					
4	f13GR	General Reserve	Complete	-	-	12/20/2013					
5	f13gurun2	FIN 3380	Being Prepared	-	-	12/20/2013					
6	f13kiddell	f13kiddell	Being Prepared	-	-	12/20/2013					
7	f13kief	PA 7305	Being Prepared	-	-	12/20/2013					
8	f13lanham2	f13lanham2	Being Prepared	-	-	12/20/2013					
9	f13magdine	CLDP 3303	Being Prepared	-	-	12/20/2013					
10	f13Maier	ACCT 3331	Being Prepared	-	-	12/20/2013					
11	f13mcclean2	HUMS 6310	Being Prepared	-	-	12/20/2013					
12	f13murtensen	HUMA 1301	Being Prepared	-	-	12/20/2013					
13	f13nkelson	CHEM 5314	Being Prepared	-	-	12/20/2013					
14	f13pfaler2	HIST 4344	Being Prepared	-	-	12/20/2013					

Done

- The operator user name has been added to the Resource Request Slip Letter xml. It can be found under notification_data/operator_user_name. In order to add it to the notification, customize the letter's xsl.
- An additional quiet zone may now be added to the Code 39 barcode image. To enable this feature, contact Ex Libris customer support.
- The loan status in Primo now includes the reading room status (At Shelf or With User statuses), if applicable. This appears in the loan status in Primo My Account.
- When creating a new resource sharing library, the resource sharing ISO symbol is now checked across all Alma instances. If the ISO symbol already exists, a message will block the user from creating the resource sharing library. The message is: The resource sharing library symbol must be globally unique.

- The term, In House Loan, has been changed to In House Use. This term appears on labels in the Item History tab of the Item Editor and the Other Details section of the Repository Search.
- Previously, if there were multiple copies of an item, and multiple requests on the item, when the last copy was checked out, if there were still waiting requests on the item, this copy was immediately recalled. The oldest loan is now recalled instead of recalling the item which is currently being loaned. This is controlled by a new customer parameter, **recall_during_loan_prefer_oldest_loan**. If set to false, which is the default behavior, the current loan is recalled. When set to true, the oldest loan is recalled.
- Two separate issues have been fixed:
 - SMS notifications are now correctly being sent to the preferred SMS number.
 - SMS Full Item Change Due Date Letter now sends information on all items that have had their due dates changed.

These changes are in the OTB XSL files of the SMS letters. If you have customized the XSL files of these letters, these changes will not be automatically applied. Restore the letters or view the new OTB XSL files by using the View default option and copy the relevant changes (listed below) into their customized files.

- In the XSL files of all SMS letters, the following line:
`< xsl:value-of select="notification_data/receivers/receiver/user_phone/phone"/>`
 was changed to:
`< xsl:value-of select="notification_data/receivers/sms_receiver/phone_list_str"/>`
- In `SmsFullItemChangeDueDateLetter.xsl`:
 The lines for displaying the item's information were inserted into a for-each loop:
`< xsl:for-each select="notification_data/item_loans/item_loan">`
`...`
`</xsl:for-each>`

Resource Sharing - September 2017 Enhancements

Level of Service Facet



Idea Exchange: The level of service on a borrowing or lending request was added as a facet to borrowing and lending request lists.

The screenshot displays the 'Resource Sharing Lending Requests Task List (1 - 12 of 12)'. On the left, a sidebar contains various filters, with 'Level of Service' expanded to show options: Normal (Full) (1), Normal (Local) (5), Priority (Local) (4), Rush (Local) (1), and When Convenient (1). The main area lists three items, each with detailed metadata including title, author, ISBN, LCCN, and request status. The 'Level of Service' is indicated by a colored dot and text at the bottom of each item's details.

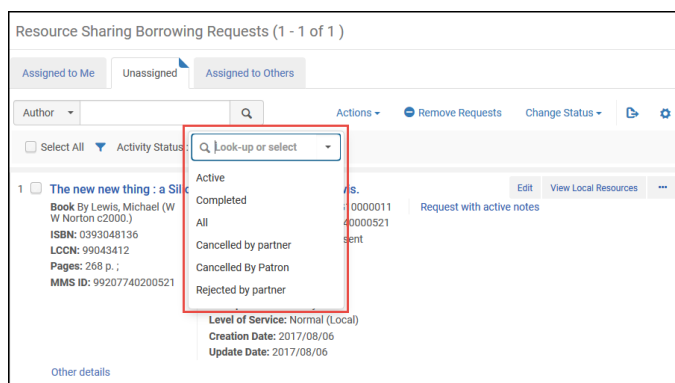
Item	Title	Author	ISBN	LCCN	Level of Service
1	Big brain : the future of human intelligence	Gary Lynch and Richard Granger.	1409797922	200708199	Normal (Local)
2	Bioethics : an anthology	edited by Helga Kuhse and Peter Singer.	1405129476	2005029295	Normal (Full)
3	Blindside : how to anticipate forcing events and wild cards in global politics	Francis Fukuyama, editor.	9780815729992	2007027757	Normal (Local)

Level of Service Facet

See [Managing Resource Sharing Borrowing Requests](#) and [Managing Resource Sharing Lending Requests](#).

New Borrowing Requests Activity Status Filter Options

The borrowing requests task list filter now includes new values that can be used to filter the **Active** view.



Borrowing Requests Task List

In order to display the new options in the drop-down list, modify the new code table, **Borrowing Requests Inactive Filters**, in the Fulfillment Configuration menu. For more information, see [Configuring Borrowing Requests Inactive Filters](#).

Additional Resource Sharing Enhancements

- The Fulfillment Services Manager and Fulfillment Services Operator can now view the fund list from the borrowing request drop-down list. There is no need to ask Ex Libris customer support to enable the view function.

Collaborative Networks - September 2017 Enhancements

Pushing Persistent Blocks to Member Institutions

In addition to user data that is copied when linking an account between libraries, a library may now copy a user's existing blocks from the user's source account and use them in the linked account. The Linked Account Rules Output Parameters contains a new option, **Copy Network Blocks**. When **Copy Network Blocks** is set to **Yes**, Alma deletes all the current Network Zone blocks that exist on the linked account and re-creates them each time the linked record is refreshed. When this parameter is set to **No**, no blocks will be copied from the source account to the linked account. **No** is the default value. See [Configuring Linked Account Rules](#).

The screenshot shows the 'Linked Account Rules' configuration page. Under the 'Output Parameters' section, the 'Copy Network Blocks' option is set to 'No' (indicated by a red box around the radio button).

Linked Account Rules

The User Block Definitions mapping table now contains a new column, **Network Block**. This column defines which blocks will be copied when creating or refreshing a linked account. The default value for the field is **False**. See [Configuring User Block Descriptions and Definitions](#).

The screenshot shows the 'Mapping Table' for 'User Block Definitions'. The table has columns: Id, Type, Description, Overridable, BlockedAction, Network Block, Updated By, and Last Updated. The first row shows a 'GUEST' user with 'Loan' type, and the 'Network Block' column is set to 'False' (highlighted with a red box).

Id	Type	Description	Overridable	BlockedAction	Network Block	Updated By	Last Updated
1	GUEST	Loan	User is suspens	OPERATOR	01	False	ex_lmpl 2013/08/23

User Block Definitions

At the target institution, the block will be created with the new **Consortia** block type. To use this block type, configure it with your required attributes in the User Blocks Definitions table. See [Configuring User Block Definitions and Descriptions](#).

Network-Managed Authority Templates Available to Member Institutions

Templates created in the Network Zone for locally managed authority records (such as LC Name, LC Subject, and so forth) are automatically available to member institutions that work with the same local authority records. See [Creating Templates in the Network Zone](#) for more information.

Additional Network Zone Staff Search Fields

In the Network Zone, you can specify additional local fields for staff search display and distribute them to member institutions. See [Centrally Managing Additional Staff Search Fields in a Network Zone](#) for more information.

Analytics - September 2017 Enhancements

New Leganto Instructor Usage Events Subject Area

The new Leganto Instructor Usage Events subject area was added, enabling you to create reports concerning the instructor usage of Leganto. For more information, see [Leganto Instructor Usage Events](#).

New Physical Items Historical Events Subject Area

The new Physical Items Historical Events subject area was added, enabling you to create reports on the following historical events of physical items:

- Item Transit Event
- Item Temporary location Event
- Item Process Status change events
- Work Order Dept. Status change events

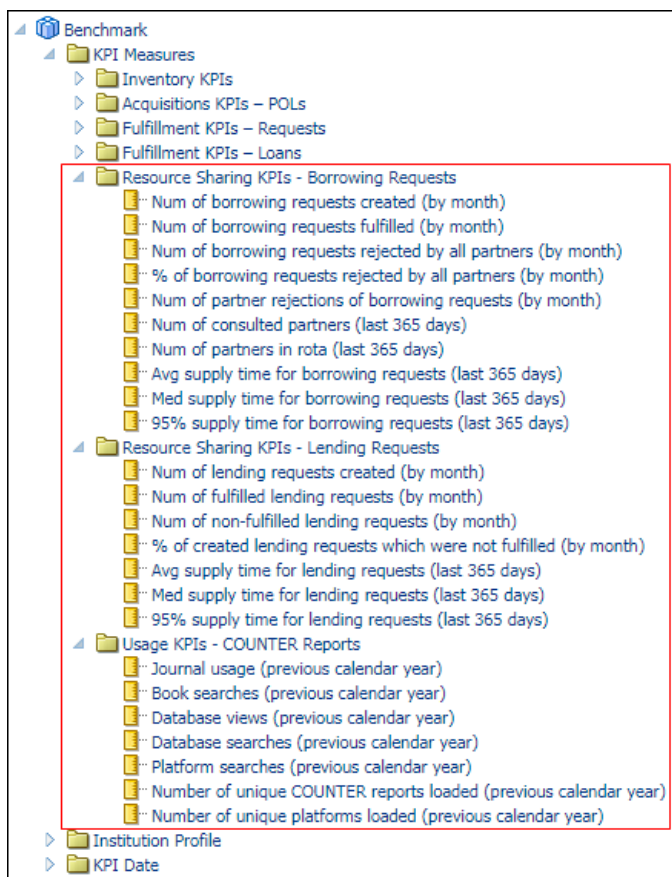
For more information, see [Physical Items Historical Events](#).

New Analytics Administrator Role

The configuration permissions available with the Design Analytics role were transferred to the new Analytics Administrator role. Users with this role can access the configuration actions in **Configuration > Analytics**. Users with only the Design Analytics role can create Analytics reports, but do not have access to the Analytics configuration actions.

Additional Analytics Enhancements

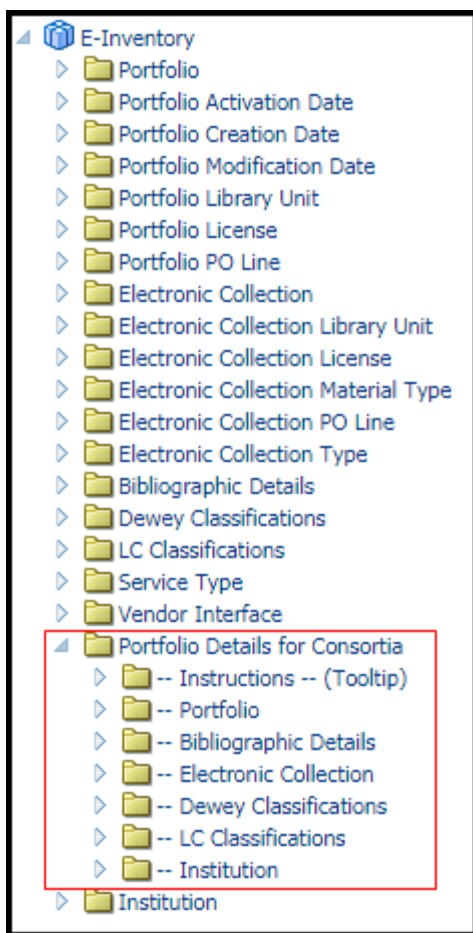
- The following new folders and fields were added to the Benchmark subject area:



New Benchmark Fields



- **Idea Exchange:** The following changes were made to the fields of the **Reporting Code** dimension of the Funds Expenditure subject area.
 - The Code field was renamed **Reporting Code**.
 - The Description field was renamed **Reporting Code Description**.
 - The following fields were added:
 - **Reporting Code - Secondary**
 - **Reporting Code - Tertiary**
 - **Reporting Code Description - Secondary**
 - **Reporting Code Description - Tertiary**
- The **Assign To** field (**Lending Requests > Lending Request Details**) was removed.
- The fields of the **Portfolio Details For Consortia** dimension of the E-Inventory subject area were organized into folders. In addition, an **Instructions** folder was added to display a tooltip that explains how to use the fields of this dimension.



Portfolio Details for Consortia Folders

- Analytics now supports the following COUNTER type reports in the Usage Data subject area:
 - BR4 – Platform Access Denied (license limit exceeded)
 - BR4 – Platform Access Denied (item not licensed)
 - BR5 - Total Searches
 - BR5 - Total Searches Federated
 - MR1 - Multimedia Full Content Unit Requests
- The **Users who have a social login ID** report was added under [Users > Reports](#). This report displays the users that have a login ID to Alma through a social media site, such as Twitter or Facebook.
- The **Borrowing Requests > Borrowing Request Details > Partner Request Status (to be deprecated)** field was removed.
- The **Citation Digital File Name**, **Citation Digital File Date Added**, and **Citation Additional Person Name** fields were added to the Reading List Citation dimension of the Course Reserves subject area.
- The **Foreign Currency Transaction Amount** field was added to the Fund Transactions dimension of the Fund Expenditure subject area. This field contains the transaction amount when it is in a currency other than dollars.
- The **Filter out % of high values** and **Filter out % of low values** filters were added to the Benchmark dashboard to prevent extreme values from being displayed in graphs:

KPI Watchlist

My Trends

Inventory Total

Inventory By Month

Institution Profile

Institution Type

☒ (All Column Values)

☒ Academic

☒ Government

☒ Public

☒ Special

☒ Technical Trade Scho

☒ Unknown

<

||||

>

Is Consortia Member Institution

☐ No

☐ Yes

Main source of Library funding

(All Column Values)

▼

Total annual amount spent on all materials

(All Column Values)

▼

Total undergraduate student body size

(All Column Values)

▼

Total graduate student body size

(All Column Values)

▼

Filter out % of high values

10

Filter out % of low values

20

Apply

Reset ▼

Filter Out Filters

Administration and Infrastructure - September 2017 Enhancements

View Only Fulfillment and User Administrator Roles



Idea Exchange: In the new UI, if you want Fulfillment Administrators or User Administrators to be able to view but not edit fulfillment or user configuration settings, you can now disable the Fulfillment or User Administrator's ability to edit the configuration settings. For more information, see [User Roles - Descriptions and Accessible Components](#).

The screenshot shows the 'User Roles Details' form. At the top, there are 'Cancel' and 'Save Role' buttons. Below is a user profile section for 'User, Admin' with fields for Primary Identifier (admin), Account Type (Internal), Record type (Staff), and User group (Staff). The 'Role information' section includes Role name (Fulfillment Administrator), Scope (Clean Training), Status (Active), and Expiry Date. The 'Role parameters' section at the bottom has a 'Read only' checkbox, which is highlighted with a red box.

User Role Details

Additional Administration and Infrastructure Enhancements

- You can now add the user's title (honorific) to the user's display name. See [Configuring the Display of User's Names](#).
- The parameter **enable_auth_caching**, which was not in use, was removed.
- On the Find and Manage Users page (see [Managing Users](#)), the names of the facets were changed: **Account Filter** was changed to **Account**, **Role Filter** was changed to **Role**, and **Status Filter** was changed to **Status**.
- Some fields were changed in the Mail Handling integration profile: **Delivery via Ex Libris mail gateway** was changed to **Send directly from Ex Libris**, **Delivery direct to customer's SMTP mail relay** was changed to **Send using institution mail relay**, and **Enforce encryption** was changed to **Use encryption**.
- For the Student Information System integration profile (see [Student Information Systems](#)), additional scheduling options were added for both Export Users and SIS Synchronize.
- For the Fines/Fees Notification Job, an additional daily scheduling option was added.
- On the Find and Manage Users page, the filter labels on the user list have changed. **Account Filter** is now **Account**, **Role Filter** is now **Role**, and **Status Filter** is now **Status**.

Content Operations - September 2017 Enhancements

Library of Congress Authorities Community Zone Updates

The following are the Library of Congress subject authority updates for the period of July 21st through August 17th:

- Number of records updated: 131
- Number of records added: 205
- Number of records deleted: 31

The following are the Library of Congress name authority updates for the period of July 21st through August 17th:

- Number of records updated: 15819
- Number of records added: 23559
- Number of records deleted: 533

The following are the Canadian name authority updates for the period of July 21st through August 17th:

- Number of records updated: 102
- Number of records added: 966
- Number of records deleted: 1

The following are the Library of Congress Genre/Form Terms (LCGFT) updates for the period of July 21st through August 17th:

- Number of records updated: 2
- Number of records added: 1

New Electronic Collections Added to the Alma CKB

The following electronic collections were added to the Alma Community Zone from July 24th through August 18th:

- [MAL 期刊回溯库](#)
- [Acta Sanctorum - International Clients](#)
- [Adis 期刊回溯库](#)
- [AIP期刊回溯库](#)
- [American Medical Association Journals](#)
- [American Musical Instrument Society Publications](#)
- [Archaeology Data Service Journals, Series and Books](#)
- [Archives Historiques](#)
- [Austrian Academy of Sciences](#)
- [BEP 2012 Digital Library](#)
- [BMJ Clinical Evidence](#)

- BMJ 期刊回溯库
- Budrich Journals
- Caribbean Newspaper Digital Library
- CEDRAM Journals
- Cold Spring Harbor Protocols
- Cold Spring Harbor Protocols
- Conseil International de la Langue Française
- Corpus de la littérature médiévale des origines au 15e siècle
- CSHL过刊集
- De Gruyter Online
- Dictionary of Irish Biography
- Digital Library of the Commons
- Digital Papers of Albert Einstein
- DSM-5 Library
- Electronic Journals and Newspapers on Africa
- Electronic Text Centre - University of New Brunswick
- English Heritage Archaeological Monographs
- Google Books - Getty Publication Virtual Library
- Google Magazines
- Habelt Zeitschriften Online
- Heterocycles
- ICE Virtual Library Archive - Proceedings Collection
- Independent Scholarly Publishers Group - JISC Collection 2015-2017
- International Union of Pure and Applied Chemistry
- Internet Library of Early Journals
- IWA期刊回溯库
- JAP-online
- Journal of Bone and Joint Surgery (JBJS) Online
- Justis
- Karger Online Discontinued Publications
- Karger Online Discontinued Publications
- Karger期刊回溯库
- King James Bible(UK)
- Lexxion Zeitschriften
- Literary Manuscripts from the Brotherton Library
- Literature Online (LION) Complete
- Luminos
- LWW期刊经典回溯库

- Macmillan Cabinet Papers, 1957-1963
- Macmillan Cabinet Papers, 1957-1963
- Macmillan Cabinet Papers, 1957-1963
- Magnolia Press Serials
- Making of America Journals (Michigan)
- Manchester University Press Journals - Open Access
- Maney Open Access and freely available journals
- Mass Media in Russia, 1908-1918
- Mass Observation Online
- Mass Observation Online (Update I)
- Mass Observation Online (Update II)
- Modernist Journals Project
- Museum Studies Working Papers
- Nature 周刊回溯文档数据库
- NCSE facsimiles
- New Left Review
- New Left Review
- Nineteenth-Century Fiction
- NomosZeitschriften
- Now Publishers Journals
- Now Publishers Journals
- NRC 期刊回溯库
- NZCER Journals Online
- OJS på Statsbiblioteket - OJS at The State and University Library
- Open SUNY Textbooks
- Ornithological Society of New Zealand Publications
- Patrologia Latina Database (via UK)
- Project Gutenberg Online Catalog
- ProQuest Congressional Record Permanent Digital Collection Part A (1789-1997)
- ProQuest Congressional Record Permanent Digital Collection Part B (1998-2001)
- ProQuest PAO Periodicals Online Foundation Collection 3
- Purdue University Press Journals
- Referencia Latina
- Rinton Press Journals
- Royal Historical Society Bibliography
- Royal Irish Academy Publications
- Royal Society of Chemistry
- RSC回溯库

- [RSNA期刊回溯库](#)
- [Salem History](#)
- [Scholastic Education PLUS](#)
- [Single Journals](#)
- [Société Rencesvals](#)
- [Society for Ethnomusicology \(SEM\)](#)
- [T&F ST期刊回溯库](#)
- [The New Presence](#)
- [Thieme-Connect](#)
- [Turpion网络版期刊回溯文档数据库](#)
- [UNESCO World Heritage Papers series](#)
- [V&R Unipress Journals](#)
- [Victoria and Albert Museum Research & Conservation Publications](#)
- [Virginia Company Archives](#)
- [Welsh Journals Online](#)
- [Who's Who / Who Was Who](#)
- [WILEY期刊回溯库](#)
- [施普林格在线回溯期刊数据库\(Springer\)](#)
- [英国物理学会网络版期刊回溯文档数据库\(IOP\)](#)

New External Search Resources

There were no new external search resources for the September release.

Centrally Managing Additional Staff Search Fields in a Network Zone

New for September!

In the Network Zone, you can specify additional local fields for staff search display and distribute them to member institutions.

Creating Additional Staff Search Fields

From the Additional Fields For Network Zone Search Results mapping table, you can customize five additional 9XX fields for staff search. For each additional field that you customize, you can specify the label that is to appear for that field in the search results.

To centrally create additional staff search fields:

1. In the Network Zone, open the Additional Fields For Network Zone Search Results mapping table ([Configuration > Resources > Search Configuration > Additional Network Zone Staff Search Fields](#)).

Mapping Table

You are configuring:

Training - Network - Clean

Change Organization Unit

Additional Fields For Network Zone Search Results

Table Description

Select additional fields to be displayed in Network ...

Customization mode:

Specific rows can be customized

Enabled	Key	Field Label	Field Tag	Managed in Network	Updated By	Last Updated	
1	☐	additional_nz_field_1	Field Label 1	900	-	-	...
2	☐	additional_nz_field_2	Field Label 2	900	-	-	...
3	☐	additional_nz_field_3	Field Label 3	900	-	-	...
4	☐	additional_nz_field_4	Field Label 4	900	-	-	...
5	☐	additional_nz_field_5	Field Label 5	900	-	-	...

Additional Fields for Network Zone Search Results Mapping Table

2. Using the ellipsis button, select **Customize** for the row that you want to edit. The Field Label and Field Tag column options become available for editing.
3. From the drop-down list, select the field that you want to make available for staff search, and customize the label for this field.

Enabled	Key	Field Label	Field Tag
1	☒	additional_nz_field_1	Local Notes 1
			915

Customizing a Search Field

The label appears in the search results with the contents of the additional field and, like other search result fields, can be configured to appear or not appear in the search results view.

1 The computer : a tool for the teacher / Edward B. Wright, Richard C. Forcier.
Book (Book - Physical) By Wright, Edward B. (Belmont, Calif. : Wadsworth Pub Co c1985.)
 Subject: Education--Data processing. Computer-assisted instruction. Education--Computer programs--Purchasing, and others
 Series: Wadsworth series in computer education
 Language: English
 ISBN: 0534047823 (pbk.)
 Record number: ocm11399264

Local Notes 1 Note field created with Additional Network Zone Staff Search Fields configuration.

Physical Electronic Digital Held by (1) Other details

Search Results with Additional Search Field

Customize view

Title information order ? Columns

Column 1	Column 2	Column 3
☒ Creator/Publisher	☒ Medium Type	☒ Orders
☒ Subject	☒ Language	☒ Requests
☒ Series	☒ Library Unit	
☒ Relation	☒ ISBN	
☒ Edition	☒ ISSN	
☒ Local Notes 1	☒ Record number	

Configure Search Results View

Note

There is a known issue that the field label does not appear in the bold font in the search results.

- Use the row slider to enable the field that you have customized.
- Click **Save**.

Distributing Additional Staff Search Fields

As described in [Centrally Managing Configuration Tables in a Network Zone](#), you can centrally distribute the additional staff search fields that you customize.

To distribute additional staff search fields from the Network Zone:

- On the Additional Fields For Network Zone Search Results mapping table page (**Configuration > Resources > Search Configuration > Additional Network Zone Staff Search Fields**), click the ellipsis button for the row/field that you want to distribute and select **Manage in Network**.

Enabled	Key	Field Label	Field Tag	Managed in Network	Updated By	Last Updated	
☒	additional_nz_field_1	Local Notes 1	915	☒	ex_limpl	07/08/2017	...
☐	additional_nz_field_2	Field Label 2	900	☐	-	-	Manage in Network Restore

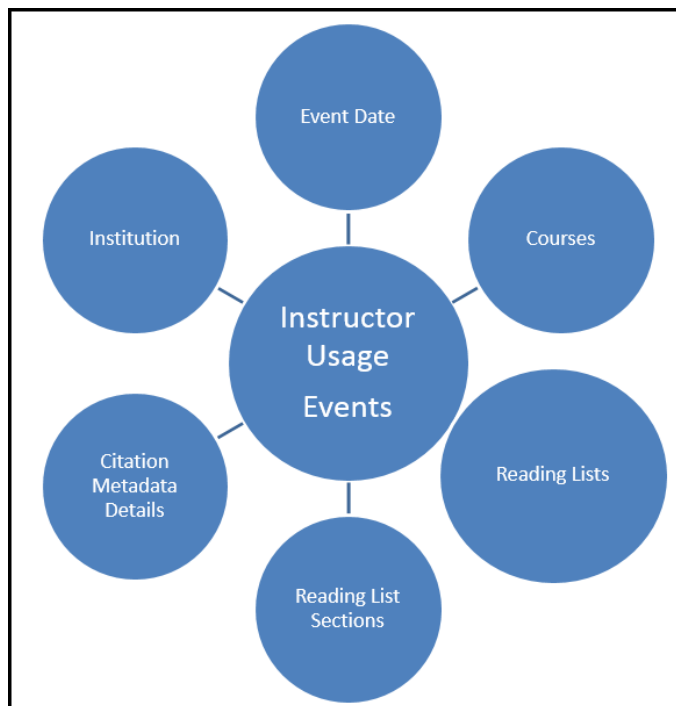
Manage in Network

- Click **Save and Distribute**.
- From the Confirm pop-up window, select the distribution mode; and click **Confirm**.

Leganto Instructor Usage Events

Using the Leganto Instructor Usage Events subject area, you can create reports/dashboards relating to Leganto instructor usage events and answer the following type of business question:

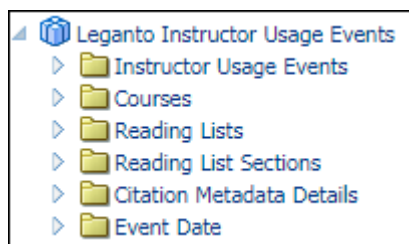
- What are the changes done in a reading list during a period of time?



Star Diagram – Leganto Instructor Usage Events

Field Descriptions

The following fields are available in Leganto Instructor Usage Events.



Leganto Instructor Usage Events – Field Descriptions

Instructor Usage Events

The Instructor Usage Events table is a dimension table that stores details about instructor usage events.

Instructor Usage Events

Field	Description	Additional Information
Event Date	The date of the event	
Event Type	The type of the event	
Event Value	The value of the event	The value of the event type

The following table describes the possible values of the Event Type field:

Event Types and Values

Event Types	Event Values
Create a Reading List	The name of the reading list.
Associate/disassociate to Course	Possible Values: • Associate – <the new course code> <the course section> • De-associate – <the old course code> <the course section> • Re-associate – <the new course code> <the course section>
Change reading list status	The publication status. Possible values: • All Students Restricted • Course Students • Anyone Restricted • All Students Full • Anyone Full • Anyone Restricted, All Students Full • Draft
Add Section Tag	The tag value
Add Citation Tag	The tag value
Remove Citation Tag	The tag value
Remove Section Tag	The tag value
Citation sent to Library	The citation ID

Event Types	Event Values
Add Citation Public Note	The text of the public note
Change Citation due date	The new due date

Courses

The Courses table is a dimension table that stores details about the course, including the course name, the course year, and the course creator. The primary key of the table is COURSE_ID.

Courses

Field	Description	Additional Information
Academic Department	The academic department of the course	
Course Code	The code of the course	
Course Create Date	The date that the course was created	
Course Creator	The creator of the course	
Course End Date	The end date of the course	
Course Hours	The hours of the course	
Course ID	The ID of the course	
Course Instructor	The name of the course instructor	
Course Instructor and ID	The course instructor with the course instructor's identifier	This field is useful when a course has more than one instructor. This field allows you to display the instructors together with their identifiers.
Course Instructor Identifier	The primary identifier of the course instructor	
Course Modification Date	The date that the course was modified	

Field	Description	Additional Information
Course Modified By	The person who modified the course	
Course Name	The name of the course	
Course Section	The section of the course	
Course Start Date	The start date of the course	
Course Status	The status of the course	
Course Term	The term of the course	
Course Year	The year of the course	
Number of Citations	The total number of citations	
Number of Participants	The total number of participants in the course	
Processing Department	The processing department of the course	
Searchable ID 1-3	Searchable ID 1-3 of the course	

Reading Lists

The Reading Lists table is a dimension table that stores details relating to reading lists, including the reading list name, the reading list status, and the reading list creation date. The primary key of the table is `READING_LIST_ID`.

Reading Lists

Field	Description	Additional Information
Number of Citations	The total number of citations	
Number of Mobile Activities	The percentage of usage from mobile devices	
Number of Non-Mobile Activities	The percentage of usage from non-mobile devices	
Reading List Code	The code of the reading list	

Field	Description	Additional Information
Reading List Create Date	The date that the reading list was created	
Reading List Creator	The creator of the reading list	
Reading List Due Back Date	The due back date of the reading list	
Reading List ID	The ID of the reading list	
Reading List Modification Date	The date that the reading list was modified	
Reading List Modified By	The person who modified the reading list	
Reading List Name	The name of the reading list	
Reading List Owner	The owner of the reading list	
Reading List Status	The status of the reading list	
Instructors and Collaborators IDs	The IDs of the instructors and collaborators	
Publication Status	The publication status of the reading list	Possible values are: • Draft • Published
Publication List Visibility	To whom the reading list is visible	Possible values are: • Authenticated Students • Enrolled course's students • Open to Everyone • Material Open to All Authenticate Students

Reading List Sections

The Reading List Sections table is a dimension table that stores details relating to a reading list, including Section Name, Section Order, and Section Create Date.

Reading List Sections

Field	Description	Additional Information
Description	The description of the section	
Section End Date	The end date of the section	
Number of Citations	The total number of citations in the section	
Section ID	The ID of the section	
Section Order	A total number indicating the place of the citation in order	
Section Name	The name of the section	
Start Date	The start date of the section	

Citation Metadata Details

The Citation Metadata Details table is a dimension table that stores the citation metadata details of the course reserves.

Citation Metadata Details

Field	Description	Additional Information
Article End Page	The end page of the article	
Article Start Page	The start page of the article	
Author	The author of the article	
Book Call Number	The call number of the book	
Book Chapter	The chapter of the book	
Book Edition	The edition of the book	
Barcode	The barcode of the book	
DOI	The digital object identifier	
ISBN	The ISBN of the book	
ISSN	The ISSN of the journal	

Field	Description	Additional Information
Issue	The issue of the journal	
Journal Title	The title of the journal	
Note	The note on the citation	
OCLC Number	The OCLC number	
Pages	The pages of the citation	
Part	The part of the book	
Publication Date	The date of publication	
Publication Place	The place of publication	
Publisher	The publisher of the book	
Title	The title of the citation	
Volume	The volume of the citation	

Event Date

The Event Date is a dimension table that stores details about the event date.

Event Date

Field	Description	Additional Information
Date Key	Stores the event date in a date format such as 2/29/2012	
Full Month Desc	Stores the month and the year of the date in a display format such as Feb 2017	
Full Month Key	Stores the month and the year of the date in a display format such as 2/2017	
Full Quarter Desc	Stores the quarter of the date in a display format such as Q1 and the year	

Field	Description	Additional Information
Full Quarter Key	Stores the quarter of the date in a display format such as 1 and the year	
Month Desc	Stores the month of the date in a display format such as February	
Month Key	Stores the month of the date in number format such as 2 for February	
Quarter Desc	Stores the quarter of the date in a display format such as Q1	
Quarter Key	Stores the quarter of the date in a display format such as 1	
Year Desc	Stores the year of the date in number format such as 2012	
Year Key	Stores the year of the date in a string format such as 2012.	

Physical Items Historical Events

The Physical Items Historical Events subject area allows you to create reports on the following historical events of physical items:

- Item Transit Event
- Item Temporary location Event
- Item Process Status change events
- Work Order Dept. Status change events

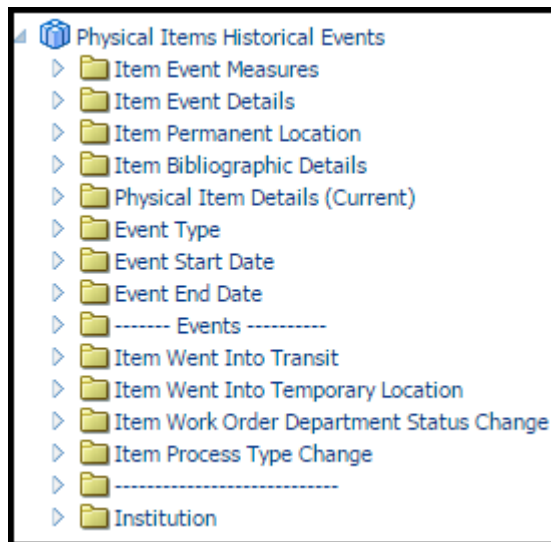
The following are examples of business questions that can be answered with this subject area:

- Which items were in a temporary location any time over the past two years?
- What are the details for items sent in-transit in the past?
- What are the details for items that were in a temporary location in the past?
- What work order department was an item in and what was the work order status code?
- How can I track all of the process statuses an item goes through and the process status change dates?



Physical Items Historical Events

Field Descriptions



Physical Items Historical Events - Field Descriptions

Item Event Measures

Field	Description	Additional Information
Num of Events	The number of events	
Num of Ended Events	The number of ended events	
Num of Items	The number of items	
Total Event Duration (days)	The total event duration in days	
Avg Event Duration (days)	The average event duration in days	
Total Event Duration (hours)	The total event duration in hours	
Avg Event Duration (hours)	The average event duration in hours	

Item Event Details

Field	Description	Additional Information
Barcode	The barcode of the item	

Field	Description	Additional Information
Request Type	The request type of the item	
Item ID	The ID of the item	
Request ID	The Request ID of the item	
Event ID	The event ID of the item	
Event Creator	The event creator	

Item Permanent Location

Field	Description	Additional Information
Item Library Code	The library code of the item.	
Item Library Name	The library name of the item	
Item Library Description	The library description of the item	
Item Unit Type	The unit type of the item	
Item Location Code	The location code of the item	
Item Location Name	The location name of the item	
Item Location Type	The location type of the item	
Item Campus Code	The campus code of the item	
Item Campus Name	The campus name of the item	
Item Campus Description	The campus description of the item	
Item External Name	The external name of the item	
Item Remote Storage Code	The remote storage code of the item	
Item Call Number Type	The call number type of the item	

Item Bibliographic Details

The Item Bibliographic Details table is a dimension table that stores the bibliographic details about the items. 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

Field	Source in Alma (for Internal Reference)	Mapping from MARC
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
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

Field	Source in Alma (for Internal Reference)	Mapping from MARC
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
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.

Field	Source in Alma (for Internal Reference)
Local Param2	See the description above.
Local Param3	See the description above.
Local Param4	See the description above
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).
Brief Level	The level of the brief record
Originating System	The system where the bibliographic record originated

Field	Source in Alma (for Internal Reference)
Originating System ID	The ID of the system where the bibliographic record originated
Originating System Version	The version of the originating system

Physical Item Details (Current)

Physical Item Details

Field	Description	Additional Information
Num of Items	Stores the number of items (one for each item)	See the field location in Alma in the figure List of Holdings, below.
Num of Loans (In house + Not In House)	The sum of the in house loans and the not in house loans.	This number includes loans with a loan status of <i>inactive</i> as well as in-house loans.
Num of Loans (In House)	The number of items that were used in the library, but not actually loaned	
Num of Loans (Not In House)	The number of items that were actually loaned	
Item ID	Stores the unique ID of the physical item	See the field location in Alma in the figure Physical Item Editor – Summary Tab, below.
Barcode	The unique identifier of the specific physical item	See the field location in Alma in the figure Physical Items Details Fields in Physical Item Editor – general Information Tab, below.
Material Type	Describes the nature of the material represented by the item record	See the field location in Alma in the figure Physical Items Details Fields in Physical Item Editor – general Information Tab, below.
Item Policy	Defines the conditions under which a request for this item can be fulfilled	See the field location in Alma in the figure Physical Items Details Fields in Physical Item Editor – general Information Tab, below.

Field	Description	Additional Information
Provenance Code	A code used to identify separate items that belong to different groups (but may be shelved together)	See the field location in Alma in the figure Physical Items Details Fields in Physical Item Editor – general Information Tab, below.
Base Status	Indicates the availability of the item in its permanent location (in place/ not in place)	See the field location in Alma in the figure Physical Item Editor – Summary Tab, below.
Process Type	When the item is being processed (acquisition/loan/bindery/etc) this indicates the type of processing	See the field location in Alma in the figure Physical Items Details Fields in Physical Item Editor – general Information Tab, below.
Lifecycle	Indicates whether the item is active or deleted	
Chron I	The main level of chronology - usually the year	See the field location in Alma in the figure Physical Items Details Fields in Physical Item Editor – general Information Tab, below.
Chron J-M	Additional chronology fields	
Enum A	The main level of enumeration - usually the volume	See the field location in Alma in the figure Physical Items Details Fields in Physical Item Editor – general Information Tab, below.
Enum B-H	Additional enumeration fields	
Is Magnetic	Whether the item is magnetic material or not.	This is used in the circulation desk in order not to desensitize magnetic material See the field location in Alma in the figure Physical Items Details Fields in Physical Item Editor – general Information Tab, below.
Expected Arrival Date	The date when a purchased item is expected to arrive at the library	See the field location in Alma in the figure Physical Items Details Fields in Physical Item Editor – general Information Tab, below (Expected Receiving Date).
Due Back Date	Indicates the date that the item is due back at the library	See the field location in Alma in the figure Physical Items Details Fields

Field	Description	Additional Information
		in Physical Item Editor – general Information Tab, below.
Receiving Date	The date the material was actually received/activated for the first time	See the field location in Alma in the figure Physical Items Details Fields in Physical Item Editor – general Information Tab, below.
Receiving Date and Time	The date and time the material was actually received/activated for the first time	See the field location in Alma in the figure Physical Items Details Fields in Physical Item Editor – general Information Tab, below.
Inventory Date	The last time inventory was checked (not currently in use)	
Last Loan Date	The last time the item was loaned	
Temporary Physical Location In Use	Whether the item is in a temporary location or in a permanent location	See the field location in Alma in the figure Physical Items Details Fields in Physical Item Editor – general Information Tab, below.
Temporary Call Number Type	A call number type provided when the item is in a temporary location	See the field location in Alma in the figure Physical Items Details Fields in Physical Item Editor – general Information Tab, below.
Display Temporary Call Number	A normalized temporary call number for display	See the field location in Alma in the figure Physical Items Details Fields in Physical Item Editor – general Information Tab, below.
Alternative Call Number Type	An alternative call number type	See the field location in Alma in the figure Physical Items Details Fields in Physical Item Editor – general Information Tab, below.
Display Alternative Call Number	A normalized alternative call number for display	See the field location in Alma in the figure Physical Items Details Fields in Physical Item Editor – general Information Tab, below.
Originating System ID	The ID of the item in the source system from which it has been imported	See the field location in Alma in the figure MARC Record Simple View, below.

Field	Description	Additional Information
Creator	Holds the username of the operator that created the physical item	See the field location in Alma in the figure Physical Item Editor – Summary Tab, below.
Modified By	Holds the user name that modified the physical item	See the field location in Alma in the figure Physical Item Editor – Summary Tab, below.
Creation Date	Holds the date the physical item was created	This date is assigned by Alma when the physical item is created.
Modification Date	Holds the date the physical item was modified	See the field location in Alma in the figure Physical Item Editor – Summary Tab, below.
Num of Loans - not sum	Stores the number of times each item was loaned but not as an aggregate like Time Loaned.	
Statistics Note 1-3	Holds statistic notes	See the field location in Alma in the figure Physical Item Editor – Notes Tab, below.
Description	Description of the item	See the field location in Alma in the figure Physical Items Details Fields in Physical Item Editor – general Information Tab, below.
Fulfillment Note	The Fulfillment note	
Internal Note 1-3	Internal notes 1-3.	
Storage Location ID	The ID of the storage location.	
Inventory Number	The inventory number	
Inventory Price	The price of the physical inventory for each physical item	
Replacement Cost	The replacement cost	
Pieces	The item's number of pieces.	
Temporary Item Policy	The temporary item policy	

Field	Description	Additional Information
IEP	The IE number for physical items	You can use this identifier to reconcile Analytics data, which has only MMS IDs, with the number from record IDs supplied to Primo from Alma. You can then pass the results to a reading list system in order to make relegation and capacity decisions. This number is essential for reports on Fulfillment activity where this number is the only common ID between the two systems.

Event Type

Field	Description	Additional Information
Event Type	The event type	
Event Type Description	The event type description	

Event Start Date

Field	Description	Additional Information
Event Start Date	The start date of the event	
Event Start Time	The start time of the event	
Event Start Date and Time	The start date and time of the event	
Event Start Month Key	The start month of the event in number format such as 2 for February	
Event Start Month	The start month of the event such as February	
Event Start Full Month Key	The start month and the year of the event in a display format such as Feb 12	

Field	Description	Additional Information
Event Start Full Month	The start month and the year of the event in a display format such as Feb 12	
Event Start Quarter	The start quarter of the event	
Event Start Year	The start year of the event	
Event Start Fiscal Month Key	The start fiscal month of the event in number format such as 2 for February	
Event Start Fiscal Year	The start fiscal year of the event	
Event Start Date Filters	Start date filters of the event	

Event End Date

Field	Description	Additional Information
Event End Date	The end date of the event	
Event End Time	The end time of the event	
Event End Date and Time	The end date and time of the event	
Event End Month Key	The end month of the event in number format such as 2 for February	
Event End Month	The end month of the event such as February	
Event End Full Month Key	The end month and the year of the event in a display format such as Feb 12	
Event End Full Month	The end month and the year of the event in a display format such as Feb 12	
Event End Quarter	The end quarter of the event	

Field	Description	Additional Information
Event End Year	The end year of the event	
Event End Fiscal Month Key	The end fiscal month of the event in number format such as 2 for February	
Event End Fiscal Year	The end fiscal year of the event	
Event End Date Filters	End date filters of the event	

Item Went Into Transit

Transit from Library

Field	Description	Additional Information
Transit from Library Code	The code of the library from which the item when into transit	
Transit from Library Name	The name of the library from which the item when into transit	
Transit from Library Description	The description of the library from which the item when into transit	
Transit from Unit Type	The unit type from which the item when into transit	

Transit from Circulation Desk

Field	Description	Additional Information
Transit from Circ Desk Code	The circulation desk code from which the item when into transit	
Transit from Circ Desk Name	The circulation desk name from which the item when into transit	

Field	Description	Additional Information
Transit from Circ Desk Description	The circulation desk description from which the item when into transit	
Transit from Has Self Check	Indicates if the circulation desk from which the item when into transit has a self check machine	
Transit from Hold Shelf	The hold shelf of the circulation desk from which the item when into transit	
Transit from Hold Shelf Period	The period of the the hold shelf of the circulation desk from which the item when into transit	
Transit from Hold Shelf Sort	The sort of the hold shelf of the circulation desk from which the item when into transit	
Transit from Payment Cash	Indicates if the circulation desk from which the item when into transit accepts cash payments	
Transit from Payment Credit Card	Indicates if the circulation desk from which the item when into transit accepts credit card payments	
Transit from Primary Indicator	The primary indicator of the circulation desk from which the item when into transit	
Transit from Print Receipt	Indicates if the circulation desk from which the item when into transit can print receipts	
Transit from Reading Room Desk	The reading room desk of the circulation desk from which the item when into transit	

Transit from Department

Field	Description	Additional Information
Transit from Department	The transit from department	

Transit to Library

Field	Description	Additional Information
Transit to Library Code	The code of the library to which the item when into transit	
Transit to Library Name	The name of the library to which the item when into transit	
Transit to Library Description	The description of the library to which the item when into transit	
Transit to Unit Type	The unit type to which the item when into transit	

Transit to Circulation Desk

Field	Description	Additional Information
Transit to Circ Desk Code	The circulation desk code to which the item when into transit	
Transit to Circ Desk Name	The circulation desk name to which the item when into transit	
Transit to Circ Desk Description	The circulation desk description to which the item when into transit	
Transit to Has Self Check	Indicates if the circulation desk to which the item when into transit has a self check machine	
Transit from Hold Shelf	The hold shelf of the circulation desk to which the item when into transit	

Field	Description	Additional Information
Transit to Hold Shelf Period	The period of the the hold shelf of the circulation desk to which the item when into transit	
Transit to Hold Shelf Sort	The sort of the hold shelf of the circulation desk to which the item when into transit	
Transit to Payment Cash	Indicates if the circulation desk to which the item when into transit accepts cash payments	
Transit to Payment Credit Card	Indicates if the circulation desk to which the item when into transit accepts credit card payments	
Transit to Primary Indicator	The primary indicator of the circulation desk to which the item when into transit	
Transit to Print Receipt	Indicates if the circulation desk to which the item when into transit can print receipts	
Transit to Reading Room Desk	The reading room desk of the circulation desk to which the item when into transit	

Transit to Department

Field	Description	Additional Information
Transit to Department	The transit to department	

Fulfillment Network Only

Field	Description	Additional Information
From Another Institution	Indicates the institution in the fulfillment network from which the item transitted	

Field	Description	Additional Information
From Another Institution Library	Indicates the institution library in the fulfillment network from which the item transitted	
From Another Institution Circulation Desk	Indicates the circulation desk institution in the fulfillment network from which the item transitted	
To Another Institution	Indicates the institution in the fulfillment network to which the item transitted	
To Another Institution Library	Indicates the institution library in the fulfillment network to which the item transitted	

Field	Description	Additional Information
Is Fulfillment Network	Indicates if the institution is part of a fulfillment network	

Item Went Into Temporary Location

Source Location

Field	Description	Additional Information
Source Library Description	The description of the source library	
Source Library Code	The code of the source library	
Source Library Name	The name of the source library	
Source Unit Type	The unit type of the source library	
Source Location Code	of the source library	
Source Location Name	The location name of the source library	
Source Location Type	The location type of the source library	

Field	Description	Additional Information
Source Campus Code	The campus code of the source library	
Source Campus Name	The campus name of the source library	
Source Campus Description	The campus description of the source library	
Source External Name	The external name of the source library	
Source Remote Storage Code	The remote storage code of the source library	
Source Call Number Type	The call number type of the source library	

Temporary Location

Field	Description	Additional Information
Temporary Library Description	The description of the temporary library	
Temporary Library Code	The code of the temporary library	
Temporary Library Name	The name of the temporary library	
Temporary Unit Type	The unit type of the temporary library	
Temporary Location Code	The location code of the source library	
Temporary Location Name	The location name of the temporary library	
Temporary Location Type	The location type of the temporary library	
Temporary Campus Code	The campus code of the temporary library	
Temporary Campus Name	The campus name of the temporary library	

Field	Description	Additional Information
Temporary Campus Description	The campus description of the temporary library	
Temporary External Name	The external name of the temporary library	
Temporary Remote Storage Code	The remote storage code of the temporary library	
Temporary Call Number Type	The call number type of the temporary library	

Field	Description	Additional Information
Due Back Date	The due back date	

Item Work Order Department Status Change

Field	Description	Additional Information
Work Order Type	The work order type	
Work Order Department	The work order department	
Work Order Status	The work order status	
Work Order Next Status	The next work order status	

Item Process Type Change

Field	Description	Additional Information
Process Type	The process type	
Process Type Next Status	The next status of the process type	

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.
