

Alma February 2018 Release Notes

The Galaxy

February 1930 – the discovery
of Pluto by astronomer
Clyde Tombaugh



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

- ☐ [Change PO Line Attributes After Ordering \(Part I\)](#) – A new job, **Update PO Lines Limited Attributes**, enables staff users to change the purchase type of an order that is not closed or canceled to another purchase type of the same inventory type and continuity. For example, now an entire set of PO lines can be changed from **Database One Time** to **Electronic Book One Time** or from **Print Book One Time** to **Musical Score One Time**. This job will be further enhanced with additional options in future releases.
- ☐ [New Controlled Vocabulary \(CV\) Option in License Term Types](#) – It is now possible to add a list of controlled vocabulary for customized license terms. This makes the process of adding terms more efficient and ensures the uniqueness of the data. All terms are entered by staff in a unique manner by choosing from the predefined list.
- ☐ [Peer Review and Open Access](#) – You are now able to see **Peer Reviewed** and **Open Access** visual indications in various areas of Alma, such as the search results, resource editors, and the list of items. You are also able to use the indication as a parameter in the advanced search, improving your search refinement capabilities.
- ☐ [Dublin Core Forms for Patron Deposits](#) – Institutions can now customize their end-user deposit forms for Dublin Core records. The selection of metadata, the order in which it is displayed, and the definition of mandatory fields are configurable, allowing you to create designated deposit forms per collection.
- ☐ [Print a Receive Slip Automatically for Non-Returnable Physical Items](#) – If the resource sharing service you offer to your patrons includes receiving non-returnable items for fulfilling their requests, you now have an option to print a slip for these resources when they are received at the borrowing library. The slips can be attached to the received resources.
- ☐ [Configure UI Width and Font Size](#) – As a user, you are now able to switch between different view modes. You can either view more information with a smaller font, or less information with a larger font.

What's New

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

New Alma User Interface

As of this release, users are no longer be able to use the classic UI. For more information on Alma's new user interface, see [What's New in Alma's New User Interface](#) and [The Alma User Interface](#).

Acquisitions



- **Idea Exchange** and



NERS Enhancement (ID # 5271): [Change PO Line Attributes After Ordering](#) (Part I) – You can now update PO line attributes after an order is created and sent to the vendor.

- [New Controlled Vocabulary \(CV\) Option in License Term Types](#) – You can now create a license term with a license term type of **Controlled Vocabulary**, enabling you to define your own custom list of values for the license term field that you add.

Watch the [Adding a Controlled Vocabulary for Local License Terms](#) video.



- **NERS Enhancement (ID # 4958):** [Enhancements to the Electronic Activation Task List](#) – The Electronic Activation Task List has two new columns to indicate whether the PO line has interested users and a rush status.
- [Delete PDA Profiles](#) – Patron Driven Acquisition profiles now have the option to delete canceled profiles.
- [Additional Acquisitions Enhancements](#)

Resource Management

- [Browse Bibliographic Headings User Interface](#) – The Browse Bibliographic Headings user interface was modified to improve usability.
- [Peer Review and Open Access](#) – When identified in the standard MARC 21 500 and 506 fields, the peer reviewed and open access information is indexed, searchable, and identified in search results.
- [ProQuest Ebook Central Integration](#) – Institutions that would like to automatically update ProQuest Ebook Central electronic resources can now do so with Alma's Upload Electronic Holdings integration capability.
- [Normalization Rule Syntax](#) – To automatically generate the 859 field from the 866 summary holdings data (per the ZDB form requirements), a new normalization rule syntax was created.
- [Suppression Handling for Imported Records](#) – A new parameter for Set Management Tags was added to the import profile.
- [Hanzi to Pinyin Task Configuration](#) – The user interface for the Hanzi to Pinyin task parameter configuration was improved, and the **Transliterate Entire Record** option was added to make configuration easier.
- [French UNIMARC](#) – As part of the ongoing enhancement of French UNIMARC, multiscript authority support and multiple IDs in bibliographic fields linking to separate authority records were implemented.
- [Additional Resource Management Enhancements](#)

Digital Resource Management

- [Dublin Core Forms for Patron Deposits](#) – You can now configure patron deposit forms for creating Dublin Core metadata records.
- [DC:Identifier Field Added to Exported Dublin Core Records](#) – The `dc:identifier` field containing the MMS ID is now added to exported Dublin Core records to enhance the ability to track the record.
- [Additional Digital Resource Management Enhancements](#)

Fulfillment

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

Resource Sharing

- [Print a Receive Slip Automatically for Non-Returnable Physical Items](#) – There is now an option on the Received Items page to automatically print a Receive Slip for a physical non-returnable item that is received from the lender to fulfill a borrowing request.

Course Reserves

- [Resource Sharing Requests for Citations](#) – You can now initiate a resource sharing request for a citation.
- [Citations of Type Note](#) – Citations of type **Note** are added by instructors in Leganto and can be added in Alma as well.
- [Additional Course Reserves Enhancements](#)

Collaborative Networks

- [Define ID Types for Fulfillment Networks](#) – Libraries can define that an ID type is mandatory in order to participate in a fulfillment network.

Analytics

- [New Leganto Institution Student Usage Subject Area](#) – This new subject area enables you to create reports concerning Leganto institution student usage.
- [Additional Analytics Enhancements](#)

Administration and Infrastructure

- [Webhook for Change Log Updates](#) – To better support instant publishing of bibliographic records to discovery systems, a webhook was added for changes to bibliographic records and physical items.
- [Direct Link to Resolved URLs for Portfolios in General Publishing](#) – It is now possible to add access URLs for electronic inventory enrichment.



Idea Exchange: [Configure UI Width and Font Size](#) – You can now configure the font size and width of the UI. You can select between options for font size (Small, Regular, and Big), and layout width (Focused (normal), and Spread (wide)).

- [Additional Administration and Infrastructure Enhancements](#)
-

Note

In April, Ex Libris will start using a new SSL certificate vendor, DigiCert, which will provide your connection to Alma with increased security and stability. This change should cause no downtime or service degradation.

To ensure that the migration goes smoothly, please confirm that all systems that connect to Alma have the Intermediate and root certificate installed, as follows:

- Intermediate SSL certificate - DigiCert SHA2 High Assurance Server CA (Serial #: 04:E1:E7:A4:DC:5C:F2:F3:6D:C0:2B:42:B8:5D:15:9F). <https://www.digicert.com/CACerts/DigiCertSHA2HighAssuranceServerCA.crt>
 - Root CA - DigiCert High Assurance EV Root CA (Serial #: 02:AC:5C:26:6A:0B:40:9B:8F:0B:79:F2:AE:46:25:77). <https://www.digicert.com/CACerts/DigiCertHighAssuranceEVRootCA.crt>
-

APIs

- New Discovery optimized APIs include services such as retrieving a full list of a given bibliographic record's physical items. For details, see <https://developers.exlibrisgroup.com/alma/apis/bibs>.
- A new API enables you to create a lending resource sharing request. For details, see <https://developers.exlibrisgroup.com/alma/apis/bibs>.
- Use of the REST APIs is now available only through the API gateway. This service is blocked when accessing Alma directly.

Accessibility

- Ex Libris is committed to providing an experience that is fully accessible to everyone. We make every effort to ensure that all pages comply with web accessibility guidelines. In the February release, we improved many aspects of accessibility, and during the month of February, we will release an updated Accessibility Conformance Report (valid for VPAT® Version 2.0). This report will cover the degree of conformance for [Web Content Accessibility Guidelines 2.0](#) and [Section 508 as published in 2017](#). For information on accessibility and Alma, see [this FAQ](#) page.
- Alma-Summon (patron-facing, services page) accessibility was improved. More than 40 issues were resolved, including:
 - removing all the unnecessary alt text and unsupported ARIA label attributes that are not announced by the screen reader
 - verifying that the correct semantics are used on all pages by ensuring that a hierarchical heading structure is used and that there is consistent navigation throughout the site using the “skip to” links
 - placing the focus on the last interactive element when opening and closing objects

Content Operations

- [Library of Congress Authorities Community Zone Updates](#)
- [New Electronic Collections Added to the Alma CKB](#)
- No new external search resources were added.

Known Issues

There are no known issues for the February release.

Next Release Sneak Preview

[View a list of the features](#) that are planned for the March 2018 release.

Acquisitions - February 2018 Enhancements

Change PO Line Attributes After Ordering (Part I)



Idea Exchange and



NERS Enhancement (ID #5271): A new job, **Update PO Lines Limited Attributes**, was added to update PO line attributes after an order is created and sent to the vendor. The job updates the purchase type as follows:

Update Type	Restrictions	Outcome
Purchase Type	The PO line type must remain within the same inventory type and continuity. For example: - The type can be changed from Database One Time to Electronic Book One Time. - The type can be changed from Print Book One Time to Musical Score One Time. - The type cannot be changed from Print Book One Time to Journal Continuous (subscription). - The type cannot be changed from Print Book One Time to Electronic Book One Time. The type is not changed for closed and canceled PO lines.	If the PO line is within a PO, the PO line is removed from the PO and the item is set to In Review.

The Run Jobs page has two new types that can be selected from the **Type** filter.

The **Update PO lines** type includes the following jobs:

- Update PO Lines Workflow
- Update PO Lines Transactions
- Update PO Lines Information
- Change PO Lines Status
- Update PO Lines Limited Attributes

The **Vendor reports** type includes the Legal Deposit Annual Receipt Task job.

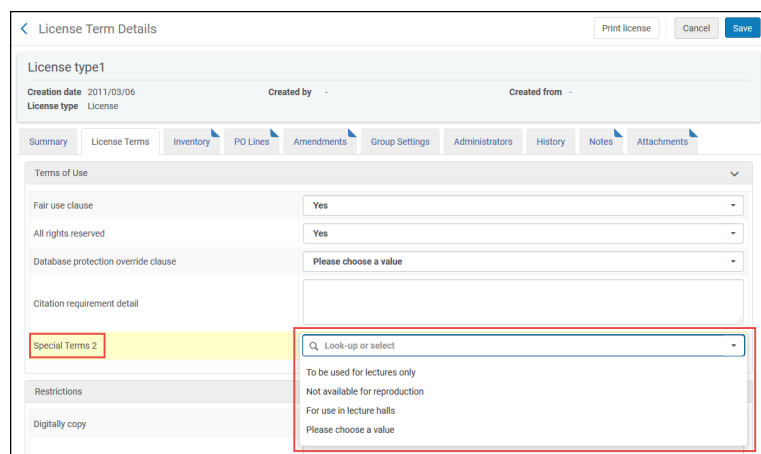
For more information, see [Configuring Processes](#) and [Running Manual Jobs on Defined Sets](#).

Additional options will be added for update types in coming months.

New Controlled Vocabulary Option in License Term Types

When adding a new license term in Manage License Terms (**Configuration Menu > Acquisitions > Licenses > Manage License Terms**), you now have the option to create the term with a license term type of **Controlled Vocabulary**. There is also an option to add the values for the controlled vocabulary field directly in the License Term Controlled Vocabulary mapping table (**Configuration Menu > Acquisitions > Licenses > License Term Controlled Vocabulary**). The controlled vocabulary option allows you to define your own custom list of values for the license term field that you add.

When a license term is added with this license term type, the license term will display in the section defined in the **License Section** field. The codes defined in the license term values will populate the field's drop-down list.



License Term Details

License type1

Creation date 2011/03/06 Created by - Created from -

License type License

Summary License Terms Inventory PO Lines Amendments Group Settings Administrators History Notes Attachments

Terms of Use

Fair use clause Yes

All rights reserved Yes

Database protection override clause Please choose a value

Citation requirement detail

Special Terms 2 Look-up or select

To be used for lectures only

Not available for reproduction

For use in lecture halls

Please choose a value

Restrictions

Digitally copy

License Terms

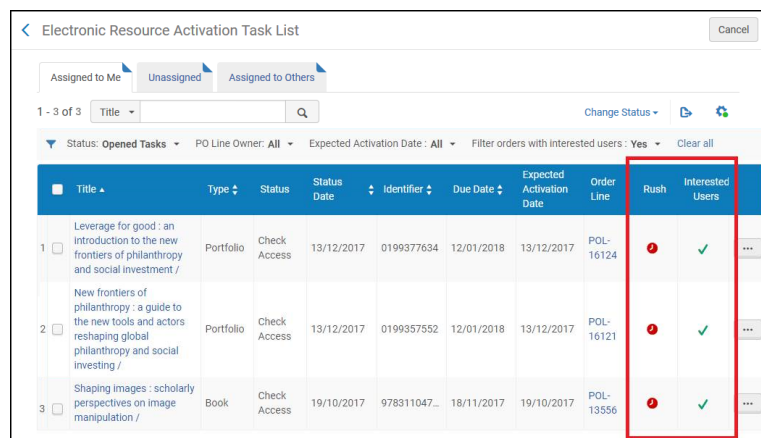
For more information on configuring a controlled vocabulary license term, see [Managing License Terms](#).

For more information about adding values for the controlled vocabulary field directly in the mapping table, see [Configuring License Term Controlled Vocabulary Values](#) and [Adding a controlled vocabulary local license term](#).

Enhancements to the Electronic Resource Activation Task List



NERS Enhancement (ID #4958): The Electronic Resource Activation Task List has two new columns to indicate whether the PO line has interested users and a rush status.

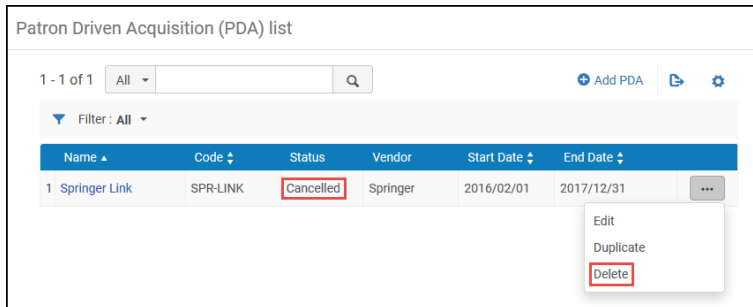


Title	Type	Status	Status Date	Identifier	Due Date	Expected Activation Date	Order Line	Rush	Interested Users
1 Leverage for good : an introduction to the new frontiers of philanthropy and social investment /	Portfolio	Check Access	13/12/2017	0199377634	12/01/2018	13/12/2017	POL-16124	1	✓
2 New frontiers of philanthropy : a guide to the new tools and actors reshaping global philanthropy and social investing /	Portfolio	Check Access	13/12/2017	0199357552	12/01/2018	13/12/2017	POL-16121	1	✓
3 Shaping images : scholarly perspectives on image manipulation /	Book	Check Access	19/10/2017	978311047...	18/11/2017	19/10/2017	POL-13556	1	✓

Electronic Resource Activation Task List

Delete Patron Drive Acquisition Profiles

Patron Driven Acquisition profiles now have the option to delete canceled profiles. After canceling a profile, the **Delete** option is available on the row action list.



Patron Driven Acquisition (PDA) list

1 - 1 of 1 All

Filter: All

Name	Code	Status	Vendor	Start Date	End Date	
1 Springer Link	SPR-LINK	Cancelled	Springer	2016/02/01	2017/12/31	Edit Duplicate Delete

Patron Driven Acquisition List

For more information, see [Patron Driven Acquisitions](#).

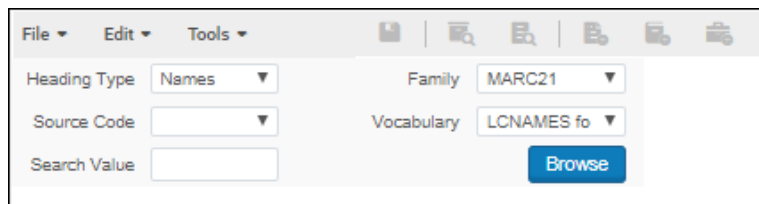
Additional Acquisitions Enhancements

- The vendor URL was added to the list of columns in Manage Column Display and to the export to Excel function for the Usage Data Loader page. See [Managing COUNTER-Compliant Usage Data](#).

Resource Management - February 2018 Enhancements

Browse Bibliographic Headings User Interface

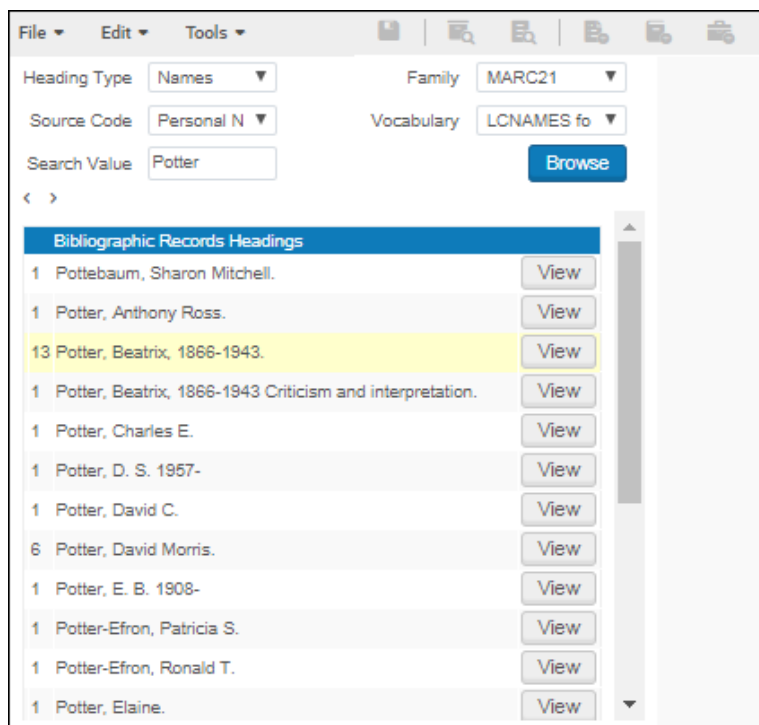
The Browse Bibliographic Headings user interface was modified to improve usability, and the **Go** button was re-labeled **Browse**.



The screenshot shows the top section of the user interface. It includes a menu bar with 'File', 'Edit', and 'Tools'. Below the menu bar are several input fields: 'Heading Type' set to 'Names', 'Family' set to 'MARC21', 'Source Code' set to 'Personal N', and 'Vocabulary' set to 'LCNAMES fo'. There is a 'Search Value' field containing the text 'Potter'. A blue 'Browse' button is located to the right of the search value field.

Browse Button

The browse results default to a split-screen view when you click **Browse**, and the browse page forward and backward arrows are positioned at the left (versus the right) above the results.



The screenshot shows the search results for the query 'Potter'. The results are displayed in a list format. The first result is '1 Pottebaum, Sharon Mitchell.' with a 'View' button. The second result is '1 Potter, Anthony Ross.' with a 'View' button. The third result is '13 Potter, Beatrix, 1866-1943.' with a 'View' button. The fourth result is '1 Potter, Beatrix, 1866-1943 Criticism and interpretation.' with a 'View' button. The fifth result is '1 Potter, Charles E.' with a 'View' button. The sixth result is '1 Potter, D. S. 1957-' with a 'View' button. The seventh result is '1 Potter, David C.' with a 'View' button. The eighth result is '6 Potter, David Morris.' with a 'View' button. The ninth result is '1 Potter, E. B. 1908-' with a 'View' button. The tenth result is '1 Potter-Efron, Patricia S.' with a 'View' button. The eleventh result is '1 Potter-Efron, Ronald T.' with a 'View' button. The twelfth result is '1 Potter, Elaine.' with a 'View' button. The results are displayed in a split-screen view, with the search form on the left and the results on the right.

Browse Results

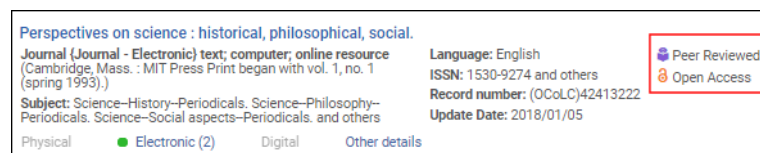
See [Browsing Bibliographic Headings](#) for more information.

Peer Review and Open Access

When identified in the standard MARC 21 500 and 506 fields (see below), the peer reviewed and open access information is indexed, searchable, and identified in search results.

- 500 __ \$a Refereed/Peer-reviewed
- 506 0_ \$f Unrestricted online access \$2 star

New **Peer Reviewed** and **Open Access** advanced search options are available to easily locate bibliographic records that are identified as peer reviewed and/or having open access. The **Peer Reviewed** and **Open Access** indications appear in the title search results on the Institution, Network, and Community tabs.



Peer Reviewed and Open Access Indications

See the following for more information:

- [Search Result Icons](#)
- [Peer Reviewed](#)
- [Open Access](#)
- [Configuring Repository Lists](#) (to customize the view in search results)
- [Search Indexes](#)

Note

Indexing of the peer-reviewed and open access information for records stored with this information prior to the February 2018 release will be handled during the next semi-annual re-indexing process.

ProQuest Ebook Central Integration

Institutions that would like to automatically update ProQuest Ebook Central electronic resources can now do so with Alma's Upload Electronic Holdings integration capability. See [Upload Electronic Holdings from ProQuest Ebook Central](#) for more information.

For customers planning to be early adopters of this feature, you are reminded to use your sandbox environment first to complete a configuration and then test the configuration of this functionality.

Normalization Rule Syntax

The following new syntax was added to the normalization rules:

```
splitSubField "<tag>.{ind1,ind2}.<code>.<delimiter>" to
"<tag>.{<ind1>,<ind2>}.<code>" addSeq "<code>"
```

In particular, this syntax can be utilized to generate the 859 field for ZDB publishing.

See [Split subfields](#) in the [List of Actions](#) section on the [Working with Normalization Rules](#) page for more information.

Suppression Handling for Imported Records

A new parameter for **Set Management Tags** was added to the import profile. With this new parameter, you can determine the handling of suppression for existing records that are being merged or overlaid by imported records. See [Suppress records from publish/delivery](#) in the [Creating/Editing an Import Profile: Set Management Tags](#) section for more information.

Hanzi to Pinyin Task Configuration

The user interface for the Hanzi to Pinyin task parameter configuration was improved, and the **Transliterate Entire Record** option was added to make configuration easier. See the [Add Hanzi to Pinyin Transliterations](#) explanation in the Task List Options table for more information.

French UNIMARC

As part of the ongoing enhancement of French UNIMARC, multiscript authority support and multiple IDs in bibliographic fields linking to separate authority records were implemented. See [Working with Multiscript UNIMARC Bibliographic Records](#) for more information.

Additional Resource Management Enhancements

- The flexible cursor placement when editing a field functionality in the MD Editor is being re-released (previously announced in the [July 2017 release notes](#)). You can now position your cursor anywhere within a field to begin editing. Previously, the cursor would jump automatically to the end or beginning of the field, depending on the field type. Note that this feature is not supported in IE. See the [MD Editor Working Example](#) section.
- Non-preferred terms of authority records linked to bibliographic records from the Community Zone are now published to Primo. With this change, you can now search by non-preferred terms in Primo. In addition, all bibliographic headings of Community Zone records are now available when using Browse Bibliographic Headings.
- **Alt+Shift+L** was added as a shortcut for the **Manage Location Information** option in the MD Editor Tools menu. See [Sending Location Information and Updating the UNIMARC 899 Field in Alma](#) for more information.
- The **Run Now** button in the Upload Electronic Holdings profiles was changed to **Save and Run** so that you can now immediately save and run the profile in one step. See the following for more information:
 - [Upload Electronic Holdings from Elsevier](#)
 - [Upload Electronic Holdings from Ovid](#)
 - [Upload Electronic Holdings from ProQuest Ebook Central](#)
- The following new message was added when Network records are viewed using Preview for normalizing records in the MD Editor: **Note that the rules will be applied only to local fields when the normalization process is run.** See the procedure [To preview the outcome of a rule file](#) for more information.
- **Library name** and **Location name** can now be specified in the holdings mapping options in the general publishing profile. See [Add Holdings Information](#) for more information.

Digital Resource Management - February 2018 Enhancements

Dublin Core Forms for Patron Deposits

You can now configure patron deposit forms for creating Dublin Core metadata records. When the patron selects a collection in which to submit the deposit, the fields of the form associated with the collection appear for the patron to fill in.

For more information, see [Working with Forms \(DC Only\)](#).

Additionally, the Patron Deposit interface can now be displayed in multiple languages. For information on configuring the language labels, see [Configuring Patron Deposit Labels](#).

DC:Identifier Field Added to Exported Dublin Core Records

The `dc:identifier` field containing the MMS ID is now added to exported Dublin Core records to enhance the ability to track the record. This includes records exported by the following methods:

- Exporting Digital Titles
- General Publishing
- Publishing to Primo
- REST API
- SRU

Additional Digital Resource Management Enhancements

- The **Preview** button was added to the Deposit Profiles page ([Resources > Deposit > Manage Deposit Profiles](#)). It displays a preview of the form configured for the collection to which the profile is assigned. In addition, the **Metadata Schema** field was removed because now the target format is set with a form at the collection level and not the deposit profile level.
- In the row actions on the List of Forms page ([Configuration > Resources > Metadata Configuration > Qualified Dublin Core > Forms tab](#)) the **Copy** action was renamed **Duplicate**.

Fulfillment - February 2018 Enhancements

Note

For additional resource sharing-related issues, see [Resource Sharing - February 2018 Enhancements](#). For course reserve-related issues, see [Course Reserves - February 2018 Enhancements](#).

The following changes were made in the Fulfillment functional area for this release:

- For articles, **Volume** and **Issue** fields were added to the Alma patron/staff digitization requests.
- On the Manage Fulfillment Sets page, statuses that are no longer applicable were removed from the **Loan status** field. The values are now:
 - Normal
 - Recalled
 - Renewed
 - Lost
 - Claim Returned
 - Any

For more information, see [Creating Itemized Sets](#).



- **Idea Exchange:** Overdue blocks for active loans (that were created by the Loans - Overdue and Lost Item job) will be removed during loan renewal. For more information, see [Configuring User Blocks Due to Overdue Loans](#).
- The **URL** field of the Discovery Interface integration profile has **language** as a new parameter. The URL can include the string `lang={lang_code}`. See [Configuring the Delivery Tabs](#).

Resource Sharing - February 2018 Enhancements

Print a Receive Slip Automatically for Non-Returnable Physical Items

There is now an option on the Received Items page to automatically print a Receive Slip for a physical non-returnable item that is received from the lender to fulfill a borrowing request. Select **Yes** on the **Automatically print slip** field on the Received Items page to print the slip. **Automatically print slip** defaults to **No**. If you select **Yes**, this value will be remembered for the length of the session. For more information, see [Receiving Items](#).

Note

Also see [Resource Sharing Requests for Citations](#).

Course Reserves - February 2018 Enhancements

Resource Sharing Requests for Citations

You can now initiate a resource sharing request for a citation. Note that, to use this feature, a) Ex Libris must enable this feature for your institution, and b) your Course Reserves Operator or Manager role must be in the scope of the resource sharing library. For more information, see [Managing Citations](#).

To create a resource sharing borrowing request for a citation: click the **Resource Sharing Request** citation action on the Edit Reading List page. The Resource Sharing Borrowing Request form appears. For more information see [Creating a Borrowing Request](#). The form is prefilled with the citation information, as well as the parameter values of parameters starting with **citation_rs_default_**; see [Other Settings](#).

- Four new citation alerts related to resource sharing were added.
- Four new customer parameters (starting with **citation_rs_default_**) were added to pre-fill certain information in the borrowing request, see [Other Settings](#).
- Reading list (**reading_list**) and citation (**citation**) codes were added to the Resource Sharing Receive Slip Letter; for the XSL, the codes are **reading_list_name** and **citation_id**; see [Configuring Alma Letters](#).

Citations of Type Note

Citations with the new type **Note** (citations whose material type is set to **Note**; see [Configuring Citation Material Types](#)) can be added by instructors in Leganto. They are used to provide information to the students who are viewing the reading list, and do not need to be fulfilled by the library staff.

They can also be added in Alma: add a non-repository citation and select the material type **Note** (or edit a citation to have this material type). More likely, you will see these types of citations after they are added to a reading list by an instructor.

The only actions you can perform on these citations are **Edit** and **Remove**. See [Managing Citations](#).

Additional Course Reserves Enhancements

- The course's **Processing Department** filter and column (initially hidden) were added to the Reading Lists Tasks List page; see [Managing Reading Lists](#). When accessing this page from a task related to unassigned reading lists, the processing department to which you are associated is pre-selected.
- The **Citation/Locate Status** filter on the Edit Citations and Edit Reading List pages was split into **Citation Status** and **Resource Locate**.
- For articles, volume and issue fields were added to the Copyright Attributes tab for a citation.
- The options to modify the reading list visibility start and end dates, remove owners, or remove course associations was added to the [Reading List Bulk Update job](#).
- A course code can now be up to 255 characters (instead of 50 characters).

Collaborative Networks - February 2018 Enhancements

Define ID Types for Fulfillment Networks

Previously, libraries were able to define what type of patron user groups can participate in a fulfillment network. With this release, patrons with only specified ID types can be exposed in the linked account rules mechanism. This enables the library to limit the fulfillment network services to patrons that have been issued a specific ID type.

A new mapping table, Searchable Identifiers ([Configuration Menu > User Management > Collaborative Networks > Searchable Identifiers](#)), was created to define which user identifiers are searchable using the fulfillment network process in order to fetch patron information. If the table is empty (which is the default), all user identifiers will be part of the fulfillment network. If a value is entered in the table and the searched user does not have an ID of this type in the other institution, the user's information from the other institution is not returned. See [Configuring Searchable User Identifiers](#).

Analytics - February 2018 Enhancements

New Leganto Institution Student Usage Subject Area

The Leganto Institution Student Usage subject area allows you to create reports concerning Leganto institution student usage. For more information, see [Leganto Institution Student Usage](#).

Additional Analytics Enhancements

- The **PDA Name** and **PDA Code** fields were added to the following locations in Alma Analytics. These fields contain the name and code of the Patron Driven Acquisition (PDA) entries configured in Alma. For more information, see [Patron Driven Acquisitions](#).
 - E-Inventory > Portfolio PO Line
 - E-Inventory > Portfolio
 - Funds Expenditure > PO Line
- The following changes were implemented:
 - The following fields were added to Titles > Title Measures:
 - Num of Digital Representations (All)
 - Num of Digital Representations (Active)
 - Num of Digital Representations (Deleted)
 - The following out-of-the-box reports replace the previous ones in the **Titles** folder and the default dashboard - **Title level overlap analysis**:
 - Overlap P and E
 - Overlap P and D
 - Overlap E and D
 - Overlap P and E and D
 - Bibliographic records with no inventory
- The **Level of Service** field was added to Lending Requests > Lending Requests Details. It indicates the level of service of the lending request.
- The Industry Standard reports were copied from the community folder, modified, and placed under the Alma folder. While the Industry Standard reports in the Community folder often contain local filters such as library name or patron status, the reports under the Alma folder are all generic and work with prompts for filtering.

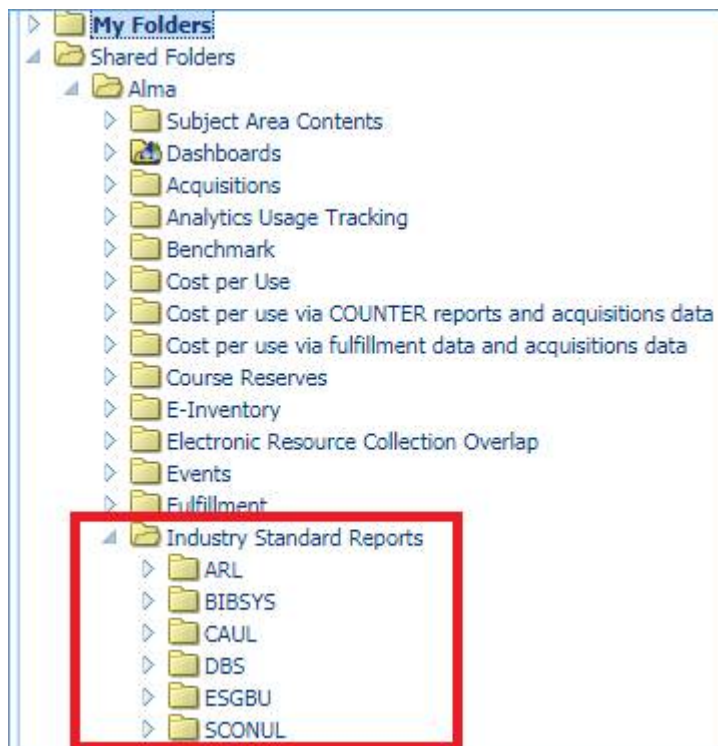
The reports include the following folders:

- Shared Folders/Alma/Industry Standard Reports/ARL/Reports
- Shared Folders/Alma/Industry Standard Reports/SCONUL/Reports
- Shared Folders/Alma/Industry Standard Reports/CAUL/Reports
- Shared Folders/Alma/Industry Standard Reports/DBS/Reports

- Shared Folders/Alma/Industry Standard Reports/BIBSYS/Reports
- Shared Folders/Alma/Industry Standard Reports/ESGBU/Reports

These folders each correspond to the following organizations:

- In North America the reports are for ARL (American Research Libraries)
- In UK they the reports are for SCONUL (Society of College, National and University Libraries)
- In Australia the reports are for CAUL (Council of Australian University Librarians)
- In Germany the reports are for DBS (Deutsche Bibliotheksstatistik)
- In Norway the reports are for BIBSYS (collaborating with all Norwegian universities and university colleges as well as research institutions and the National Library of Norway)
- In France the reports are for ESGBU (Enquete Statistique Generale aupres des Bibliotheques Universitaires)



- The **Caused Recall** field was added to Requests > Request Details. It indicates whether the request caused a recall of an item that is on loan.

Administration and Infrastructure - February 2018 Enhancements

Webhook for Change Log Updates

To better support instant publishing of bibliographic records to discovery systems, a webhook was added for changes to bibliographic records and physical items. The Webhooks integration profile has two new check boxes in the Actions tab of the profile for **BIB records** and **Physical Items**. A webhook is triggered when **BIB records** is selected and a bibliographic record is changed. A webhook is also triggered when **Physical Items** is selected and a physical item is changed. For more information, see [Webhooks](#) and the [Developer Network](#).

Direct Link to Resolved URLs for Portfolios in General Publishing

A new field, **Direct Link subfield**, was added to the **Electronic Inventory Enrichment** section of the General Publishing Profile Details. This field allows for the addition of access URLs for electronic inventory enrichment.

The screenshot displays the 'Publishing Profile Details' form, specifically the 'Electronic Inventory Enrichment' section. The form is divided into several tabs: 'Profile Details', 'Data Enrichment', and 'Actions'. The 'Profile Details' tab is active, showing various enrichment options and fields. The 'Electronic Inventory Enrichment' section is expanded, revealing a list of fields for adding electronic portfolio information. The 'Direct Link subfield' is highlighted with a red box, indicating its new addition to the form.

Holdings Tag	Holdings Subfield	Bib Tag	Bib Subfield
1 852	b	852	b
2 852	c	852	c
3 852	h	852	h

ADDITIONAL HOLDINGS FIELDS

Create date field	Subfield
Update date field	Subfield
Library name field	Subfield
Location name field	Subfield

Exclude suppressed records ☐

Physical Items Enrichment

Add Items information ☐

Electronic Inventory Enrichment

Add Electronic Portfolio Information ☒

Repeatable field ☒ 859

Portfolio PID

Access URL subfield u

Collection Name subfield b

Interface Name subfield c

Coverage Statement subfield d

Create date subfield

Activation date subfield

Activation Status

Link Resolver Base URL a

Library subfield e

Public Note subfield f

CZ Collection Identifier subfield

Update date subfield

Direct Link subfield

Digital Inventory Enrichment

Add Digital Representation Information ☐

Add Remote Representation Information ☐

Collection Enrichment

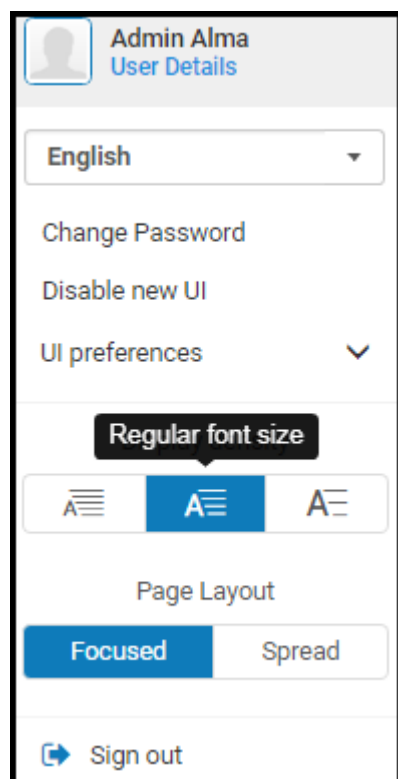
Add Collection Information ☐

Publishing Profile Details - Electronic Inventory Enrichment Section

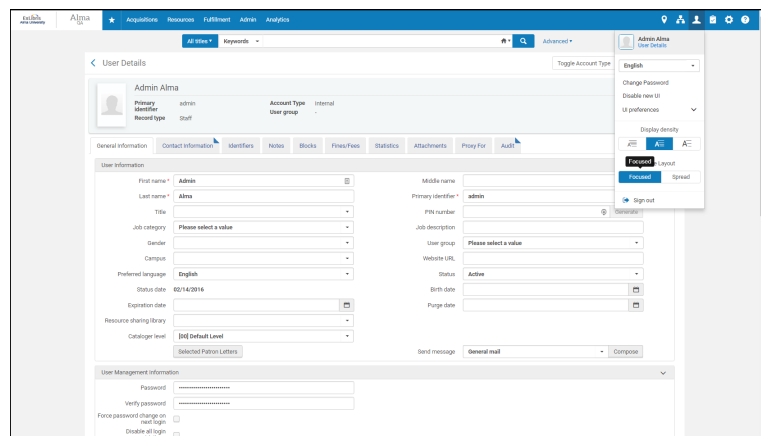
For more information, see [Publishing and Inventory Enrichment \(General Publishing\)](#).

Configure UI Width and Font Size

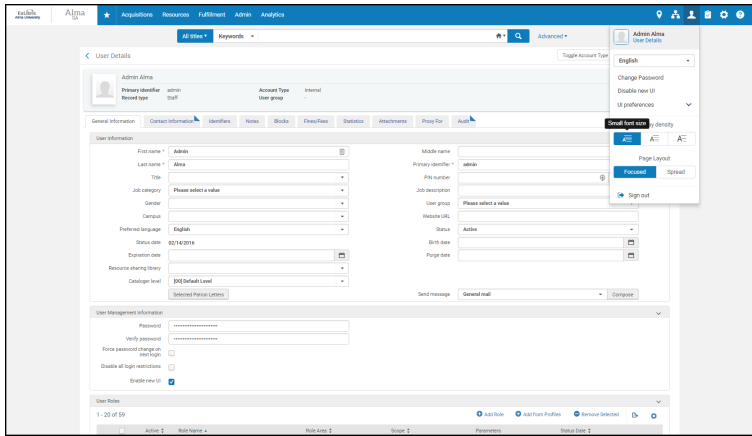
You can now configure the font size and width of the UI. Select the configuration in the user menu. There are three options for font size (Small, Regular, and Big), and two layouts (Focused (normal), and Spread (wide)). When you select big font size, wide width is selected automatically.



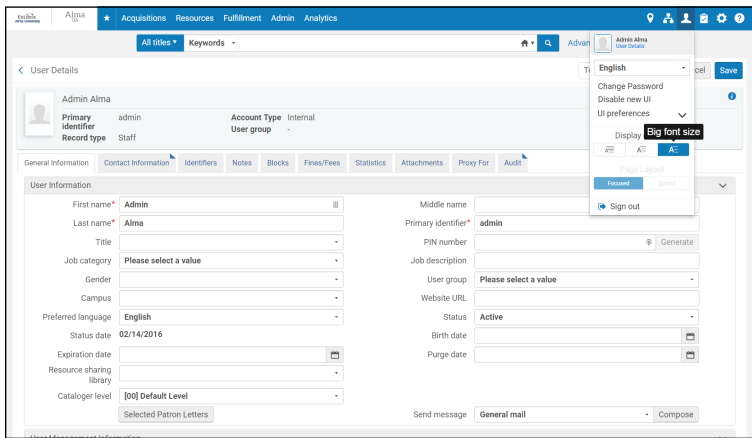
UI Preferences in the User Menu



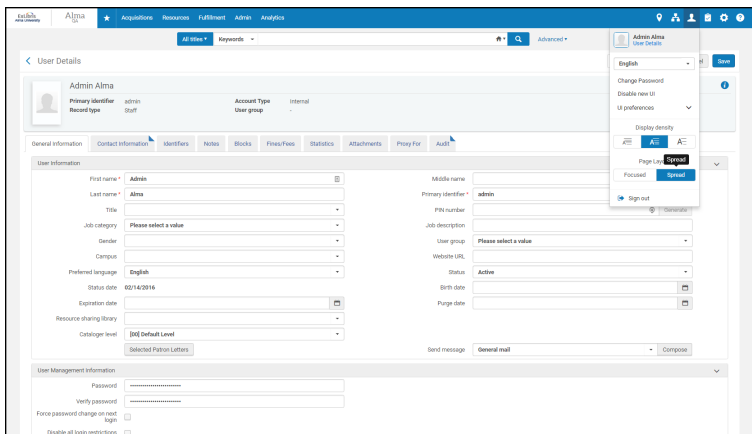
Regular Sized Font with Page Gutters (Default)



Small Font with Page Gutters



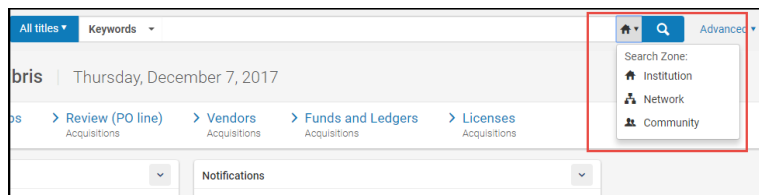
Large Font (No Gutters)



Regular Sized Font with No Gutters

Additional Administration and Infrastructure Enhancements

- You can now select the search scope for simple searches using the scope drop-down. Select a scope to show the search results with the corresponding tab selected by default. For more information about the tabs, see [Institution, Community, and Network Tabs](#). Your selection is saved during and/or between your Alma sessions.



Search Scopes

Content Operations - February 2018 Enhancements

Library of Congress Authorities Community Zone Updates

The following are the Library of Congress subject authority updates for the period of December 22nd through January 18th:

- Number of records updated: 52
- Number of records added: 233
- Number of records deleted: 37

The following are the Library of Congress name authority updates for the period of December 22nd through January 18th:

- Number of records updated: 11697
- Number of records added: 16999
- Number of records deleted: 257

The following are the Canadian name authority updates for the period of December 22nd through January 18th:

- Number of records updated: 86
- Number of records added: 706
- Number of records deleted: 6

The following are the Library of Congress Genre/Form Terms (LCGFT) updates for the period of December 22nd through January 18th:

- Number of records updated: 5
- Number of records added: 13

New Electronic Collections Added to the Alma CKB

The following electronic collections were added to the Alma Community Zone from December 25th through November 21st:

- ADB Online Publications
- American Association for Artificial Intelligence Publications
- American Memory: The 19th Century in Print
- Bacon Classiques Garnier Numérique Global All ebooks
- Bacon Classiques Garnier Numérique Global All journals
- Bacon Classiques Garnier Numérique Global All titles
- Bacon Classiques Garnier Numérique Global BIf
- Bacon Classiques Garnier Numérique Global Cg-Aed
- Bacon Classiques Garnier Numérique Global Cg-Alk
- Bacon Classiques Garnier Numérique Global Cg-Alm
- Bacon Classiques Garnier Numérique Global Cg-Amg
- Bacon Classiques Garnier Numérique Global Cg-Arb

- Bacon Classiques Garnier Numérique Global Cg-Are
- Bacon Classiques Garnier Numérique Global Cg-B17
- Bacon Classiques Garnier Numérique Global Cg-B18
- Bacon Classiques Garnier Numérique Global Cg-B19
- Bacon Classiques Garnier Numérique Global Cg-B20
- Bacon Classiques Garnier Numérique Global Cg-Bau
- Bacon Classiques Garnier Numérique Global Cg-Bcl
- Bacon Classiques Garnier Numérique Global Cg-Bec
- Bacon Classiques Garnier Numérique Global Cg-Bfr
- Bacon Classiques Garnier Numérique Global Cg-Bgi
- Bacon Classiques Garnier Numérique Global Cg-Bhm
- Bacon Classiques Garnier Numérique Global Cg-Bhr
- Bacon Classiques Garnier Numérique Global Cg-Blm
- Bacon Classiques Garnier Numérique Global Cg-Bpj
- Bacon Classiques Garnier Numérique Global Cg-Bpr
- Bacon Classiques Garnier Numérique Global Cg-Bre
- Bacon Classiques Garnier Numérique Global Cg-Bsm
- Bacon Classiques Garnier Numérique Global Cg-Bsp
- Bacon Classiques Garnier Numérique Global Cg-Bss
- Bacon Classiques Garnier Numérique Global Cg-Btf
- Bacon Classiques Garnier Numérique Global Cg-Bvy
- Bacon Classiques Garnier Numérique Global Cg-Cad
- Bacon Classiques Garnier Numérique Global Cg-Caj
- Bacon Classiques Garnier Numérique Global Cg-Cat
- Bacon Classiques Garnier Numérique Global Cg-Cdu
- Bacon Classiques Garnier Numérique Global Cg-Cen
- Bacon Classiques Garnier Numérique Global Cg-Cer
- Bacon Classiques Garnier Numérique Global Cg-Cgr
- Bacon Classiques Garnier Numérique Global Cg-Clb
- Bacon Classiques Garnier Numérique Global Cg-Cld
- Bacon Classiques Garnier Numérique Global Cg-Clf
- Bacon Classiques Garnier Numérique Global Cg-Clj
- Bacon Classiques Garnier Numérique Global Cg-Clm
- Bacon Classiques Garnier Numérique Global Cg-Cme
- Bacon Classiques Garnier Numérique Global Cg-Cmh
- Bacon Classiques Garnier Numérique Global Cg-Cmo
- Bacon Classiques Garnier Numérique Global Cg-Cvl
- Bacon Classiques Garnier Numérique Global Cg-Cyl
- Bacon Classiques Garnier Numérique Global Cg-Dis
- Bacon Classiques Garnier Numérique Global Cg-Dma
- Bacon Classiques Garnier Numérique Global Cg-Dol
- Bacon Classiques Garnier Numérique Global Cg-Dtf

- Bacon Classiques Garnier Numérique Global Cg-Ecr
- Bacon Classiques Garnier Numérique Global Cg-Edg
- Bacon Classiques Garnier Numérique Global Cg-Edp
- Bacon Classiques Garnier Numérique Global Cg-Eec
- Bacon Classiques Garnier Numérique Global Cg-Eer
- Bacon Classiques Garnier Numérique Global Cg-Ees
- Bacon Classiques Garnier Numérique Global Cg-Efa
- Bacon Classiques Garnier Numérique Global Cg-Ele
- Bacon Classiques Garnier Numérique Global Cg-Elf
- Bacon Classiques Garnier Numérique Global Cg-Eli
- Bacon Classiques Garnier Numérique Global Cg-Elu
- Bacon Classiques Garnier Numérique Global Cg-Emo
- Bacon Classiques Garnier Numérique Global Cg-Enc
- Bacon Classiques Garnier Numérique Global Cg-Eno
- Bacon Classiques Garnier Numérique Global Cg-Eph
- Bacon Classiques Garnier Numérique Global Cg-Epm
- Bacon Classiques Garnier Numérique Global Cg-Erd
- Bacon Classiques Garnier Numérique Global Cg-Eri
- Bacon Classiques Garnier Numérique Global Cg-Esa
- Bacon Classiques Garnier Numérique Global Cg-Esm
- Bacon Classiques Garnier Numérique Global Cg-Eth
- Bacon Classiques Garnier Numérique Global Cg-Eto
- Bacon Classiques Garnier Numérique Global Cg-Fma
- Bacon Classiques Garnier Numérique Global Cg-Gmo
- Bacon Classiques Garnier Numérique Global Cg-Hcu
- Bacon Classiques Garnier Numérique Global Cg-Hdr
- Bacon Classiques Garnier Numérique Global Cg-Hef
- Bacon Classiques Garnier Numérique Global Cg-Hit
- Bacon Classiques Garnier Numérique Global Cg-Hlf
- Bacon Classiques Garnier Numérique Global Cg-Hpe
- Bacon Classiques Garnier Numérique Global Cg-Hpr
- Bacon Classiques Garnier Numérique Global Cg-Hps
- Bacon Classiques Garnier Numérique Global Cg-Htm
- Bacon Classiques Garnier Numérique Global Cg-Ist
- Bacon Classiques Garnier Numérique Global Cg-Kai
- Bacon Classiques Garnier Numérique Global Cg-L17
- Bacon Classiques Garnier Numérique Global Cg-L18
- Bacon Classiques Garnier Numérique Global Cg-Lcc
- Bacon Classiques Garnier Numérique Global Cg-Lce
- Bacon Classiques Garnier Numérique Global Cg-Lhp
- Bacon Classiques Garnier Numérique Global Cg-Lip
- Bacon Classiques Garnier Numérique Global Cg-Lmo

- Bacon Classiques Garnier Numérique Global Cg-Lva
- Bacon Classiques Garnier Numérique Global Cg-Maf
- Bacon Classiques Garnier Numérique Global Cg-Mat
- Bacon Classiques Garnier Numérique Global Cg-Med
- Bacon Classiques Garnier Numérique Global Cg-Mra
- Bacon Classiques Garnier Numérique Global Cg-Mus
- Bacon Classiques Garnier Numérique Global Cg-Par
- Bacon Classiques Garnier Numérique Global Cg-Pas
- Bacon Classiques Garnier Numérique Global Cg-Pco
- Bacon Classiques Garnier Numérique Global Cg-Phc
- Bacon Classiques Garnier Numérique Global Cg-Pln
- Bacon Classiques Garnier Numérique Global Cg-Pol
- Bacon Classiques Garnier Numérique Global Cg-Rbo
- Bacon Classiques Garnier Numérique Global Cg-Rci
- Bacon Classiques Garnier Numérique Global Cg-Rcl
- Bacon Classiques Garnier Numérique Global Cg-Rcm
- Bacon Classiques Garnier Numérique Global Cg-Rda
- Bacon Classiques Garnier Numérique Global Cg-Rel
- Bacon Classiques Garnier Numérique Global Cg-Ren
- Bacon Classiques Garnier Numérique Global Cg-Rep
- Bacon Classiques Garnier Numérique Global Cg-Ret
- Bacon Classiques Garnier Numérique Global Cg-Rlc
- Bacon Classiques Garnier Numérique Global Cg-Rme
- Bacon Classiques Garnier Numérique Global Cg-Rne
- Bacon Classiques Garnier Numérique Global Cg-Rnl
- Bacon Classiques Garnier Numérique Global Cg-Rom
- Bacon Classiques Garnier Numérique Global Cg-Rps
- Bacon Classiques Garnier Numérique Global Cg-Rsm
- Bacon Classiques Garnier Numérique Global Cg-Rve
- Bacon Classiques Garnier Numérique Global Cg-Set
- Bacon Classiques Garnier Numérique Global Cg-Sir
- Bacon Classiques Garnier Numérique Global Cg-Sme
- Bacon Classiques Garnier Numérique Global Cg-Sya
- Bacon Classiques Garnier Numérique Global Cg-Thl
- Bacon Classiques Garnier Numérique Global Cg-Tle
- Bacon Classiques Garnier Numérique Global Cg-Tlm
- Bacon Classiques Garnier Numérique Global Cg-Tph
- Bacon Classiques Garnier Numérique Global Cg-Tre
- Bacon Classiques Garnier Numérique Global Cg-Upr
- Bacon Classiques Garnier Numérique Global Cg-Urh
- Bacon Classiques Garnier Numérique Global Cg-Wgi
- Bacon Classiques Garnier Numérique Global Cg-Zum

- Bacon Classiques Garnier Numérique Global Diderot
- Bacon Numérique Premium France Istexebooks
- Bacon Numérique Premium Global All ebooks
- Bacon Numérique Premium Global Degaulle
- Bacon Numérique Premium Global Droitpratique
- Bacon Numérique Premium Global Enseignementdelhistoire-Historiographie
- Bacon Numérique Premium Global Etudedelalitteraturefrancophone
- Bacon Numérique Premium Global Geopolitique
- Bacon Numérique Premium Global Histoireancienne
- Bacon Numérique Premium Global Histoirecontemporaine
- Bacon Numérique Premium Global Histoiredelameriquedunord
- Bacon Numérique Premium Global Histoiredelapsychanalyse
- Bacon Numérique Premium Global Histoiredelart
- Bacon Numérique Premium Global Histoiredesreligions
- Bacon Numérique Premium Global Histoiredessciences
- Bacon Numérique Premium Global Histoireducinema
- Bacon Numérique Premium Global Histoiregenerale
- Bacon Numérique Premium Global Histoiregenerale-Xixexxesiècle
- Bacon Numérique Premium Global Histoiredemedievale
- Bacon Numérique Premium Global Histoiredemoderne
- Bacon Numérique Premium Global Oeuvrescompletesetetudeszoliennes
- Bacon Numérique Premium Global Philosophesfrançaisduxxesiècle
- Bacon Numérique Premium Global Premiereguerremondiale
- Bacon Numérique Premium Global Renseignementetsecurite
- Bacon Numérique Premium Global Revolutionfrançaise-Premierempire
- Bacon Numérique Premium Global Sciencesdeleducation
- Bacon Numérique Premium Global Secondeguerremondiale-Etudes
- Bacon Numérique Premium Global Secondeguerremondiale-Sourcesettemoignages
- Bacon Numérique Premium Global Sociologieethistoiredesmedias
- Bacon Numérique Premium Global Usuelsetgeneralitesenhistoire-Delantiquiteanosjours
- Bacon Numérique Premium Global Usuelsxixexxesiècle
- Bacon Numérique Premium Global Viepolitiquefrançaiseauxxxesiècle
- Federal Reserve Bank of Atlanta Publications
- Federal Reserve Bank of Boston Publications
- Federal Reserve Bank of Dallas Economic Research Publications
- HeinOnline Brennan Center for Justice Publications at NYU School of Law
- HeinOnline Congress and the Courts
- HeinOnline History of Supreme Court Nominations
- HeinOnline International Law Association Reports
- HeinOnline Parker School of Foreign & Comparative Law Publications
- HeinOnline Provincial Statutes of Canada
- HeinOnline Scottish Legal History

- HeinOnline State Statutes: A Historical Archive
- HeinOnline Trends in Law Library Management and Technology
- HeinOnline UNC Press Law Publications
- HeinOnline Uniform Law Commission: National Conference of Commissioners on Uniform State Laws
- H-Net Reviews
- Making of America Books
- Open Knowledge Repository
- Ovid Lippincott Williams and Wilkins Total Access Collection 2018
- Oxford Handbooks Online 2013 Criminology and Criminal Justice
- Oxford Handbooks Online 2014 History
- Oxford Scholarly Authorities on International Law
- Oxford Scholarly Authorities on International Law (OSAIL)
- Rettsdata Total
- SpringerLINK - UNIPA 2016
- Techniques de l'Ingénieur
- University of Virginia Library
- WHO/IARC Classification of Tumours
- Wildlife Online
- Wiley Online Library AGU Free Content

New External Search Resources

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

Next Release Sneak Preview (for March 2018)

Note

The features below are currently planned for the next release. However, some of these features may, for various reasons, not be included in this month's release, but rather in a future Alma release.

Acquisitions



- **NERS Enhancement (ID # 5271):** Additional Options to Update Order Records – The February release's new option to update certain PO lines attributes after the order was created and sent to the vendor will be enhanced to include the update of additional fields, such as **Acquisition method** and **PO line owner**.
- Excel Sheet for Creating Invoices – The option to create invoices by loading an Excel file will be enhanced with an option to specify the owning library.

Resource Management

- Overlap Analysis with the Community Zone – It will be possible to run an overlap analysis comparison of an Institution Zone e-collection with one or more Community Zone e-collections.
- Call Number Duplication Check – In order to check call number duplication when a bibliographic record is saved, a new out-of-the-box MD Editor-only validation task will be added to Alma.
- Enhanced Multilingual Authority Record Management – The editing and handling of multilingual authorities with or without \$\$9 will be enhanced. It will be possible to manage an authority record with more than one preferred term with the same language or with no language.
- MD Editor Import Enhancements – There will be a new option to map fields from an incoming record to create holdings. In the MD import profile, the **Inventory Information** tab will include a new section, **Holdings Records Mapping**, that will determine the mapping of the fields in the incoming bibliographic record to the fields in the newly created holdings record.

Digital Resource Management

- HANDLE Export – Users can add pre-generated handles to bibliographic records, which will then be exported to FTP for the handle server update.
- DC Application Profiles – DC application profiles will allow institutions to catalog up to 50 local fields, beyond the standard 15 DC fields.

Resource Sharing

- Requests Monitor – The Resource Request Monitoring list will be enhanced to support viewing completed requests. A new **Activity Status** filter will be added to the screen to support this option.
- Workflow Options for Managing Rejected Requests – There will be improved options for managing the workflow of rejected resource sharing requests.

Collaborative Networks

- Central (Network Zone) SIS Handling in Network – It will be possible to manage user records centrally, in a single Network Zone-managed users list..

Analytics

- Additions to the Digital Usage Subject Area – **File** and **Representation** folders will be added to the Digital Usage subject area.

APIs

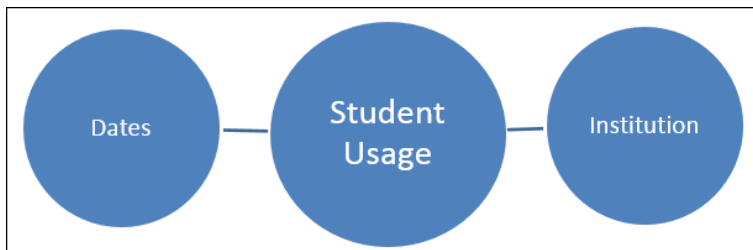
- Enhanced Campus Level Availability Information – The General Publishing platform, the RESTful Get BIB API, and the SRU search results will be enhanced with campus-level availability information
- Discovery APIs – If a holdings record does not have a cataloged Summary Holdings Statement, the AVA information that is retrieved by the GET BIB API will include a system-generated statement similar to the one currently generated in the Primo Get It tab.

Leganto Institution Student Usage

New for February!

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

- How can I see the student usage on an institute level?
- How can I create a report based on any time and date for optimal semester granularity?



Star Diagram – Leganto Institution Student Usage

Field Descriptions

The following fields are available in Leganto Institution Student Usage.



Leganto Institution Student Usage – Field Descriptions

Student Institution Usage

The Student Institution Usage table is a fact table that stores all measures relating to student institution usage, such as the number of active students, the number of reading list views, the number of full-text views, and the number of students that viewed a reading list.

Note

- Counts for unique users are those that contain the word **Students**. Those that start with **Number** count total clicks.
 - A student is someone without the instructor role.
 - The fields of this dimension contain cumulative data and cannot be limited by specific dates. Do not combine the fields of this dimension with fields from the Weeks dimension.
-

Student Institution Usage

Field	Description	Additional Information
Active Courses	The number of courses related to reading lists with any student usage	
Active Reading Lists	The number of reading lists with any student usage	
Active Students	The number of students that interacted with a reading list in some method: clicked, liked, commented, viewed the material)	
Number of Reading List Views	The total number of reading list views	
Number of Citations Views	The total number of citation views	
Number of Full Text Views	The total number of times the full text of any citation was accessed (multiple accesses by the same student count multiple times)	
Number of Comments	The total number of comments on all citations	
Number of Likes	The total number of likes on all citations	
Number of Read It	The total number of citations marked "read it" by each student, added together	
Students that Viewed Reading List	The number of unique students that viewed the reading list	
Students that Viewed Citation	The number of unique students that entered the citation full view	
Students that Viewed Full Text	The number of unique students that clicked a full text link in Leganto	
Students that Commented	The number of unique students that commented	
Students that Clicked Like	The number of unique students that clicked Like	
Students that Read It	The number of unique students that read the full text	

Dates

The Dates is a dimension table that stores details about dates.

Dates

Field	Description	Additional Information
Date	Stores the date in a format such as 2/29/2017	Use to filter the usage according to a specific date range

Field	Description	Additional Information
Full Month Desc	Stores the month and the year of the date in a display format such as Feb 2017	Use to filter the usage according to a specific month and the year, such as Feb 2017
Month Desc	Stores the month of the date in a display format, such as February	Use to filter the usage according to a specific month, such as February
Month Key	Stores the month of the date in number format such as 2 for February	Use to filter the usage according to a specific month, such as 2 for February
Year Desc	Stores the year of the date in number format such as 2012	Use to filter the usage according to a specific year
Year Key	Stores the year of the date in a string format such as 2012	
Date Hierarchy	Stores the Hierarchy column that allows the user to drill down from the year to the month to the specific usage date. Using this column provides the user with the option to view the accumulative measures in each level of the hierarchy.	

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.