

Alma June 2018 Release Notes

The Galaxy

June 1995 – American space shuttle docks with Russian Mir space station



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



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

Make the Most of This Release

Action Items

- ☐ [Authority Control Task List](#) – The addition of facets and filters to the Authority Control Task List enables you to focus on relevant changes, making it easier to manage cataloging maintenance tasks.
- ☐ [Using the Other System Number \(035\) as Matching Criteria](#) – The addition of this new matching method improves your ability to import records whose identification is based on the other system number 035 field using the portfolio loader.
- ☐ [Import Data from a Bursar System](#) – Libraries that export patron fees to external bursar systems can now expand the bursar integration to include an import action as well. In this case, fees exported to the bursar remain active in Alma until feedback is imported from the bursar system indicating that the fee was paid.
- ☐ [Normalization Rules Creation for Dublin Core Records](#) – The additional normalization rules support in this feature allows staff to automate MD normalization for Dublin Core records at various stages in the system.
- ☐ [Inventory Actions Added to MD Editor for Dublin Core Records](#) – Inventory information and actions are available from the MD Editor for Dublin Core records, allowing staff to perform as many digital-related actions as possible from a single location.
- ☐ [Internet Archive Book Reader](#) – The newly embedded Internet Archive Book Reader enhances delivery capabilities, enabling full-text search in image files.

What's New

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

Acquisitions

- [New Fields on the Order List Letter](#) – The 490 and 830 fields are now available on the Order List Letter (letter code: OrderListLetter).
- [Patron Purchase Request Enhancements](#) – The Alma patron purchase request process was enhanced with a number of new features such as a new multi-selection field on the User Details page and the **Purchase Request Library** field on the Primo Purchase Request form.
- [Normalize the Historical Titles from COUNTER Loads](#) – Titles from COUNTER loads run prior to the January 2018 release are now included in the **Normalized Title** field in the Usage Data subject area.
- [Additional Acquisitions Enhancements](#)

Resource Management



- **Idea Exchange:** [Filtering the Authority Control Task List](#) – Facets were added to the Authority Control Task List to filter the lists that appear on the Review and All tabs and enable you to more easily manage the page. Watch the [Filtering the Authority Control Task List](#) video (1:00 min.).



- **Idea Exchange:** [Deleting Multiple Fields in the MD Editor](#) – In the MD Editor, multiple fields (rows) can be deleted by selecting them with Ctrl+click and then selecting the **Remove Field** option (**Edit > Remove Field**) or Ctrl+F6. Watch the [Deleting Multiple Fields in the MD Editor](#) video (1:00 min.).
- [Using the Other System Number \(035\) as Matching Criteria](#) – When using the portfolio loader template/Excel file to import records, you may now use the 035 field other system number for your match criteria (in your import profile).
- [Alma Link Resolver Support for Electronic Collections with No Portfolios](#) – The Alma Link Resolver and Primo View It now support the display of electronic collections with no portfolios when certain additional openURL attribute-related conditions are met.
- [249 Field](#) – The 249 field (Titles for parts of compilations lacking a collective title etc. (NR)) is now configurable in the MARC 21 Bibliographic profile using Metadata Configuration.
- [Additional Resource Management Enhancements](#)

Note

As of July, repository searches for Keywords, Creator, Uniform Title, Names, Subject, and Subject (LC) will be able to include matches to non-preferred terms in any associated authority records. For example, if there's an authority record **Tchaikovsky, Peter Ilich, 1840-1893 (MMS ID 98124867430000041)** that includes **Ciaikovsky** as a non-preferred term, a search for **Ciaikovsky** will be able to find a matching bibliographic record linked to this authority record, even though the bibliographic record itself does not include the term. To activate this new functionality, you will need to enable a customer parameter that will become available with the July release, before the July re-indexing process takes place.

Digital Resource Management

- [Full Text Support for Digital Inventory](#) – You can upload a plain or ALTO fulltext file to accompany a digital file and search for the text in the file using the newly embedded Internet Archive Book Reader.

- [Normalization Rules Creation for Dublin Core Records](#) – You can now create normalization rules in the MD Editor for Dublin Core records.
- [Inventory Actions Added to MD Editor for Dublin Core Records](#) – You can now perform additional inventory actions on Dublin Core records from the MD Editor.
- [Additional Digital Resource Management Enhancements](#)

Fulfillment



- **Idea Exchange:** [Import Data from a Bursar System](#) – You can now import files from a bursar system to update Alma on the transactions that were exported from Alma to the bursar system.



- **NERS Enhancement (Request #5109)** [Calculate an Item's Queue Place in Primo's Get It Tab](#) – On the Primo Get It tab, a patron may now view his or her request's place in the queue before submitting the request.
- [Configuring Fulfillment Networks](#) – The following configuration pages are now visible to users with administrator roles: Fulfillment Member, Fulfillment Network Groups, and Institutions Relations.
- [Additional Fulfillment Enhancements](#)

Resource Sharing

- [Support ItemRequested to Create a Borrowing Request in NCIP v1.0](#) – Alma now creates a borrowing request when a broker system sends an ItemRequested message to the borrowing institution.
- [Additional Resource Sharing Enhancements](#)

Course Reserves

- [Searching for Citations](#) – You can now search for citations in the persistent search box located at the top of most pages.
- [Campus Associations for Courses](#) – If you have defined campuses in your institution, you can associate these campuses with your courses.
- [Additional Course Reserves Enhancements](#)

Analytics

- [Analytics Enhancements](#) – Several enhancements were made to Analytics for the June release.

Administration and Infrastructure



- **Idea Exchange:** [Expand All Tabs in a Record List](#) – On pages with record lists that have an **Expand** table action menu, the option **Expand all** was added to this table.



- **Idea Exchange:** [Select All Items for Itemized Repository Sets](#) – When adding items to a repository set, you can now click **Add All** to add all items on all results pages to the set.
- [Additional Administration and Infrastructure Enhancements](#)

APIs

- The fields **Chapter author**, **Chapter title**, and **Editor** were added to the resource sharing borrowing and lending APIs so that they are now in line with the Alma UI.
- The PUT and GET physical Item APIs were updated to support the new physical item's **Physical condition** field.
- A linked account can now be implemented using an API.
- The Create Citation API now supports secondaryType for POST/PUT operations.

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 June release.

Next Release Sneak Preview

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

Acquisitions - June 2018 Enhancements

New Fields on the Order List Letter

The 490 field, **series_statement**, and 830 field, **series_uniform_title**, are now available on the Order List Letter (letter code: OrderListLetter). To display the new fields, add them to the XSL of the letter. For example:

```
<xsl:for-each select="notification_data/po/po_line_list/po_line">
  <tr>
    <td>
      <xsl:value-of select="series_statement">
    </td>
    <td>
      <xsl:value-of select="series_uniform_title">
    </td>
  </tr>
</xsl:for-each>
```

For more information on the Letter to Vendor, see [Configuring Alma Letters](#).

Patron Purchase Request Enhancements

The Alma patron purchase request process is now enhanced with the following new features:

- A new multi-selection field, **Purchase Request Library**, was added to the User Details page. If one or more libraries are defined for a user, the user may create purchase requests only for the listed libraries. If no libraries are listed, the user may create a purchase request for any library. See [Adding Users](#).
- The **Purchase Request Library** field appears on the Primo Purchase Request form if one or more libraries are selected for the user. When the user selects a library, the library becomes the owning library of the request.
- If a purchase request is created from a citation, the **From** field on the purchase request contains a link to the citation. A user must have permission to view citations in order to see the citation when clicking the link.
- When a purchase request is created for an already existing PO line, a pop-up notification is now sent to confirm that the user wants to continue creating the purchase request.

Normalize the Historical Titles from COUNTER Loads

Titles from COUNTER loads run prior to the January 2018 release are now included in the **Normalized Title** field in the Usage Data subject area. The title is normalized in the same manner that Alma normalizes the titles of bibliographic records. This enables accurate matching of titles between the COUNTER reports and the Alma bibliographic records.

For more information, see [Usage Data](#).

Additional Acquisitions Enhancements

- If a user doesn't have the Invoice Manager role, a new approval status, **Not Required**, is added and the field **Approved by** is empty.
- If an electronic activation task is assigned to a user that no longer exists in Alma, the job completes with errors and the electronic activation task assignment is released.
- When searching for a fund, if the fund code has trailing spaces and the fund code in Alma's internal database does not (or vice versa), the trailing spaces in the fund code are removed so that the fund can be located.
- When a resource is ordered from the Network Zone and the PO line is created in the Institution Zone, the material type is now editable on the PO Line Details page. The process that creates PO lines for records from the Network Zone now always sets the material type (either to the existing one or to the default). When the PO line is created according to the inventory type (and the table below), the material type is editable and receives its possible values from the relevant code table. The possible options are as follows:

PO Line Type	Inventory Type	Default Value
ELECTRONIC_COLLECTION_OT	Collection	Book
ELECTRONIC_COLLECTION_CO	Collection	Journal
ELECTRONIC_TITLE_OT	Portfolio	Book
ELECTRONIC_TITLE_CO	Portfolio	Journal
ELECTRONIC_SO	Portfolio	Journal
E_BOOK_OT	Portfolio	Book
E_BOOK_CO	Portfolio	Book
E_BOOK_SO	Portfolio	Journal
E_JOURNAL_CO	Portfolio	Journal
E_JOURNAL_OT	Portfolio	Journal
PRINT_OT	Book	Book
PRINTED_BOOK_OT	Book	Book
PRINT_SO_NONMON	Holding	Journal
PRINT_SO	None	Book

Resource Management - June 2018 Enhancements

Filtering the Authority Control Task List



Idea Exchange: To more easily manage the Authority Control Task List, facets were added that enable you to filter the lists that appear on the Review and All tabs. See [Using the Authority Control Task List](#) for more information. Additional facets/filters will be implemented in coming releases.

Deleting Multiple Fields in the MD Editor



Idea Exchange: In the MD Editor, multiple fields (rows) can be deleted by selecting them with Ctrl+click and then selecting the **Remove Field** option (**Edit > Remove Field**) or Ctrl+F6. This is in addition to the existing option to mark several fields and copy/paste them as a group. See [Remove Field](#) for more information.

Using the Other System Number (035) as Matching Criteria

When using the portfolio loader template/Excel file (see [The Bulk Portfolio Information File](#)) to import records, you may now use the 035 field other system number for your match criteria (in your import profile). As announced in the May release, the portfolio loader template/Excel file handles three additional columns for the other system number. In addition, when you export a list of portfolios (Electronic Service Editor > Portfolios tab), the Excel file that is created contains up to three other system number columns when that information is available. See [035 \(Other System Identifier\) Match Method](#) and [Tools](#) for more information.

Note

Since this feature requires that the Community Zone be updated, it will only be available in the sandbox with the production release and not two weeks prior to the production release.

Alma Link Resolver Support for Electronic Collections with No Portfolios

The Alma Link Resolver and Primo View It now support the display of electronic collections with no portfolios when certain additional OpenURL attribute-related conditions are met. See [Working with Newspaper Electronic Collections](#) for more information. Contact Support to enable this feature for your institution.

249 Field

The 249 field (Titles for parts of compilations lacking a collective title etc. (NR)) is now configurable in the MARC 21 Bibliographic profile using Metadata Configuration. This includes the following subfields: \$a – Title for part of compilation (R), \$b – Other title information relating to the compilation (NR), \$c - Statement of responsibility relating to the compilation (NR), and \$v – Statement of responsibility relating to the title for part of compilation (R).

In search results, the 249 information now appears with the 245 title information in the following format: 245 data; 249 \$a / 249 \$v : 249 \$b / 249 \$c.

The 249 is indexed in the following manner:

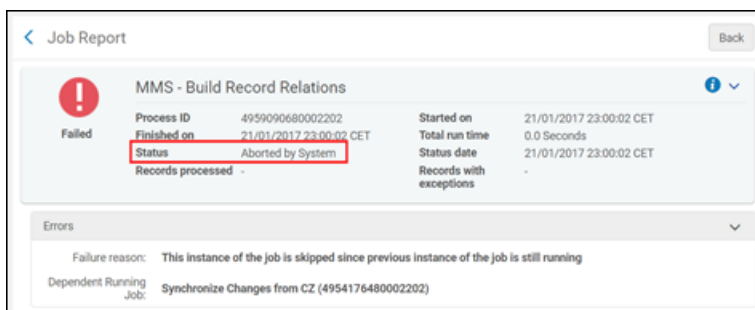
- Title index – 249 \$a, \$b
- Names index – 249 \$c, \$v
- Keywords index – 249 \$a, \$b, \$c, \$v

See the [MARC 21 Bibliographic Tag to Search Index Mapping](#) table.

For the staff search options and search results to display as described above, a full re-indexing for any 249 fields cataloged prior to the June release is required. The next full re-indexing is scheduled for the July release. Newly cataloged 249 fields beginning with the June release will be automatically indexed and available in the staff search and search results.

Additional Resource Management Enhancements

- For general publishing jobs that do not complete because a dependent job is still running and they are stopped by the system, the job report status is now identified as **Aborted by System** instead of **Failed**. The job failure reason that is provided indicates that the job is skipped due to a previous instance of the job still running.



Aborted by System Job Status

- For bibliographic records created with Quick Cataloging ([Resources > Create Inventory > Add Physical Item](#)), the following changes were implemented:
 - For MARC 21 records, a 008 field is now added by default.
 - Position 05 of the leader (LDR) field is now set to **n** (new record).
 - For the Citation Type of **Book**, the **Pages** field is now mapped to MARC 21 field 300 \$a instead of 773 \$g.
 - For the Citation Type of **Article**, the **ISSN** field is now mapped to MARC 21 field 773 \$x instead of 022 \$a.
- For authority records in vocabularies that use linking IDs in the *See also* 5XX \$0 (MARC 21) and 5XX \$3 (UNIMARC and CNMARC), clicking the **See also** link in the authority record search results displays the record identified by the ID that is specified in the 5XX field.

- The list of options for the **Originating system** parameter in the Import Profile Details was expanded to include the following: ABC-CLIO; ABES; American Psychological Association; American Society of Mechanical Engineers; Askews and Holts; Backstage; Baker & Taylor; Beck-Verlag; BePress; Bibliothèque nationale de France; Bloomberg BNA; Business Expert Press; Casalini Libri; Catálogo Colectivo de Autoridades Bibliográfica (CCAB); Commerce Clearing House; Dewey Decimal System; Edward Elgar Publishing; Electre; Films Media Group; Films OnDemand; Gale; GOBI (YBP); Harvard University Press; HathiTrust; IGI Global; ILO Thesaurus; International Monetary Fund; IOP Publishing; JSTOR; Kanopy; Knowledge Unlatched; MARC Magician; McGraw Hill Education; Midwest Library Services; Myilibrary; National Bureau of Economic Research; OCLC Partners; OCLC WMS; OECD; Ovid Technologies Pty. Ltd; Oxford; Palgrave; Project Muse; ProQuest Ebook Central; Psychotherapy.net Streaming videos; Repos. UC; Reveal Digital; Sage; Sage Knowledge; Salem Press; Schweitzer; SIAM, Society for Industrial and Applied Mathematics; SoundCloud; SPIE, Society of Photographic Instrumentation Engineers; Springer (SPR); Springer (SPRINGER); Swank Motion Pictures; Taiwan National Central Library; Taylor & Francis (TAYLORFRANCIS); The Institution of Engineering and Technology; Total BooX; University of Oxford; World Bank; World Scientific; Worldshare Collection Manager.
- Three additional monthly scheduling options are now available for publishing jobs, making a total of four uniquely configurable monthly options.
- In the Network Zone, an additional scheduling option was added for publishing electronic records to Primo Central in order to enable you to publish the Network Zone records a day before member institution records.
- When the **enable_file_extension_fix_in_general_publishing_profiles** customer parameter (an internal parameter) is set to **true** (by Ex Libris staff), the .xml and .mrc file name extensions are added to the FTP file names created when publishing with the general publishing profile. In addition, the tar.gz file name/files issues when file compression was enabled is fixed. See [File name prefix](#) and [File name](#) for more information.
- An option was added for normalizing authority records before contributing them to an external system such as GND or BARE. Contact Support to configure this feature for you in the Community Zone-based Authority Record Contribution integration profile.
- For institutions with the Chinese and Hong Kong (Solr) configuration, all punctuation marks are removed when they appear in CJK text when performing a repository search (see [CJK Punctuation](#)). Previously, only a limited list of punctuation marks were removed during repository search. Since this change requires re-indexing, this feature will affect only new and modified records until the full re-indexing is completed with the July release.
- Alma supports a workflow that provides integration with SUDOC, the French National Catalog. See [Integrating an Alma Institution with SUDOC](#) for more information.
- For records that have alternate graphic representations, search results now include alternate graphic representations when physical title searches are completed. Previously, they appeared only in all titles search results. For more information about working with alternate graphic representations, see [Working with Linked 880 Fields in Bibliographic Records](#) and [alternate_graphic_representation_editing](#).

Digital Resource Management - June 2018 Enhancements

Full Text Support for Digital Inventory

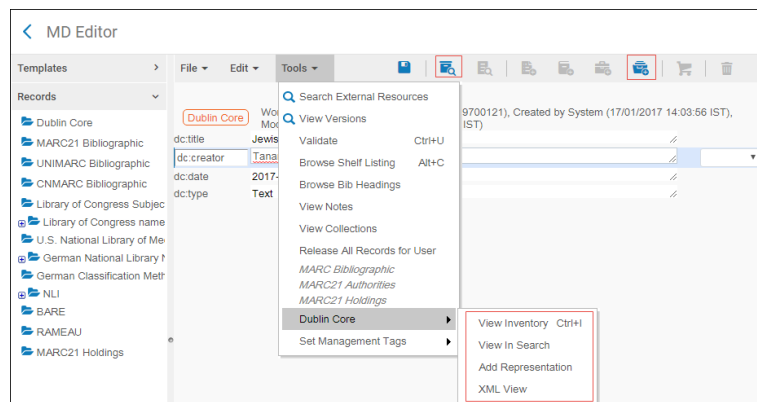
You can upload a plain or ALTO fulltext file to accompany a digital file and search for the text in the file using the newly embedded Internet Archive Book Reader. For more information, see [Managing Digital Resources](#). In addition, you can now search for fulltext format using the Advanced Repository Search under **Digital File > Fulltext Format**.

Normalization Rules Creation for Dublin Core Records

You can now create normalization rules in the MD Editor for Dublin Core records. The new **DcDroolNormalization** normalization task uses the normalization rules that you create. For more information, see [Working with Normalization Rules](#) and [Working with Normalization Processes](#).

Inventory Actions Added to MD Editor for Dublin Core Records

You can now perform additional inventory actions on Dublin Core records from the MD Editor. To support this feature, the **View Inventory** and **Add Representation** actions were added as icons and menu items (**Tools > Dublin Core**) in the MD Editor. In addition, the **XML View** action was added as a menu item that allows you to view the DC record as an XML file. For more information, see [MD Editor Menu and Toolbar Options](#).



Inventory Actions Added to MD Editor for Dublin Core Record

Additional Digital Resource Management Enhancements

- You can change the schema of DCMI records using the new **Change Record DC Application Profile** job. For more information, see [Running Manual Jobs on Defined Sets](#).
- You can create a process that adds the MMSID to the dc:identifier field of Dublin Core records using the new **addMmsIdToDcIdentifier** DC normalization task. In addition, the **Qualified Dublin Core Bib normalize on SRU search** process was added, which uses this normalization task. For more information, see [Configuring Processes](#).

If the SRU integration profiles are configured to use normalization rules, search results that use the SRU protocol contain the MMSID in the Dublin Core record. For more information, see [SRU/SRW Search](#).

Fulfillment - June 2018 Enhancements

Import Data from a Bursar System



Idea Exchange: You now have the ability to import files from a bursar system to update Alma on the transactions that were exported from Alma to the bursar system. The bursar integration profile includes a new import section. When this section is active, the export process sets the transaction type to **Exported** instead of **Exported and Paid**, which is set when the import section is not active. The section includes the job schedule for the import process and an option to run the import immediately. For more information, see [Bursar Systems](#).

The following enhancements appear on the **Fines/Fees** tab of the User Details page when the bursar integration profile import section is active:

- A **Transferred Balance** summed amount is shown on the amounts summary header.
- The **Status** filter now includes the **Transferred** value.

See [Managing User Fines and Fees](#).

A new job was added, **Import from Bursar using Profile <integration profile name> Fines and Fees**. The job performs the following tasks:

- Search for the matching fine/fee record with the bursar transaction ID. If a match cannot be made, the internal ID is used.
- Create a new transaction with the **Payment Imported** type.
- Update the relevant fine/fee. If the payment is a full payment, close the fee. Otherwise, update the active amount. If the payment is an overpayment, create a credit.

See [Viewing Scheduled Jobs](#).

Once a fine/fee is exported, it is considered active. Therefore, the user cannot be deleted until the payment is received from the bursar. This applies to manual deletions, the Purge User Records job, and the Bulk Fine Waiving job. It will not be possible to purge a user that has exported fines/fees. If the **allow_activity_on_transferred_finesfees** parameter is set to **false** and the user has exported fines/fees, the fees will also not be waived. Additionally, both jobs include the exported fines/fees when calculating the waive threshold.

Two new customer parameters were created to support this function.

When the **include_transferred_finesfees_in_alma_limits** parameter is set to **true**, fines and fees transferred to the bursar system are included when calculating the user cash limit and the amount for user option in the Fines/Fees Notification profile. When it is set to **false**, which is the default, the transferred fees are not taken into account.

When the **allow_activity_on_transferred_finesfees** parameter is set to **true**, you can perform activities such as payment or waive on fines/fees that were exported. The **Waive** link appears on the row action menu of the **Fines/Fees** tab of the User Details page when this parameter is set to **true**. When it is set to **false**, which is the default, transferred fees cannot be changed. See [Configuring Other Settings \(Fulfillment\)](#).

Calculate an Item's Queue Place in Primo's Get It Tab



NERS Enhancement (Request #5109): On the Primo Get It tab, a patron may now view his or her request's place in the queue before submitting the request. A **Calculate Queue** button appears on the Hold Request form and the Digitization Request form on the Get It tab. Clicking the button calculates whether there are any other outstanding requests for this item and returns a number that indicates where this request will be placed in the queue. A result of zero means that there are no outstanding requests. Any value greater than 0 means that the item is already requested or on loan and indicates where this request will be placed in the queue.

The **Calculate Queue** button is hidden by default. To make the button visible, set the **Display to Public** value to **true** for the **calculateQueueButton** on the Hold Request Form Customization and the Digitization Request Form Customization pages (accessed from **Configuration menu > Fulfillment > Discovery Interface Display Logic**).

See [Customizing Primo Request Forms](#).

Configuring Fulfillment Networks

The following configuration pages are now visible to users with administrator roles: Fulfillment Member, Fulfillment Network Groups, and Institutions Relations. For more information, see [Configuring Network Groups](#).

Additional Fulfillment Enhancements

- The **hkall** parameter was added as an option for the general electronic service URL attributes and rules parameters. See [Adding a General Electronic Service](#).
- On the Physical Location page, the labels were renamed to remove the Location from the beginning of each label. So they are now **Code**, **Name**, **Type**, and so forth. See [Configuring Physical Locations](#).
- On the Manage In Process Items page, the Date Received at Department column has been renamed **Date Received for Department**.
- On the Pick from Shelf page, for title level requests that are attached to lending requests, the following fields are now available: **Volume**, **Issue**, **Chapter**, **Pages**.



- **Idea Exchange:** A **Location** column was added to the Loans list in Patron Services. The column is hidden by default. See [Loaning Items](#).

Resource Sharing - June 2018 Enhancements

Support ItemRequested to Create a Borrowing Request in NCIP v1.0

Alma now creates a borrowing request when a broker system sends an **ItemRequested** message to the borrowing institution. This functionality already exists for NCIP v2.0. For more information, see [Broker-based Resource Sharing in the Developer Network](#).

Additional Resource Sharing Enhancements

- Alma now supports the use of a general message for NCIP-P2P borrowing and lending requests. See [Sending a General Message With a Resource Sharing Request](#).



- Idea Exchange:** A **Partner** column was added to the Resource Sharing Lending Requests Task List page.



- Idea Exchange:** The borrowing request statuses code table is now available for customization and translation. The customized values are displayed in Primo and in the requests list on the Patron Services page. The code table can be accessed from **Configuration Menu > Fulfillment > Resource Sharing > Borrowing Request Statuses**. See [Configuring Borrowing Request Statuses](#).

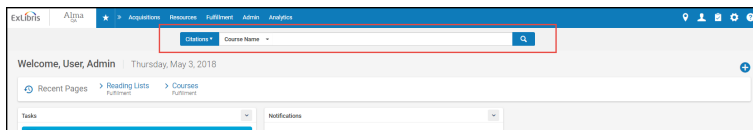


- Idea Exchange:** On the Shipping Interface, the **Automatically print slip** now defaults to **Yes**. The user's check box selection persists during the session. See [Shipping Items](#).

Course Reserves - June 2018 Enhancements

Searching for Citations

You can search for citations in the persistent search box located at the top of most pages.



Citation Search in the Persistent Search Box

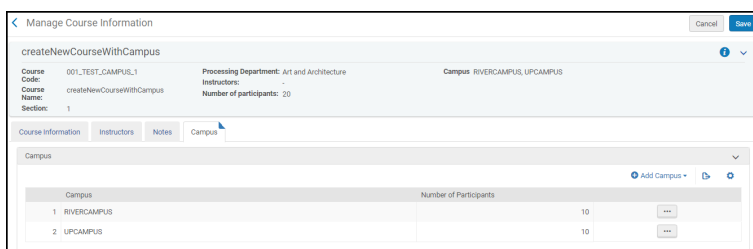
When searching for citations, you can enter the following additional criteria (for descriptions, see [Managing Citations](#)). Note that there is no advanced search for citations.

- Citation ID
- Course Code
- Course Name
- Creator - The primary ID or name of the user who created the citation
- ISBN / ISSN
- MMS ID
- Reading List Name
- Title - Citation name

Campus Associations for Courses

If you have defined campuses in your institution (see [Configuring Campuses](#)), you can associate these campuses with your courses. This enables you to define the number of participants on each campus for the course, which is helpful to librarians when they are fulfilling materials for reading lists associated with the course.

- When adding or editing a course (see [Managing Courses](#)), **Campus** appears as an additional tab. You can add predefined campuses as well as the number of participants for the campus.



Manage Course Information - Campus Tab

- When you associate campuses with your course, the number of participants for the course is the total of the number of participants defined for all campuses associated with the course. In this case, the **Number of Participants** field on the **Course Information** tab of the Manage Course Information page is disabled.

If no campuses are associated with your course, or if all campuses have no defined participants, you control the number of participants in the **Number of Participants** field on the **Course Information** tab of the Manage Course Information page (which is the current functionality).

- Campus** was added as an available column (hidden by default), on the Courses, Course's Reading List, and Reading Lists Task List pages.
- Campus** was added to the header information on the Manage Course Information, Course's Reading List, and Edit Reading List pages. Course was also added to **Course Information** on the Manage Resource Options pane when managing fulfillment options for a citation. When the number of characters is too short to display the full list of campuses, the full list is available in a tooltip.
- Campus** and **Campus Participants** were added as columns in the Course Loader integration profile; see [Configuring Course Loading](#). For multiple campuses, enter campus codes separated by commas. Enter participants separated by commas in the same order (corresponding to the campus codes). If you enter a campus code that does not exist in Alma, the code is still accepted; a warning appears in the job report, but the campus is created and appears in Alma with the name "<code> not found". You can edit the campus name, as usual.
- The Course API now includes a campuses element:

```
<campuses>
  <campus>
    <campus code></campus code>
    <campus name></campus name>
    <campus participants></campus participants>
  </campus>
</campuses>
```

- Campuses** was added to Analytics.

Additional Course Reserves Enhancements

- The options for **citation tags** and **item to student ratio** were added to the automatic purchasing request rules; see [Configuring Automatic Purchasing Requests from Citations](#).
- The Citation Inventory Enrichment job was renamed the **Process and Enrich Citations** job. The link to this job was changed from Bulk Citation Inventory Enrichment to **Process and Enrich Citations**. The job can now validate URL citations by trying to access the URLs and checking for valid HTTP responses. When running the job, you can select whether to a) match to the repository (enriching with an MMS ID), b) using the OpenURL link resolver, and/or c) validating URLs.

- The column **Required Pages** was added as a column (initially hidden) on the Approval Requests List page (see [Approving/Rejecting a Request for Digitization](#)). This can help you discover whether there are overlapping pages when determining whether to approve/reject the page for processing.
- You can now edit reading list subjects; see [Configuring Reading List Subjects](#).

Analytics - June 2018 Enhancements

- The **Normalized Source** field was added to the OpenURL Context Details dimension of the Alma Link Resolver subject area. This field displays the normalized name of the source and allows for grouping together the same source which would otherwise appear separately. If you have additional ideas for normalizing other Source field values to the Normalized Source, submit them via the Ideas Exchange.
- The **Process Type Date** field was added to the Physical Item Details dimension of the Physical Item subject area. It indicates the date on which the process type was changed.
- The following enhancements were made to the Analytics Objects List:
 - You can now search by title or description.
 - You can add the **Analytics Source System** column (for Primo VE users).
 - The following filters were added:
 - Type
 - Schedule
 - Status
- The **Fund Description** field was added to Funds Expenditure > Fund Ledger and to Physical Items > Fund Information > Fund Ledger. It contains the contents of the **Description** field of the fund's Summary tab.
- The **Open Access** and **Peer Reviewed** fields were added to the shared Bibliographic Details dimension.
- The **Reading List Deleted** field was added to the Reading List dimension of the Course Reserves, Leganto Student Usage, and Leganto Instructor Usage Events subject areas. It indicates whether the reading list was deleted.
- The **Course Submit List By** field was added to the Course dimension of the Course Reserves subject area. It contains the date by which all reading lists for the course should be submitted.
- The **Reading List Description** field was added to the following locations:
 - Course Reserves > Reading List
 - Leganto Instructor Usage Events > Reading Lists
 - Leganto Student Usage > Reading Lists
- The following fields were added to the Citation Metadata Details dimension of the Leganto Instructor Usage Events subject area:
 - Author
 - Book Call Number
 - Book Chapter Number
 - Book Edition
 - DOI
 - End Page
 - Issue
 - Journal Title
 - MMS ID
 - OCLC Number

- Pages
- Publication Date
- Publication Place
- Publisher
- Volume

Administration and Infrastructure - June 2018 Enhancements

Expand All Tabs in a Record List



Idea Exchange: On pages with record lists that have an **Expand** table action menu, the option **Expand: All** was added to this table. Use this option to expand all tabs on the page by default (previously, only one tab could be expanded by default on these pages).

The screenshot shows a record list for 'All Titles (1 - 20 of 28,113)'. The first record is a 'History' record. The 'Expand' table action menu is visible, and the 'Expand All' button is highlighted with a red box. The table shows the following data:

Interface Name	Collection Name	Service Type	Availability	Portfolio
EBSCOhost	EBSCOhost Academic Search Complete	Full Text	Active	View
Galegroup	Gale Student Resources in Context	Full Text	Active	View
-	EBSCOhost Academic Search Complete	Full Text	Inactive	View

Search Results with All Tabs Expanded

Select All Items for Itemized Repository Sets

When adding items to a repository set, you can now click **Add All** to add all items on all results pages to the set.

The screenshot shows search results for 'Kenya'. The 'Add All' button is highlighted with a red box. The results list shows the following items:

Item	Medium Type	Language	Record number	Update Date
Kenya [electronic resource]	Medium Type: [electronic resource]	Language: English	Record number: (OCLC)36000000438101	Update Date: 08/25/2017
Kenya [electronic resource]	Medium Type: [electronic resource]	Language: English	Record number: (OCLC)36000000438048	Update Date: 08/17/2017
Kenya [electronic resource]	Medium Type: [electronic resource]	Language: English	Record number: (OCLC)36000000437948	Update Date: 08/25/2017
Kenya [electronic resource]	Medium Type: [electronic resource]	Language: English	Record number: (OCLC)36000000437918	Update Date: 08/23/2017

Repository Search Results for Adding Items to an Itemized Set

After you click **Add All**, click **Confirm** in the confirmation dialog box. If the number of items is large, the items are added to the set by running a **Manage set members** job. For more information, see [Managing Search Queries and Sets](#).

Additional Administration and Infrastructure Enhancements

- The **Resource Sharing library** field on the User Details page is now a single, multi-value field that allows you to select multiple resource sharing libraries without a limitation of five libraries. See [Adding Users](#).

Content Operations - June 2018 Enhancements

Library of Congress Authorities Community Zone Updates

The following are the Library of Congress subject authority updates for the period of April 22nd through May 21st:

- Number of records updated: 80
- Number of records added: 152
- Number of records deleted: 23

The following are the Library of Congress name authority updates for the period of April 22nd through May 21st:

- Number of records updated: 20088
- Number of records added: 24599
- Number of records deleted: 510

The following are the Canadian name authority updates for the period of April 22nd through May 21st:

- Number of records updated: 64
- Number of records added: 1047
- Number of records deleted: 21

The following are the Library of Congress Genre/Form Terms (LCGFT) updates for the period of April 22nd through May 21st:

- Number of records added: 2

New Electronic Collections Added to the Alma CKB

The following electronic collections were added to the Alma Community Zone from April 22nd through May 20th:

- ASM Online Journals
- Biochemical Journal
- Charleston Advisor
- Conference Board Research Online Collection
- Copeia Online
- Early American Fiction 1789 - 1850
- Early American Newspapers, African American Newspapers
- EBSCOhost Arte Público Hispanic Historical Collection: Series 1
- EBSCOhost Arte Público Hispanic Historical Collection: Series 2
- EBSCOhost eBook Nursing Collection
- eDuke 2018 Books
- Emerald eCase Collection
- Emerald eCase Collection - North America

- HeinOnline History Of Capital Punishment
- HeinOnline Reports Of U.S. Presidential Commissions And Other Advisory Bodies
- IDUNN Open Access Journals
- IEEE Articles On Demand
- IEEE Proceedings Order Plans POP 2010 – Present
- IEEE Proceedings Order Plans POP All 2010 – Present
- IEEE Xplore Morgan & Claypool Synthesis Ebooks Library Computer & Information Science Collection Nine
- IEEE Xplore Wiley Ebooks 2016 (IEEE Xplore)
- IEEE Xplore Wiley Ebooks 2017 (IEEE Xplore)
- IEEE Xplore Mit Press Ebooks 2017
- IEEE Xplore Now Ebooks
- Indiana University Mathematics Journal
- International journal of engineering education
- Iowa Research Online
- ITU iLibrary
- KB+ BIBSAM BrillOnline Journals 2017-2019
- KB+ BIBSAM Independent Scholarly Publishers Group Collection 2013-2015
- KB+ JISC Collections American Association For The Advancement Of Science 2018-2020
- KB+ JISC Collections American Society Of Civil Engineers Journals 2018-19
- KB+ JISC Collections Brill Journals 2018
- KB+ JISC Collections Cambridge University Press Full Collection 2018
- KB+ JISC Collections Cambridge University Press Science Technology And Medicine 2018
- KB+ JISC Collections Cambridge University Press Social Sciences And Humanities Collection 2018
- KB+ JISC Collections Jstor Sustainability 2017-2018
- KB+ JISC Collections Karger Medical And Scientific Publishers Full Collection 2018-2020
- KB+ JISC Collections Nature Publishing Group 2018
- KB+ JISC Collections Nature Publishing Group 2018 (Pre 2018 Subscribers)
- KB+ JISC Collections Oxford University Press Full Collection 2018-2019
- KB+ JISC Collections Oxford University Press Humanities And Social Sciences Collection 2018
- KB+ JISC Collections Oxford University Press Humanities Collection 2018
- KB+ JISC Collections Oxford University Press Law Collection 2018
- KB+ JISC Collections Oxford University Press Life Sciences Collection 2018
- KB+ JISC Collections Oxford University Press Mathematics & Physical Science Collection 2018
- KB+ JISC Collections Oxford University Press Medicine Collection 2018
- KB+ JISC Collections Oxford University Press Science Technology And Medicine Collection 2018
- KB+ JISC Collections Oxford University Press Social Sciences Collection 2018
- KB+ SHEDL Cambridge University Press Full Collection 2017
- London Review of Books
- Merriam-Webster Unabridged
- Mineralogical Society of America:Master
- Neurology Collection
- New York Review of Books Archive

- Norden iLibrary
- OECD Economic Surveys
- Open Source Science Journal - OSSJ
- Portico Triggered Ebook For Participants
- Portico Triggered Ejournal For Participants
- Portico Triggered Ejournal Open Access
- ProQuest Education Magazine Archive
- ProQuest Religious Magazine Archive
- Reference Shelf
- Routledge Encyclopedia of Modernism
- Thomist
- University of Calgary Press Journals
- Virginia Gazette, Part 2: 1746-1755
- Virginia Gazette, Part III: 1756-1765
- Virginia Gazette, Part IV: 1766-1775
- Virginia Gazette, Part V: 1776-1780
- VIVA Brill Online Ebooks
- VIVA Elsevier Ebooks
- VIVA IOP Journals
- VIVA Oxford Scholarship Online Ebooks
- VIVA Oxford University Press Journals
- VIVA Taylor & Francis Evidence-Based Ebooks
- VIVA University Press Scholarship Online Ebooks
- VIVA Wiley Perpetual Access Journals
- Wiley-Blackwell Encyclopedia of Literature

New External Search Resources

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

Next Release Sneak Preview (for July 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



- **Idea Exchange:** Relink Purchase Requests – It will be possible to relink a purchase request to a different bibliographic record.
- Enhanced Claims Task List – In the Claims task list, the **Communications** tab will be enhanced to include PO line information. The PO line will also be a searchable element in the tab.
- Matching Purchase Requests to the Repository – The matching of purchase requests to the repository will be enhanced and will make use of import profile matching capabilities.

Resource Management



- **Idea Exchange:** Test Access Functionality – The Community Zone Updates Task List table will include a new option to use test access functionality for portfolios and electronic collections.



- **Idea Exchange:** Validation when Creating an Authority Record – A validation will be added when creating an authority record, to prevent duplicates.



- **Idea Exchange:** New Filtering Option for Authority Control Task List – The Authority Control Task List will have filtering options, such as the record's brief level and linked inventory type.
- Access to a Digital Viewer from the MD Editor – There will be a new option to open a digital viewer from within the MD Editor.

Digital Resource Management

- Copyright Declaration – Copyright declaration in multiple languages will be able to be displayed based on the user's interface language.

- Waiver Statement – It will be possible to keep and view an exact copy of the waiver statement that was associated with a deposited representation.

Fulfillment



- **Idea Exchange** and



NERS Enhancement (Request ID #3856) Courtesy and Overdue Notices for Short Loans – It will be possible to generate courtesy and overdue notices for short loans by configuring the number of minutes before and after the due time for generating the notice.

Collaborative Networks

- Other Details in the Network Tab – Records searched in the Network tab will now have an **Other Details** link with links to related records, reminders, and publishing information.

Administration and Infrastructure



- **Idea Exchange:** Recent Searches List – The recent searches list will be enhanced to display a longer list of recent searches, including non-repository search types.

APIs

- A new API will enable retrieving the Fines and Fees report.

Configuring Fulfillment Networks

Newly Customer Facing for June!

A fulfillment network can be set up for a group of institutions regardless of whether they work with a [Network Zone](#).

By default, when working with a fulfillment network in either Alma or Primo, user records at each institution are unrelated. When a patron from institution A walks into institution B, a circulation desk operator must retrieve the patron's information from institution A as the first step of managing the patron's activities. All identifier fields (such as student ID, barcode, etc.) remain non-unique between institutions. Alternatively, Ex Libris can configure cross consortia identifiers to ensure that one or more user identifiers are identical throughout all of the fulfillment network's linked institutions. For example, you can set that a specified user name configured at one fulfillment network institution is automatically configured at the network's linked institutions. Note that if you use the same IDs to identify students at multiple institutions, you must ensure that these IDs are unique at all member institutions.

To use the fulfillment network functionality:

1. Verify that the **networkSearchPassword** customer parameter is set to the password to be used by all the institutions that are part of the same fulfillment network. See [Configuring Other Settings \(Resource Management\)](#).
2. Add each institution that is part of the fulfillment network to the Fulfillment Members page. See [Configuring Fulfillment Members](#).
3. Add network group members on the Fulfillment Networks Management Groups page (see [Configuring Fulfillment Networks Management Groups](#)). When the fulfillment network is being configured for institutions that are part of an inventory collaborative network working with a Network Zone institution, the Network Zone institution itself is the one that must configure the fulfillment networks management groups.

To enable staff to search in Alma for users in a fulfillment network by any user identifier, set the **fulfillment_network_search_by_all** parameter to **true**. In Primo, all requests and loans are searched for by the primary identifier and any other specified identifiers.

Configuring Fulfillment Members

To configure fulfillment members, you must have one of the following roles:

- General System Administrator

Each institution that is part of a fulfillment network must be listed in the Fulfillment Members page ([Configuration Menu > General > Network Groups > Fulfillment Member](#)).

Mapping Table

You are configuring: Ex Libris University [Change Organization Unit](#)

Fulfillment Members

Table Description: Fulfillment Members
Customization mode: Entire table needs to be customized

+ Add Row

Enabled	Customer Code	URL	Display Name	Updated By	Last Updated
☒	Alma Test		Alma Test	Docteam	2018/05/15

Fulfillment Members Page

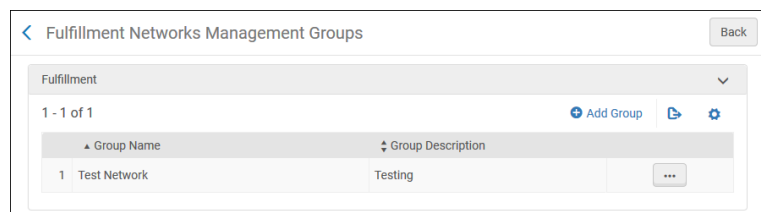
1. Click **Add Relation** and enter the following for each library that is to be part of the fulfillment network:
 - Customer code – the Alma institution code
 - URL – the base URL used by the institution to access Alma
 - Display name – the name of the institution to be displayed in Alma
2. Click **Add Row**. The details for the institution you added appear in the list of mapping table rows. Perform the previous two steps for each institution that is to be part of the fulfillment network.
3. Click **Save**.

Configuring Fulfillment Networks Management Groups

To configure fulfillment networks management groups, you must have one of the following roles:

- General System Administrator

Network management groups are created to define groups with their campuses and libraries that are part of the fulfillment network. Access the Fulfillment Networks Management Groups page (**Configuration Menu > General > Network Groups > Fulfillment Network Groups**).



Fulfillment Networks Management Groups Page

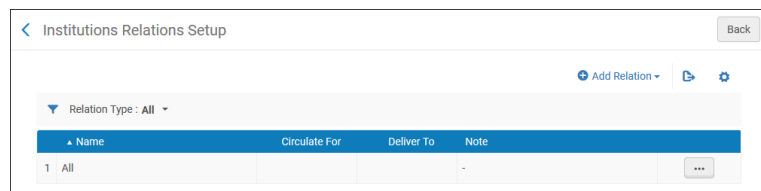
1. Click **Add Group**. The Add Group dialog box appears.
2. Define a name for the fulfillment network group, add a description of the group (optional), and click **Add and Close**. The group you defined is added to the list of groups on the Fulfillment Networks Management Groups page.
3. Edit the group you defined. In the Add Another Member section, select the campus or library that you want to include in the fulfillment network group, and click **Add Campus** or **Add Library** (accordingly). The selected members appear in the list of fulfillment network group members.

Configuring Institutions Relations

To configure institution relations, you must have one of the following roles:

- General System Administrator

Configure the Institutions Relations page to use pickup anywhere/return anywhere (see [Configuring Pick Up Anywhere/Return Anywhere](#)). In the Network Zone (if you are implementing a Network Zone) or any fulfillment network member institution (if you are working in a fulfillment network that is not implementing a Network Zone), open the Institutions Relations Setup page (**Configuration Menu > General > Network Groups > Institutions Relations**),



1. Click **Add Relation** to add a new relation. The Add Relation pane appears. Populate the pane as follows:
 - **From** - select the institution whose fulfillment network behavior is configured.
 - **To** - configure the institution who participates as a remote institution in the fulfillment process.
 - Select **Deliver To** and/or **Circulate For**.
 - Optionally add a note in **Note**.
2. Click **Add Relation** to finish. The Add Relation pane closes. The relationship appears in the table on the Institutions Relations page.

Configuring Pick Up Anywhere/Return Anywhere

The following configuration steps must be completed to ensure that all the fields described below appear throughout the pickup anywhere and return anywhere processes.

- The **Pickup Location** policy must be set to **At Any Institution** in a request Terms of Use. See [Adding Fulfillment Policies](#).
- The **Serves Other Institutions** check box must be selected in each library's summary. See [Managing General Institution Information](#).
- Configure the **Institutions Relations** table (see [Configuring Institutions Relations](#)).

Given two institutions, A and B, the following example of configurations exists for configuring institution A: If Circulate For is selected, patrons of institution A can check out and check in items belonging to institution B. If Deliver to is selected, institution A can send its own items to institution B for pickup at institution B.

For more information about return anywhere, see [Returning Items](#).