# Alma June 2016 Release Notes


The Alma June release provides numerous new features and enhancements. Some of these enhancements are a result of the NERS or Idea Exchange 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 |
| --- |
| ☐ Brief Record Levels - To enable more granular control of bibliographic record levels of briefness, Alma has introduced the support of multiple brief record levels instead of the previous two-level record support (brief/not brief). As part of this release, choose the brief level rule that is most appropriate for your cataloging policies (you can choose one of the out-of-the-box rules or create your own). Following this release, Alma calculates the brief level of the entire catalog, based on your choice. If you do not choose a brief level rule, a default one, simulating the two-level (brief/not brief) approach, is chosen for you. |
| ☐ **A NERS Enhancement:** Alerts for Shortened Due Dates - You probably don't want your patrons to miss the fact that their loan has been issued with a shortened due date. With this month's new feature, you can set the |

| Action Items |
| --- |
| system to highlight this condition so that the circulation desk staff and the borrowing patrons do not miss this fact at loan time. |
| ☐ Contribute Vendors to the Network Zone - This new capability will allow your consortia to better collaborate in order to create and manage a shared vendor list. |

# What's New?

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

## Acquisitions

- Contribute Vendors to the Network Zone - See Collaborative Networks
- **Idea Exchange**: Multiple PO Lines for an Electronic Resource - When a new order extends an electronic resource, such as adding additional users or adding access to additional portfolios in an electronic collection, the new (or existing) PO line can be added as an **Additional Order** to the existing electronic resource.

## Resource Management

- Brief Record Levels - A new multiple-level approach for defining a bibliographic record's briefness level is being introduced, replacing the current approach that supports two levels (brief/not brief).

  Watch the Brief Record Levels video
- Call Number Duplication Validation Check - A new validation process has been added for checking duplicate call numbers.
- Automatic Generation of the Author Number for the 090 Local Call Number Field - The 090 $b author number can now be automatically generated.
- Authority to Bibliographic Record Navigation - Locating bibliographic records linked to authority record results when using an Authorities search has been enhanced to use the Authority Record ID, where applicable.
- SRU Operators Expanded - SRU support has been expanded to include new search operators.

- CJK Transliteration Options Expanded - CJK transliteration options have been expanded to include Kana.
- CNMARC Support - CNMARC support for bibliographic records is available in Alma.
- Hebrew Support for External Searches - Alma now provides improved display of Hebrew language results for external searches.
- Enhanced Search for German Language Characters - Search results for German language characters or character combinations have been improved.
- Multiple PO Lines for an Electronic Resource - See Acquisitions.
- Additional Resource Management Enhancements

## Digital Resource Management

- Exporting Collections as an EAD - You can now download an EAD (Encoded Archival Description) file that contains the information from a collection and all its subcollections and items.
- Support for Dublin Core as a Digital Import Profile Target Format - You can now select Dublin Core as the target format for digital import profiles.
- Additional Digital Resource Management Enhancements

## Fulfillment

- Additions to the Overdue and Lost Loan Profiles - New options are now available in the overdue and lost loan profiles.
- New Fields on the Fines/Fees Notification Profile - New fields are now available in the fines/fees notification profile.
- **A NERS Enhancement:** Alerts for Shortened Due Dates - Staff and patrons will now be notified when a loan is created with a shortened due date.
- **Idea Exchange**: Place a Request from Manage Patron Services - A request may now be placed for a patron on the Manage Patron Services page.

  Watch the Place a Request from Manage Patron Services video

- View Title in Search Option from Request Lists - The **View Title in Search** link now allows the user to see a request's title in the context of a search page.
- Matching Reading List Citations to Inventory in Bulk - You can now match inventory to citations in bulk by running the new Citation Inventory Enrichment job.
- Update RFID from the Scan In Items Page - Certain fields stored on the RFID chip may now be changed using the scan in interface in the Change Item Information tab.
- Additional Fulfillment Enhancements

## Resource Sharing

- Prevent Receiving and Shipping from the Scan In Interface - The scan in interface now has the option to block a user from scanning resource sharing items.
- Receive Multiple Items for a Single Request - It is now possible to better receive and return resource sharing requests that have multiple items.

  Watch the Multiple Items for a Single Borrowing Request video

## Collaborative Networks

- Contribute Vendors to the Network Zone - Members of a collaborative network can now share or edit global information about vendors managed in the Network Zone.

  Watch the Contribute Vendors to the Network Zone video

## Analytics

- Note Field Anonymized for Analytics Reports from the Network Zone - The **Note** field of the Lending Requests Details dimension of the Lending Requests subject area is now included as one of the fields that are anonymized for the Network Zone when creating reports for member institutions.
- **A NERS Enhancement**: The number of records that can be exported from Alma Analytics will be increased to 250,000 in the coming weeks and to 500,000 records at a later stage.
- Additional Analytics Enhancements

NOTE:

- Due to an upgrade of the OBIEE used by Alma Analytics that will take place in June and July, the export option for reports from Alma Analytics to Excel 2003 will no longer be supported. Only export to an .xslx format will be supported and not export to an .xls format.
- The new **Fund Information** dimension under the Physical Items subject area is currently under construction and should not be used. It will be made available soon in an upcoming release.

## Alma Administration, Integrations, and Infrastructure

- Enhancements to the SAML Integration Profile - Several enhancements were made to the SAML integration profile.
- Additional Enhancements

## APIs

- **Idea Exchange**: All jobs that can be run from **Administration > Manage Jobs > Run a Job** can now be run using an API as well. For detailed information, see https://developers.exlibrisgroup.com/alma/apis/conf#jobs.

# Known Issues

- When importing an EOD file using the New Order profile, if the location of the item does not have a call number type, the call number type of the institution should be used as the alternative call number type. Currently, however, no alternative call number is used.
- Related to merging bibliographic records in the MD Editor, if there are no requests, the Merge Records and Combine Inventory pop-up window does not display a count of 0 (zero) requests. The count appears for requests only when it is greater than 0 (zero). The count should also appear as 0 (zero) requests when they occur.
- Regarding the autocomplete/pop-up assistance being provided for several UNIMARC fields in the MD Editor, there is a known issue related to UNIMARC 327 $a and 327 $b. These subfields are based on the same functionality and as a result, the pop-up suggestions in the MD Editor suggests both subfields' values when entering content in either the 327 $a or the 327 $b.
- Fixed position fields cannot be modified using the extension loader (extension packs) at this time.

- When creating an OCLC Connexion import profile in a Network Zone member institution with the **Use NZ** option selected, the **Use NZ record** option is used upon finding a match. Currently, there is no possibility to select the **Merge**, **Overlay**, or **Do not import** options instead.
- When a record is deleted in Alma, the headings associated with the record are still available when browsing bibliographic headings.
- The **Total electronic portfolios imported** count in the MD import report does not take into account the portfolios imported in the first file that is imported when the import is split into several files.
- When LDAP is used for authentication, and one or more fields values in the LDAP integration profile are missing, the values from a previously defined LDAP integration profile are used. If there is no previously defined LDAP profile, or if this profile also contains missing values for these fields, authentication will fail. In the future, mandatory fields will be enforced and the previous LDAP profile values won't be used. In the meantime, it is recommended that you fix your LDAP profile if you have missing field values.

The following known issue was fixed for the June release:

- When creating an Analytics report using the **Cost per Use** field, the year used is taken from the date of the invoice transaction instead of the fiscal year of the fund used in the transaction.

## Data Services

- Library of Congress Authorities Community Zone Updates
- New Electronic Collections Added to the Alma CKB
- No new external search resources for added for this release.

# Acquisitions - June 2016 Enhancements

## Multiple PO Lines for an Electronic Resource

When a new order extends an electronic resource, such as adding additional users or adding access to additional portfolios in an electronic collection, the new (or existing) PO line can be added as an additional order to the existing electronic resource.

For electronic resources, a new purchase request can be either a *main PO line* - the first purchase order line linked to the inventory - or an *additional PO line* - such as to upgrade the number of users or for new titles in a collection.

- A main PO line creates inventory for the resource.
- When you attempt to cancel or delete a main PO line, Alma attempts to delete the inventory. Cancelling or deleting an additional PO line does not affect the inventory.
- Activating an electronic resource does not affect the status of an additional PO line.

NOTE: A single PO line can be the main PO line for only one electronic resources and the additional PO line for one or more other electronic resources.

When viewing a PO line for an electronic resource, the status of whether this PO line is the main or an additional PO line for that resource appears on the **Summary** tab. In the following picture, this PO line is the main PO line for one electronic resource and an additional PO line for another.

Description 13fF Ownership Current & Histoircal WRDS [Institutional (13f) Holdings - s34] (WRDS) - Non-Capital,
Order line type Electronic Collection - Subscription
PO Line Owner Eugene McDermott Library
Order/Line DS-212105/ POL-171944
Sent Date 02/10/2016
Status Waiting for Renewal (2016-02-10)

Summary | Description | Alerts | Invoice Lines | Associated PO Lines | Communications | Interested Users | History | Notes | Attachments

**Ordered items**

eResource Institutional (13f) Holdings -s34 — Institutional (13f) Holdings -s34
License Thomson Reuters — View license

Columns

| | Name | Type | Activation status | Activation date | Additional PO Line |
|---|---|---|---|---|---|
| 1 | Institutional (13f) Holdings -s34 | Database | Active | 02/10/2016 | |
| 2 | EBSCOhost Literary Reference Center | Aggregator package | Active | 10/24/2013 | ✓ |

**Vendor information**

Material Supplier THOMREUTERS/THOMREUTMARK — THOMSON REUTERS (THOMREUTERS)/ THOMSON REUTERS (MARKETS) LLC (THOMREUTMARK)
Access Provider
Claiming grace period (days) 0
Expected Activation after Ordering (days) 0
Or Expected Activation Date 02/10/2016
E-Activation due after Ordering (days) 30

**Pricing**

List Price 12,000.00 USD
Net price 12,000.00 USD
Quantity for pricing 1
Discount (%) 0.0
Amount paid in current FP 12,000.00 USD

**Funding**

Columns

| | # | Fund Name | Percent | Amount | |
|---|---|---|---|---|---|
| 1 | 1 | NEW BUSINESS AND MANAGEMENT DATASETS (08/31/2015 - 08/30/2016) (11,340.01 USD) | 100.0% | 12,000.00 USD | Delete |
| 2 | Total | - | 100.0% | 12,000.00 USD | |

Redistribute Lines

**PO Line details**

Acquisition method Purchase at Vendor System
Material type -
Invoice status Partially invoiced
Reporting Code
Rush No
Cancellation restriction No
Cancellation restriction note -
Vendor reference number -
Vendor reference number type
Note to vendor -
Vendor invoice number -

**Renewal**

Manual renewal Yes
Subscription from date 03/01/2016
Subscription to date -
Renewal date 02/28/2017
Renewal reminder period (days) 60

**Additional**

Associated PO Lines -
Source type Manual Entry
Additional PO Line Reference -
Manual Packaging Yes

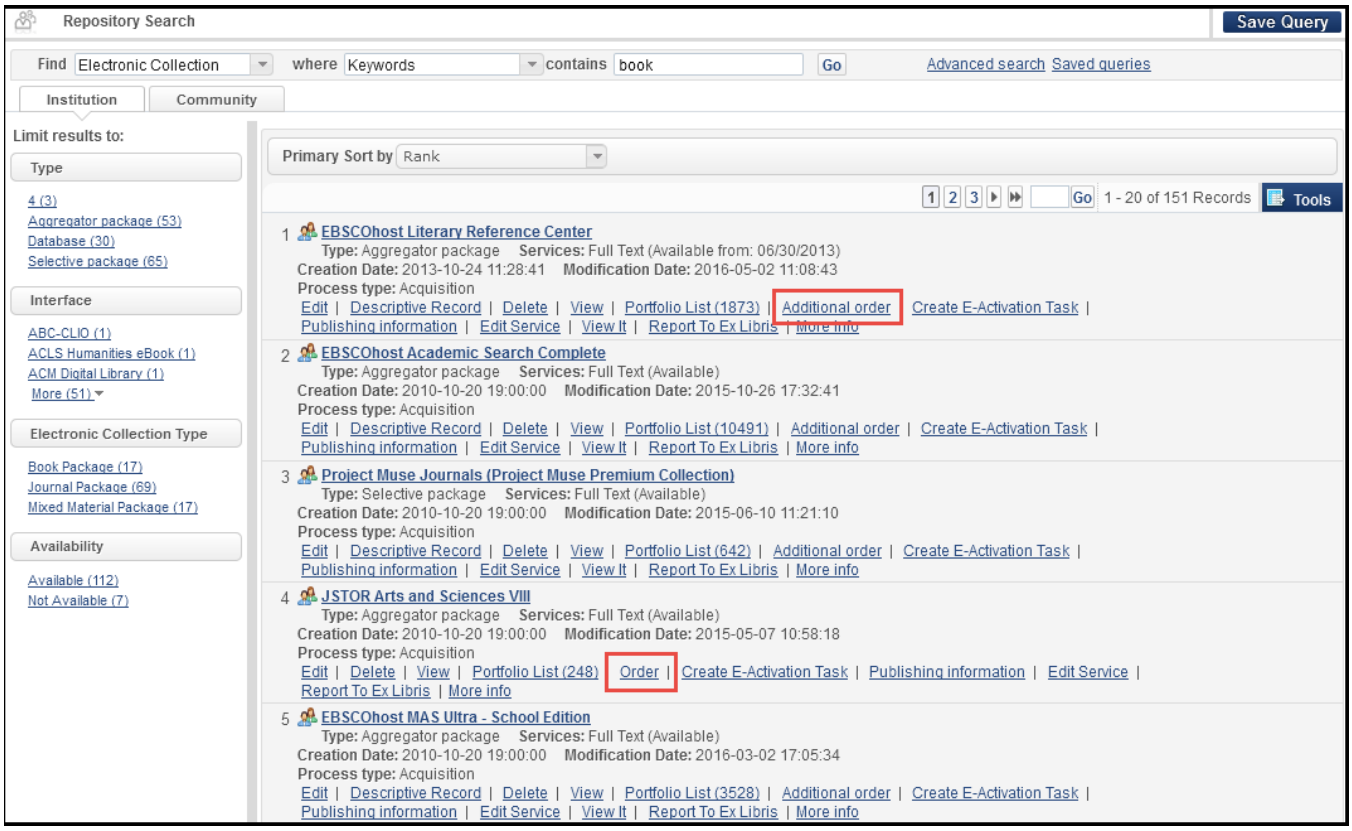
Back to PO Line list

**PO Line Information - Summary Tab**

In a future release, PO lines linked to the same resource will be marked as associated PO lines.

### To create a PO line as an additional PO line:

In the repository search results, select **Additional Order** beneath an electronic collection or portfolio that already has a main PO line. For electronic resources without a main PO line, the **Order** link appears as usual.




**Repository Search**

When adding a PO line as an additional PO line, only a limited number of non-inventory service type are available for the PO line's purchase type.

**To add an existing PO line as an additional order to an electronic resource:**

When editing an electronic collection or portfolio, select and add a PO line as an additional PO line in the **Quick Add** area on the appropriate tab: the **General Information** tab for an electronic collection, or the **Portfolio Information** tab for an electronic portfolio.

Electronic Collection Editor

Cancel Save

Resource description Literary reference center EBSCO Pub [Ipswich, MA] : Began in 2006.

Electronic Collection name EBSCOhost Literary Reference Center

Electronic Collection Description | General Information | Additional Information | Notes | History

Collection ID 61176498060001421

**Summary and Inventory Information**

Electronic Collection type Aggregator package

Interface Name EBSCOhost — Interface Description

Services Full Text

Process type -

Access type Current Perpetual

**Acquisitions and License Information**

PO Line POL-38213 — PO line details POL-38213

Activation date 10/24/2013 — Expected activation date

License EBSCO (TSLAC) — View license details EBSCO (TSLAC)

Columns

| | Additional PO Line | |
|---|---|---|
| 1 | POL-171944 | Delete Additional Po Line |

Quick Add

Additional PO Line

Add PO Line

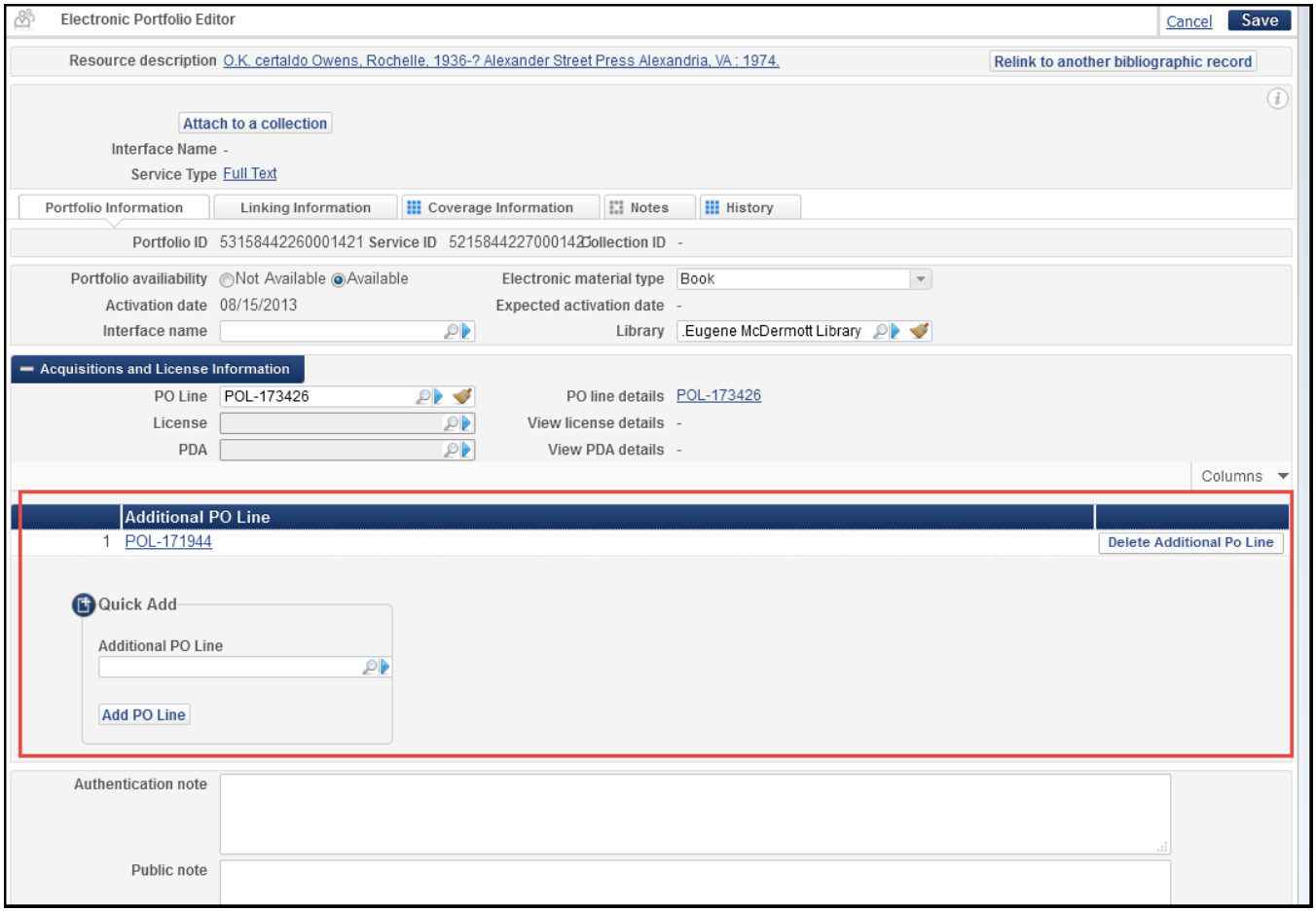
Authentication note

Public note

**Historical Licenses**

1 - 1 of 1 Records Columns Tools

**Electronic Collection Editor - General Information Tab**




**Electronic Portfolio Editor - Portfolio Information Tab**

**To remove a PO line as an additional PO line from an electronic resource:**

On the appropriate tab when editing an electronic resource (the **General Information** tab for an electronic collection, or the **Portfolio Information** tab for an electronic portfolio), click **Delete Additional PO Line** beside the PO line that you want to remove as an additional PO line for this resource.

## Other Acquisitions Features

- A task list entry for patron purchase requests (**Items - in department - requested by patron**) was added. Clicking this task opens the In Process Items page with patron requests pre-selected.

# Resource Management - June 2016 Enhancements

## Brief Record Levels

In order to enable more granular control of a bibliographic record's level of briefness, Alma has introduced the support of multiple brief record levels instead of the previous two-level record support (brief/not brief). With this new capability, varying levels of brief records can be defined using normalization rules. Ten levels of brief records can be defined from 01 through 10, where 01 represents the most brief record and 10 represents the most full brief record. This implementation of brief level rules provides you with the greatest flexibility for identifying the level of briefness of a bibliographic record.

This new capability is being implemented in phases over multiple releases. By the end of this phased-in implementation, the old two-level (brief/not brief) approach of identifying brief records will be removed from the system. As a result, it is key that you take the steps necessary to ensure that by the end of this phased-in implementation your requirements are addressed in the manner that you prefer for identifying brief records. See the Phased-In Implementation of Brief Record Levels section for details regarding the phases and schedule.

For more information, see Working with Brief Record Levels.

**NOTE:** There is a known issue with editing the brief level rules provided by Ex Libris in the Shared folder. To work with these rules, make a duplicate and work with the duplicate to view/edit the rule.

### Phased-In Implementation of Brief Record Levels

The new brief record level feature is being implemented in phases starting with the June 2016 release and ending with the August 2016 release. In the August release, the old (brief/not brief) method for calculating brief records will be removed from the system and the final components of the new brief record level feature will be implemented. The following information describes possible considerations and actions you may need to take.

As part of the June release, choose the brief level rule that is most appropriate for your cataloging policies. You can choose one of the rules provided or create and test your own. See Creating Brief Level Rules for information about creating rules and locating rules that are provided in Alma. See Testing Brief Level Rules for information regarding how to test the rules that you create.

To identify the preferred brief level rule that you want to be used by Alma, see Setting the Brief Level Rule Default in the Metadata Configuration. As part of the July release, Alma will calculate the brief level of the entire catalog based on the rule that you have identified as the default. If you do not choose a brief level rule, a default one will be chosen for you that simulates the two-level (brief/not brief) approach (see drools/OldBriefRule.dslr or drools/OldBriefRule_Unimarc.dslr). During June, you may also begin to identify brief bibliographic records in your catalog

with the new brief level rule that you have set as your default using the job described in Running Brief Record Level Jobs. (In August, the old job, Identifying Brief Records, will be removed.)

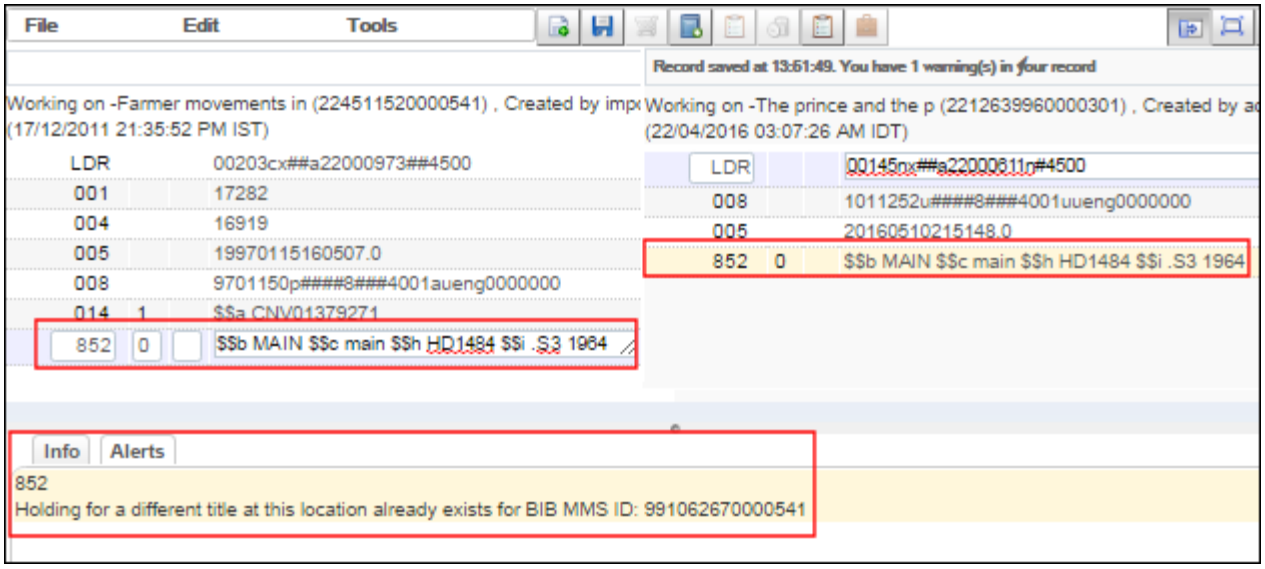
As you plan for the brief record level changes in Alma, be aware that in August, new import options will be available for handling records with a brief level. This will be managed with a new merge/overlay option in your import profile.


**Merge/Overlay Option for Brief Level**

When **No** is selected, the import process ignores the brief level and may override records with a higher brief level by a record with a lower one. When **Yes** is selected, the imported record can overlay or merge with a record in the repository only if it has an equal or lower brief level than itself.

## Call Number Duplication Validation Check

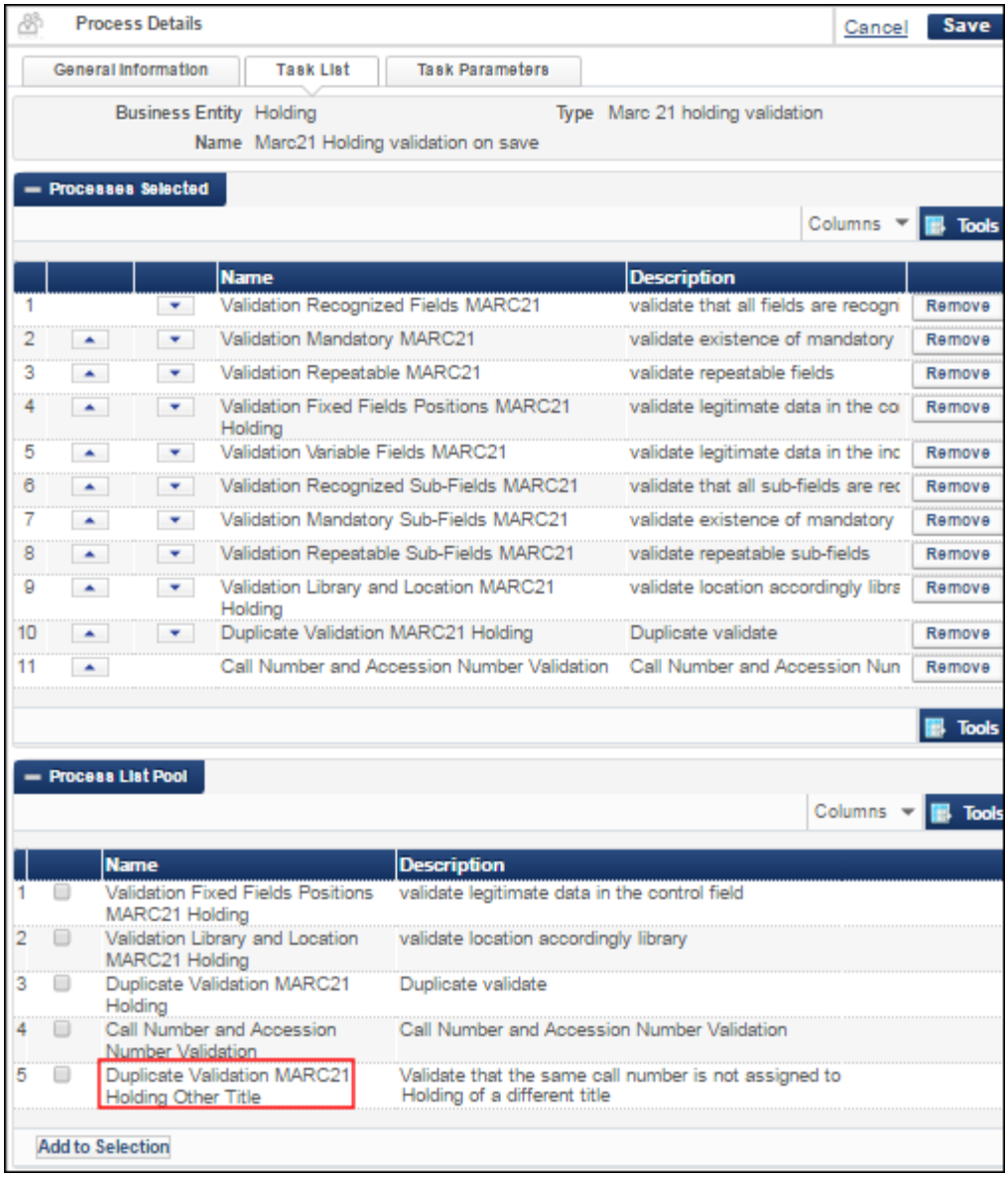
The **Validate on Save** options have been enhanced to include a new option, **Duplicate Validation MARC21 Holding Other Title**, that checks for duplicate call numbers for two different titles when you save a holdings record in the MD Editor. When a duplicate is found, the record is blocked or an alert is provided, depending on how the validation exception profile details are configured in the Metadata Configuration.




**Alert Message Example for Duplicate Holdings for Different Titles**

**To configure the new validation option for checking duplicate call numbers for different titles:**

1. Click **Metadata Configuration** in the **Cataloging** section of Resource Management configuration (**Resource Management > Resource Configuration > Configuration Menu**).
2. Click the **MARC21 Holding** profile link.
3. Select the **Validation Processes** tab.
4. Click the **Marc21 Holding validation on save** validation process link or select the **Edit** action for this process.
5. Select the **Task List** tab. The list of processes appears.




**List of Processes**

6. Select the **Duplicate Validation MARC21 Holding Other Title** validation process and click **Add to Selection**.

7. Change the priority order of the processes in the Processes Selected section to match your requirements, and click **Save**.

   See Working with MARC 21 Holdings Profiles for more information.

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NOTE: The existing **Duplicate Validation MARC21 Holding** process that was previously available (and continues to be available) checks for duplicate call numbers for the same titles (instead of different titles).

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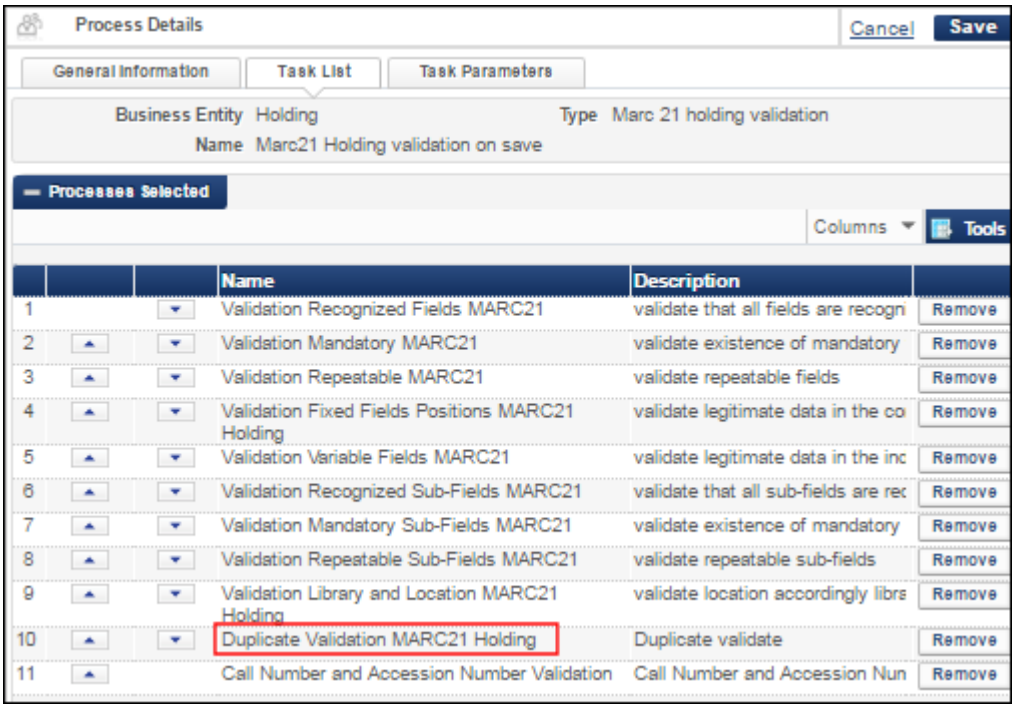



**Duplicate Validation MARC21 Holding Process**

## Automatic Generation of the Author Number for the 090 Local Call Number Field

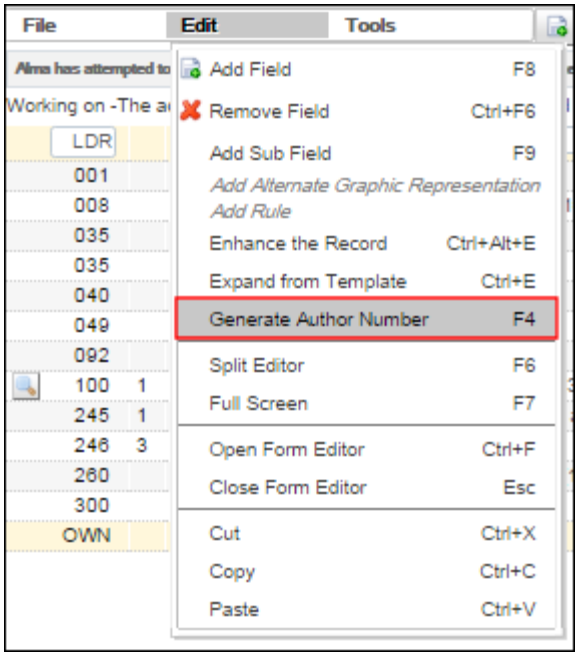
Alma cataloging has been enhanced to automatically generate the author number for the 090 local call number field. The 090 local call number field consists of the following:

- 090 $a - Dewey call number that is copied from the 082 $a
- 090 $b - Author number that is pulled from a standardized list of author numbers with a prefix consisting of the first initial of the author's last name and a suffix containing the first initial of the title such as G329w
- 090 $c - Year that is copied from the 260 $c

The standardized list of author numbers has been incorporated into Alma's logic for automatically generating author numbers when the appropriate file in the mapping table is enabled. See Configuring Author Number Lists for more information.

**To automatically generate an author number in the 090:**

1. Open a bibliographic record to which you want to add the 090 author number in the MD Editor.
2. Make a 100 or 700 author field the active field.
3. Select **Edit > Generate Author Number** (or press **F4**).




**Generate Author Number**

The 090 $b is automatically generated with the author number.

File Edit Tools

You have 4 warning(s) in your record - Draft auto-saved at 00:66:40.

Working on -What do you do when (991223360000541) , Created by import (17/12/2011 23:06:44 PM IST)

| | | | |
|---|---|---|---|
| LDR | | | 00921pam#a2200253#a#4500 |
| 001 | | | 34962 |
| 008 | | | 850611s1985####mdu######b####000#0#eng |
| 010 | | | $$a 85013551 |
| 020 | | | $$a 0819148105 (alk. paper) : $$c $21.75 |
| 020 | | | $$a 0819148113 (pbk. : alk. paper) : $$c $10.25 |
| 035 | | | $$a ocm12214300 |
| 035 | | | $$a (TrN)34962-train20072_c2db |
| 040 | | | $$a DLC $$c DLC $$d m/c $$d SHC |
| 049 | | | $$a SHCM |
| 050 | 0 | | $$a LB3013 $$b .G47 1985 |
| 082 | 0 | | $$a 371.1/024 $$2 19 |
| 100 | 1 | | $$a Gervais, Robert L., $$d 1937- |
| 245 | 1 | 0 | $$a What do you do when -- ? : $$b a handbook for classroom discipline problems with practical and positive solutions / $$c Robert L. Gervais, Delos A. Dittburner. |
| 260 | | | $$a Lanham, MD : $$b University Press of America, $$c c1985. |
| 300 | | | $$a vi, 168 p. ; $$c 23 cm. |
| 504 | | | $$a Includes bibliographical references. |
| 590 | | | $$a $23.76 B&T 7-24-89 PAA |
| 650 | | 0 | $$a Classroom management. |
| 650 | | 0 | $$a School children $$x Discipline. |
| 700 | 1 | | $$a Dittburner, Delos A., $$d 1936- |
| OWN | | | $$a Training Master DB |
| 090 | | | $$b G329w |

**Author Number Automatically Generated**

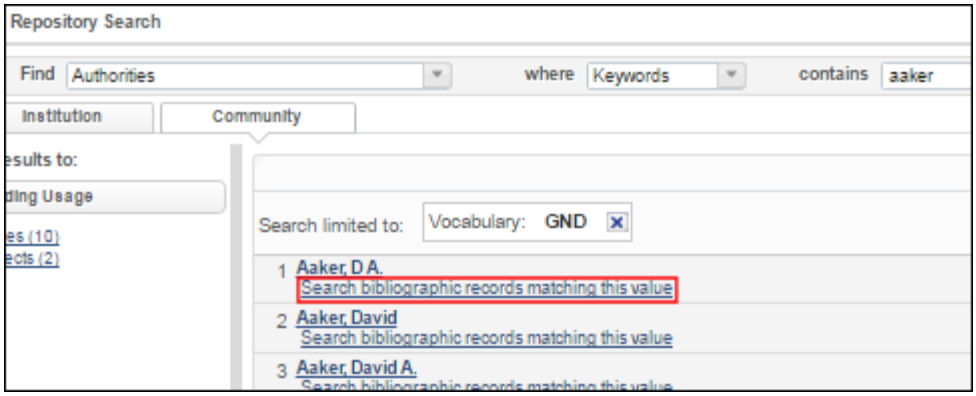
4. Save your record.

NOTE: To add $a and $c to the 090 field, create a normalization rule and use the **Enhance the Record** option in the MD Editor **Edit** menu (with your cursor positioned in the 090 field) to copy the 082 $a and 260 $c to the respective 090 subfields. See Working with Normalization Rules for more information regarding normalization rules.

## Authority to Bibliographic Record Navigation

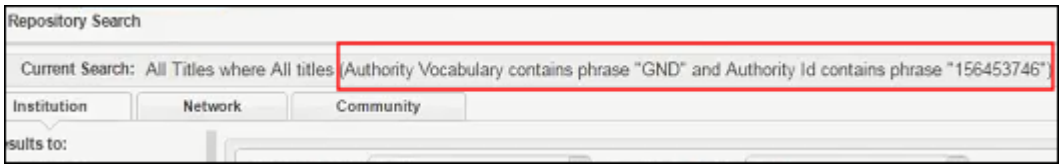
The authority record to bibliographic record navigation has been enhanced to use the Authority record ID when your authority to bibliographic record linking strategy is configured to use **ID** (as defined in a customer parameter managed by Ex Libris).

When completing a repository search to find authorities (Community Zone or institution managed authority records), the search results display a list of authority records with the link **Search bibliographic records matching this value**.




**Search Bibliographic Records Matching This Value Link**

With this enhancement, when you click the **Search bibliographic records matching this value** link, the system can now locate the specific, linked bibliographic record(s) using the authority vocabulary and the linked originating system ID.




**Originating System ID Authority to Bibliographic Record Linking**

Previously, when you clicked the link for **Search bibliographic records matching this value**, the system did a text-based keyword search that produced a broader set of linked bibliographic record results.

**NOTE:** Support for the originating system ID in the authority record's 035 $a and the bibliographic record's 100 $0 (or other control field as described in Using Originating System IDs for Linking Bibliographic Records to Authority Records) will be provided in the July release. With the July enhancement, the **Current Search** that is processed will also use the direct ID defined in the 035$a, as in the following example: **All Titles where All titles (Authority Vocabulary contains phrase "GND" and Authority Id contains phrase "000901458" or Authority Id contains phrase "90145-3")**.

## SRU Search Operators Expanded

Search operator options have been expanded for SRU Search/Retrieve via URL) searches to more closely align with search functions in Alma's staff search. With this release, the following capabilities have been added:

- Equals (==) for numeric, date or text fields
- Not equals (<>) for all indexed fields
- Is empty (==“”) for numeric, date or text fields

- Contains keywords/wildcard search (all <key>*) for all indexed fields

  Example: alma title all fish*

  This search will locate titles that contain the string "fish" like fishing, fisher, and so forth.

Previously, the following SRU operators were and continue to be supported:

- Contains phrase (=) for all indexed fields
- Contains keywords (all) for all indexed fields
- Greater than (>) for numeric, date or text fields
- Greater than or equal to (>=) for numeric, date or text fields
- Less than (<) for numeric, date or text fields
- Less than or equal to (<=) for numeric, date or text fields

For additional information, see https://developers.exlibrisgroup.com/alma/integrations/SRU and SRU/SRW Search.

## CJK Transliteration Options Expanded

The CJK transliteration options for cataloging have been expanded to include the following:

- Kana To Hangul
- Kana To Romanized Kana

For more information, see Working with CJK Transliterations in Cataloging and Working with Normalization Processes.

## CNMARC Support

Alma supports creation of bibliographic records using the CNMARC format. This support includes the CNMARC tags (fields/subfields) for bibliographic records and extensions, search indexes, display indexes, and related record functionality. For details regarding this support, see the following:

- Creating a CNMARC Bibliographic Record
- Configuring Cataloging (profile details for CNMARC)
- All Titles - CNMARC (search indexes)
- More Info in Actions You Can Perform on the Repository Search Results Page (regarding CNMARC support for related records)
- SRU/SRW Search

**NOTE:** The support for CNMARC does not currently include support for bibliographic headings.

Contact Ex Libris to set the Active Registry mapping in your system for CNMARC bibliographic support.

## Hebrew Support for External Searches

With the June release, Alma now provides improved Hebrew language display support for external searches. The external search results display Hebrew bibliographic content in the appropriate right to left alignment. In addition, when copy cataloging is performed from an external search repository, the copied Hebrew text also displays in the appropriate right to left alignment. For the steps to complete an external search, see Searching External Resources.

## Enhanced Search for German Language Characters

Effective with the Alma June 2016 release, searching German language characters has been updated in the following manner:

| German Language Character / Character Combinations | Stored in the Alma Database |
|---|---|
| **Previously:** | |
| ß | ss |
| ä | a |
| ö | o |
| ü | u |
| ae | a |
| oe | o |
| ue (when not following a vowel or q | u |
| **Effective with the June 2016 release:** | |
| ß | ss |
| ä, Ä | ae |
| ö, Ö | oe |
| ü, Ü | ue |

| German Language Character / Character Combinations | Stored in the Alma Database |
|---|---|
| ae | ae |
| oe | oe |
| ue (when not following a vowel or q | ue |

This change affects how the special German language characters are stored in the Alma database. To address this change for records stored in the database prior to the June 2016 release, a re-indexing is required. The re-indexing will occur with the June release for institutions that have the searching language customer parameter (managed by Ex Libris) configured for German (de).

With this change, searches that use German language characters or character combinations will return improved results. For example, when search criteria like düster and duester are entered, the English word duster will not be considered a match.

**NOTE:** The re-indexing may take a few days after the June release to process during which time you may notice some discrepancies in search results. Once the re-indexing is complete, search results will reflect the new logic for handling special German language characters and character combinations.

## Additional Resource Management Enhancements

- You can select **Remove Temporary Location Fields Content** when running a **Change Physical Items** job to remove the temporary library and location information from the items. If you select this field, you must also select **Remove Temporary Item Indication** or you will receive an error in the job report. Note that you can select **Remove Temporary Item Indication** without selecting **Remove Temporary Location Fields Content**; the item will be returned for a search in the temporary location, although the item will not be marked as in a temporary location. See Running Manual Jobs on Defined Sets.
- The Info icon (see Info Icon) is now present in all tabs of the Physical Item Editor.
- When moving a sub-collection to another collection, if there already exists another sub-collection with the same name in the target collection, the moved collection's name is changed to a dummy, unique value to avoid a conflict. You should edit the moved collection's name, as required. The same enhancement was made when making a sub-collection into a top-level collection (a dummy, unique name is applied if there is a conflict with an already existing top-level collection name).
- In the Publish electronic records to Google Scholar publishing profile report, the field **Local Records** was changed to **Institution Level Records**, for clarity. For information about the profile, see Publishing Electronic Holdings to Google Scholar.

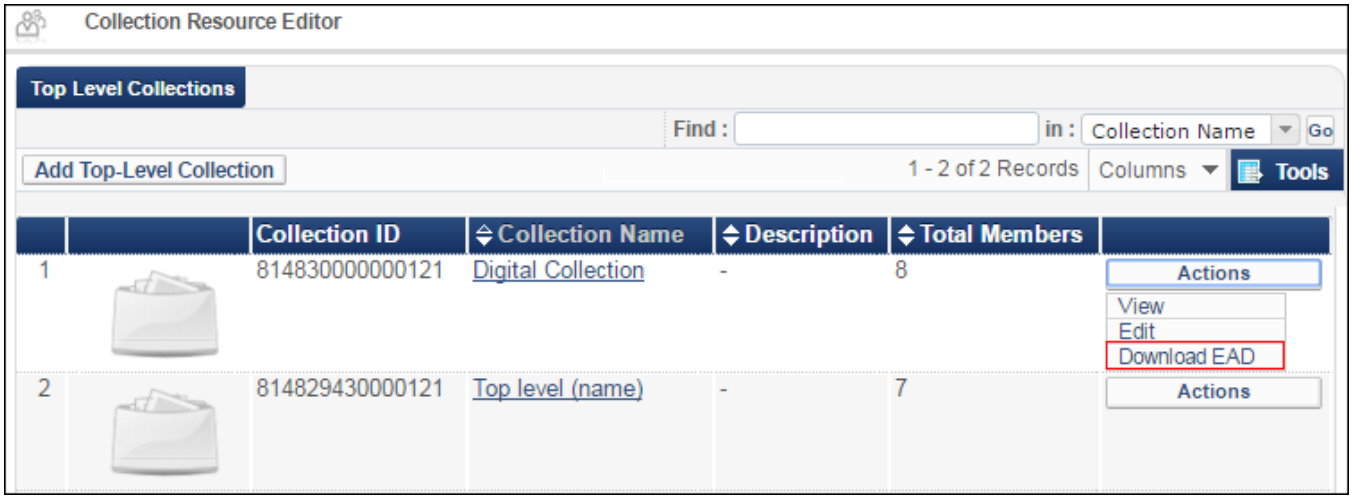
# Digital Resource Management - June 2016

## Exporting Collections as an EAD

You can download collection information as an EAD (Encoded Archival Description) file. EAD allows for the standardization of collection information in finding aids, such as inventories and indexes, within and across repositories.

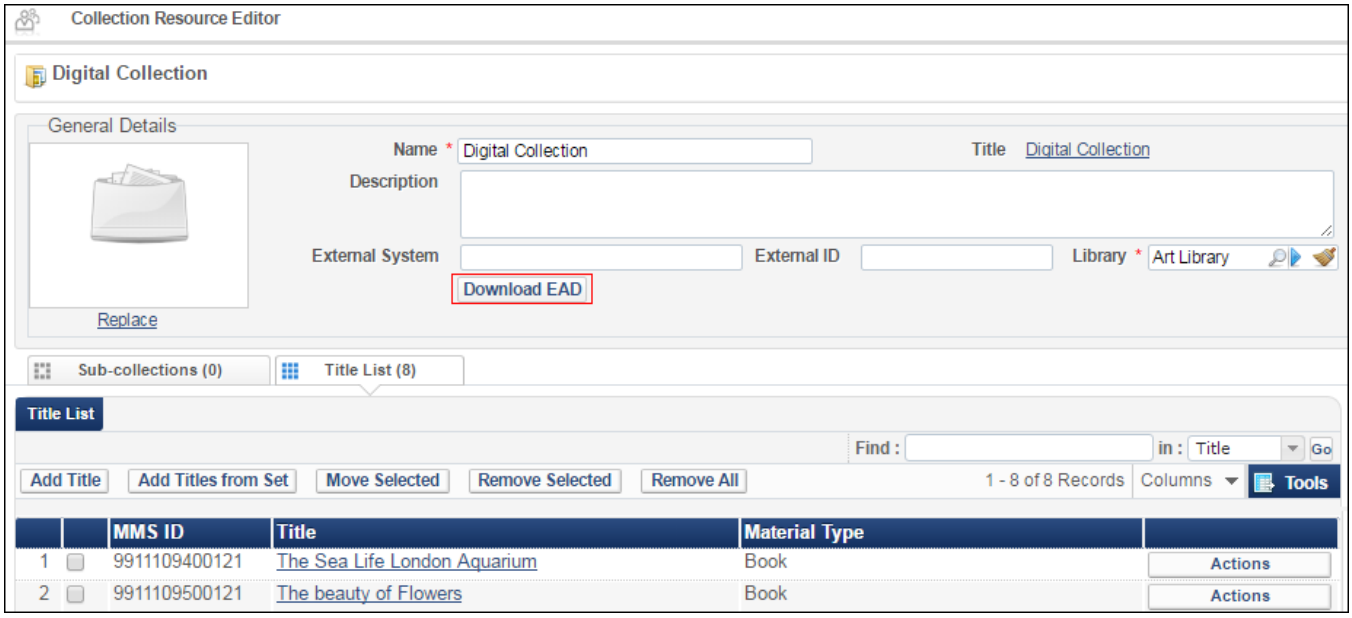
You can download the EAD file from two locations:

- When managing collections (**Resource Management > Search and Sets > Manage Collections > Actions > Download EAD**):




**Managing Collections**

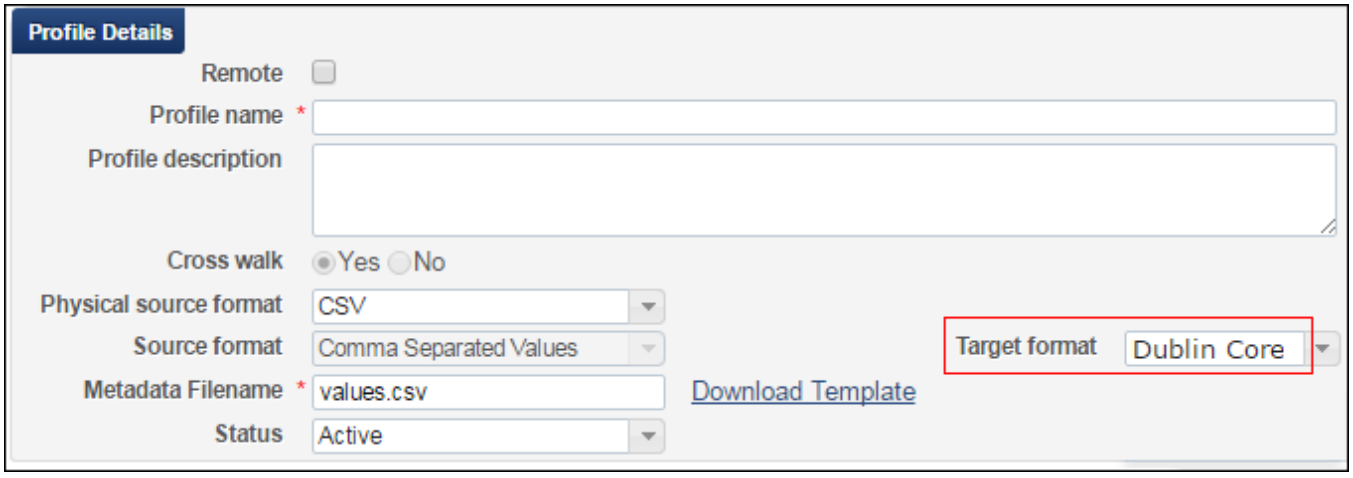
- When editing collections (**Resource Management > Search and Sets > Manage Collections > Edit**):




**Editing Collections**

# Support for Dublin Core as a Digital Import Profile Target Format

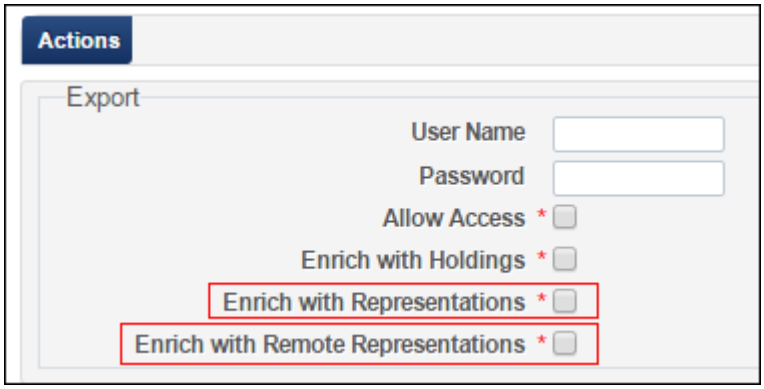
You can now select Dublin Core as the target format for digital import profiles (**Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles > Digital**) for remote representations (OAI DC) and CSV source formats. Previously, only MARC XML was available as the target format.




**Dublin Core Target Format**

## Additional Digital Resource Management Enhancements

- You can now configure the Z39.50 integration profile to include availability information for digital representations for both remote and non-remote representations.




**Enrich with Representations**

For detailed information on the Z39.50 integration profile, see Z39.50 Search.

- Right-to-left languages are now supported in the Alma digital viewer.

# Fulfillment - June 2016 Enhancements

## Additions to the Overdue and Lost Loan Profiles

When editing the **Overdue and Lost Loan** profile, the following new option was added to automatically block the notified patron:

- A **Create Block** check box displays when the selected profile type is a notification. When selecting the box, a drop-down of block types displays. The list of block types is taken from the list in **User Block Description**. Selecting a block type is mandatory when the check box is selected. When the **Loans - Overdue and Lost Item** job runs, the corresponding block is created for the borrower. The block is removed when one of the following conditions is met:
  - The item is returned.
  - The loan status set to **Claimed returned**.
  - The loan status set to **Lost**.
  - The loan's due date is changed so the loan is no longer overdue.
  - The loan is deleted.

For more information, see Configuring Overdue and Lost Loan Profiles.

## New Fields on the Fines/Fees Notification Profile

When editing the **Fines/Fees Notification** profile, the following new fields are available.

- **Fines/Fees Types** is a new multi-select field that runs the profile only on the selected fine/fee types. If nothing is selected, the profile runs on all types.
- **Maximal Amount for User** is an optional numeric field to indicate the max amount that triggers a letter.

For more information, see Configuring Fines/Fees Notification Profiles.

## Alerts for Shortened Due Dates

It is now possible to configure alerts for staff and patrons when a loan's due date is shortened. A loan's due date can be shortened due to patron expiration, a booking request, or recall request during the loan period.

A new customer parameter (**Fulfillment > Fulfillment Configuration > Configuration Menu > General > Other Settings**), **shortened_due_date_notifications**, controls these alerts. Its default value is `None`, which indicates that no alerts are sent.

When **shortened_due_date_notifications** is set to `MESSAGE` or `MESSAGE_EMAIL`, an on-screen alert is displayed for staff on the Manage Patron Services page when loaning or renewing an item with a shortened due date. The message format is: **Please note that the due date was shortened due to <Reason>**. When loaning an item from a self-check machine, a message is also displayed.

**NOTE:**
The message text is not configurable.

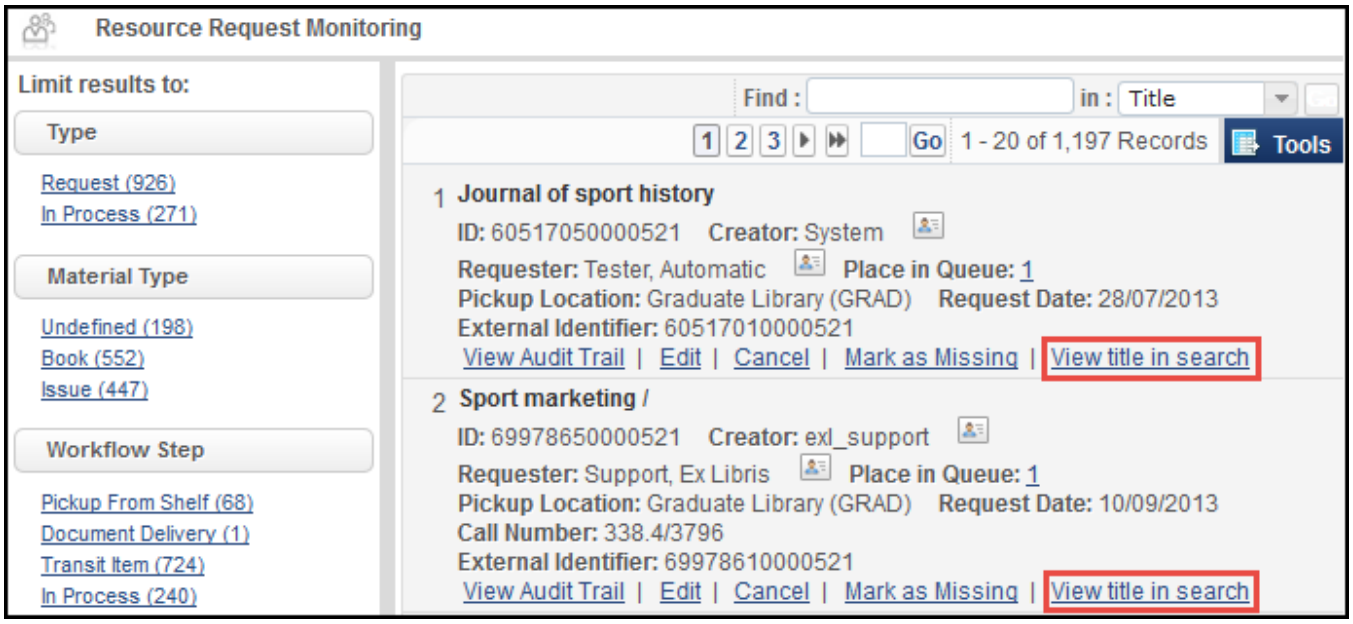
In addition, when **shortened_due_date_notifications** is set to `EMAIL` or `MESSAGE_EMAIL`, a notification is sent to the patron regarding the shortened due date. There is a new letter **FulShortenedDueDateLetter** for this notification, which can be sent either by email or SMS.

For more information on the customer parameter, see Configuring Other Settings.

For more information on the new letter, see Configuring Alma Letters.

## View Title in Search Option from Request Lists

The **View title in search** link now appears in the **Pick From Shelf** list and the **Requests** tab in Manage Patron Services. Clicking the link shows the title in the context of the search page.




**Requests Monitor**

For more information, see Managing Requests and Work Orders, Managing Patron Services, and Pickup at Shelf.

## Place a Request from Manage Patron Services

It is fairly common that a patron comes to the desk to loan an item or perform some other activity at the circulation desk and then asks the librarian to create a request. Until now, the operator needed to leave the patron record, find the title, and then re-insert the patron information. Now, the request may be placed for the patron in Manage Patron Services using a new link, **Submit Request**, on this page. The link appears if the you have the required permissions to create requests. Clicking this link opens a pop-up in which you can search for a title/item and submit a request for it. The type of requests that can be selected in this pop-up depend on the type of selected record (physical/electronic).

For more information, see Managing Patron Services.

## Matching Reading List Citations to Inventory in Bulk

When non-repository citations are added to reading lists, you can manually try to match each one to Alma inventory using **Resource Locate**. You can now match inventory to citations in bulk by running the new Citation Inventory Enrichment job.

For detailed information, see Matching Citations to Inventory in Bulk.

## Update RFID from the Scan In Interface

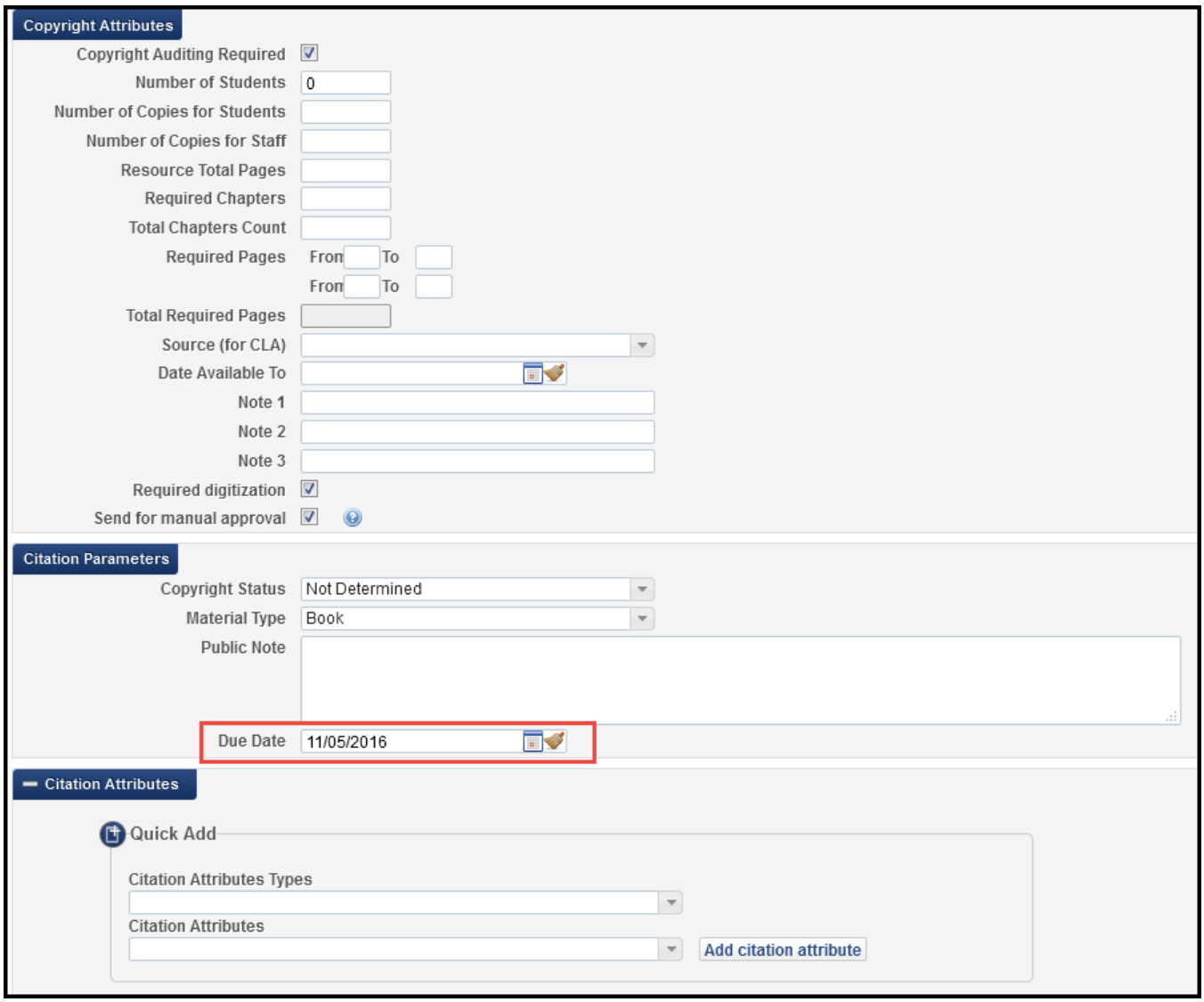
The **Location**, **Call number**, **Item policy,** and **Barcode** fields stored on the RFID chip may now be changed using the scan in interface in the Change Item Information tab. A new check box, **Update RFID**, was added. If this check box is selected, scanning an item also attempts to update the RFID.

For more information on this feature, see Changing Item Information.

For additional information on RFID, see the RFID support page of the online help and the Developer's Network.

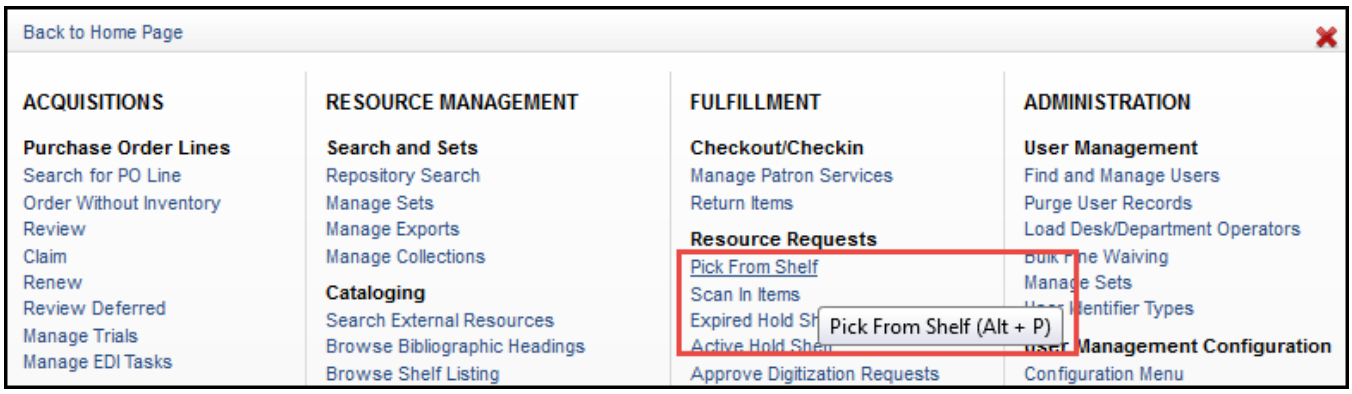
## Additional Fulfillment Enhancements

- You can now configure (create, edit, delete) the public and library tags for citations (this feature was previously only available to institutions using Leganto). For more information, see Configuring Citation Tags.
- The due date (the date by which the citation should be read by students) was added to the Edit Reading List Citation page.



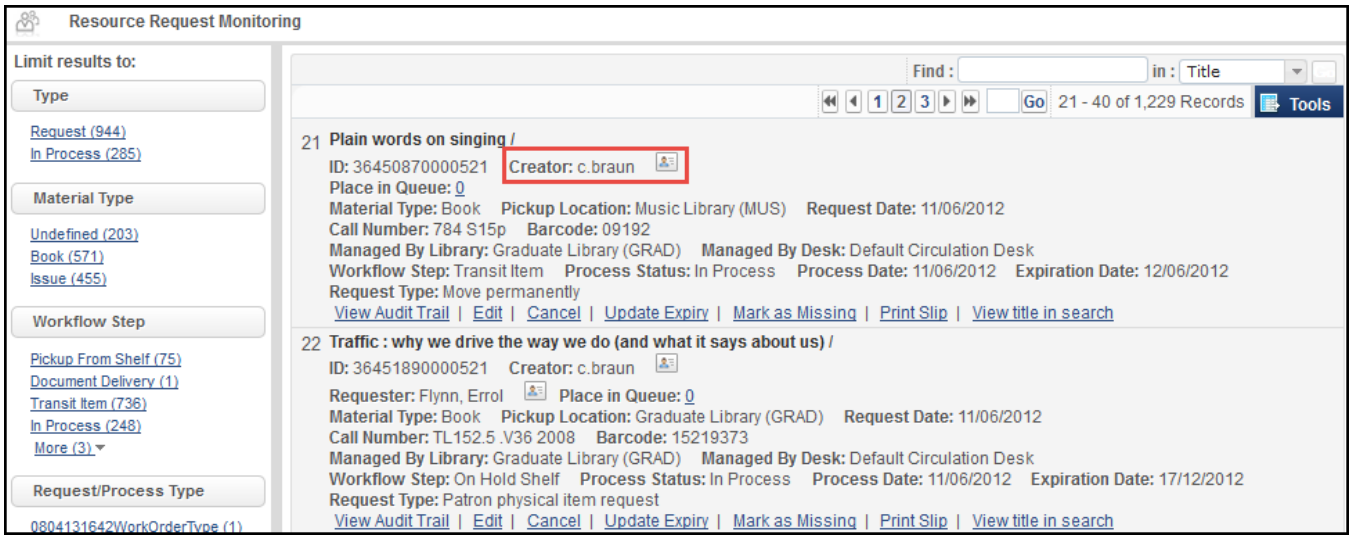

**Edit Reading List Citation Page - Bottom**

- Hover-over tool tips were added to menu links for which keyboard shortcuts were added. For all cases, the hover-over shows the page name and the keyboard shortcut. The affected links are:
  - Manage Patron Services
  - Return item interface
  - Scan in interface
  - Pick from Shelf list




**Hover Over Tool Tip for Pick From Shelf**

- The Scan In Items page now remembers the user's last entry for the **Register in house use** field. The value is stored per user and circulation department/desk.
- The request creator was added to the Resource Request Monitoring page (**Fulfillment > Resource Requests > Monitor Requests & Item Processes**).




**Resource Request Monitoring List with New Request Creator Field**

- The following columns were added to the Reading Lists Task List (see Managing Reading Lists):

  Note that some of the new columns are hidden by default.

  - **Academic Department** - The course's academic department
  - **Start Date** - The course's start date

- **End Date** - The course's end date
- **Due Back Date** - The default due back date for the citations in the reading list; inherited from the course

- If an item on a move request is scanned in but cannot be reshelved to the new location, the status of the move request is now changed to **In Transit** while the item is in transit to the new location, rather than being set to **Completed**. This behavior also affects the request note in the transit slip, and will cause it to appear until the last step of fulfilling the request.
- You can now enable or disable course terms. For more information, see Configuring Course Terms.

# Resource Sharing - June 2016 Enhancements

## Prevent Receiving and Shipping from the Scan In Items Page

**IMPORTANT:**

This feature will be fully available for use after the June 12th release refresh. Please do not set the **rs_allow_actions_on_scan_in** to false before then.

Using the Scan In Items page to receive resource sharing items may have a negative effect on the request workflow. For example, defaults may incorrectly set the due date and item location. It is strongly recommended that all receiving and shipping for resource sharing items be done only from the receiving and shipping pages. Therefore, it is possible to set up an optional warning message that informs the user that the receiving or shipping pages should be used. If Alma determines that a scanned item requires shipping or receiving and the parameters have been set accordingly, an error message displays that may be overridden.

The option to block shipping and receiving of resource sharing items on the Scan In page is controlled by a new customer parameter, **rs_allow_actions_on_scan_in**.

Loaning from Manage Patron Services is also handled when the item has not been received, with a corresponding block defined in Block Preferences. The loan action may continue by overriding the block that will trigger the receive action, update the request status, send an ISO message to the partner, and allow the loan to continue.

The override options for this block are defined in the Block Preferences. (**Main Menu > Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Block Preferences**). The parameter, **Item has not been received by a resource sharing operator**, has five possible settings.

- Block - The pop-up warning appears and the loan action may not be carried out.
- Override by All - The pop-up warning appears and may be overridden by all users.
- Override by Manager - The pop-up warning appears and may be overridden by users with manager roles.
- Override by Operator - The pop-up warning appears and may be overridden by users with operator roles.
- Handle Automatically - The pop-up warning does not appear and the receiving action will be carried out automatically, with appropriate actions taken to handle the resource sharing actions. This is the default option.

If the block is overridden, the following actions take place:

- The borrowing request status is updated to **Loaned to Patron**.

- The **Receive** ISO message is sent.
- The temporary item is updated as if the receive page was used without the due date.
- The location is updated due to the item creation rules.
- The loan proceeds as if a regular receive was executed.
- Fees are calculated.

The scan in interface has two new buttons for moving to the shipping and receiving interfaces.

For more information about the block in the scan in interface, see Scanning Items.

An item scanned twice in the shipping and receiving interfaces will behave like the initial scan. The item will be added to the list, displaying data from the initial receive/ship, but no action is taken. This is to prevent mistakes when an item for shipping/receiving is scanned twice.

For more information about receiving and returning items in the receive and shipping interfaces, see Receiving and Shipping.

**NOTE:** A self-check or API loan is blocked without an override option.

## Multiple Items for a Single Request

It is now possible to receive and return more than one item for a single borrowing request. The receive or return operation is considered complete when all items are scanned in, though a partial receive may also be done.
A manual receive can be performed from the row action in the borrowing task list and from the Receiving Items interface. A manual return can be done from Return Items, the **Manage Patron Services > Returns** tab, and Scan In Items.

Lender shipping of multiple items will be supported in future releases.

For detailed information, see Receiving or Shipping Multiple Items for a Single Request.

# Collaborative Networks - June 2016 Enhancements

## Contribute Vendors to the Network Zone

Alma already provides a means for administrators of the Network Zone to push global information of a list of vendors to member institutions in the collaborative network. Members of a collaborative network can now share or edit global information about vendors managed in the Network Zone.

When a vendor manager at a member institution pushes new vendor information, or changed information about a shared vendor, to the Network Zone, that information is pushed to all member institutions the next time the **Distribute Network Acquisition Changes to Members** job is run on the Network Zone.

NOTE: A vendor is uniquely identified by its code. When a vendor manager pushes vendor information to the Network Zone, or when the Network Zone pushes information to its member institutions, Alma creates a new vendor if a vendor with that code doesn't already exist. Otherwise, the new information overwrites the existing information in that vendor.

A vendor's code cannot be changed.

Each member institution continues to define local information for vendors, such as vendor accounts, EDI information, access providers, and vendor interfaces.

For information about contributing global information from a member institution to the Network Zone, see the marked sections in Sharing Vendor Information in a Network Zone.

For more information see the Shared Vendors - Ability to Contribute to NZ video.

# Analytics - June 2016 Enhancements

## Note Field Anonymized for Analytics Reports from the Network Zone

The **Note** field of the Lending Requests Details dimension of the Lending Requests subject area is now included as one of the fields that are anonymized for the Network Zone when creating reports for member institutions. Being able to anonymize such data enables a consortium collaborative network to make reports for statistics and trends across all of the consortium without violating any privacy concerns or local privacy-related laws. This setup and functionality is relevant only for Analytics reports that are created in the Network Zone and has no influence on the Analytics reports created in member institutions.

For detailed information, see Anonymizing Member Details in Network Zone.

## Additional Analytics Enhancements

- The following fields in the **Usage Data Details** dimension of the **Usage Data** subject area have been renamed to better describe the fields:

| Old Name | New Name |
|---|---|
| Records Views | DB Records Views |
| Result Clicks | DB Result Clicks |
| Success Section Requests | Book Success Section Requests |
| Success Title Requests | Book Success Title Requests |

- **A NERS Enhancement:** The number of records that can be exported from Alma Analytics will be increased to 250,000 in the coming weeks and to 500,000 records at a later stage.

# Alma Administration, Integrations, and Infrastructure - June 2016 Enhancements

## Enhancements to the SAML Integration Profile

The following enhancements were made to the SAML integration profile:

- The **Default** check box was removed from the first page of the wizard when configuring SAML integration profiles (and CAS and LDAP), since it has no function.
- A new **Default SAML profile** check box was added to the second page of the wizard. Select this check box to configure the profile as the default.

  NOTE: For the June release, Alma configures the oldest existing active profile as the default. For new integration profiles, if no default profile is selected, there is no default.

- The **Active** check box on the second page of the wizard was removed, since its functionality has been replaced by the default functionality.
- A new Alma SAML certificate with an extended expiration date is now available. It is recommended that you update the SAML certificate for all existing SAML integration profiles with the new certificate. New SAML integration profiles automatically use the new certificate. There is no change in functionality.

  For more information on the SAML integration profile, see SAML-Based Single Sign-On/Sign-Off. For information about the new certificate, see the Developers Network at: https://developers.exlibrisgroup.com/alma/integrations/user-management/authentication/saml.

## Additional Enhancements

- The job processing framework is currently being optimized to handle jobs of various sizes. Note that you may therefore experience some changes in job run times.
- The **All** option was removed from the **Find in** drop-down list on the Manage Sets page and the select a set when running a job page.
- The icon to email a patron was replaced by a **Compose** button on the User Details page.

- The Export Users area of the SIS integration profile (see Student Information Systems) now has additional scheduling options. The complete list of scheduling options is now:
  - Not scheduled
  - Every 12 hours, starting at 10:00
  - Every Wednesday at 19:00
  - Every day at 12:00
  - Every day at 19:00
- The (Aleph) Central Catalog integration profile (see Integrating the Aleph Central Catalog) now has additional scheduling options. The complete list of scheduling options is now:
  - Not scheduled
  - Every 12 hours, starting at 11:00
  - Every 6 hours, starting at 05:00
  - Hourly
- In the MD Editor, if a Central Cataloging integration profile was configured, you can now contribute the current record using the hotkey Cntl-Alt-C.

# Data Services - June 2016

The Alma May Central KnowledgeBase and Community Zone package was applied to the Alma environments.

## Library of Congress Authorities Community Zone Updates

The following are the Library of Congress Subject authority updates for the period of May 1st through May 29th:

- Number of records updated: 103
- Number of records added: 213
- Number of records deleted: 20

The following are the Library of Congress Name authority updates for the period of April 27th through May 26th:

- Number of records updated: 19102
- Number of records added: 30068
- Number of records deleted: 515

The following are the Canadian name authority file updates for the period of April 27th through May 26th:

- Number of records updated: 43
- Number of records added: 1400
- Number of records deleted: 6

The following are the Library of Congress Genre/Form Terms (LCGFT) updates for the period of April 27th through May 26th:

- Number of records updated : 2
- Number of records added : 1
- Number of records deleted : 0

## New Electronic Collections Added to the Alma CKB

The following collections were added to the Alma Community Zone from May 1, 2016 until May 29, 2016:

- Cambridge University Press Journals Agriculture
- Cambridge University Press Journals Biological Sci
- Cambridge University Press Journals Business
- Cambridge University Press Journals Full Package Standard North America
- Cambridge University Press Journals Full Package Standard UK
- Cambridge University Press Wholly Gold Open Access Journals
- CAUL NonSubscribed Springer link Journals 2016
- CAUL Subscribed SpringerLink Journals 2016
- French National Licences Emerald
- IEEE Xplore All Conference Proceedings
- IEEE Xplore All Journals
- IEEE Xplore All Standards
- JISC Collections Bloomsbury Taylor & Francis Full Collection 2015
- JISC Collections Bloomsbury Taylor & Francis Visual Collection 2015
- JISC Collections EDP Sciences 2015
- JISC Collections EDP Sciences 2016
- JISC Collections EDP Sciences Astronomy 2016
- JISC Collections EDP Sciences Engineering & Technology 2016
- JISC Collections EDP Sciences Life Sciences 2016
- JISC Collections EDP Sciences Mathematics & Computer Sciences 2016
- JISC Collections EDP Sciences Physics 2016
- JISC Collections JSTOR Arts And Sciences I Collections 2015-2016
- JISC Collections JSTOR Arts And Sciences II Collection 2015-2016
- JISC Collections JSTOR Arts And Sciences III Collection 2015-2016
- JISC Collections JSTOR Arts And Sciences IV Collection 2015-2016
- JISC Collections JSTOR Arts And Sciences IX Collection 2015-2016
- JISC Collections JSTOR Arts And Sciences V Collection 2015-2016
- JISC Collections JSTOR Arts And Sciences VI Collection 2015-2016
- JISC Collections JSTOR Arts And Sciences VII Collection 2015-2016
- JISC Collections JSTOR Arts And Sciences VIII Collection 2015-2016
- JISC Collections JSTOR Arts And Sciences X Collection 2015-2016
- JISC Collections JSTOR Arts And Sciences XI Collection 2015-2016

- JISC Collections JSTOR Arts And Sciences XII Collection 2015-2016
- JISC Collections JSTOR Arts And Sciences XIII Collections 2015-2016
- JISC Collections JSTOR Arts And Sciences XIV Collection 2015-2016
- JISC Collections JSTOR Biological Sciences Collection 2015-2016
- JISC Collections JSTOR Business And Economics Collection 2015-2016
- JISC Collections JSTOR Business I Collection 2015-2016
- JISC Collections JSTOR Business III Collection 2015-2016
- JISC Collections JSTOR Business IV Collection 2015-2016
- JISC Collections JSTOR Current Scholarship Program 2016
- JISC Collections JSTOR Ecology And Botany I Collection 2015-2016
- JISC Collections JSTOR Ecology And Botany II Collection 2015-2016
- JISC Collections JSTOR Health And General Sciences Collection 2015-2016
- JISC Collections JSTOR Hebrew Collection 2015-2016
- JISC Collections JSTOR Ireland Collection
- JISC Collections JSTOR Jewish Studies Collection 2015-2016
- JISC Collections JSTOR Language And Literature Collection 2015-2016
- JISC Collections JSTOR Life Sciences Collection 2015-2016
- JISC Collections JSTOR Mathematics And Statistics Collection 2015-2016
- JISC Collections JSTOR Music Collection 2015-2016
- JISC Collections JSTOR Religion And Theology Collection 2015-2016
- JISC Collections Springer Compact 2016-2018
- JISC Collections Springer Institutional Agreement:2013-2015
- JISC Collections Taylor & Francis Full Collection Expanded 2016-2017
- JISC Collections Taylor & Francis Science and Technology 2016-2017
- JISC Collections Taylor & Francis Social Science and Humanities 2016-2017
- JISC Collections Taylor And Francis Behavioral Science Collection 2015
- JISC Collections Taylor And Francis New Launch Titles 2015
- JISC Collections Taylor And Francis New Launch Titles 2016
- JSTOR Arts & Sciences XV
- KB+ JISC Collections Gale Daily Mail Historical Archive 1896-2004
- KB+ JISC Collections Oxford University Press Economics and Finance Collection 2016
- KB+ JISC Collections Oxford University Press Humanities and Social Sciences Collection 2016

- KB+ JISC Collections Oxford University Press Humanities Collection 2016
- KB+ JISC Collections Oxford University Press Journals Collection including 20 new titles 2016
- KB+ JISC Collections Oxford University Press Law Collection 2016
- KB+ JISC Collections Oxford University Press Life Sciences Collection 2016
- KB+ JISC Collections Oxford University Press Mathematics & Physical Science Collection 2016
- KB+ JISC Collections Oxford University Press Medicine Collection 2016
- KB+ JISC Collections Oxford University Press Social Sciences Collection 2016
- KB+ JISC Collections Sage Premier 2016
- KB+ WHEEL Cengage The Times Digital Archive (1785-2008) 2014-2017
- KB+ WHEEL SAGE Premier 2016
- KB+ WHEEL Wiley Online Library Full Collection 2015-2017
- KB+ WHEEL/NESLI2 Oxford University Press Journals Collection 2014
- Mintel Alimentação fora do Lar: Brasil
- Mintel Attitudes and Trends: China
- Mintel Automotive: UK
- Mintel Automotive: USA
- Mintel Beauty and Personal Care: Brazil
- Mintel Beauty and Personal Care: China
- Mintel Beauty and Personal Care: UK
- Mintel Beauty and Personal Care: USA
- Mintel Business - Construction: UK
- Mintel Business - Engineering: UK
- Mintel Business - Services: UK
- Mintel Continental European Consumer Lifestyles: Europe
- Mintel Country Reports - Travel and Tourism
- Mintel Drink: UK
- Mintel Drink: USA
- Mintel Estilos de Vida: Brasil
- Mintel European Retail Briefing
- Mintel Finance Standard
- Mintel Finance Standard Plus
- Mintel Finance: Ireland

- Mintel Finance: USA
- Mintel Financial Services - Big Picture: UK
- Mintel Financial Services - Insurance and Protection: UK
- Mintel Financial Services - Intermediaries: UK
- Mintel Financial Services - Investment and Savings: UK
- Mintel Financial Services - Lifestyles: UK
- Mintel Financial Services - Pensions and Retirement: UK
- Mintel Financial Services - Retail Banking: UK
- Mintel Food and Drink: Brazil
- Mintel Food and Drink: China
- Mintel Food and Drink: Ireland
- Mintel Food: UK
- Mintel Food: USA
- Mintel Foodservice: Brazil
- Mintel Foodservice: China
- Mintel Foodservice: UK
- Mintel Foodservice: USA
- Mintel Health and Wellbeing: UK
- Mintel Health and Wellbeing: USA
- Mintel Household Care: UK
- Mintel Household: Brazil
- Mintel Household: China
- Mintel Household: USA
- Mintel International Travel Series
- Mintel Ireland: Industrial
- Mintel Leisure and Entertainment: USA
- Mintel Leisure: Ireland
- Mintel Leisure: UK
- Mintel Lifestyles: Brazil
- Mintel Lifestyles: Ireland
- Mintel Lifestyles: UK
- Mintel Lifestyles: USA

- Mintel MBD Industrial: UK
- Mintel Media: UK
- Mintel Mintel Reports: Ireland
- Mintel Multicultural America: USA
- Mintel Produtos para Casa: Brasil
- Mintel Retail - Clothing and Footwear: UK
- Mintel Retail - E-Commerce: UK
- Mintel Retail - Home: UK
- Mintel Retail - Overview: UK
- Mintel Retail Exposure: International
- Mintel Retail Intelligence: Europe
- Mintel Retail Intelligence: International
- Mintel Retail: Brazil
- Mintel Retail: China
- Mintel Retail: Ireland
- Mintel Retailing and Apparel: USA
- Mintel Technology and Media: USA
- Mintel Technology: UK
- Mintel Travel and Tourism Analyst (International)
- Mintel Travel and Tourism: International
- Mintel Travel: China
- Mintel Travel: UK
- Mintel Travel: USA
- Mintel UK Retail Briefing
- Mintel Varejo: Brasil
- North East Research Libraries (NERL) Springer Journals TONS 2016
- SHEDL Springer Closed Consortium Agreement 2013-2015
- SpringerLink Books Behavioral Science and Psychology
- SpringerLink Books Behavioral Science and Psychology 2016
- SpringerLink Books Business and Management
- SpringerLink Books Economics and Finance
- SpringerLink Books Economics and Finance 2015

- SpringerLink Books Economics and Finance 2016
- SpringerLink Books Education
- SpringerLink Books Education 2015
- SpringerLink Books History
- SpringerLink Books History 2016
- SpringerLink Books J.B. Metzler Humanities German
- SpringerLink Books J.B. Metzler Humanities German 2016
- SpringerLink Books Law and Criminology
- SpringerLink Books Law and Criminology 2015
- SpringerLink Books Law and Criminology 2016
- SpringerLink Books Lecture Notes In Computer Science
- SpringerLink Books Lecture Notes In Mathematics
- SpringerLink Books Lecture Notes In Mathematics 2016
- SpringerLink Books Lecture Notes In Physics
- SpringerLink Books Literature Cultural and Media Studies
- SpringerLink Books Literature Cultural and Media Studies 2016
- SpringerLink Books Medicine Dutch 2016
- SpringerLink Books Political Science and International Studies
- SpringerLink Books Political Science and International Studies 2015
- SpringerLink Books Political Science and International Studies 2016
- SpringerLink Books Psychology German
- SpringerLink Books Religion and Philosophy
- SpringerLink Books Religion and Philosophy 2015
- SpringerLink Books Religion and Philosophy 2016
- SpringerLink Books Social Science and Law German
- SpringerLink Books Social Science and Law German 2010
- SpringerLink Books Social Science and Law German 2016
- SpringerLink Books Social Sciences
- SpringerLink Books Social Sciences 2015
- SpringerLink Books Social Sciences 2016
- SpringerLink Books Springer Reference De German
- SpringerLink Books Springer Reference De German 2016

- SpringerLink Health & Hospitals General Hospitals Journals 2016
- Taylor & Francis FRESH Medical
- Taylor & Francis Medical New Launch Trial (Volume 1 & 2)

## New External Search Resources

No new external search resources were added for this release.

# Working with Brief Record Levels

**NEW FOR JUNE !**

Alma provides the ability to customize the definition of a brief record. Varying levels of brief records can be defined using brief rules that utilize a syntax similar to normalization rules. Ten levels of brief records can be defined from 01 through 10 where 01 represents the most brief record and 10 represents the most full brief record. Previously, bibliographic records were identified in two forms, brief or not brief. Since there are varying standards for defining the criteria of a brief record (such as the MARC and OCLC standards), this implementation of brief rules provides you with the greatest flexibility for identifying the level of briefness of a bibliographic record.

This new capability is being implemented in phases over multiple releases. By the end of this phased-in implementation, the old brief/not brief method of identifying brief records will be removed from the system. As a result, it is key that you take the steps necessary to insure that by the end of this phased-in implementation your requirements are addressed in the manner that you prefer for identifying brief records. See the Phased-In Implementation of Brief Record Levels section of the June 2016 release notes for details regarding the phases and schedule.

For more information, see the Brief Record Levels video (7:00 min.).

## Creating Brief Level Rules

Brief level rules are created using the MD Editor. The syntax for brief level rules is similar to the syntax used for normalization rules with new logic for the `set` statement. (See Working with Normalization Rules for more information.) Previously, for the brief/not brief identification of bibliographic records, the `set` statement has been coded (internally) as follows:

```
set brief."true"
```

With the new brief record level options, the `set` statement is coded as follows where 01 can be 01, 02, 03, 04, 05, 06, 07, 08, 09, or 10.

```
set brief_level."01"
```

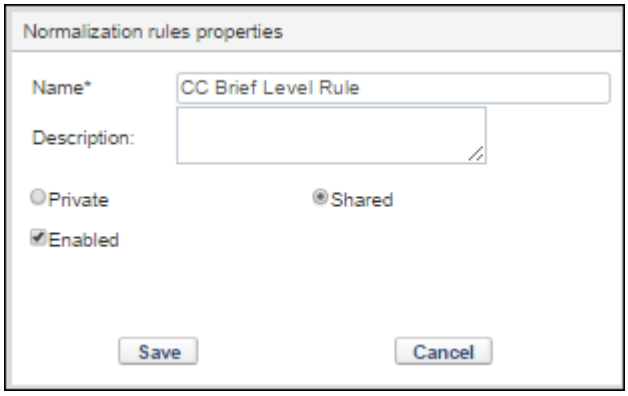
See the procedure below for additional details.

**PERMISSIONS:** To work with brief level rules, you must have the following role:

- Catalog Administrator

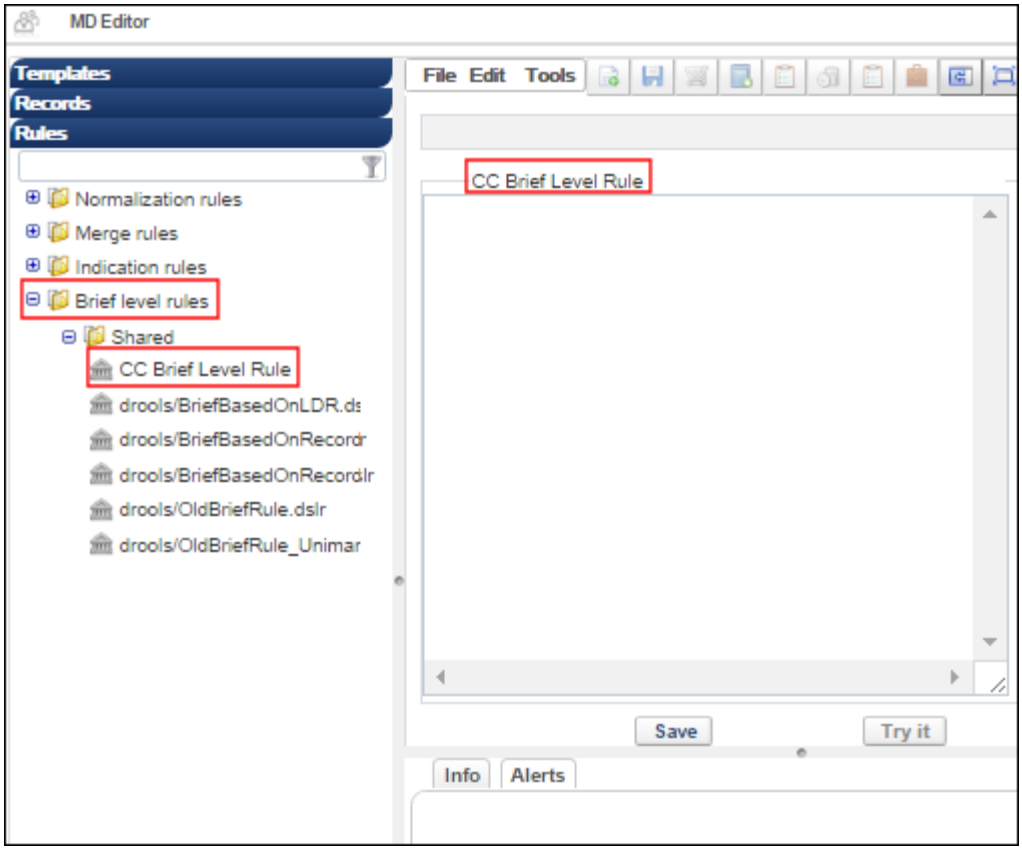
**To create a brief level rule:**

1. Open the MD Editor (**Resource Management > Cataloging > Open Metadata Editor**).
2. Select the Rules tab.
3. Click **File > New > Brief level rules**.
4. Complete the information in the properties dialog box, and click **Save**.




**Brief Level Rule Properties**

The rule editing area appears and the rule name is added to the list on the Rule tab in the **Brief level rules** folder.




**Brief Level Rule Editing Area**

5. Enter the rule logic in the rule editing area for the brief level rule that you want to create. For examples of rule logic, open the existing brief level rules provided in the Shared folder. The old rule in the list (drools/OldBriefRule.dslr) contains the rule logic used for the previously available brief/not brief identification of bibliographic records and is adapted to specify a brief level number (see below).

**NOTE:** There is a known issue with editing the brief level rules provided by Ex Libris in the Shared folder. To work with these rules, make a duplicate and work with the duplicate to view/edit the rule.

Old rule logic with new brief level statements:

```
rule "Brief 050 042 subjects"
priority 1
when
  ((not existsControl "LDR.{17,1}. ") AND
  (not existsControl "LDR.{17,1}.1") AND
  (not existsControl "LDR.{17,1}.2") AND
  (not existsControl "LDR.{17,1}.4") AND
  (not existsControl "LDR.{17,1}.7"))
  OR (not exists "050")
  OR (not exists "042")
  OR (not exists "6**")
```

```
then
  set brief_level."01"
end
rule "set default to 10"
priority 2
when
  TRUE
then
  set brief_level."10"
end
```

Using the `priority` statement (as shown above), you can identify rule logic to be processed in a hierarchical manner and include multiple brief levels.

Old rule logic without brief level statements:

```
#rule "Brief 050 042 subjects "
# when
MARC.control."LDR".EncodingLevel does not contain " ,1,2,4,7"
# or MARC does not contain "050"
# or MARC does not contain "042"
# or MARC does not contain "6XX"
# then
# set brief."true"
#end
```

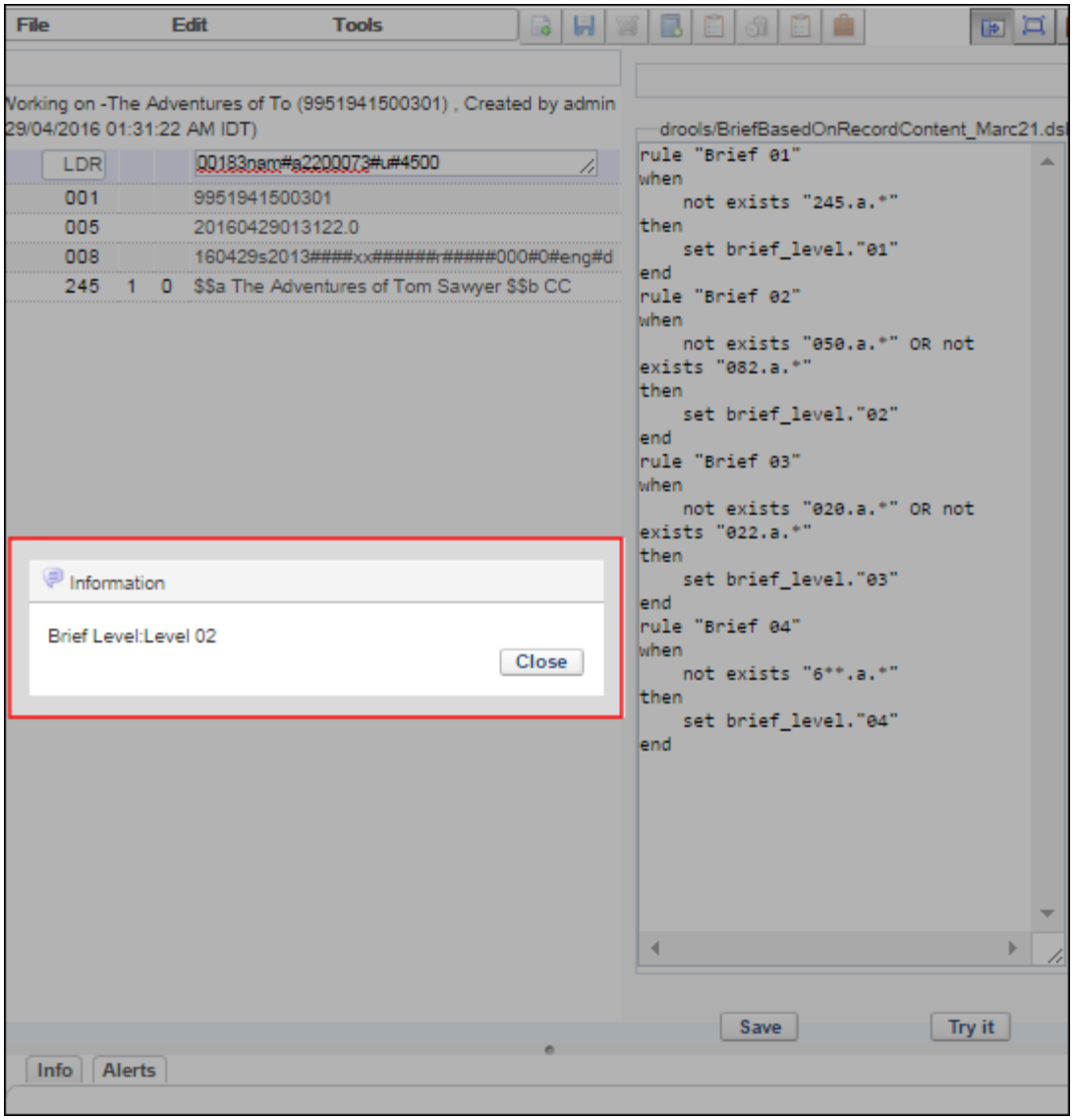
6. When you have completed entering the rule logic, click **Save**.

## Testing Brief Level Rules

After you have created a brief level rule, you can test its logic with a bibliographic record.

**To test a brief level rule that you have created:**

1. Open a bibliographic record in the MD Editor.
2. Click the **Split Editor** icon and open the brief level rule that you created.
3. Click **Try it**. The system processes your rule logic against the open bibliographic record to calculate the brief level to be assigned to the record and displays an informational message indicating the level that it has assigned to the bibliographic record.



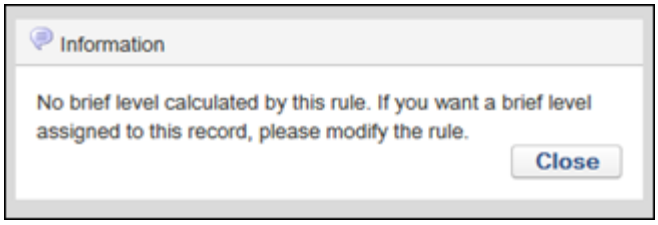

**Brief Level Rule Informational Message with Calculated Level**

The brief level description that is displayed (**Level 02** in the example above) can be customized for each level 01 through 10. Contact Ex Libris Support to customize these descriptions for your institution.

4. Click **Close**.

## *Rule Logic / Testing Considerations*

When your rule logic is processed using **Try it** and the end result is no brief level assignment, the system displays the following message:




**No Brief Level Assigned Message**

This may occur when you have a rule with logic like the rule in the example below and the 245 does exist.

```
rule "Example"
priority 1
when
        not exists "245"
then
        set brief_level."01"
end
```

If you expand the logic of your rule like the rule example below, you ensure that the record is assigned a brief level.

```
rule "Example"
priority 1
when
        not exists "245"
then
        set brief_level."01"
end


rule "set default to 10"
priority 2
when
                TRUE
then
                set brief_level."10"
end
```

## Setting the Brief Level Rule Default in the Metadata Configuration

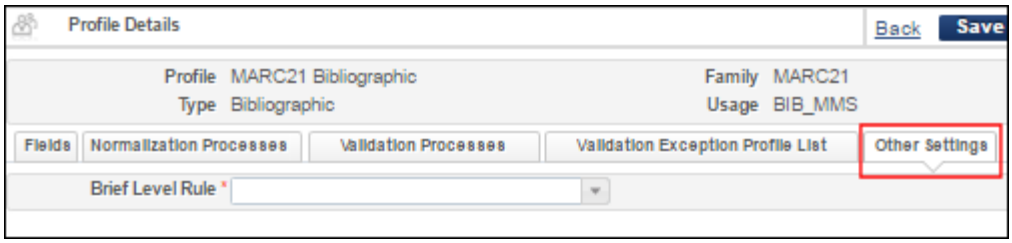
The bibliographic Metadata Configuration provides a parameter on the Other Settings tab for defining a default brief level rule. This default setting is used when saving and importing bibliographic records and running the Identifying Brief Level job.

**To set the brief level rule default in the Metadata Configuration:**

1. Click **Metadata Configuration** in the **Cataloging** section of the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**).

2. Click the link for the bibliographic profile that you want to configure.

3. Select the **Other Settings** tab.




**Metadata Configuration Other Settings Tab**

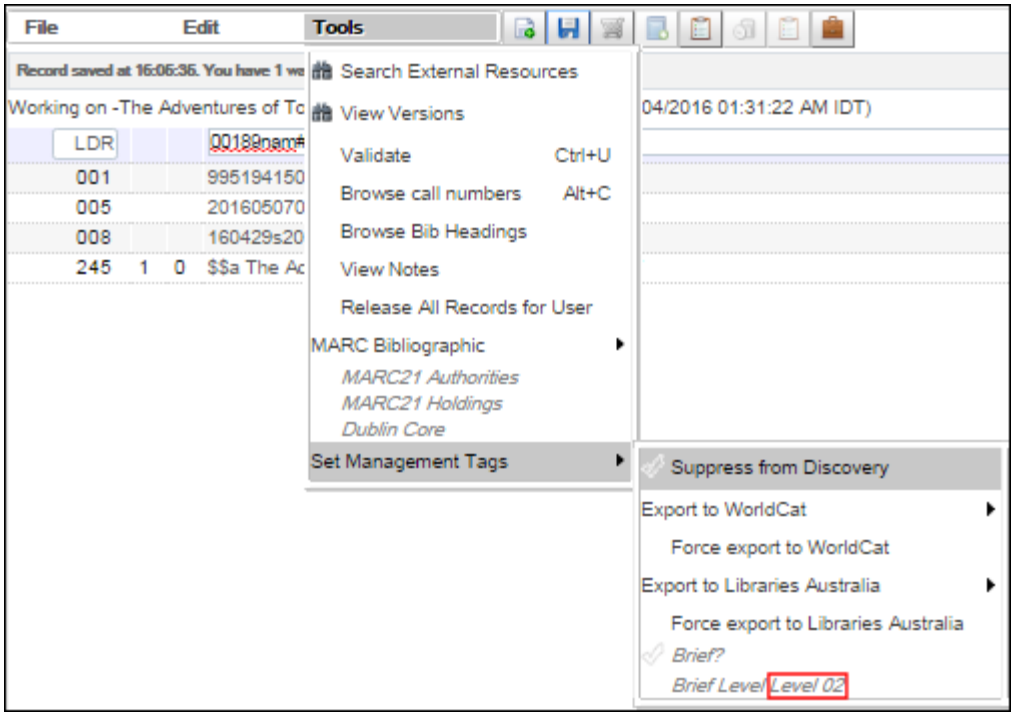
The Brief Level Rule parameter appears on the Other Settings tab.

4. Open the drop-down list for the Brief Level Rule parameter and select the rule that you want to be the default rule used when saving and importing bibliographic records and running the Identifying Brief Level job.
5. Click **Save**.

For more information about Metadata Configuration, see Configuring Cataloging.

## Viewing the Brief Record Level Set for a Bibliographic Record

When you save a bibliographic record, the brief record level is calculated using the brief level rule that is configured as the default in the Metadata Configuration for bibliographic records (see Set the Brief Level Rule Default in the Metadata Configuration) and saved with the bibliographic record. To view the brief level that is set for the bibliographic record, open a bibliographic record in the MD Editor and click **Tools > Set Management Tags**. The **Brief Level** appears in the list of Set Management Tags settings.




**Brief Level Setting for a Bibliographic Record**

For the bibliographic record in the figure above, the brief level is Level 02. This level description (Level 02) can be customized for all levels 01 through 10. Contact Ex Libris Support to customize these level descriptions.

See MD Editor Menu and Toolbar Options for more information regarding the MD Editor Tools menu.

## Running Brief Record Level Jobs

After you have defined your brief level rules (see Creating Brief Level Rules) and configured the default Brief Level Rule in your Metadata Configuration (see Set the Brief Level Rule Default in the Metadata Configuration), you can run a job to calculate and save the brief level for a set of MARC 21 bibliographic records. (In the July release, this job is being enhanced to also run with UNIMARC, KORMARC, and CNMARC bibliographic records.)

**To run the brief level calculation job:**

1. Create/save the set of bibliographic records for which you want to calculate the brief level.
2. Open the **Run a Job - Select Job to Run** page (**Administration > Manage Jobs > Run a Job**).
3. From the Type filter drop-down list, select **Marc 21 management tags**.
4. Select the **Identifying Brief Level** job.


**Identifying Brief Level Job**

5. Click **Next**.
6. Select the set against which you want to process brief level calculations and click **Next**.
7. Since there are no parameters to specify, click **Next**.
8. Enter a job name or use the default name provided and click **Next**.
9. Click **Submit**.

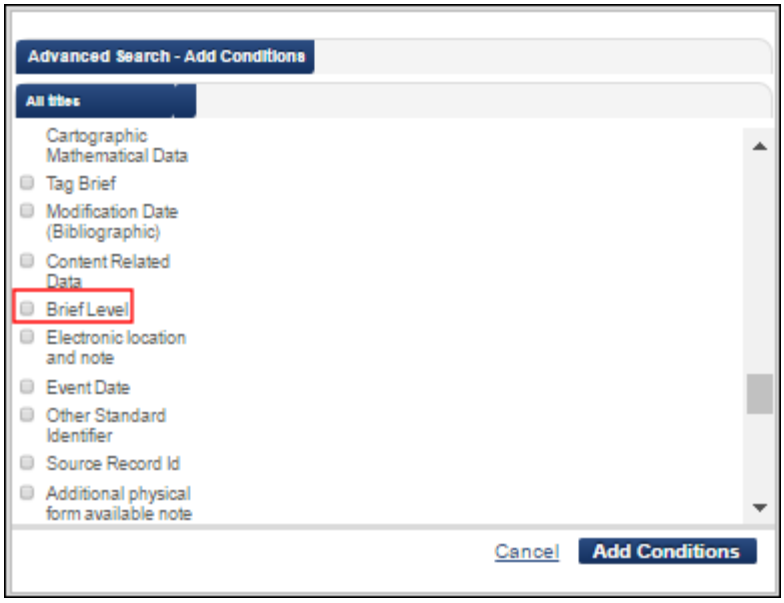
For more information about running jobs, see Running Manual Jobs on Defined Sets.

## Searching for Bibliographic Records with a Specific Brief Level

The Advanced repository search provides the Brief Level condition for locating bibliographic records with a specific brief level.

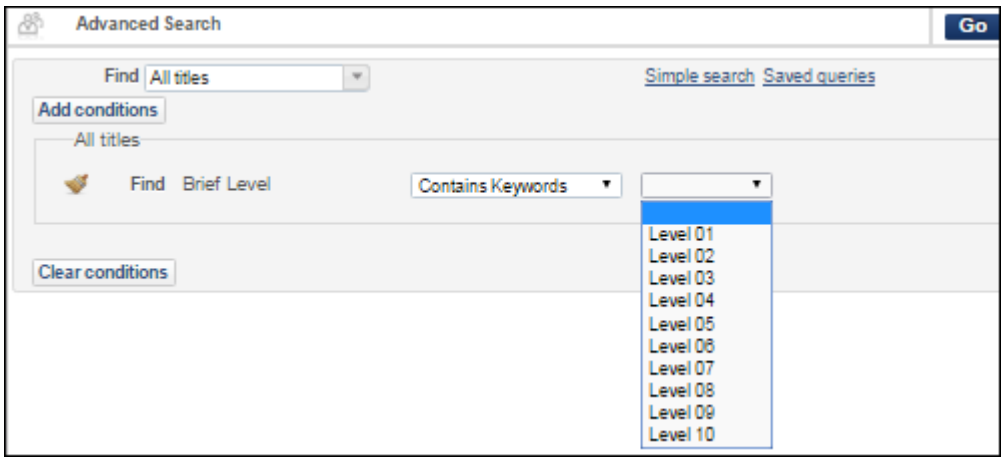
**To search for bibliographic records with specific brief levels:**

1. Open Repository Search (**Resource Management > Search and Sets > Repository Search**).
2. Click **Advanced search**.
3. Click **Add conditions**.
4. Select the **Brief Level** condition and click **Add Conditions**.




**Brief Level Advanced Search Condition**

5. Select the **Brief Level** for which to search.




**Brief Level Advanced Search Condition - Select the Level for Which to Search**

6. Click **Go**.

# Matching Reading List Citations to Inventory in Bulk

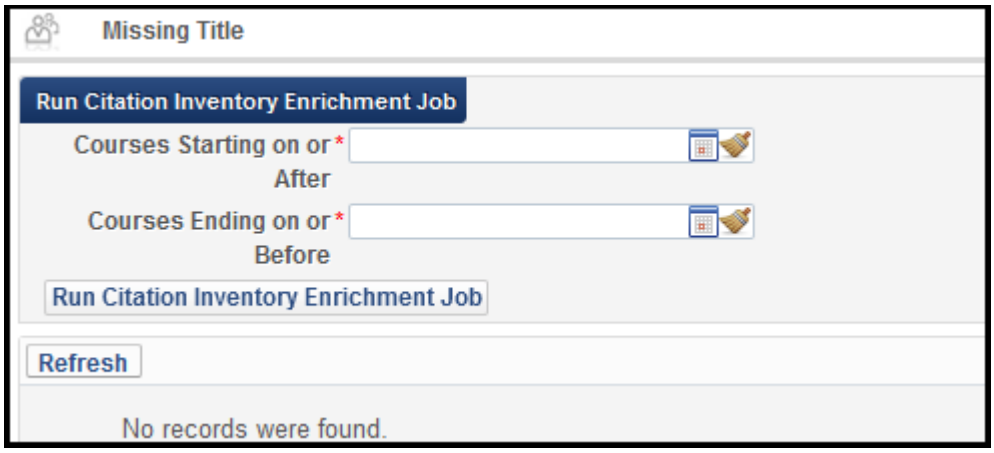
## NEW FOR JUNE !

**PERMISSIONS:** To run the citation inventory enrichment job, you must have one of the following permissions *with an institution-wide scope*:

- Course Reserves Operator/Manager
- Fulfillment Services Operator/Manager
- General System Administrator

When citations are added to reading lists, they are usually matched automatically to inventory if a single match can be found. Alma does not automatically match citations if this feature is turned off, or if there are no matches, or multiple matches, for a citation.

You can match inventory to citations in bulk by running the Citation Inventory Enrichment job page (**Fulfillment > Advanced Tools > Bulk Citation Inventory Enrichment**).




**Bulk Citation Inventory Enrichment Job Page**

On this page, you can match all citations in all courses starting on or after a certain date and ending on or before a certain date.

To match citation to inventory in bulk:

1. On the Citation Inventory Enrichment job page, select the dates for the courses whose citations you want to match to inventory. All courses that start on or after that date you set in **Courses Starting on or After** and ending before the date you select in **Course Ending on or Before** will be checked.
2. Click **Run Citation Inventory Enrichment Job** and click confirm in the confirmation dialog box. The job starts.

---

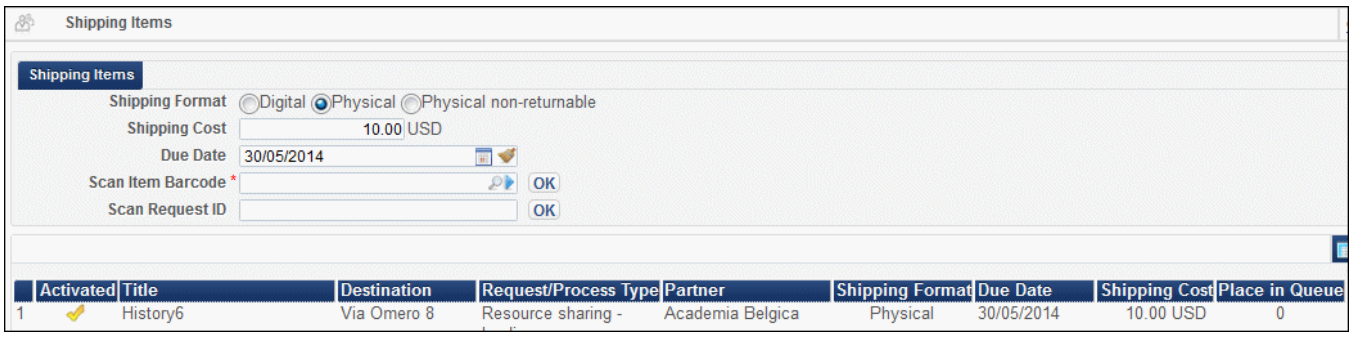
NOTE: The job also (re)connects to inventory any citations that were manually disconnected from inventory.

---

Information about the running job appears on this page, as well as on the **Running**/**History** tabs of the Monitor Jobs page (see Viewing Running Jobs). Click **Refresh** to update the page.

When the job completes, click **View Report** to see the job's report. The job report includes the number of records processed and how many match attempts succeeded or failed.

7. In the **Scan item barcode** field, enter the item's barcode. This field displays only when **Shipping format = Physical.** When shipping an itemless request, leave this field blank.
8. Select the **Complete the request** check box to change the item's status to **Request Completed** and mark the request as **Closed**. This check box displays only when **Shipping format = Digital** or **Physical non-returnable**.
9. In the **Scan request ID** field, enter the item's external identification number.
10. Click **OK** next to either the **Scan item barcode** or **Scan request ID** fields. The item is located and displays on the bottom of the page.



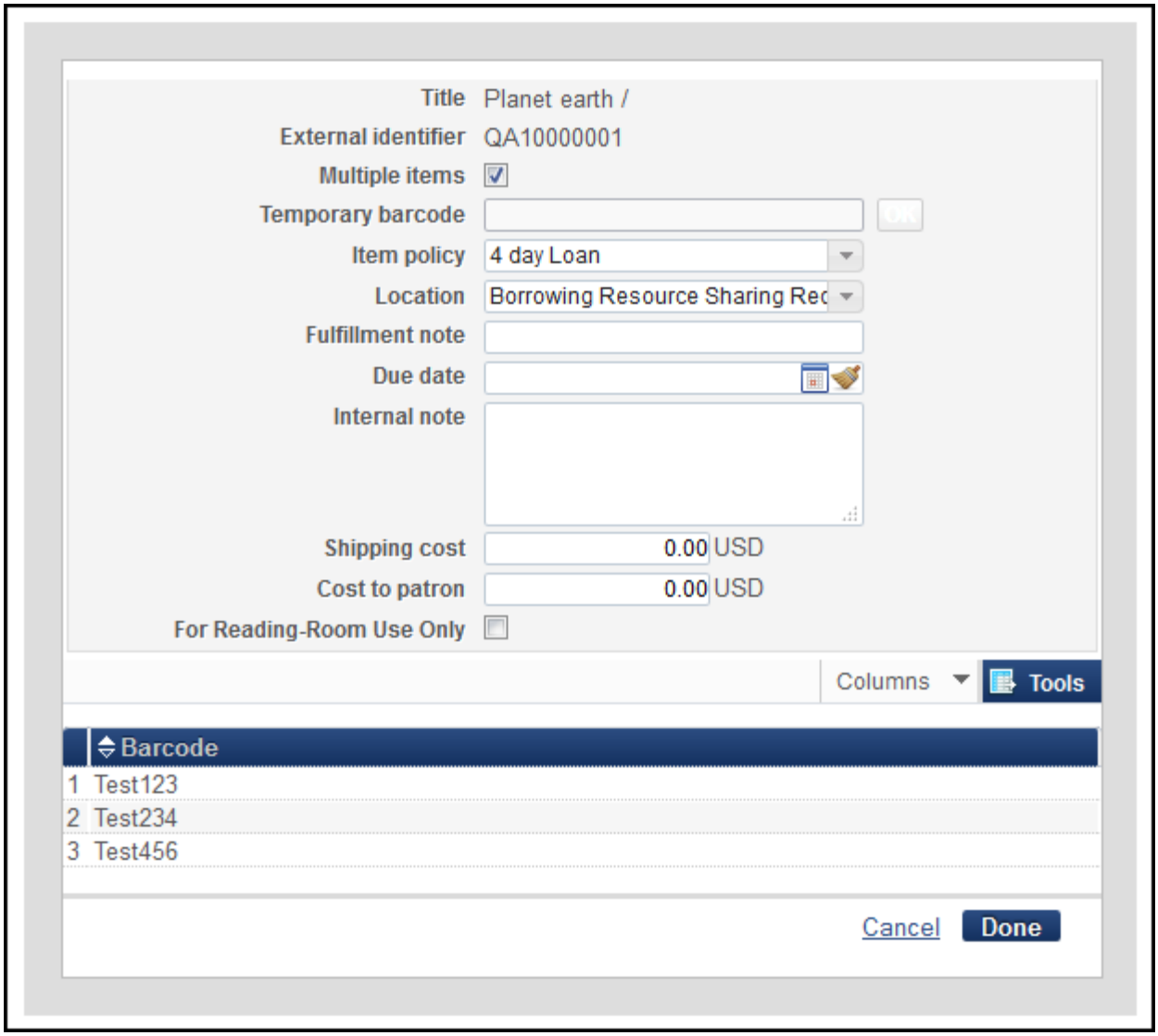

**Shipping Items Page – Located Item for Shipping**

Repeat step 7 and step 9 for all items you want to ship. The items display in the table at the bottom of the page, and the configured shipping cost and due date are applied to each of the items.
If an item is scanned in twice, the item will be added to the list, displaying data from the initial ship, but no additional action is taken. This is to prevent mistakes when an item for shipping is scanned twice.

---

## NEW FOR JUNE ! Receiving or Shipping Multiple Items for a Single Request

It is possible to receive and return more than one item for a single borrowing request. The receive or return operation will be considered done when all items are scanned in, though a partial receive may also be done.
A manual receive can be done from the row action in the **Borrowing Task List** and from the **Receiving Items interface**. A manual return can be done from **Return Items**, the **Returns** tab in **Patron Services** and **Scan in Items**.



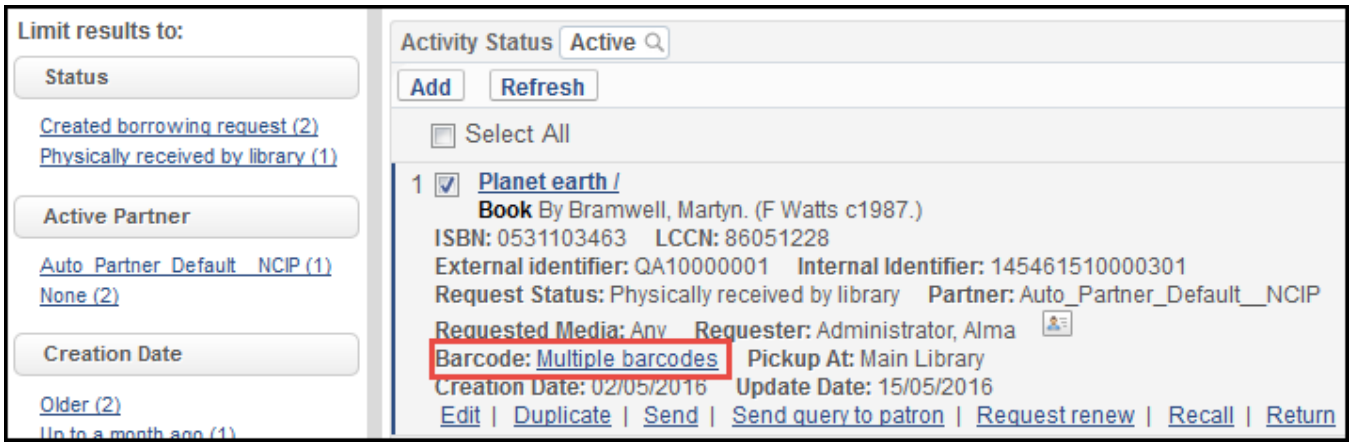

**Receive Multiple Items**

On the Receive Items screen, the **Multiple Items** checkbox is visible only if the Physical format was chosen on the receiving interface. When the checkbox is selected, as each item is scanned and accepted, the barcode field is cleared. Click the **Done** button at the end to indicate that all parts of the request have been scanned, and send a hold shelf notification to the patron. Clicking done also triggers the following validations on the entered barcodes:

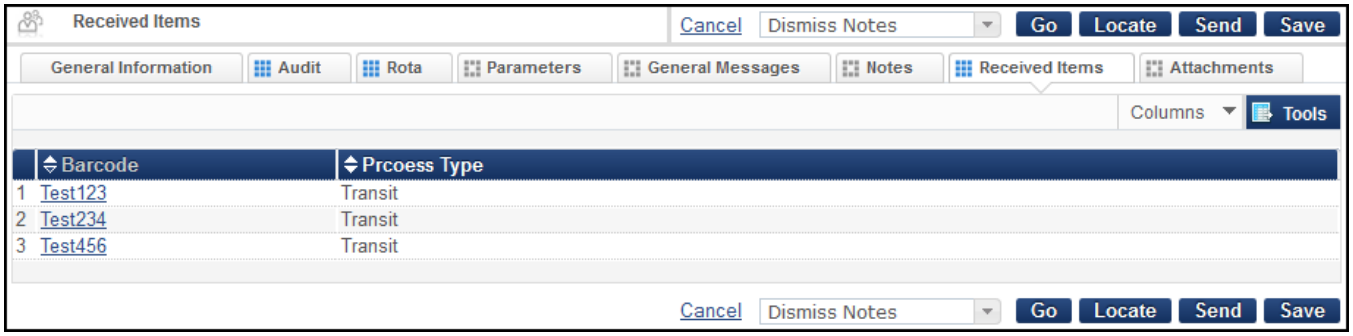
- No barcodes are empty
- No barcodes are duplicated
- No barcodes are already used (in the repository)

If the request is still missing some items, a receive may still be done to indicate a partially received request. When the additional items are received, they can be added to the main request if the request is not returned yet and the multiple option is selected.

The Borrowing Request List has a link for Multiple Barcodes when multiple items have been received. Clicking the link opens the request to the Received Items tab.

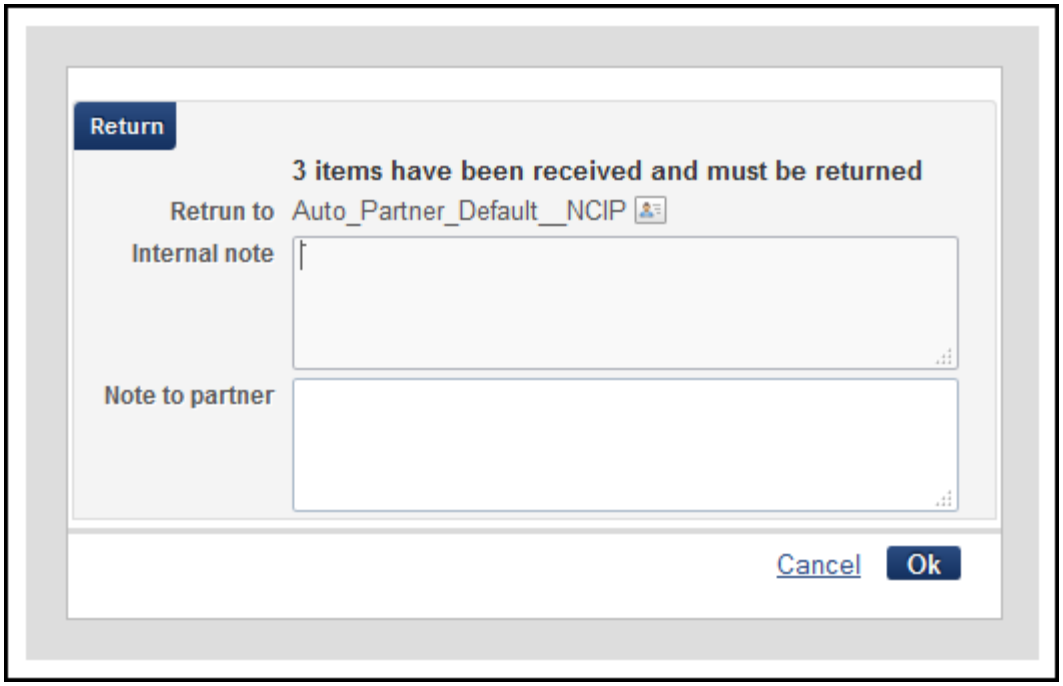



**Borrowing Request List with a Multi-Item Request**




**Received Items Tab of the Request**

When selecting the Return action, the Return pop-up window indicates that this is a multi-item request.




**Return Pop-up Window**

The following behaviors apply to multi-item requests:

- The status of the request changes to Loaned to Patron when any of the items is loaned.
- Cancelling a hold request, cancels only the specific hold request. The parent borrowing request is only canceled if all items are canceled.
- Renew and recall messages received from the lender will update all loans under the parent request.
- Only one Renew fee will be applied to the loan.

# Sharing Vendor Information in a Network Zone

Global information about vendors, such as the vendor's name, code, and address, can be shared between member institutions in a Network Zone. This alleviates the need for each member institution to add this basic information.

The Network Zone institution can define any global information about a vendor. In addition, each member institution can define a new vendor's global information, or change the shared global information about an existing vendor, and then share it with the Network Zone institution. The **Distribute Network Acquisition Changes to Members** job runs on the Network Zone institution and distributes all global vendor information from the Network Zone institution to member institutions. The job distributes all global vendor information added to the Network Zone since the date set by the **acq_distribute_changes_last_run** parameter (**Acquisitions > Acquisitions Configuration > Configuration Menu > General > Other Settings**). If the parameter is empty, all global vendor information in the Network Zone is distributed to the member institutions when the job runs.

NOTE: A vendor is uniquely identified by its code. When a vendor manager pushes vendor information to the Network Zone, or when the Network Zone pushes information to its member institutions, Alma creates a new vendor if a vendor with that code doesn't already exist. Otherwise, the new information overwrites the existing information in that vendor.

Each member institution continues to define local information for vendors, such as vendor accounts, EDI information, access providers, and vendor interfaces. Note that a vendor remains inactive in a member institution until certain local information, such as a vendor account, is added and the vendor is activated.

The global information fields of a vendor are as follows:

- Name
- Code - This field cannot be changed by a member institution.
- Additional Code
- Financial System Code
- National Tax ID
- Liable for VAT
- Libraries
- Currencies
- Language

- Material Supplier/Subscription Agent
- Access Provider
- Licensor
- Governmental
- Contact Information - Note that the **Preferred** indication is local.
  - Addresses
  - Phone Numbers
  - Email Addresses
  - Web Addresses

For more information about working with shared vendors in a collaborative network, see the Shared Vendors in the Network video (6:44 mins). Also see the Shared Vendors - Ability to Contribute to NZ video (0:34 mins).

**PERMISSIONS:** You must have one of the following roles to enable the Distribute Acquisition Changes to Member job:

- Acquisitions Administrator
- General System Administrator

You must have the following role to contribute global information to the Network Zone from a member institution:

- Vendor Manager

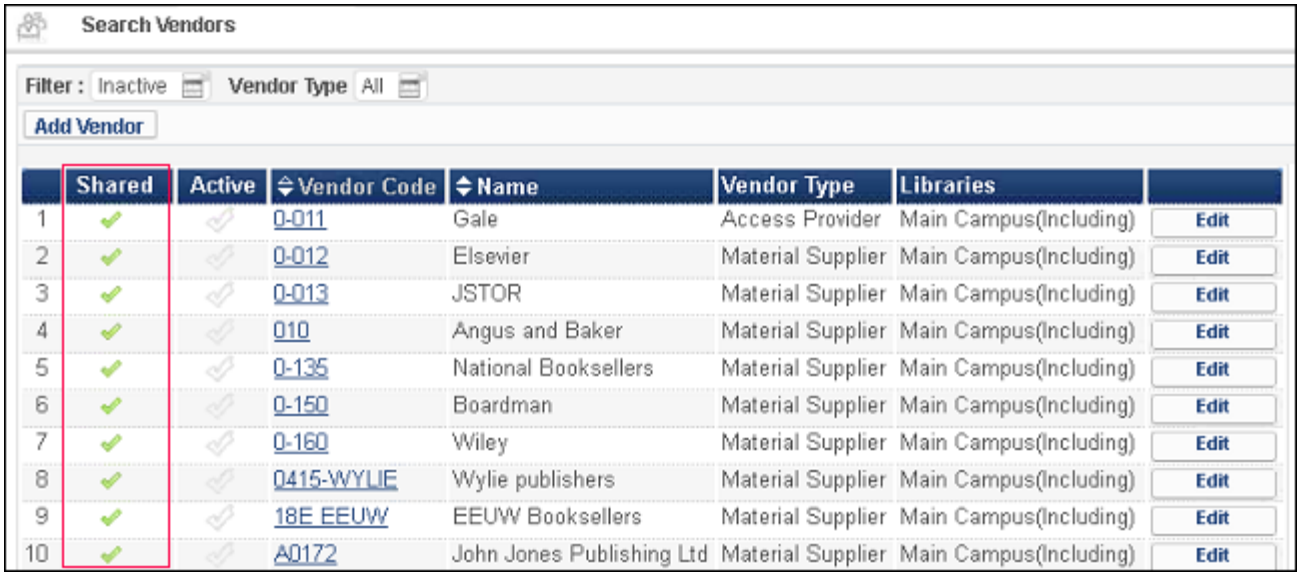
**To enable the Distribute Network Acquisition Changes to Members job:**

1. On the Acquisitions Configuration page (**Acquisitions > Acquisitions Configuration > Configuration Menu > General > Other Settings**), click **Customize** for the **acq_distribution_job** and change the parameter value to **true**.
2. Optionally set **acq_distribute_changes_last_run** to a specific date; see above for a description of this parameter.
3. Click **Save**.

   **NOTE:** For more information, see Configuring Other Settings.

4. In the list of scheduled jobs, activate **Distribute Network Acquisition Changes to Members**. For more information, see Distribute Central Resource Sharing Configuration.

On the Search Vendors page (**Acquisitions > Acquisitions Infrastructure > Vendors**), the **Shared** column indicates which vendors are shared by member institutions. Newly shared vendors are initially inactive.




| | Shared | Active | Vendor Code | Name | Vendor Type | Libraries | |
|---|---|---|---|---|---|---|---|
| 1 | ✔ | | 0-011 | Gale | Access Provider | Main Campus(Including) | Edit |
| 2 | ✔ | | 0-012 | Elsevier | Material Supplier | Main Campus(Including) | Edit |
| 3 | ✔ | | 0-013 | JSTOR | Material Supplier | Main Campus(Including) | Edit |
| 4 | ✔ | | 010 | Angus and Baker | Material Supplier | Main Campus(Including) | Edit |
| 5 | ✔ | | 0-135 | National Booksellers | Material Supplier | Main Campus(Including) | Edit |
| 6 | ✔ | | 0-150 | Boardman | Material Supplier | Main Campus(Including) | Edit |
| 7 | ✔ | | 0-160 | Wiley | Material Supplier | Main Campus(Including) | Edit |
| 8 | ✔ | | 0415-WYLIE | Wylie publishers | Material Supplier | Main Campus(Including) | Edit |
| 9 | ✔ | | 18E EEUW | EEUW Booksellers | Material Supplier | Main Campus(Including) | Edit |
| 10 | ✔ | | A0172 | John Jones Publishing Ltd | Material Supplier | Main Campus(Including) | Edit |

**Shared Vendor Column**

Click **Edit** to view the global information about a shared vendor. Global information is grayed out. You can continue to edit any local fields, as usual.

Vendor Details

Vendor name Gale

Summary | Contact Information | Contact People | EDI Information | Invoice

Vendor General Details

Institution Main Campus

Name * Gale

Code * 0-011

Additional code

Financial Sys. code

National tax ID

Status Inactive

Liable for VAT

Libraries Main Campus(Including)

Currencies ALL

Language English

Material Supplier/Subscription Agent

Access Provider

Licensor

Governmental

Accounts

Add

No records were found.

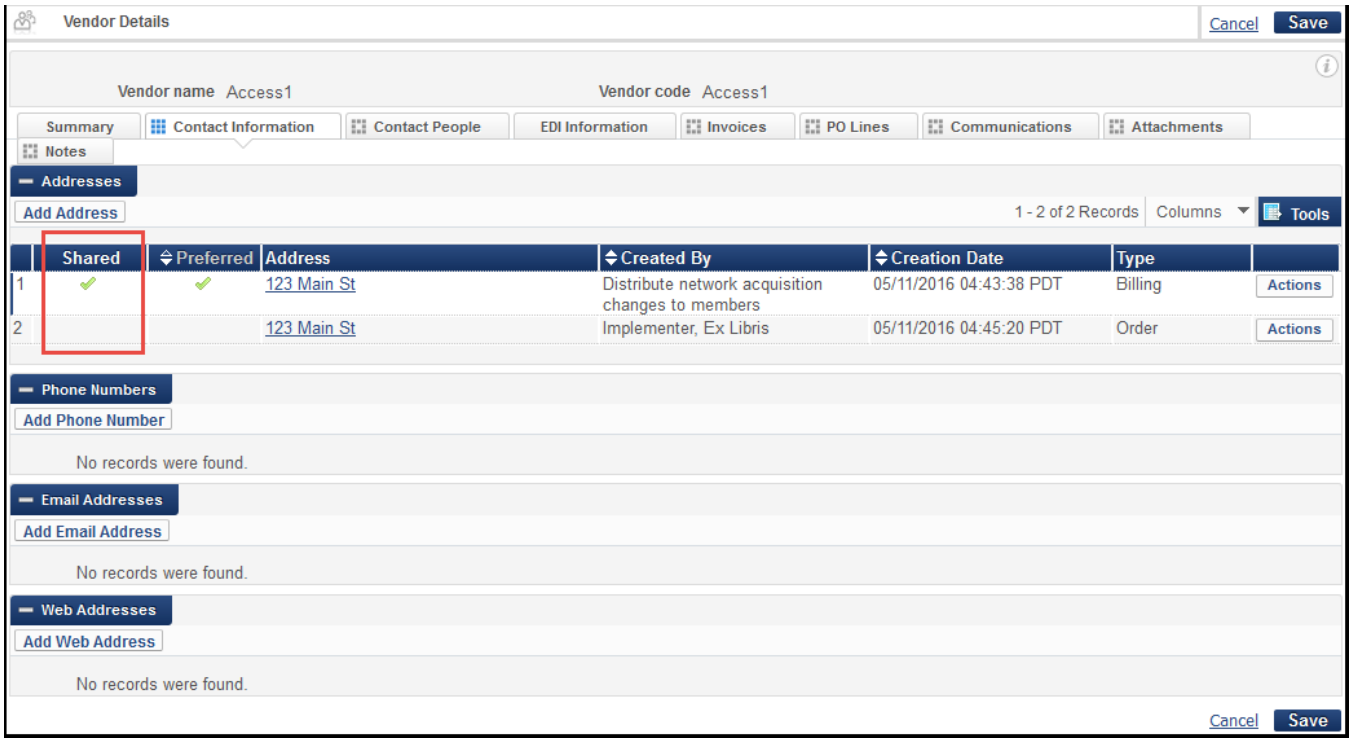
Interfaces

Add

No records were found.

**Global Attributes**

On the **Contact Information** tab, the **Shared** column indicates which information is shared.




**Vendor Details - Contact Information Tab**

## NEW FOR JUNE ! To contribute global information of a new vendor to the Network Zone:

In a network member institution, on the Search Vendors page, locate a local vendor, select **Actions > Contribute**, and click **Confirm** in the confirmation dialog box.

---

NOTE:

This operation will fail if another institution already contributed this vendor's information (according to the vendor code). This can occur between the time that the other institution contributed the vendor and the time that the distribution job runs.

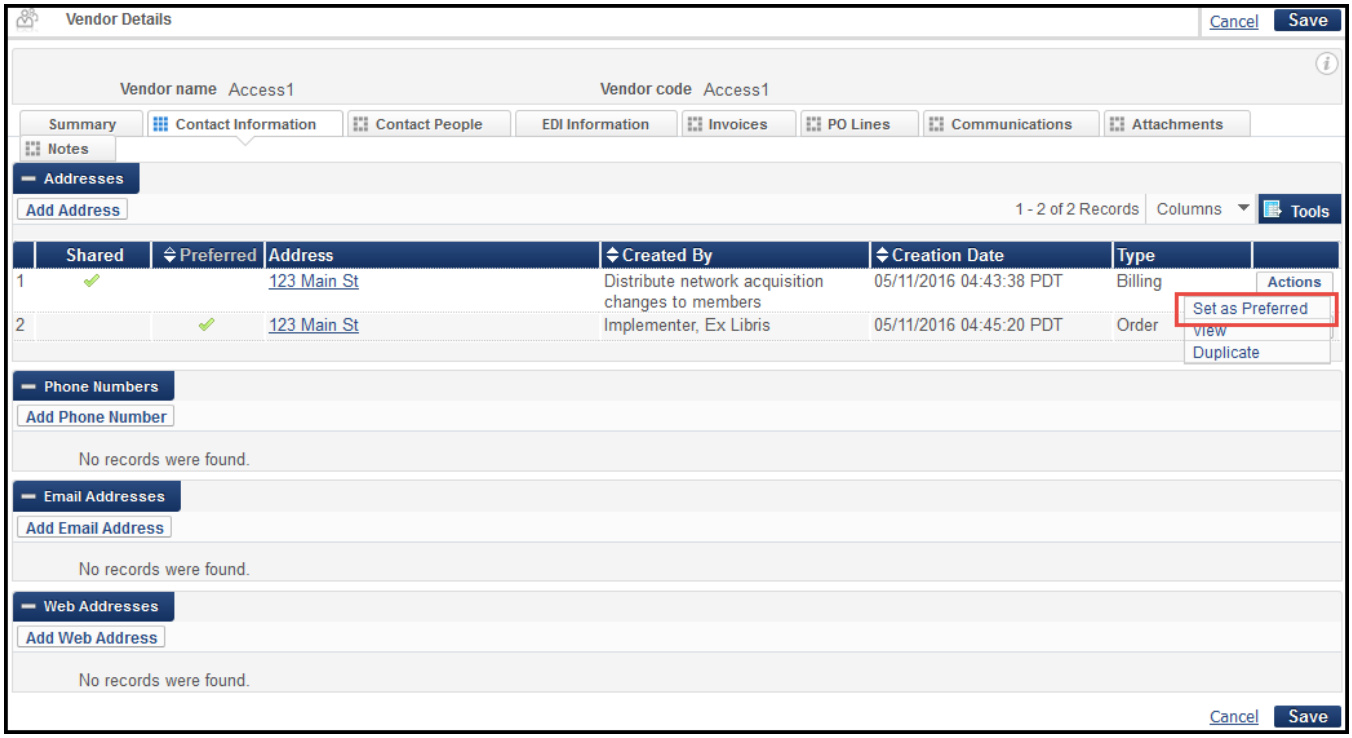
---

## NEW FOR JUNE ! To change global information of a shared vendor and contribute those changes to the Network Zone:

1. In a network member institution, on the Search Vendors page, locate the vendor and click **Edit**. The **Summary** tab of the Vendor Details page appear.
2. Click **Edit Global Attributes**, and click **Confirm** in the confirmation dialog box. The global information fields become active (except for the **Code** field, which cannot be changed).
3. Make your changes and click **Save**. Your changes are sent to the Network Zone institution, and will be distributed the next time the **Distribute Network Acquisition Changes to Members** job runs.

**NEW FOR JUNE ! To mark a shared contact information entity (address, phone number, email address, or web address) as preferred:**

You cannot edit shared contact information, which is where you would normally find the **Preferred** field for each entity type. Instead, if you want to set a shared vendor's contact information as preferred, select **Actions > Set as Preferred** beside the entity on the **Contact Information** tab on the Vendor Details page. This option only appears for shared vendors that are not preferred.




**Vendor Details Page - Contact Information Tab**