Alma January 2017 Release Notes

This Alma release provides numerous new features and enhancements. Some of these enhancements are a result of 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
☐ Browsing the Shelf Listing – Do you manage call numbers at the level of the items? The Browse Shelf Listing now includes item-level call numbers.
☐ Merge Records and Combine Inventory in Resolve Import Issues – When importing records, do you come across cases in which there are multiple matches? With this new functionality, you will be able to resolve these cases in an efficient manner; Alma will automatically merge and combine inventory associated with the multiple matches.
☐ New Deposit Functionality – With this new functionality, your institution can now consider leveraging Alma for its end user deposit workflows. This release will see an initial set of functionality for staff approval and

Action Items
mediated deposit on behalf of end users. Upcoming releases will expand this to include SWORD support as well as built-in end user deposit capabilities.
☐ Alma Document Delivery for Resource Sharing Requests – Electronically sharing resource sharing items has never been easier. You can now use the new Alma document delivery platform to send digital content to resource sharing borrowers. This is in addition to the previously existing option to send the files as email attachments.
☐ Identify Bibliographic Records that are Not Used in the Network Zone – Use this new functionality to find bibliographic records in the Network Zone that are not used by members, as a starting point for cleanup maintenance of the Network Zone.
☐ When exporting reports in CSV format, the resulting file may contain up to 500,000 lines. If there are more than 500,000 lines in the original report, the last line of the exported report will state that the maximum limit has been reached. This increased export capability is useful for, among other purposes, synchronizing files and records with external sources such as the HathiTrust Digital Library.

What's New

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

Acquisitions

- Enhanced Barcode Generation for Orders and Post-Receiving Processing – Enhanced barcode generation is now supported when creating PO lines and processing post-receiving work.
- Additional Acquisitions Enhancements

Resource Management

- Browsing the Shelf Listing – The new Browse Shelf Listing feature provides item-level call number browse capability from within the MD Editor.
- Merge Records and Combine Inventory in Resolve Import Issues – The Import Profile configuration options and the Resolving Import Issues options were enhanced to address handling multiple matching duplicate records as part of the import process.

- Support for the 689 Field – Support for the MARC 21 689 field in bibliographic records for German MARC cataloging is now available.
- CNMARC Authority Availability – The CNMARC authority profile in Alma is now available for use.
- Additional Resource Management Enhancements

Digital Resource Management

- New Deposit Functionality – A new Deposit functionality was added, allowing library staff to deposit digital material to Alma for inclusion in the digital repository.
- Activating/Deactivating and Deleting Remote Digital Repositories – Remote digital repositories can now be deactivated so that they do not appear in the drop-down list when creating an import profile and adding a digital representation.
- **A NERS Enhancement:** MMS ID Column Added to Digital Lists – The **MMS ID** column was added to several digital-related pages in Alma.
- Additional Digital Resource Management Enhancements

Fulfillment

- Resend Printouts/Emails – It is now possible to resend selected printouts and emails.
- New Calendar Options in Lost and Overdue Loan Profiles – You can now configure the **Days after Due Date** and **Days After Status Date** fields on the Overdue and Lost Loan Profiles to consider either the library's open days or the calendar days for the number of days counted by the job.
- Upload Files to a Citation – You can now upload or delete a file for a citation on the Edit Reading List Citation page.
- Changes to the Copyright Attributes Section for Citations and Staff Digitization Requests – A new field, **Include Image(s)**, appears in the Copyright Attributes area on the Edit Reading List Citation page and when creating a staff digitization request on the Create Request page.
- Regional Licensing – You can configure a copyright region to change the available options for selecting a copyright source and the available options for a Creative Commons license.
- Creative Commons for Citations – You can select a Creative Commons license for a citation. The available options depend on the regional licensing (see above).

- Additional Digital Profile Rule Clauses for Citations – Additional digital profile rule clauses related to citations were added.
- Additional Fulfillment Enhancements

Resource Sharing

- Alma Document Delivery for Resource Sharing Requests – Resource sharing requests can now send an email with a link for digital document delivery.
- Control Creation of Move Request from a Lending Request – A new customer parameter controls whether a move request will automatically be created when the lending request is created.
- Additional Resource Sharing Enhancements

Collaborative Networks

- Identify Bibliographic Records that are Not Used in the Network Zone – Alma provides a new process that identifies bibliographic records in the Network Zone that are not used by members.

Analytics

- Network ID Field Added to Bibliographic Details – The **Network ID** field was added to the shared **Bibliographic Details** dimension for use by institutions implementing a Network Zone.
- Title (Normalized) and ISSN (Normalized) Fields Added to Bibliographic Details – The **Title (Normalized)** and **ISSN (Normalized)** fields were added to the shared **Bibliographic Details** dimension.
- View It Clicks of Digital Representations in Link Resolver Usage – It is now possible to configure Alma Analytics to include View It clicks of digital representations when calculating link resolver usage.
- Additional Analytics Enhancements

Administration and Infrastructure

- Social Authentication Successful Connection Message – A direct link to Alma now displays when a staff member logs in successfully with their social network login.
- Social Authentication Activation Letter – A new letter can now be sent when a social authentication has been successfully established.

- [Additional Administration and Infrastructure Enhancements](#)

APIs

- The Sets APIs were enhanced and it is now possible to create a logical set. For detailed information on these APIs, see https://developers.exlibrisgroup.com/alma/apis/conf.
- The Update Bibliographic Record API for an institution working with a Network Zone now supports updating local fields, and allows linking/unlinking the Institution Zone's and Network Zone's bibliographic records. For details, see https://developers.exlibrisgroup.com/alma/apis/bibs.
- An API was created to enable retrieving bibliographic records in RDA/RDF XML format. For detailed information, see https://developers.exlibrisgroup.com/alma/integrations/linked_data/rda-rdf.
- The Get Lending Requests Task List API now supports multiple barcodes. For details, see https://developers.exlibrisgroup.com...pis/taskslists.
- Retrieving jobs using the Jobs API now supports filtering scheduled jobs by their profile ID.
- MMS_ID was added to the output of several hold request, loan, and PO line APIs.

Known Issues

- 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.
- The **URL** condition that was added as an advanced search option under Electronic Collection when searching for electronic titles is not functioning properly.
- When using the **Calculate** functionality (on the Physical Item Editor page) with both the Alternative and Temporary call numbers for the same prefix at the same time, an identical sequence is calculated and saved in both.
- It is currently possible to create two sequences with the same prefix for the same library and location (with a different sequence name). Two sequences with the same prefix should not be allowed. Numeric sequences (which have no prefix) that are configured with the Prefix+Sequence method should only be created once in every institution (either as an institution-level sequence, library-level sequence, or location-level sequence). This issue applies to both barcode sequences and accession number sequences.
- The **Identify records that are not used in the Network** job needs to be run from the Network Zone. Currently, this job is also available for member institutions. Access to this job for member institutions will be removed in a future release.

- When you want to create an import profile that handles merging records and combining inventory for mult-match records by selecting options from the **Merge Records and Combine Inventory for Multi-Match** section and you want to select the **Manual** option for the **Handling Method** in the **Match Actions** section, you must first select the **Automatic** option and either the **Merge** or **Overlay** option for the **Upon match** parameter in order to get the **Merge Records and Combine Inventory for Multi-Match** section to appear on the Import Profile Details page.
- In the Excel file generated from the Merge Records and Combine Inventory type of import, the content in the **Identifier** column is missing and the cell format for the content in the **MMS ID** column needs to be corrected.

Data Services

- General Community Zone Updates
- Library of Congress Authorities Community Zone Updates
- New Electronic Collections Added to the Alma CKB
- New External Search Resources

Next Release Sneak Preview

View a list of the features that are planned for the next Alma release.

Acquisitions - January 2017 Enhancements

Enhanced Barcode Generation for Orders and Post-Receiving Processing

Automatic barcode generation is now supported when creating PO lines and processing post-receiving work. For more information, see **Generating Barcodes Automatically** on the Manually Creating a PO Line page and **Generating Barcodes** on the Post-Receiving Processing page.

Additional Acquisitions Enhancements

- You can now reorder the options in the drop-down list of fields to be searched when searching for a PO line, and select one as the default search option. For more information, see Configuring PO Line Search Field Options.
- In the **Payment** area of the **Summary** tab of the Invoice Details page, the fields **Voucher date**, **Voucher number**, and **Voucher amount** were changed to **Payment date**, **Payment identifier**, and **Payment amount**.
- In the **Upload Date** filter in the **Usage Data** tab of the Vendor Details page, the option **Uploaded in the Last Month** was changed to **Uploaded in Current Month** (this change was just to clarify the option; the option's functionality did not change).

Resource Management - January 2017 Enhancements

Browsing the Shelf Listing

The Browse Shelf Listing feature provides item-level call number browse capability from within the MD Editor. See Browsing the Shelf Listing for detailed information.

Merge Records and Combine Inventory in Resolve Import Issues

The Import Profile configuration options and the Resolving Import Issues options were enhanced to address handling multiple matching duplicate records as part of the import process. If the new option is configured in the import profile, Alma performs the following steps:

- Imports incoming record
- Combines inventory of all matched records to the new incoming record
- Moves PO line, requests, or work orders to point to the new imported record
- Deletes the old bibliographic records

For more information about this new option, see the explanation for **Merge Records and Combine Inventory for Multi-Match** in the Import Profile Details - Match Profile Fields table and **Merging Records and Combining Inventory** on the Resolving Import Issues page.

Support for the 689 Field

Support for the MARC 21 689 field in bibliographic records for German MARC cataloging is now available. See Working with German MARC and the 689 Field in Alma for more information.

NOTE: Indexing for the 689 field will begin with the January release for existing records. The 689 field in new records will be indexed as they are created.

CNMARC Authority Availability

The CNMARC authority profile in Alma is now available for use. See Configuring Cataloging and Working with Authority Records for more information.

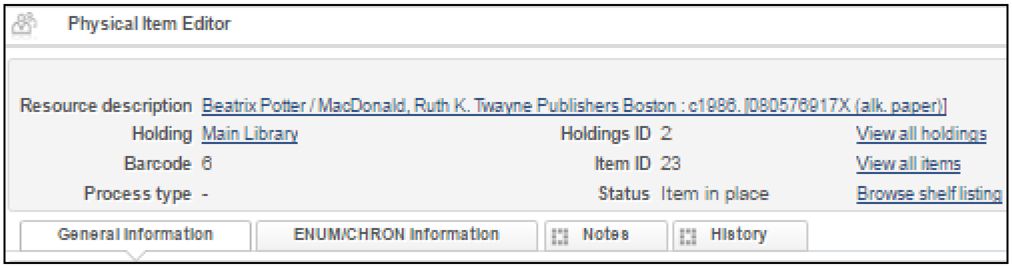
Additional Resource Management Enhancements

- Previously, the Link Resolver workflow stored the user name and IP address in a table in order to provide the user with services results. Effective with the January 2017 release, this information is no longer stored as part of the workflow.
- Changes have been made to the validation routines to better handle classifications.
- An **Every Friday** option was added to the General publishing profile. Two more **Every 6 hours** options were added to the Publish bibliographic records from Network Zone to Primo publishing profile.
- A **Deleted records** count was added to the Publishing to OCLC - Holdings Records report. This includes records that were previously published to OCLC but are now marked not to be published.
- The following values were added to the Physical Material Type code table (**Resource Management > Resource Configuration > Configuration Menu > General > Physical Material Type Descriptions**):
  - **Rare**
  - **Microfiche Master**

  If you have already customized this table, the above values are disabled. You can enable them by modifying this code table. See Configuring Physical Item Material Type Descriptions for more information.
- A check box was added to the Bibliographic Number Configuration page labeled **Add Parenthesis**. Select this check box to indicate that parenthesis should be added/surround the prefix. See Configuring Bibliographic Numbers for more information.
- For related records with a 773 field and a second indicator of 8 that currently provides items from the related record when Get It is performed, Alma now provides the option to configure your system for related records only, without getting items when Get It is performed. Contact Ex Libris Support to configure this option.
- If you want Dewey Decimal classification call number sorting to consider the numbers after the slash as numbers, contact Ex Libris Support to enable this for you. For example, currently Alma sort uses the order `123.112/1`, `123.112/100`, `123.112/2`. The `100` and `2` are not considered as numbers, and so are sorted as characters. After enabling after-slash numeric sorting, the new sort would be `123.112/1`, `123.112/2`, `123.112/100`.
- UI changes were made in the Physical Item Editor, the Electronic Portfolio Editor, the Electronic Collection Editor, and the Electronic Service Editor.

  The following Physical Item Editor changes were made:

- The Summary tab was removed and the following items were moved to the Summary section at the top of the page (above the remaining tabs):
  - Resource description (link to the title)
  - Holdings ID
  - Item ID
  - Status



Physical Item Editor Page - Summary Tab Change

- The **Issue date** field moved up on the page.
- The **Description** field was shortened, and its **Clear** button was removed.
- The **Inventory Number Information** is now in a separate section.
- The Clear button next to the Inventory number field was moved to the bottom of the Inventory Number Information section and renamed **Clear Inventory Information**.
- The **Permanent Location Information** subsection heading was removed.
- In the **Location Information** section, the **Choose prefix** field (along with its **Generate** and **Calculate** buttons) switched places with the **Storage location ID** field.
- The Additional Information section was renamed **Temporary Location Information**, and the Temporary Location Information subsection heading was removed.

The following Electronic Portfolio Editor changes were made:

- The Portfolio Information tab was renamed **General Information**, and the General Information tab is now the default tab instead of the Coverage Information tab.
- In the Summary section above the row of tabs, the following changes were made:
  - The **Resource description** field with the link to the title is now located here.
  - The **Portfolio ID**, **Collection ID**, and **Service ID** are located in the Summary section instead of the previously labeled Portfolio Information tab.

- The **Relink to another bibliographic record** and the **Attach to an electronic collection** buttons are no longer part of the Summary section at the top of the page. Instead, they were placed next to the **Cancel** button.
- The Notes information previously in the Portfolio Information tab (now the General Information tab) moved to the Notes tab.
- The Acquisitions information previously in the Portfolio Information tab (now the General Information tab) moved to the new Acquisitions tab.
- In the Coverage Information tab, the section names changed as follows:
  - Date Information is now **Global Date** Information.
  - Date Information (override) is now **Local Date Information**.
  - Embargo/Rolling Year is now **Global Embargo/Rolling Year**.
  - Embargo/Rolling Year (override) is now **Local Embargo/Rolling Year**.
- When you open the Available For Information pop-up from the Group Settings tab by clicking **Add Settings for Group**, the **Save Settings** button was renamed **Save** and the **Close** button was renamed **Cancel**.

The following Electronic Collection Editor changes were made:

- The default tab is now the **Electronic Collection Description** tab.
- In the Summary section above the row of tabs, the following changes were made:
  - The **Resource description** (link to the title) is now part of the top summary section.
  - The **Collection ID** is now part of the top summary section (instead of part of the General Information tab).
- In the General Information tab, the Notes information (**Authentication note** and **Public note**) was moved to the new **Functional Notes** section of the Notes tab.
- In the Additional Information tab, the Available Services section was renamed **Services**.
- When you open the Available For Information pop-up from the Group Settings tab by clicking **Add Settings for Group**, the **Save Settings** button was renamed **Save** and the **Close** button was renamed **Cancel**.

The following Electronic Service Editor changes were made:

- The Activation Information and Service Description tabs switched places and the Activation Information tab is now the leftmost tab and the default tab.
- In the Summary section above the row of tabs, the following changes were made:
  - The **Resource description** (link to the title) is now part of the top summary section.
  - The **Collection ID** and the **Service ID** are now part of the top summary section (instead of part of the Service Description tab).

- In the Service Description tab, the Notes information (**Authentication note** and **Public note**) was moved to the new **Functional Notes** section of the Notes tab.
- When you open the Available For Information pop-up from the Group Settings tab by clicking **Add Settings for Group**, the **Save Settings** button was renamed **Save** and the **Close** button was renamed **Cancel**.

Digital Resource Management - January 2017 Enhancements

New Deposit Functionality

A new Deposit functionality was added, allowing library staff to submit content to Alma to be added to the repository on behalf of patrons (Staff-Mediated Deposits). This will be enhanced next release with the ability to deposit via the SWORD API.

To support the Deposit functionality, the following activities can be performed:

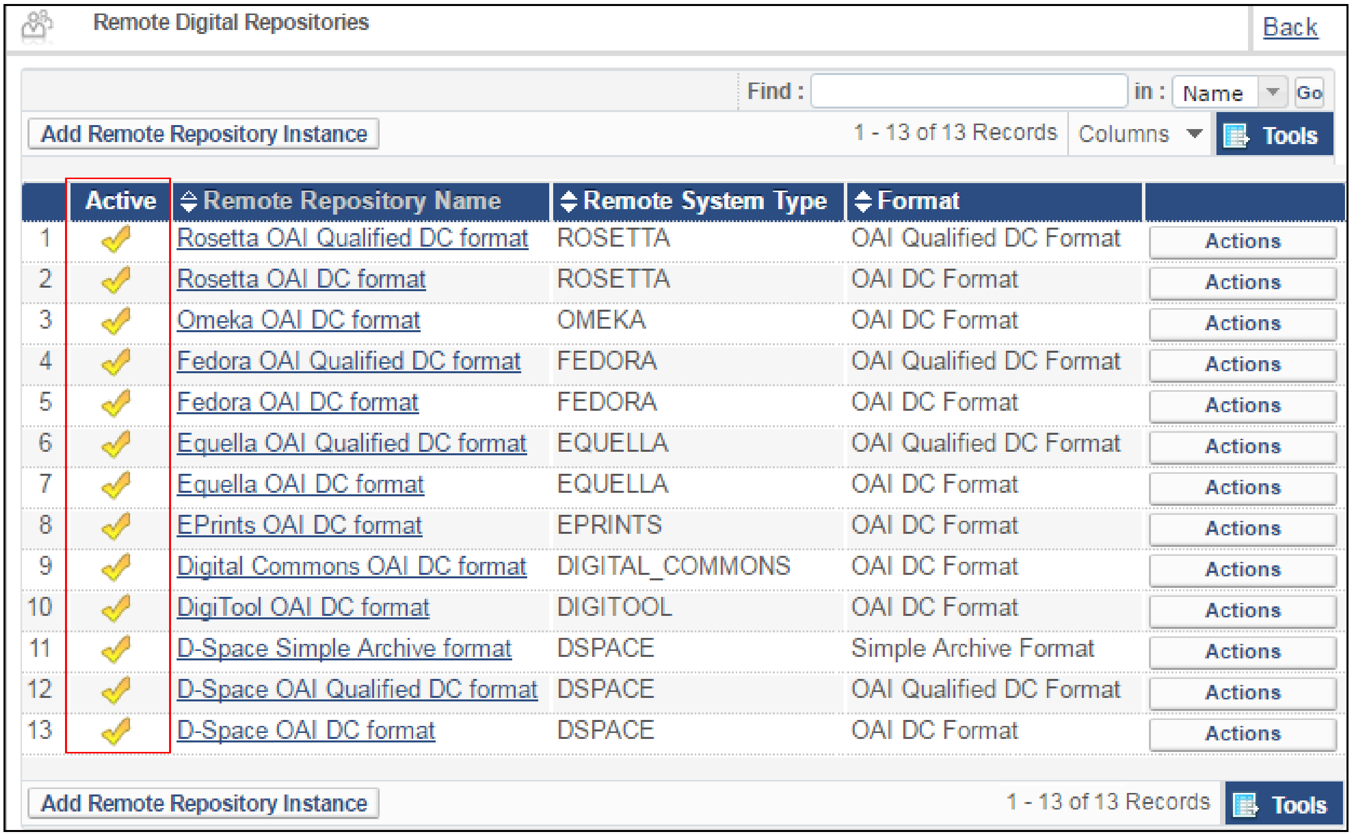
- Deposit Configuration – There are several configuration activities that must be performed to allow you to use the Deposit functionality:
  - Configuring Deposit profiles – Before deposits can be made, a deposit configuration profile must be created that determines how submitted deposits are processed.
  - Configuring Deposit Return Reasons – You can configure the email message sent to depositors when their deposit is returned for corrections.
  - Configuring Deposit Decline Reasons – You can configure the email message sent to depositors when their deposit is declined.
  - Configuring Patron Deposit Templates – You can configure the template of the email sent to depositors when their deposit is submitted, approved, declined, returned, or withdrawn.
- Search for Deposits – You can search for deposits submitted to Alma.
- Approve Deposits – You can approve deposits submitted to Alma by patrons.
- Staff-Mediated Deposits – Library staff can submit deposits to Alma on behalf of patrons.

Activating/Deactivating Remote Digital Repositories

Remote digital repositories can now be deactivated so that they do not appear in the drop-down list when creating an import profile and adding a digital representation. This way only the remote repositories that are used are displayed.

To support this feature, the following developments have been implemented:

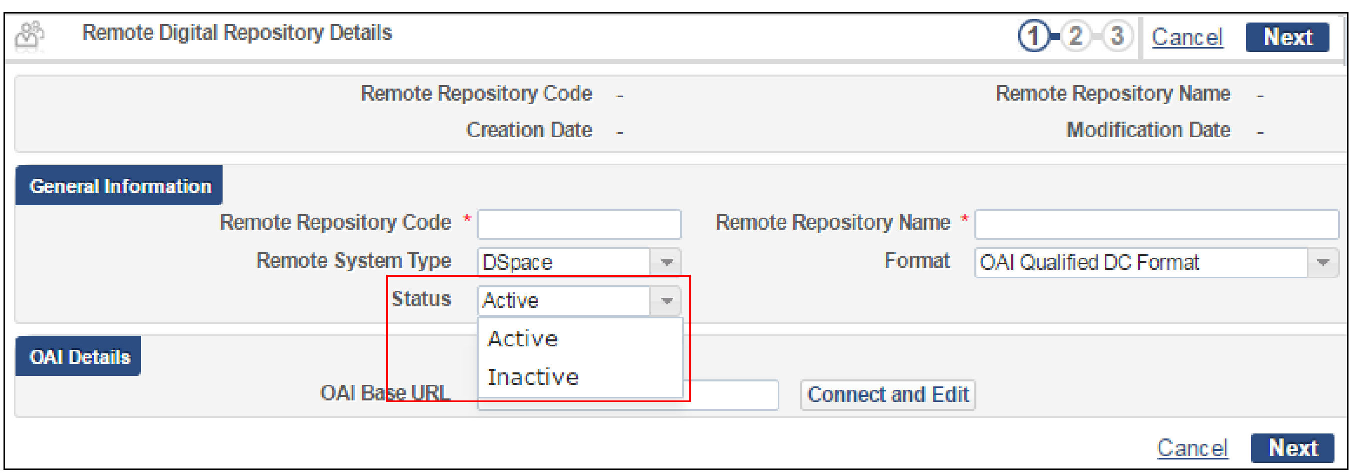
- The **Active** column appears in the list of remote repositories. A yellow check mark indicates that the remote repository is active. When clicked, remote repository becomes inactive and the check mark becomes gray.



Active Column

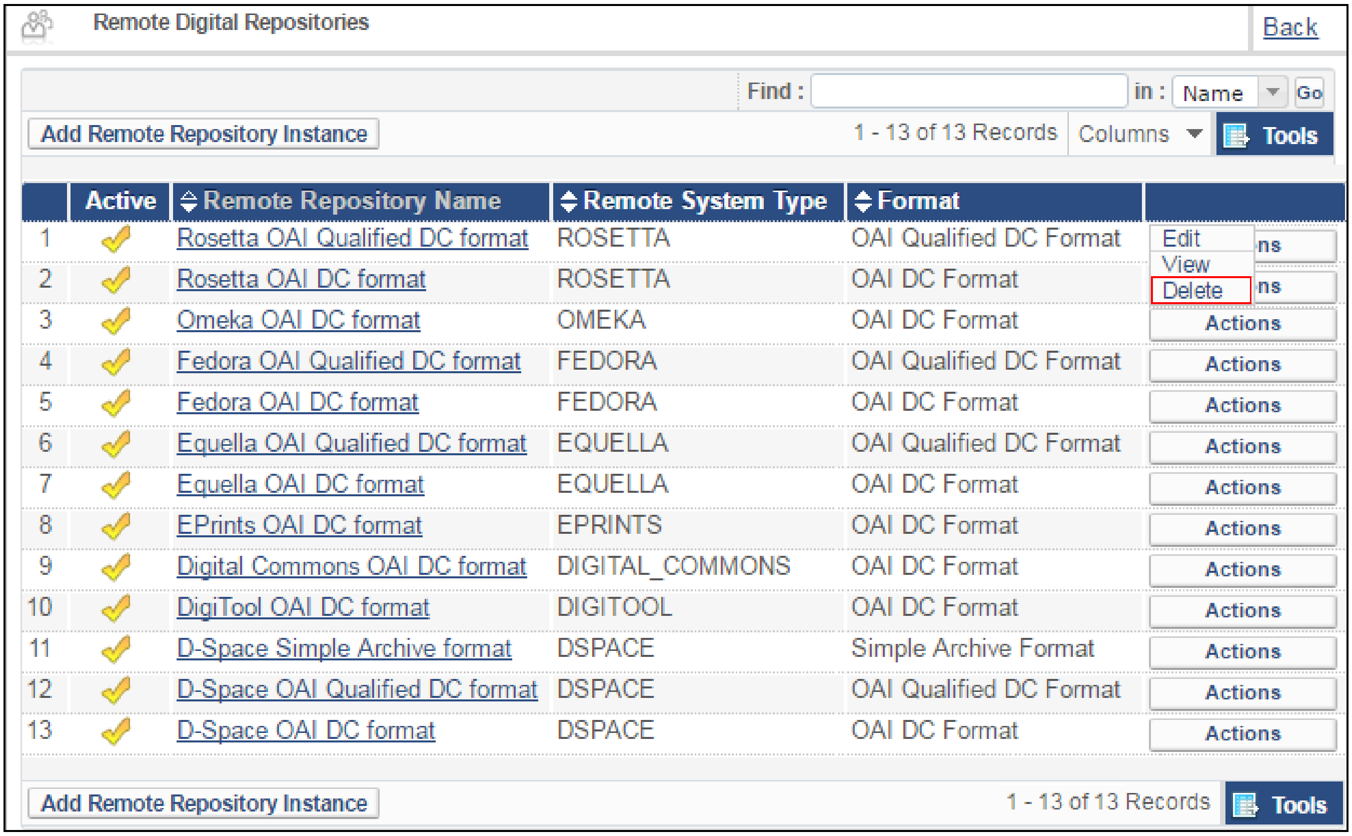
NOTE: If an import profile is configured with a remote repository, the remote repository cannot be disabled.

- When configuring a remote repository, you can now mark it as **Active** or **Inactive**:



Status Drop-Down List

Additionally, you can now delete remote repositories:

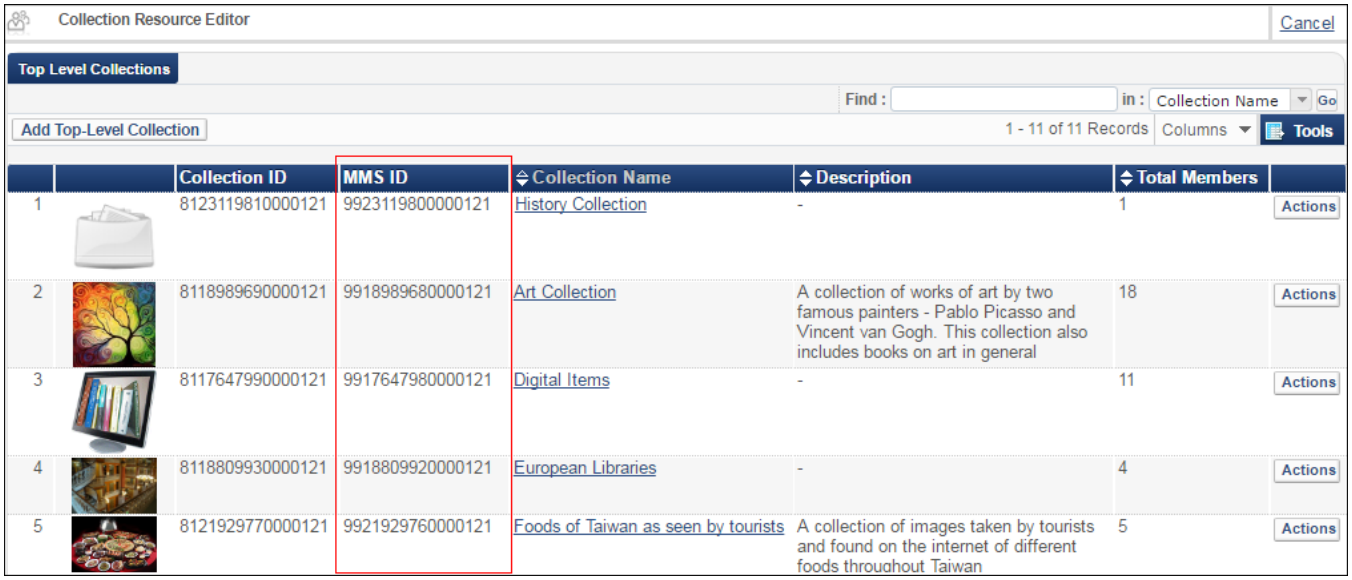


Delete Remote Repository

MMS ID Column Added to Digital Lists

The MMS ID column was added to the following digital-related pages in Alma:

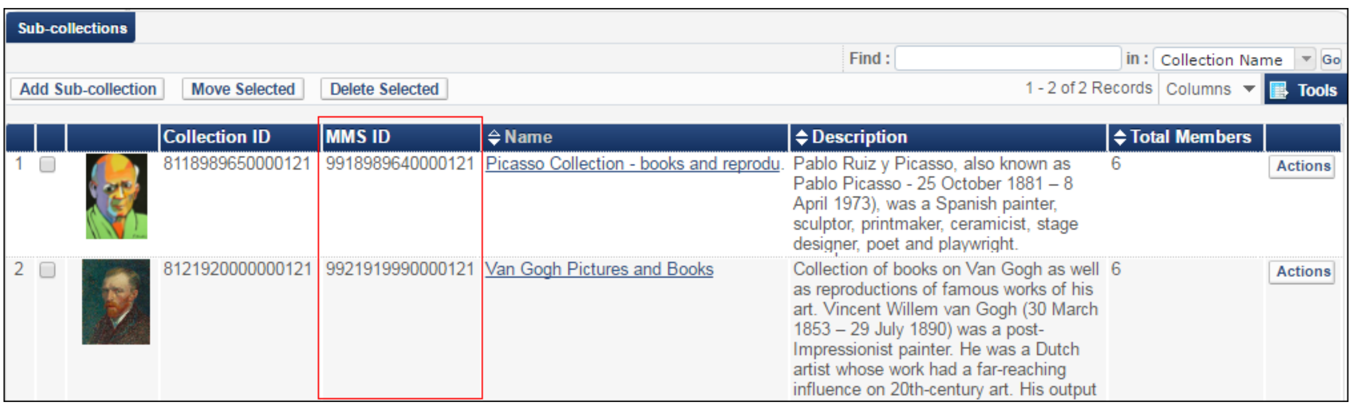
- Top-Level Collections:



		Collection ID	MMS ID	Collection Name	Description	Total Members	
1		8123119810000121	9923119800000121	History Collection	-	1	Actions
2		8118989690000121	9918989680000121	Art Collection	A collection of works of art by two famous painters - Pablo Picasso and Vincent van Gogh. This collection also includes books on art in general	18	Actions
3		8117647990000121	9917647980000121	Digital Items	-	11	Actions
4		8118809930000121	9918809920000121	European Libraries	-	4	Actions
5		8121929770000121	9921929760000121	Foods of Taiwan as seen by tourists	A collection of images taken by tourists and found on the internet of different foods throughout Taiwan	5	Actions

Collections

- Sub-Collections:



			Collection ID	MMS ID	Name	Description	Total Members	
1			8118989650000121	9918989640000121	Picasso Collection - books and reprodu.	Pablo Ruiz y Picasso, also known as Pablo Picasso - 25 October 1881 – 8 April 1973), was a Spanish painter, sculptor, printmaker, ceramicist, stage designer, poet and playwright.	6	Actions
2			8121920000000121	9921919990000121	Van Gogh Pictures and Books	Collection of books on Van Gogh as well as reproductions of famous works of his art. Vincent Willem van Gogh (30 March 1853 – 29 July 1890) was a post-Impressionist painter. He was a Dutch artist whose work had a far-reaching influence on 20th-century art. His output	6	Actions

Sub-Collections

Additional Digital Resource Management Enhancements

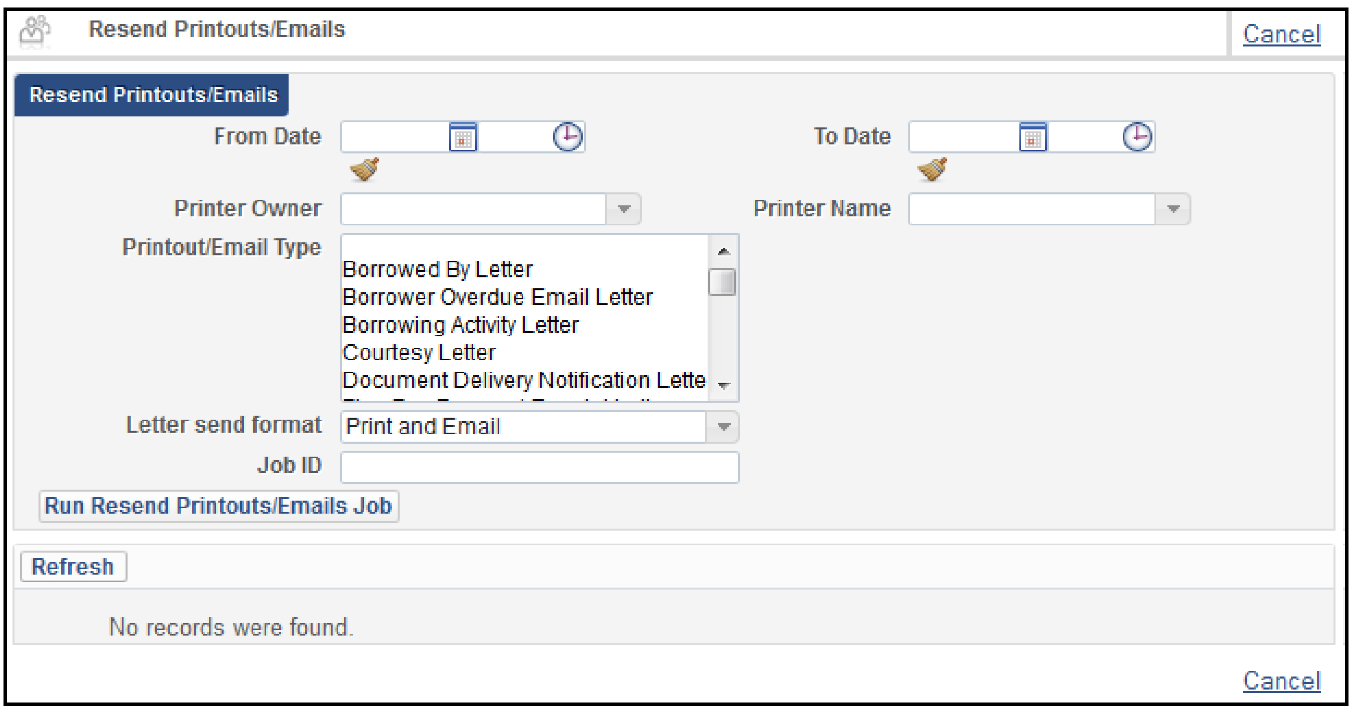
- UNIMARC, KORMARC, and MARC21 can now be used interchangeably as the source and target formats when creating digital import profiles.
- The **Clean Operational Thumbnails** job was removed. This job was not in use.

Knowledge Center

Fulfillment - January 2017 Enhancements

Resending Printouts/Emails

You can now resend printouts or emails, either from the new Resend Printouts/Emails page or from the **History** tab of the Monitor Jobs page. The resend process checks for prior attachments that have been sent and resends the attachments.



Resend Printouts/Emails page

The Resend Printouts/Emails page (**Fulfillment > Advanced Tools > Resend Printouts/Emails**) includes the following parameters.

- From Date (date and time)
- To Date (date and time)
- Printer Owner

- Printer Name
- Job ID
- Printout/Email Type

For more information, see Resending Printouts/Emails.

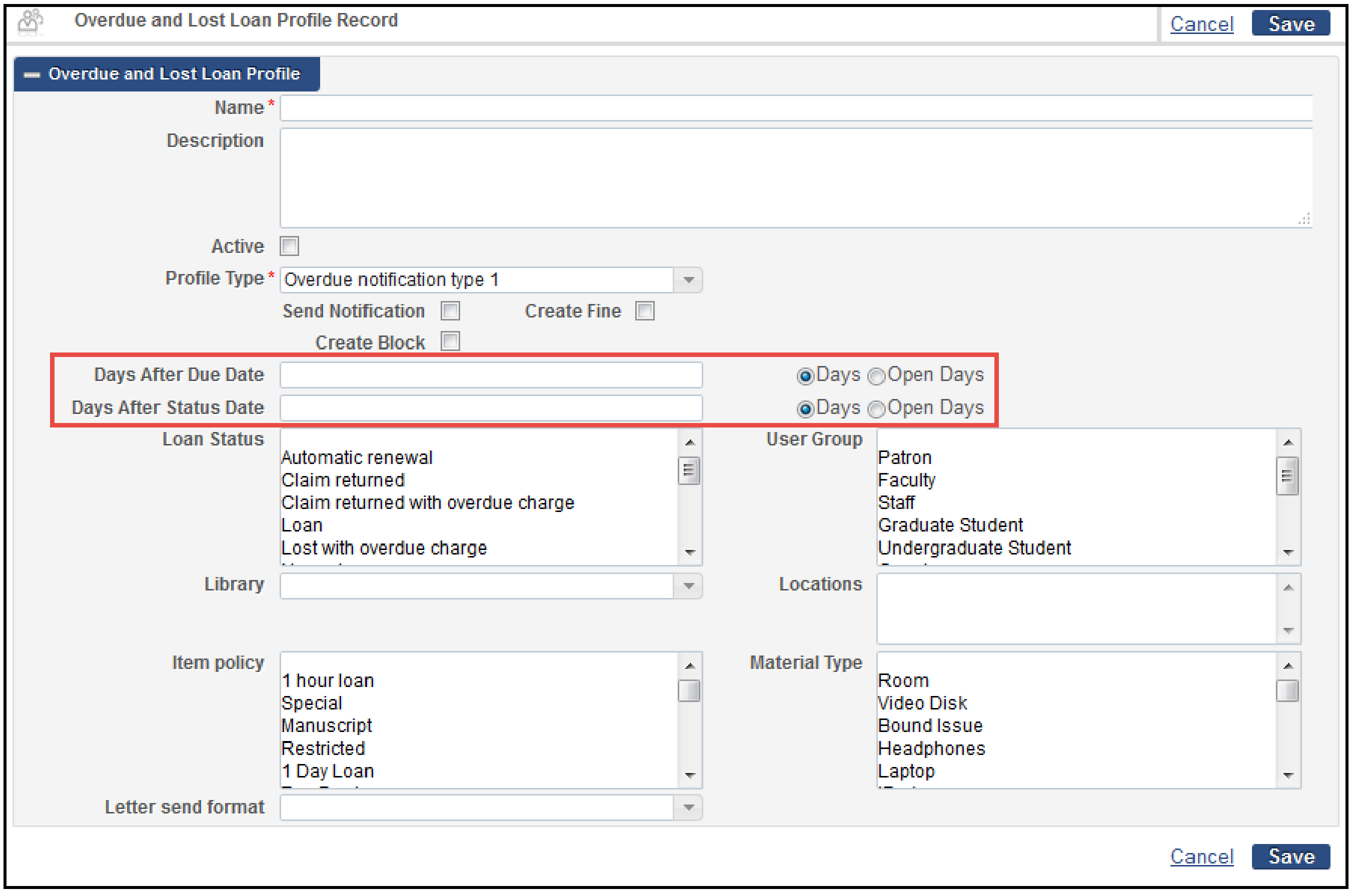
The **Actions** button of the **Monitor Jobs** page now has a new option, **Resend Printouts/Emails** for the following jobs:

- Requests - Handle Expiration Step
- Loans - Due Date Correction after Calendar Change
- Notifications - Send Courtesy Notices and Handle Loan Renewals
- Notifications - Send Periodic Fulfillment Activity Report
- Notifications - Send Due Date Reminders
- Requests - Recalculate after Inventory Update
- Loans - Overdue and Lost Item
- Send Overdue Notices Job
- Send Overdue Message to Resource Sharing Borrowing Partner
- Fines\Fees Notifications Job
- Requests - Send report
- Borrowing Activity Report Job

When selecting the resend option, the resend utility will open with the job ID, allowing the user to limit the resend to only specific printers.

New Calendar Options in Lost and Overdue Loan Profiles

You can now configure the **Days after Due Date** and **Days After Status Date** fields on the **Overdue and Lost Loan Profiles** to consider either the library's open days or the calendar days for the number of days counted by the job.



Overdue and Lost Loan Profile

Select **Days** for the **Loans - Overdue and Lost Item** job to consider the calendar days. This option is selected by default, and is selected for all previously existing overdue and lost loan profiles. Selecting Open Days will consider only days the library was open. If configured this way, the system will check that the number of open days between the current day and the due date, excluding the due date itself, matches the configured number. For example:

- The library's open days are Monday and Wednesday
- The **Days After Due Date** equals 1 and **Open Days** is selected
- The loan's due date is on Monday
- The loan will be processed on Wednesday

The new **overdue_lost_loan_profile_ignore_due_hour** parameter, configurable from the **Fulfillment Configuration > Other Settings** menu, allows control of whether the due hour will be taken into consideration. For example, if the profile is set to match on 1 overdue date and the parameter is set to **false**, then a loan that was due yesterday at 12:00 will be considered overdue only today at 12:01. If set to **true**, the loan will be considered a match immediately on the next day, ignoring the due hour. The default is **false**.

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

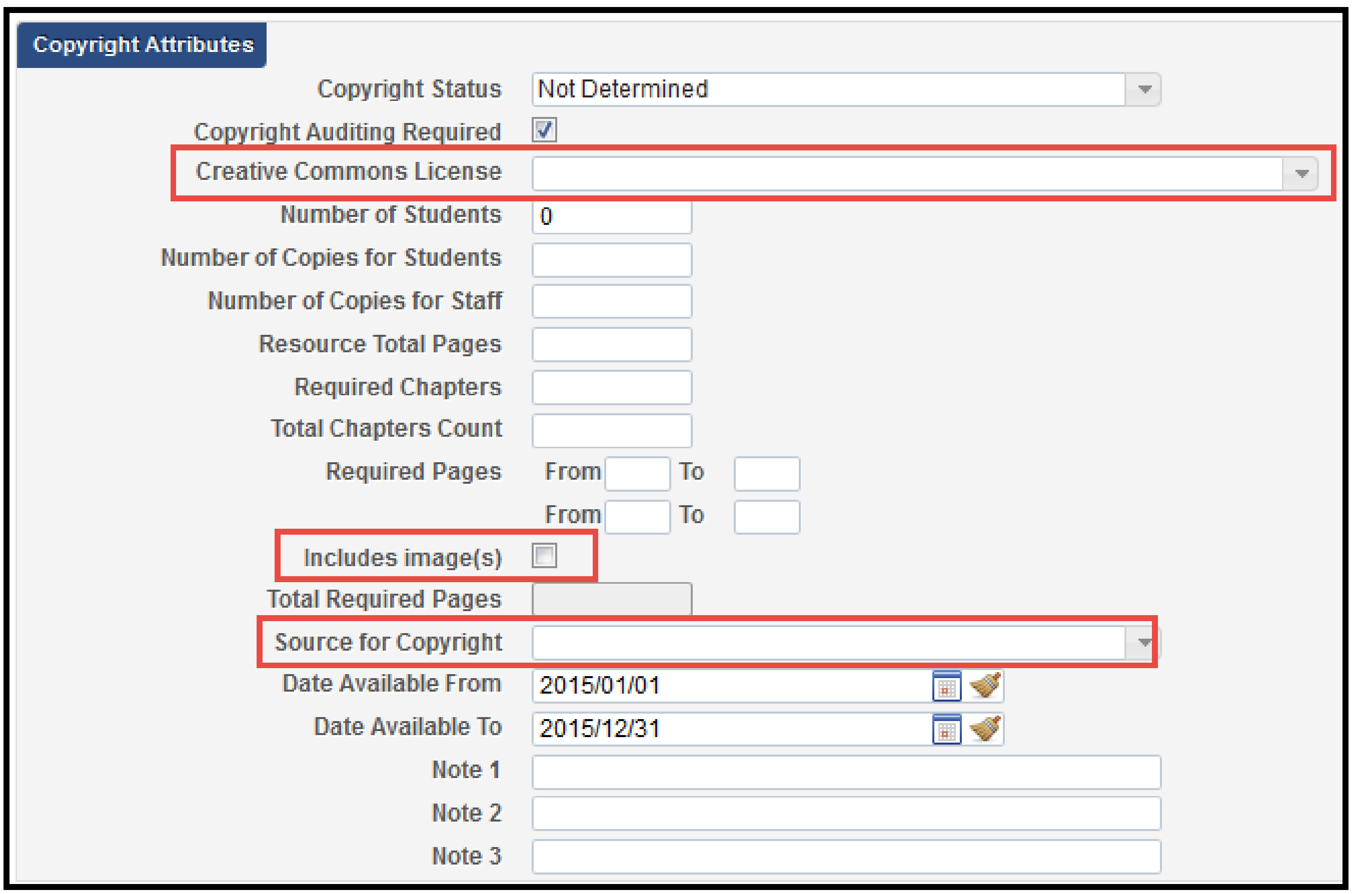
Upload Files to a Citation

You can now upload or delete a file for a citation on the Edit Reading List Citation page. A new area **File Upload** appears on this page. Use this area to upload or remove a file for this citation. For more information, see Adding Citations to a Reading List.

Changes to the Copyright Attributes Section for Citations and Staff Digitization Requests

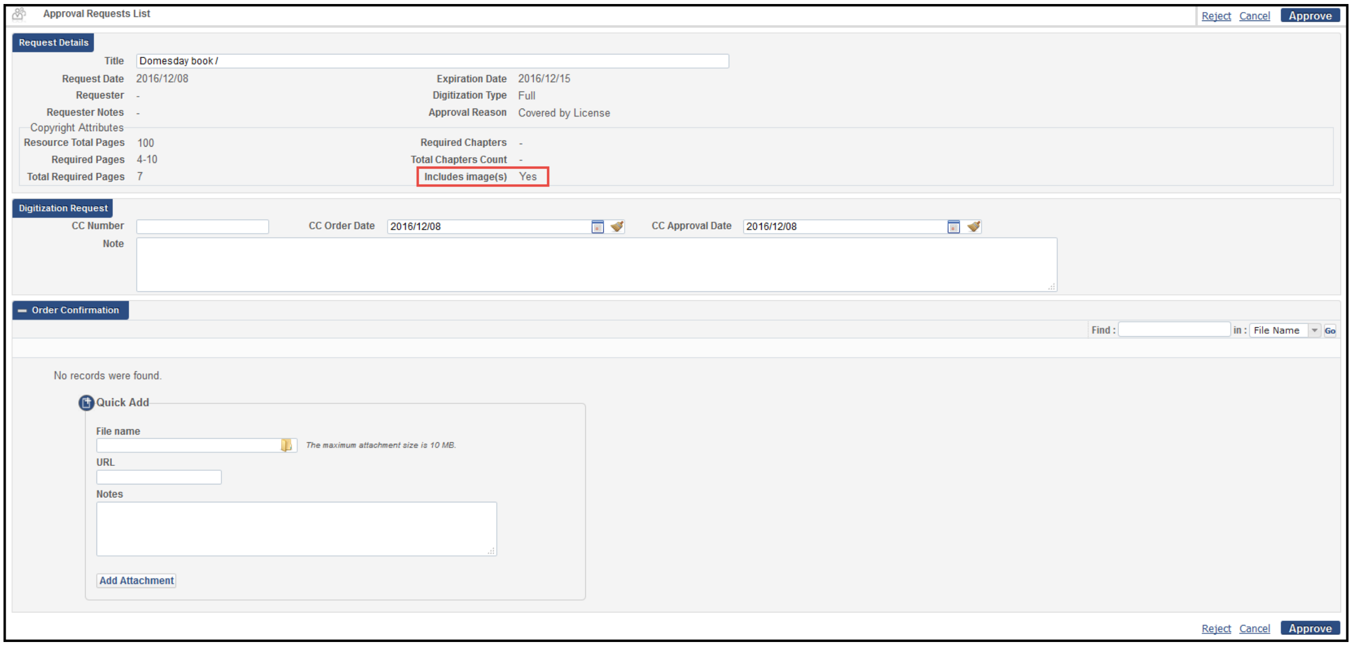
NOTE: For other changes to the **Copyright Attributes** area, see Regional Licensing and Creative Commons for Citations.

The new field **Include Image(s)** appears in the **Copyright Attributes** area on the Edit Reading List Citation page (see Managing Citations) and when creating a staff digitization request on the Create Request page (see Creating a Request).



Copyright Attributes Section on the Edit Reading List Citation Page

This field is for informational purposes only; however, an indication of whether or not the checkbox was selected appears on the Approval Requests List page when evaluating whether to approve or reject the request. For more information, see Approving/Rejecting a Request for Digitization.



Approval Requests List

Regional Licensing

When the new parameter **copyright_region** (see Configuring Other Settings) is set to either **AU** or **UK**, the **Source for Copyright** field contains options relevant to your region's licensing agency. This field, formerly appearing as **Source (for CLA)**, appears in the **Copyright Attributes** section on the Edit Reading List Citation page (see Managing Citations) or when creating a staff digitization request on the Create Request page (see Creating a Request).

NOTE: **copyright_region** replaces the previously existing (UK only) parameter **display_CLA_info_in_alma**.

For **AU**, the options are:

- W - Electronic and not Paginated
- P - Hardcopy, or Electronic and Paginated
- G - Graphic/Artwork only

For **UK**, the options are (as they were before):

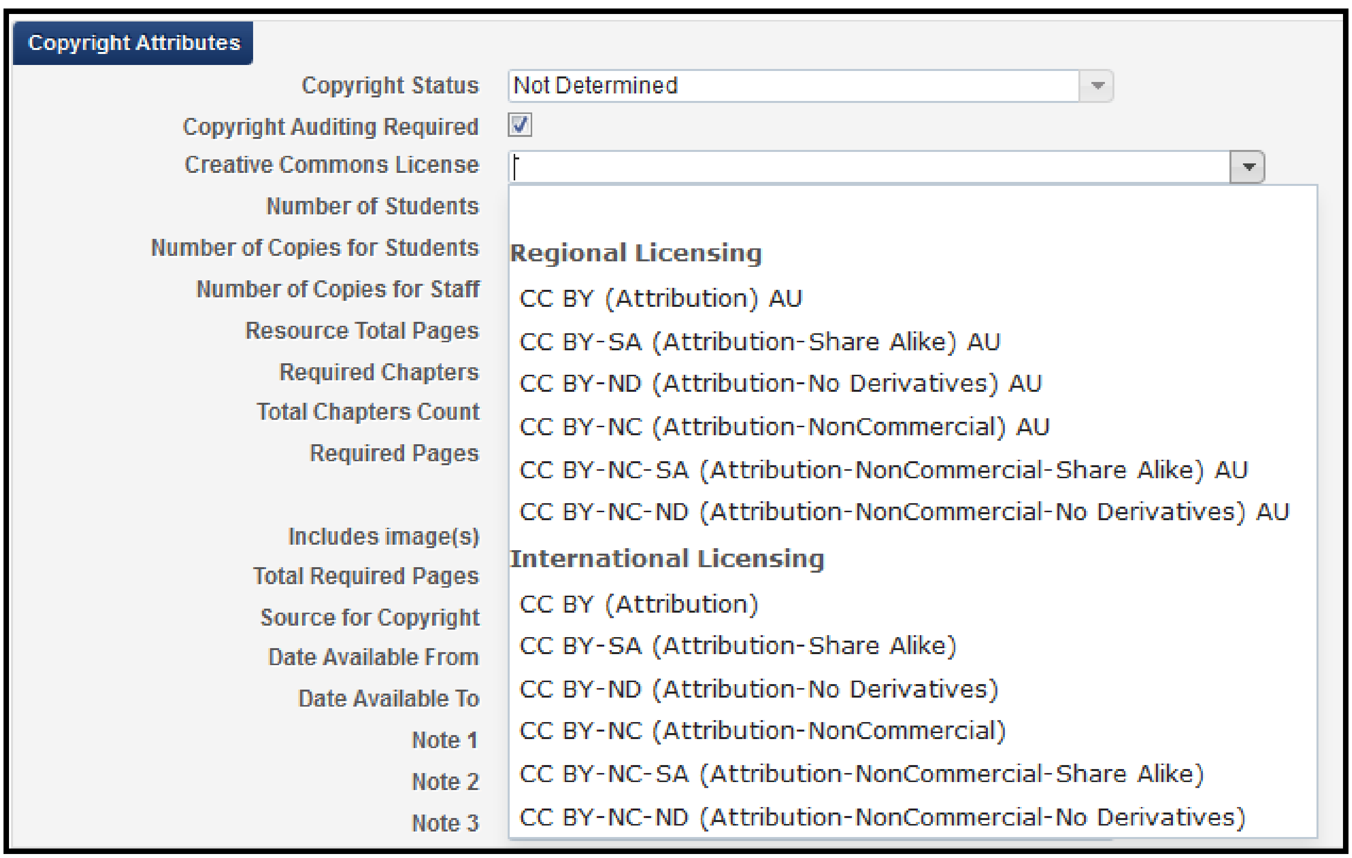
- A - From Paper original owned by institution
- B - From Digitial original licensed to institution
- C - From copyright fee paid copy
- D - From another HEI under Sharing Provision

For more usage of the **copyright_region** parameter, see the following section, **Creative Commons for Citations**.

Creative Commons for Citations

You can now select a Creative Commons license for a citation's copyright clearance request (see Managing Citations).

The available Creative Commons options depend on your region, which is set by the parameter **copyright_region** (see Configuring Other Settings). All regions support international Creative Commons licenses; Australia (**AU**) also supports regional Creative Commons licenses.



Citation Copyright Attributes - Creative Commons License Options for Australia

The **Creative Commons Licensing** option is disabled if the citation was already saved with any kind of request for copyright clearance (a Creative Commons option, self-declared, and so forth). For more usage of the **copyright_region** parameter, see the previous section, Regional Licensing.

Additional Digital Profile Rule Clauses for Citations

The following digital profile rule clauses related to citations were added. For more information, see Configuring Digitization Profile Rules.

- **Citation License Type** - Check the citation license type. Values are **Creative Commons** (any), **SIPX**, and **Self-Declared**.

  NOTE: SIPX is relevant only for institutions that have enabled Leganto. For more information about SIPX, see Working with SIPX.

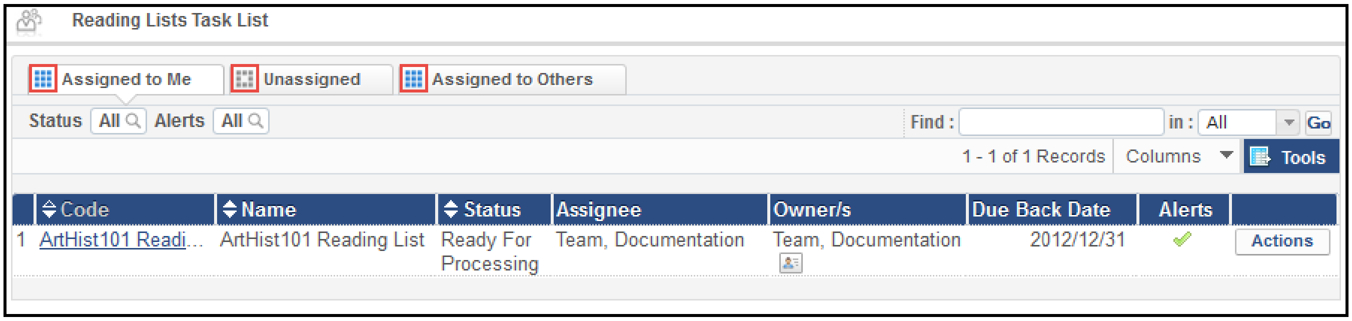
- **Citation Material Type** - Check the citation material type. Values are the current list of material types, such as **Abstract** or **Anthology**.

Default digital profile rules (disabled by default) were added for automatic approval of self-declared, Creative Commons, and SIPX license types.

In addition, the **Copyright Agency Approval Permission** clause was generalized for any region (instead of just UK). Select all valid values for matching.

Additional Fulfillment Enhancements

- The **Requests - Restore Temporarily Shelved Items** job has new run times available. Two additional once daily run times have been added as well as an option to run the job every six hours.
- The **Active/Expired Hold Shelf task lists** display a new link, **View Audit Trail**, for each item. The link displays the **Request Processing Audit Trail** page.
- You can click the **View It** link beneath a citation to view a digital representation associated with a citation (in addition to the link's previous function, which enabled you to view the OpenURL link resolver links to an article).
- Only one open digitization request can now exist for any citation.
- The reading list pages now include the Has Content indicator.



Reading Lists Task List

- In the course loader integration profile, the option **Being Prepared** was added as an option to the field **On rollover citation statuses**. Use this option to set the status of all citations to **Being Prepared** when performing a rollover on a reading list.

NOTE: In a future Alma release, duplicating a citation will also copy the citation's tags and public notes.

Resource Sharing - January 2017 Enhancements

Alma Document Delivery for Resource Sharing Requests

Resource Sharing requests that are fulfilled digitally as a document delivery service may now be sent from the lender institution as an email that contains a link to the digital resource. The patron gets access to the resource only following a successful authentication. The link remains active for a configurable time, and the number of patron accesses may also be limited by the lender.

This new option is in addition to the previously existing option to send the digital content as an attachment in the email.

This functionality is active only when both resource sharing partners are Alma institutions using the ISO protocol. The digitization target in the applicable digitization profile rule must be set to **Document delivery - link**. The **Requested Format** in both corresponding borrowing and lending requests at both institutions must also be set to **Digital**.

For more information, see Delivering Digitized Items.

Control Creation of Move Request from a Lending Request

A new user parameter, **rs_auto_request_lending_with_serials**, controls whether a move request will automatically be created when the lending request is created on a serial or multi-volume title. If the lending side located record is associated with at least one multi-volume or serial item (that is, the item that has a **Description** field), setting the parameter to **false** will stop the move request from being automatically created. If the parameter is set to **true**, the move request will still be created. The parameter defaults to **true**.

For more information, see Configuring Other Settings.

Additional Resource Sharing Enhancements

- If the customer parameter, **rs_borrower_copyright_management** is set to **true**, the **Resource Sharing Copyright Status** page becomes available to configure resource sharing copyright statuses (**Fulfillment Configuration > Configuration Menu > Resource Sharing > Copyright Status**). For more information, see Configuring Resource Sharing Copyright Statuses.

- Setting the customer parameter, **rs_allow_actions_on_scan_in** to **false**, now blocks shipping from **Manage Item Returns** in addition to the previously existing block on the Scan In Items page. The block on the Manage Item Returns page does not include an override option.
- When Alma is configured to automatically create a move request upon lending creation (that is, **rs_auto_request_lending** is set to **true**), a barcode is sent as part of the request and the barcode is part of the **Locate by** fields. Alma creates the move request based on the barcode regardless of the setting for request with volume/issue in the **rs_auto_request_lending_with_volume_issue** parameter.
- If the lending setup of the resource sharing library has the **Reject request when no requestable/available items** check box selected, and a lending request is created with the barcode as part of the **Locate by** fields (sent as part of the request), the requestability will be checked based on the barcode that was sent.

Collaborative Networks - January 2017 Enhancements

Identify Bibliographic Records that Are Not Used in the Network Zone

Alma provides a new process that identifies bibliographic records that are not used in the Network Zone. Bibliographic records are considered not used when no member has any inventory associated with them. Bibliographic record usage can also be checked for the following:

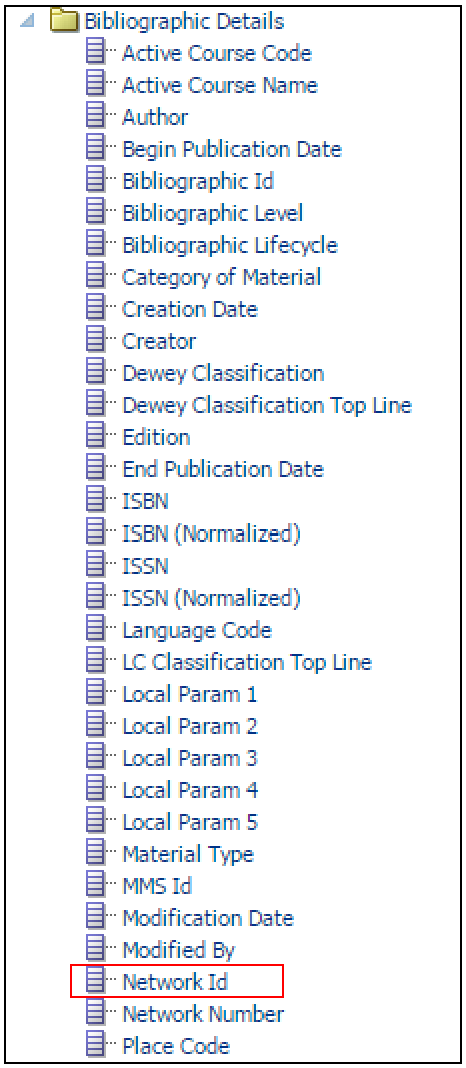
- Active work orders
- Active requests
- Associated PO lines

Identifying unused records in the Network Zone is the basis for the cleanup process of unused records. See Deleting Unused Bibliographic Records in the Network Zone for more information.

Analytics - January 2017 Enhancements

Network ID Field Added to Bibliographic Details

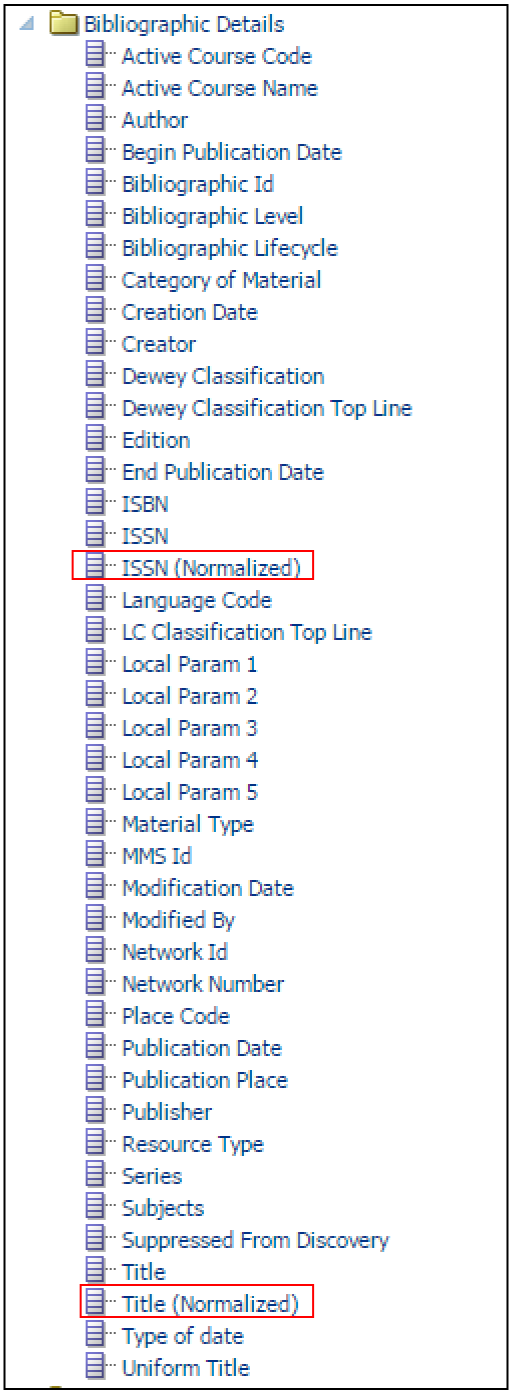
The **Network ID** field was added to the shared **Bibliographic Details** dimension for use by institutions implementing a Network Zone. It is the same as the MMS ID of the bibliographic record in the Network Zone and can be used to create reports that show the MMS ID in the member institution (using the existing MMS ID) as well as the corresponding MMS ID in the Network Zone (using the new Network ID).



Network ID

Title (Normalized) and ISSN (Normalized) Fields Added to Bibliographic Details

The **Title (Normalized)** and **ISSN (Normalized)** fields were added to the shared **Bibliographic Details** dimension. These fields are useful when you want to use the normalized title or ISBN from one subject area to compare with a report with fields from a different subject area.



Title (Normalized) and ISSN (Normalized)

View It Clicks of Digital Representations in Link Resolver Usage

It is now possible to configure Alma Analytics to include View It clicks of digital representations when calculating link resolver usage. For information on configuring this feature, see Configuring Other Settings.

Additional Analytics Enhancements

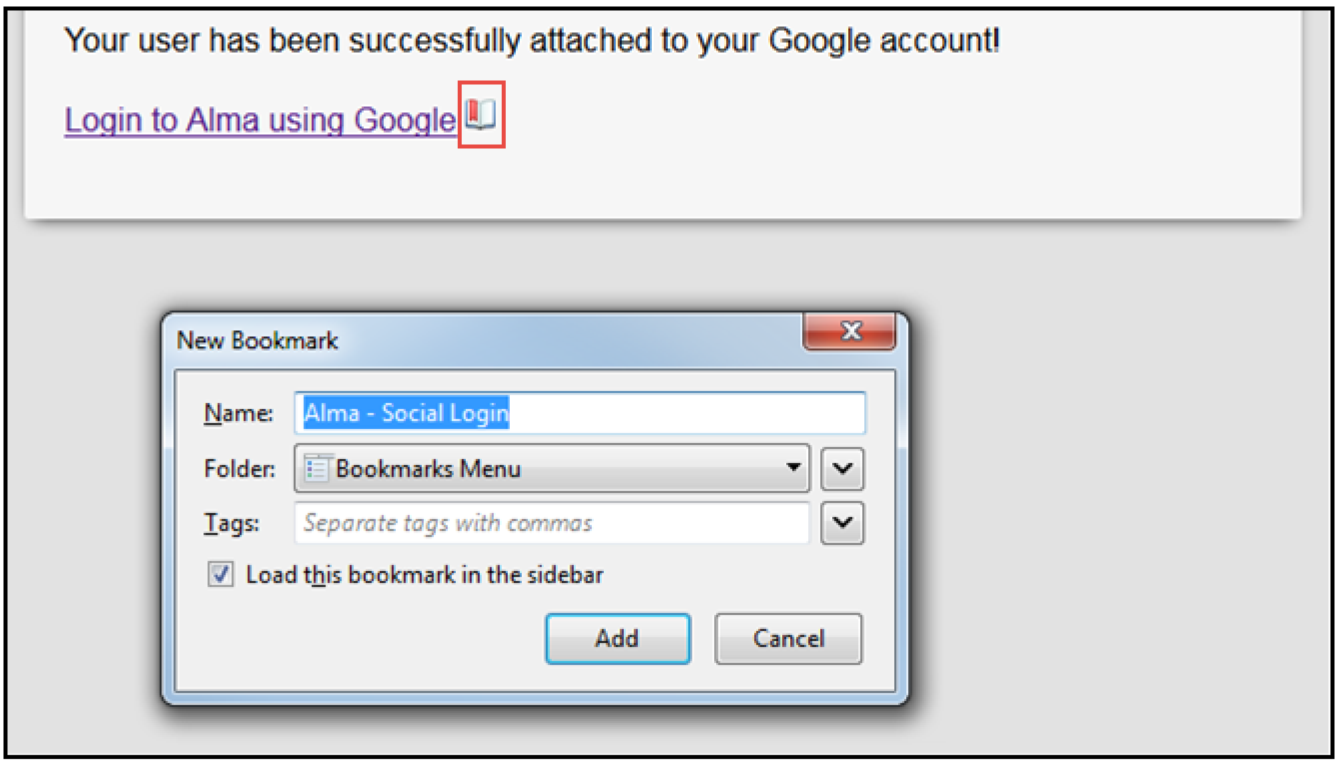
- Alma Analytics can now export up to 500,000 lines to a CSV file.
- The **Source** field in the Link Resolver Usage subject area now displays the Leganto course code and course section.
- The **Storage Location ID** field was added to the Physical Item Details dimension of the Physical Items subject area. It holds the ID of the storage location of the physical item.
- The **Partner Deleted Status** field was added to the Partner dimension of the Borrowing Requests subject area. It indicates whether the partner was deleted.

ExLibris Knowledge Center

Administration and Infrastructure - January 2017 Enhancements

(URM-61943) Social Authentication Successful Connection Message

A direct link to Alma now displays when a staff member logs in successfully with their social network login. An option to bookmark the link is also included (compatible with Firefox and Internet Explorer only).



Social Authentication Success Page

(URM-61944) Social Authentication Activation Letter

The Social Login Account Attached Letter can now be sent to a user when social authentication has been successfully established. For more information, see Social Login.

Authentication via your social network has been activated 11/28/2016

Abutbul Niv
Malha technological park
Jerusalem

Training
Malcha Technological Park
Jerusalem

Dear Sir/Madam Abutbul

Authentication via your social network has been activated.
Click here to login to Alma using your social network account.

Sincerely,
Training
Jerusalem

Clean Training

Social Login Account Attached Letter

Additional Administration and Infrastructure Enhancements

- (URM-63764) The Alma Login page now enables your browser to remember your user name and password (if your browser is configured to do so).
- (URM-63776) The default for the **Find in** search on the Manage Sets page is now **Name** as opposed to **Created by**.
- (URM-42176) The patron gender now includes Male, Female, Other, and None.
- (URM-56760) The patron primary id may now be assigned as the identifier for user photos. Assign the value of `USERNAME` to the customer parameter, **photo_identifier_type**. This parameter can be found on the customer parameters page (**Administration > User Management Configuration > Configuration Menu > General > Other Settings**).

Data Services - January 2017 Enhancements

The following was added to the Alma Community Zone during the month of December:

- 2087 authority records for BK Basisklassifikation classification were added to the Community Zone.
- 8,057,798 National Library of Spain name and subject authority records were added to the Community Zone.
- More than 1.8 BNF name authority records were converted and added to the Community Zone as authority MARC21 records
- 31250 MARC records from Cambridge University Press were used to enhance Community Zone bibliographic records.
- More than 700 Credo Reference MARC records from Cambridge University Press were used to enhance Community Zone bibliographic records.
- RAMEAU subject authority records can be now found in the Community Zone in MARC21 format.

Library of Congress Authorities Community Zone Updates

The following are the Library of Congress subject authority updates for the period of November 24th through December 27th:

- Number of records updated: 223
- Number of records added: 270
- Number of records deleted: 18

The following are the Library of Congress name authority updates for the period of November 24th through December 27th:

- Number of records updated: 18241
- Number of records added: 31157
- Number of records deleted: 464

The following are the Canadian name authority updates for the period of November 24th through December 27th:

- Number of records updated: 74
- Number of records added: 1833

- Number of records deleted: 13

The following are the Library of Congress Genre/Form Terms (LCGFT) updates for the period of November 24th through December 27th:

- Number of records added: 9

New Electronic Collections Added to the Alma CKB

The following collections were added to the Alma Community Zone from November 24th through December 27th:

- Cambridge University Press Journals Digital Archive 2016 Top Up
- Digitalia eBooks 2015
- Editorial Medica Panamericana
- iBooks.ru
- KB+ BIBSAM British Medical Journals 2017-2019
- KB+ BIBSAM British Medical Journals Complete 2017-2019
- KB+ BIBSAM Collections Royal College of Nursing Journals 2017-2019
- KB+ BIBSAM Elsevier Cell Press 2017
- KB+ BIBSAM Elsevier Journals Outside Freedom Collection 2017
- KB+ BIBSAM Elsevier SD Freedom Collection 2017
- KB+ BIBSAM Mary Ann Liebert Publishers Journals 2017-2019
- KB+ BIBSAM Oxford University Press Journals 2016 collection 2017
- KB+ BIBSAM Sage Premier 2017-2019
- KB+ BIBSAM Sage The Royal Society of Medicine Journals 2017-2019
- KB+ BIBSAM Taylor & Francis Informa Healthcare Journals 2017-2019
- KB+ BIBSAM Taylor & Francis SSH and S&T Upgrade 2017
- KB+ BIBSAM Taylor Francis Medical Package Upgrade 2017
- KB+ BIBSAM Universitesforlaget Idunn.no Journals 2017
- KB+ JISC Cengage Academic OneFile 2016-2019
- KB+ JISC Collections Annual Reviews Biomedical Life Sciences 2016-2017 Post 2008
- KB+ JISC Collections Annual Reviews Biomedical Life Sciences 2016-2017 Pre 2008
- KB+ JISC Collections Annual Reviews Sciences 2016-2017 Post 2008
- KB+ JISC Collections Annual Reviews Sciences 2016-2017 Pre 2008
- KB+ JISC Collections Brill Collection 2017

- KB+ JISC Collections British Medical Journal Journal Collection 2017
- KB+ JISC Collections British Medical Journal Optional Access Journals 2017-2018
- KB+ JISC Collections Cambridge University Press Full Collection 2017
- KB+ JISC Collections Cambridge University Press humanities and Social Sciences 2017
- KB+ JISC Collections Cambridge University Press science Technology and Medicine 2017
- KB+ JISC Collections Duke University Press Scholarly Collection 2017
- KB+ JISC Collections Edinburgh University Press Complete Collection 2017
- KB+ JISC Collections Georg Thieme Verlag Chemistry Collection 2017
- KB+ JISC Collections Georg Thieme Verlag Medicine Collection 2017
- KB+ JISC Collections Institution of Civil Engineers Engineering Journals 2017
- KB+ JISC Collections Institution of Civil Engineers Journals 2017
- KB+ JISC Collections JSTOR Arts and Sciences I Collections 2016-2017
- KB+ JISC Collections JSTOR Arts and Sciences II Collection 2016-2017
- KB+ JISC Collections JSTOR Arts and Sciences III Collection 2016-2017
- KB+ JISC Collections JSTOR Arts and Sciences IV Collection 2016-2017
- KB+ JISC Collections JSTOR Arts and Sciences IX Collection 2016-2017
- KB+ JISC Collections JSTOR Arts and Sciences V Collection 2016-2017
- KB+ JISC Collections JSTOR Arts and Sciences VI Collection 2016-2017
- KB+ JISC Collections JSTOR Arts and Sciences VII Collection 2016-2017
- KB+ JISC Collections JSTOR Arts and Sciences VIII Collection 2016-2017
- KB+ JISC Collections JSTOR Arts and Sciences X Collection 2016-2017
- KB+ JISC Collections JSTOR Arts and Sciences XI Collection 2016-2017
- KB+ JISC Collections JSTOR Arts and Sciences XII Collection 2016-2017
- KB+ JISC Collections JSTOR Arts and Sciences XIII Collections 2016-2017
- KB+ JISC Collections JSTOR Arts and Sciences XIV Collection 2016-2017
- KB+ JISC Collections JSTOR Arts and Sciences XV Collection 2016-2017
- KB+ JISC Collections JSTOR Biological Sciences Collection 2016-2017
- KB+ JISC Collections JSTOR Business and Economics Collection 2016-2017
- KB+ JISC Collections JSTOR Business I Collection 2016-2017
- KB+ JISC Collections JSTOR Business II Collection 2016-2017
- KB+ JISC Collections JSTOR Business III Collection 2016-2017
- KB+ JISC Collections JSTOR Business IV Collection 2016-2017

- KB+ JISC Collections JSTOR Ecology and Botany I Collection 2016-2017
- KB+ JISC Collections JSTOR Ecology and Botany II Collection 2016-2017
- KB+ JISC Collections JSTOR Health and General Sciences Collection 2016-2017
- KB+ JISC Collections JSTOR Hebrew Collection 2016-2017
- KB+ JISC Collections JSTOR Jewish Studies Collection 2016-2017
- KB+ JISC Collections JSTOR Language and Literature Collection 2016-2017
- KB+ JISC Collections JSTOR Life Sciences Collection 2016-2017
- KB+ JISC Collections JSTOR Mathematics and Statistics Enhanced Collection 2016-2017
- KB+ JISC Collections JSTOR Mathematics and Statistics Legacy Collection 2016-2017
- KB+ JISC Collections JSTOR Music Enhanced Collection 2016-2017
- KB+ JISC Collections JSTOR Music Legacy Collection 2016-2017
- KB+ JISC Collections JSTOR Religion and Theology Collection 2016-2017
- KB+ JISC Collections Oxford University Press Economics and Finance Collection 2017
- KB+ JISC Collections Oxford University Press Full Collection 2017
- KB+ JISC Collections Oxford University Press Full Collection 2017
- KB+ JISC Collections Oxford University Press Humanities and Social Sciences 2017
- KB+ JISC Collections Oxford University Press Humanities Collection 2017
- KB+ JISC Collections Oxford University Press Humanities Collection 2017
- KB+ JISC Collections Oxford University Press Law Collection 2017
- KB+ JISC Collections Oxford University Press Law Collection 2017
- KB+ JISC Collections Oxford University Press Life Sciences Collection 2017
- KB+ JISC Collections Oxford University Press Life Sciences Collection 2017
- KB+ JISC Collections Oxford University Press Mathematics and Physical Science 2017
- KB+ JISC Collections Oxford University Press Medicine Collection 2017
- KB+ JISC Collections Oxford University Press Medicine Collection 2017
- KB+ JISC Collections Oxford University Press Science Technology and Medicine 2017
- KB+ JISC Collections Oxford University Press Social Sciences Collection 2017
- KB+ JISC Collections Project Euclid Prime 2017
- KB+ JISC Collections Project Muse ARTS COLLECTION 2017
- KB+ JISC Collections Project Muse ASIAN STUDIES COLLECTION 2017
- KB+ JISC Collections Project Muse History Collection 2017
- KB+ JISC Collections Project Muse Literature Core Collection 2017

- KB+ JISC Collections Project Muse Literature Expanded Collection 2017
- KB+ JISC Collections Society For Industrial and Applied Mathematics Journal Collection 2017
- KB+ SHEDL Springer Compact 2016-2017
- KB+ SHEDL Springer Journals Adis
- KB+ SHEDL Wiley Full Collection 2015-2017
- Sage Clinical Medicine Package 2017
- Sage Deep Backfile Upgrade Package 2017
- Sage Health Sciences Package 2017
- Sage Premier 2017
- Sage STM Backfile Upgrade 2017
- Sage STM Package 2017

New External Search Resources

The following external search resources were added to Alma for the January release:

- ALMACALCNX – access fee required
- American Museum of Natural History Library
- Cornell University Library
- National Taiwan University Library
- Smithsonian Libraries
- The New York Botanical Garden
- University Library of Bozen/Bolzano – access fee required

Next Release Sneak Preview

Acquisitions

- Library Level Management of Funds/Ledgers – With the February release of Alma, it will be possible to start managing new ledgers and funds at the library level, allowing organizations to divide ledger/fund management and authorization among specific libraries.

Resource Management

- Controlled Vocabulary for Statistics Notes in the Item Record – An optional controlled vocabulary drop-down list will be enabled for the **Statistics Notes** fields in the Physical Item Editor's Notes tab.
- **Idea Exchange:** Support Batch Deletion of Empty Holdings Records – The February release will see new support for deleting holdings records with no items, as part of a new batch job.
- Assign a Title to a Collection from the MD Editor – There will be a new action in the MD Editor enabling you to add a title to a collection. This functionality will also enable you to see, from a bibliographic record, the collection to which it belongs.
- Unify All Set Management Menu Entries – Instead of being accessible from different Alma functional areas (Resource Management, Acquisitions, and Users) as it is today, Set Management will now be accessible from one link under Administration. The types of sets to be viewed/managed will depend on the role of the staff user.

Digital Resource Management

- New Deposit Functionality – With the January release, new Deposit functionality was added, allowing library staff to submit content to Alma to be added to the repository on behalf of patrons. With the February release, this functionality will be enhanced with the ability to deposit using the SWORD API.

Resource Sharing

- BLDSS Level of Service – It will be possible to configure a mapping table to map the values of the LevelOfService code table to BLDSS values.
- Notify Broker about a Recall Request – Alma will be able to notify a broker (lender side) that an item is requested for recall.
- **A NERS Enhancement:** Enhance Lists with the MMS ID – Resource sharing lists will be enhanced with the MMS ID, which can be exported.

Collaborative Networks

- Unlink Records From the Network Zone – There will be a new batch job for unlinking a set of bibliographic records from the Network Zone.
- Using 77x/78x Fields as Local Extensions – There are fields that are used for creating relations, based on specific member information. With the February release, it will be possible to define these fields as local fields without having to manage them in the Network Zone shared catalog.

Analytics

- New Title Level Subject Area – A new Title Level subject area will form part of Alma Analytics. It will include typical bibliographic-level facets, such as LC and Dewey, as well as audit details (created by, updated by) with user dimensions and an indication of whether there is linked physical, electronic, or digital inventory. This new subject area will support new options for performing cross-format overlap analysis.
- New Benchmark Analytics Subject Area – A new subject area for Benchmark Analytics will be deployed for system-generated KPIs on an institutional level, for eventual comparison with other institutions.

Administration

- Social Login via Twitter – Staff will be able to use their Twitter account to log in to their Alma account..

- To simplify and streamline the management of various types of sets in Alma, the Manage Sets page will be available from the **Administration > Manage Jobs and Sets** menu and will be removed from the Acquisitions, Resource Management, and User Management menus. Sets will be visible on this page according to user role.

APIs

- Call Out Channel - Webhook for Notifications – Initially, there will be support for a few specific letters that will be listed in the Letter Activity mapping table. This will allow libraries to build applications that respond to the call out—for example, to place a warning for the patron on the library portal—or for sending an instant message in real time.
- API for Retrieving Electronic Collections – An API to retrieve electronic collections will be available.

Browsing the Shelf Listing

New for January!

The Browse Shelf Listing feature provides item-level call number browse capability from within the MD Editor for holdings information.

To use Browse Shelf Listing:

1. Click **Browse Shelf Listing** (**Resource Management > Cataloging**); or from within the MD Editor, click **Tools > Browse Shelf Listing**. The following options appear in the MD Editor:
   - Call Number Level
   - Call Number Type
   - Call Number
2. Select one of the following filtering options from the Call Number Level drop-down list:
   - Holdings call number
   - Alternative call number
   - Temporary call number
   - All - This option provides blended results of all the call number options in the drop-down list.
3. Select the call number type from the available options in the drop-down list. The list of options varies depending on what is configured for your system.
4. Enter a full or partial left-aligned call number for the Call Number parameter.
5. Click **Go**.

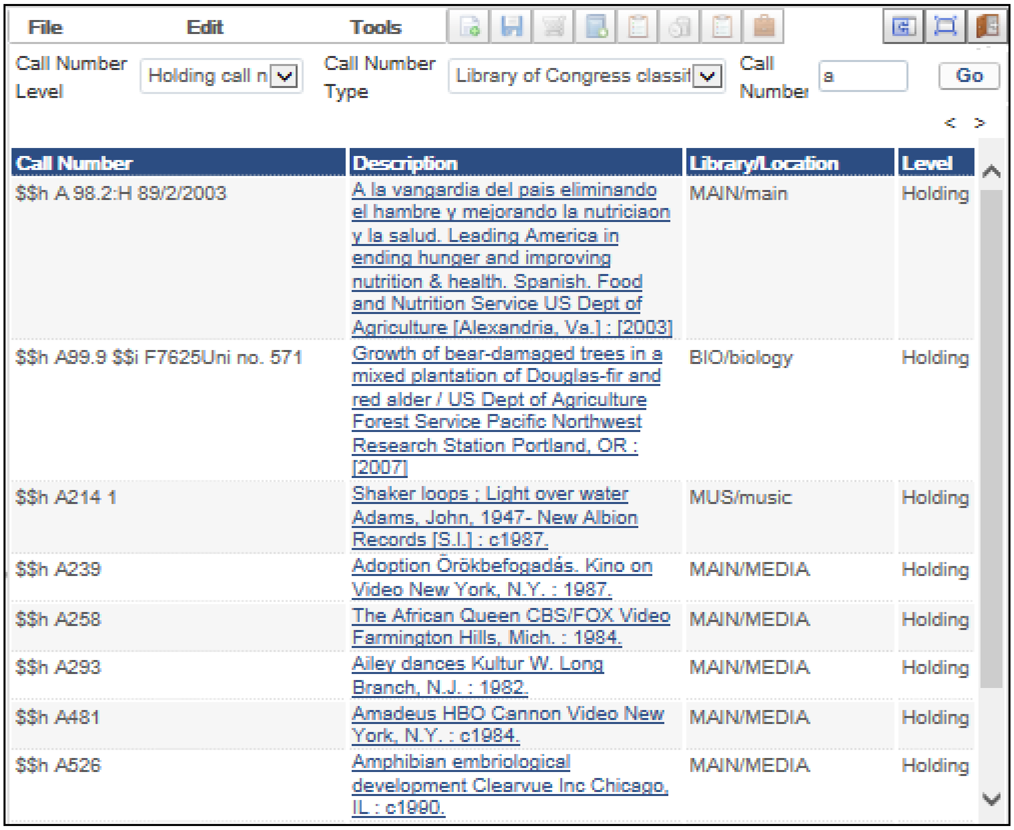
The Browse Shelf Listing results list displays the following content:

- The matching entry
- The rest of the entries after the matching entry

The results list is formatted with the following columns of information:

- Call Number
- Description

- Library/Location
- Level



Call Number	Description	Library/Location	Level
$$h A 98.2:H 89/2/2003	A la vangardia del pais eliminando el hambre y mejorando la nutriciaon y la salud. Leading America in ending hunger and improving nutrition & health. Spanish. Food and Nutrition Service US Dept of Agriculture [Alexandria, Va.] : [2003]	MAIN/main	Holding
$$h A99.9 $$i F7625Uni no. 571	Growth of bear-damaged trees in a mixed plantation of Douglas-fir and red alder / US Dept of Agriculture Forest Service Pacific Northwest Research Station Portland, OR : [2007]	BIO/biology	Holding
$$h A214 1	Shaker loops ; Light over water Adams, John, 1947- New Albion Records [S.l.] : c1987.	MUS/music	Holding
$$h A239	Adoption Örökbefogadás. Kino on Video New York, N.Y. : 1987.	MAIN/MEDIA	Holding
$$h A258	The African Queen CBS/FOX Video Farmington Hills, Mich. : 1984.	MAIN/MEDIA	Holding
$$h A293	Ailey dances Kultur W. Long Branch, N.J. : 1982.	MAIN/MEDIA	Holding
$$h A481	Amadeus HBO Cannon Video New York, N.Y. : c1984.	MAIN/MEDIA	Holding
$$h A526	Amphibian embriological development Clearvue Inc Chicago, IL : c1990.	MAIN/MEDIA	Holding

Browse Shelf Listing Results

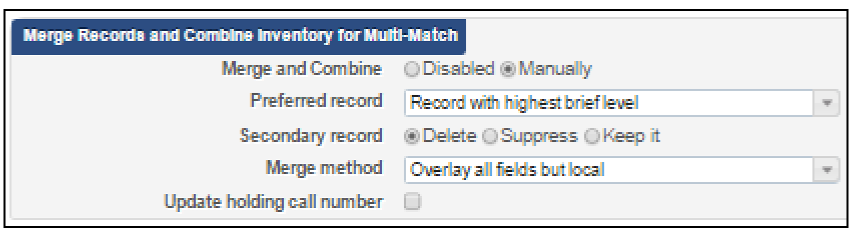
- **Merge** – Merge the records according to the options chosen in the profile configuration. The history of all linking performed for this record (for example, attached PO lines) is retained. For details on configuring import profiles, see Managing Import Profiles. Note that if this option cannot be performed, as in the case of importing records marked for deletion, it is unavailable.
- **Overlay** – Discard all bibliographic data in the old record and replaces it with the data in the new record. Like merge, the history of all linking performed for this record is retained.
- **Delete** – Delete the bibliographic when it has no inventory associated with it.
- **Use NZ Record** - Discard the new record and instead use the record from the Network Zone. This option only appears in a member institution when implementing a Network Zone.

If the record is imported, details of the import can be viewed on the Monitor and View Imports page.

Merging Records and Combining Inventory

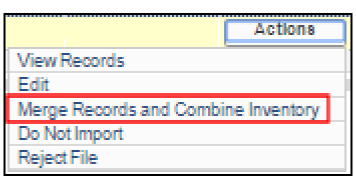
New for January!

When you configure the Merge Records and Combine Inventory for Multi-Match section in an import profile and use it to import records, you have additional options for processing records on the Resolve Import Issues page for handling multiple matching duplicate records in the Alma database that caused one or more new records to fail to import.



Merge Records and Combine Inventory for Multi-Match Section in the Import Profile

For the file that appears on the Resolve Import Issues page resulting from this type of failed import, the row Actions contain an additional option, Merge Records and Combine Inventory.



Resolve Import Issues Row Actions - Merge Records and Combine Inventory

The Merge Records and Combine Inventory row Action only appears as a option when the file in that row was produced from an import job that used an import profile configured for Merge Records and Combine Inventory for Multi-Match.

See the explanation for **Merge Records and Combine Inventory for Multi-Match** in the Import Profile Details - Match Profile Fields table on the Managing Import Profiles page for more information.

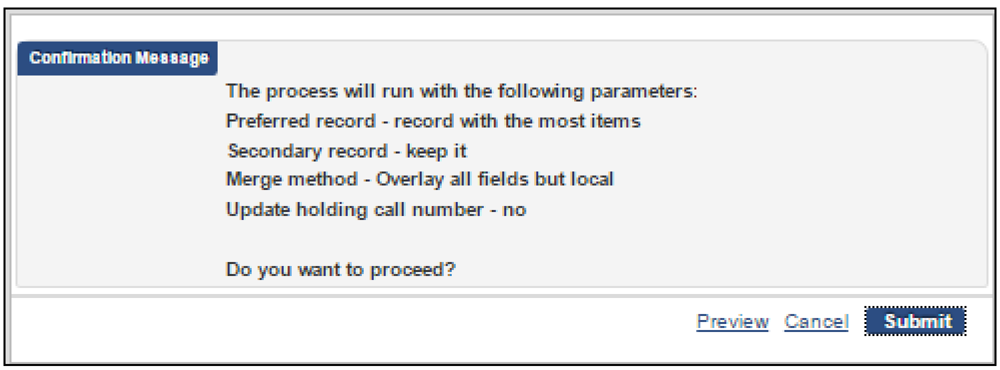
To merge records and combine inventory:

1. On the Resolve Import Issues page (**Resource Management > Import > Resolve Import Issues**), locate the file containing the multiple matching duplicate records in the Alma database that you want to resolve in order to import a new record.

2. Select **Actions > Merge Records and Combine Inventory**.

    NOTE:
    If the import job that you ran was large and resulted in multiple files appearing on the Resolve Import Issues page, you may select the check box at the beginning of each row for these files and click the **Merge Records and Combine Inventory** button. The **Merge Records and Combine Inventory** button works only with multiple files that result on the Resolve Import Issues page from the same import job.

    The Merge Records and Combine Inventory Confirmation Message pop-up box appears.

    Merge Records and Combine Inventory Confirmation Message

    The Confirmation Message pop-up box provides the following:

    - The **Merge Records and Combine Inventory for Multi-Match** settings that you selected in the import profile (that generated this failed import file)
    - The options to **Preview** the changes in Excel format, **Cancel** your request, or **Submit** the job to resolve the issues.

3. Click **Preview** to preview the changes (in Excel format) that will be made when you submit the resolve job request. This step is optional.

    Each set of multiple matching duplicate records is identified by a group number. For each group, the Operation column identifies the preferred record and the duplicate records that are identified to be merged with the preferred record. When the merge is complete, there is only one record that remains in the Alma database for merging with the new record that you are importing (unless you selected the **Suppress** or **Keep it** options in the import profile that you used that generated this failed import file).

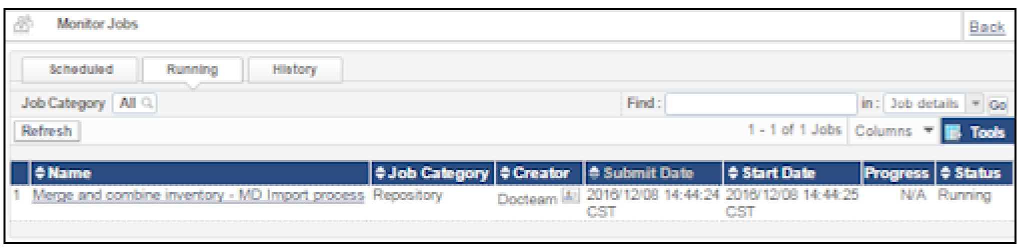
	A	B	C	D	E	F
1	Group Number	MMSID	Identifier	Records In Group	Operation	Title
2	1	99206241500521		2	preferred	History
3	1	99206241400521		2	merge	History

Preview Multiple Matching Duplicate Record Changes

In the Operation column, there may also be one or more records identified as ignore. This may occur when the record has been suppressed or if there has been a lapse in time between running the original import job and, subsequently, working with Resolved Import Issues page and some records may no longer exist.

4. When you are ready to proceed, click **Submit**.

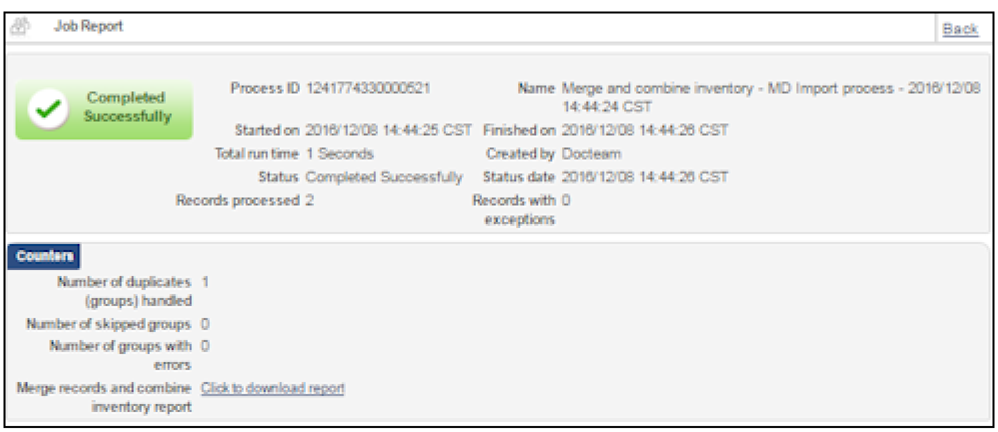
   When you click **Submit**, the Monitor Jobs page appears and shows your job request with a Status of Running.



Monitor Jobs Page Merge and Combine Inventory Job

5. Similar to other job requests, select the **History** tab to view the job results.

6. Select **Actions > Report** to view the details of the Merge and Combine Inventory job.



Merge and Combine Inventory Job Results

This shows that the multiple matching duplicate records were merged successfully.

7. Click the link for **Merge records and combine inventory report** to view the report details. Similar to other multi-match reports, this shows the preferred and secondary (merge) records; and in the Message column, the message for the secondary (merge) record shows the number of physical items, portfolios, PO lines, and so forth that were merged with the preferred record.

A	B	C	D	E	F	G	H	I
Group Number	MMSID	Identifier	Title	Records In Group	Operation	Status	Preferred MMSID	Message
1	99206241500521		History	2	preferred	Success	99206241500521	
1	99206241400521		History	2	merge	Success	99206241500521	The following entities associated

Merge Records and Combine Inventory Report

Resolving Validation Issues

Imported records are validated according to the validation task chain defined in the import profile (see Managing Import Profiles).

For jobs/records with validation issues, you can:

- Force the import
- Choose not to import
- Reject the file
- Create an XML file of the failed records

To resolve validation issues:

1. On the Resolve Import Issues page (**Acquisitions > Import > Resolve Import Issues** or **Resource Management > Import > Resolve Import Issues**), select **Validation** from the left margin. The Resolve Import Validation Errors page opens.

   NOTE: You can also access the Resolve Import Validation Errors page by clicking the **Manual Handling Required** link in the Status column on the Monitor and View Imports page.

Working with German MARC and the 689 Field in Alma

Alma provides support for German MARC cataloging with the 689 field. This support is implemented in the following areas of Alma:

- Cataloging configuration (see Cataloging Configuration for more information)
- Cataloging bibliographic records in the MD Editor (see Cataloging the 689 in the MD Editor for more information)
- Searching for records using the 689 index (see Search Indexes for more information)
- Sorting of multiple 689 fields in a record (see Sorting 689 Fields for more information)

Cataloging Configuration

Using the Metadata Configuration options, you can configure the 689 field. This can be done by editing the MARC21 Bibliographic profile on the Metadata Configuration List page (**Resource Management > Resource Configuration > Configuration Menu > Cataloging section > Metadata Configuration**).

For more information, see Configuring Cataloging.

Cataloging the 689 in the MD Editor

Authority and bibliographic headings support is provided for cataloging the 689 field so that they can be linked to authority records or other bib records using the F3 functionality. To use the F3 functionality, the 689 field needs to be the focal point in the of the record in the MD Editor when you press F3. Preferred term correction also works on these fields when they are linked. See Linking an Authority Record to a Bibliographic Record for more information.

The headings links are based on how the 689 field maps to the standard 6XX field. The mapping is identified as follows:

- 689 $D p creates 600
- 689 $D b creates 610
- 689 $D f creates 611
- 689 $D s creates 650

- 689 $D g creates 651
- 689 $D u creates 630
- 689 $A z creates 648
- 689 $A f creates 655
- 689 $A g creates 655

Sorting 689 Fields

Since the 689 is a repeatable field, Alma sorts multiple occurrences of the 689 field by indicator in the following manner:

- 689 fields with the same first indicator are grouped together.
- Within a group of 689 fields, the second indicator value is used to sort the 689 fields in ascending order.
- For 689 fields within a group that have no second indicator, they are sorted to the end of the group.

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Configuring Deposits

This section describes the configuration activities that are available regarding Deposits. It includes the following sections:

Configuring Deposit Profiles

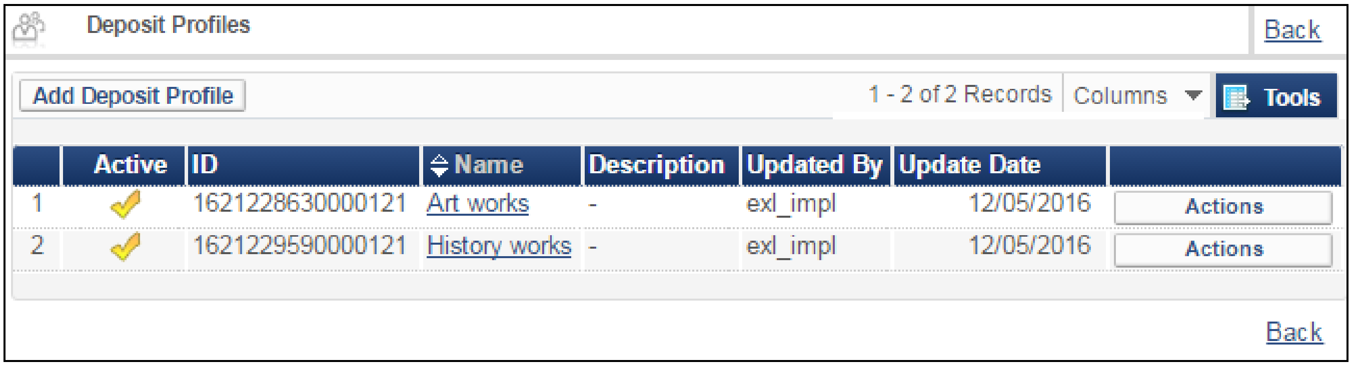
PERMISSIONS: To configure deposit profiles, you must have one of the following roles:

- Deposit Manager
- Deposit Administrator
- General System Administrator

Deposit profiles determine how submitted deposits are processed.

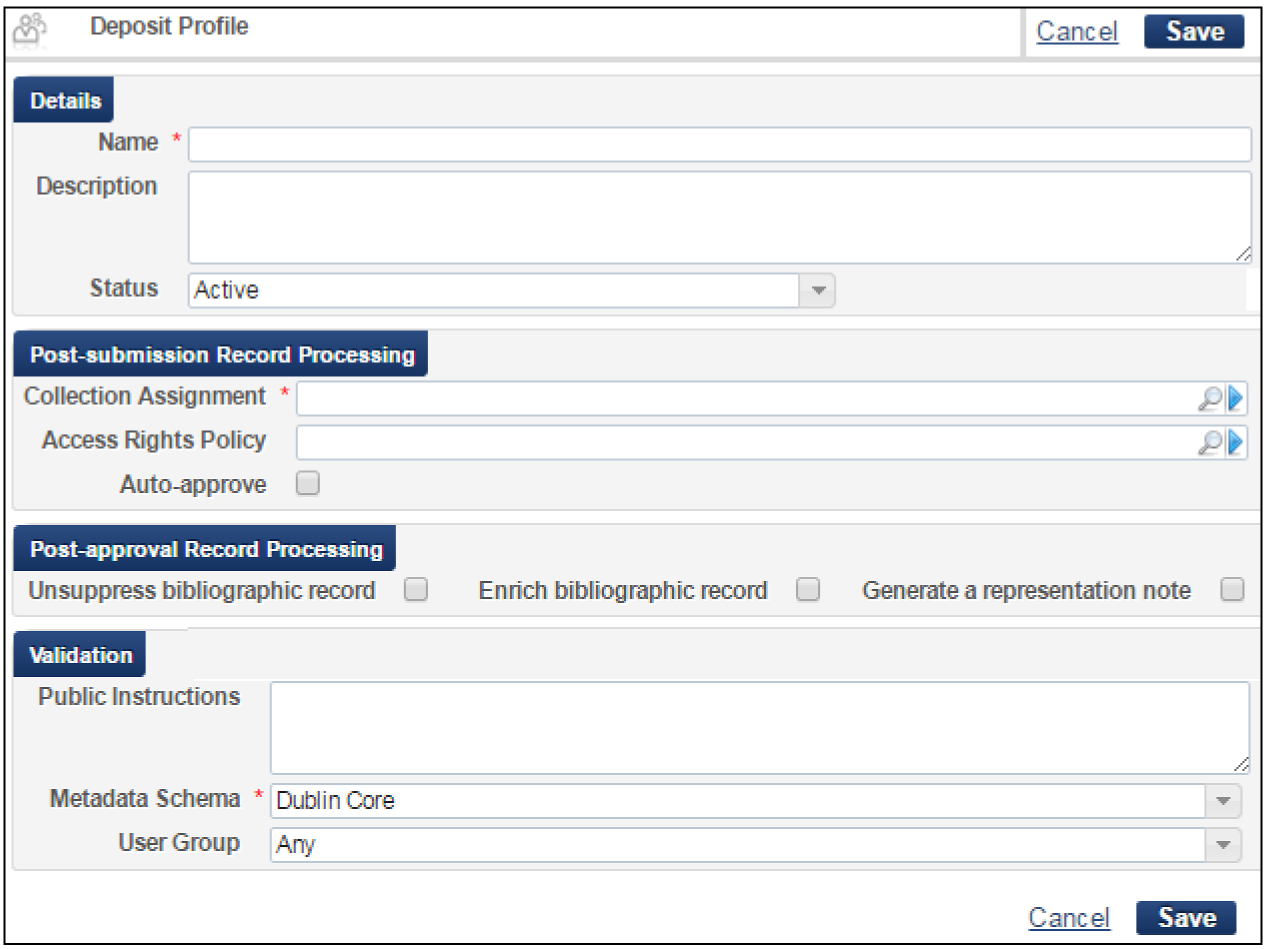
To configure a deposit profile:

1. Click **Deposit Profiles** (**Resource Management > Resource Management Configuration > Configuration Menu > Deposit**). The list of Deposit Profiles appears:



Deposit Profiles

2. Click **Add Deposit Profile**. The following appears:



Deposit Profiles

3. Fill in the fields according to the information in the following table:

Deposit Profile

Field	Description
Name	The name of the deposit profile. Must be unique. Required.
Description	An internal description for staff.
Status	Select **Active** to allow deposits to this profile.
Collection Assignment	Select the collection to which the bibliographic records created with this profile are assigned. **NOTE:** The created representation is added to the library of the selected collection.
Access Rights Policy	Select an access rights policy to be assigned to the representation created by the deposit.
Auto-approve	Select to have deposits automatically approved.
Unsuppress bibliographic record	Select to have the bibliographic record unsuppressed when the deposit is approved.
Enrich bibliographic record	Select to enrich the bibliographic record with metadata when the deposit is approved. The following fields are added: ■ `dcterms:dateSubmitted` (Deposit create date YYYY-MM-DD) ■ `dcterms:dateAccepted` (Deposit modified date YYYY-MM-DD) ■ `dcterms:provenance submitted by` (patron user ID) ■ `dcterms:provenance deposit ID` (deposit ID) ■ `dcterms:provenance approved by` (operator user ID or auto-approved)
Generate a representation note	Select to copy deposit approval notes to the representation when the deposit is approved.
Public Instructions	Instructions visible to patrons (for example, file format expected, maximum size, etc.).
Metadata Schema	Select the schema of the metadata (currently Dublin Core only.)
User Group	Select the user groups for whom the profile is available.

4. Click **Save**.

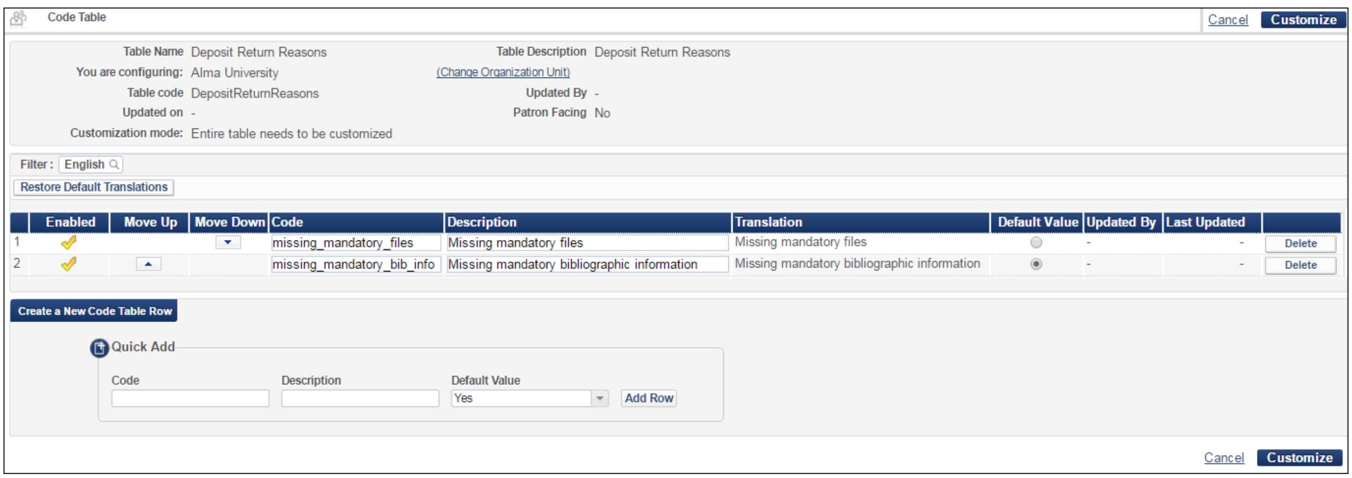
Configuring Deposit Return Reasons

PERMISSIONS: To configure deposit profiles, you must have one of the following roles:

- Deposit Administrator
- General System Administrator

You can configure the email message sent to depositors when their deposit is returned for corrections.

To configure deposit return reasons, click **Deposit Return Reasons** (**Resource Management > Resource Configuration > Configuration Menu > Deposit**). The following appears:



Deposit Return Reason

You can add, edit, and delete deposit return reasons. The reason you select as the default appears in the email sent to the depositor when you return a deposit. When you are finished, click **Save**.

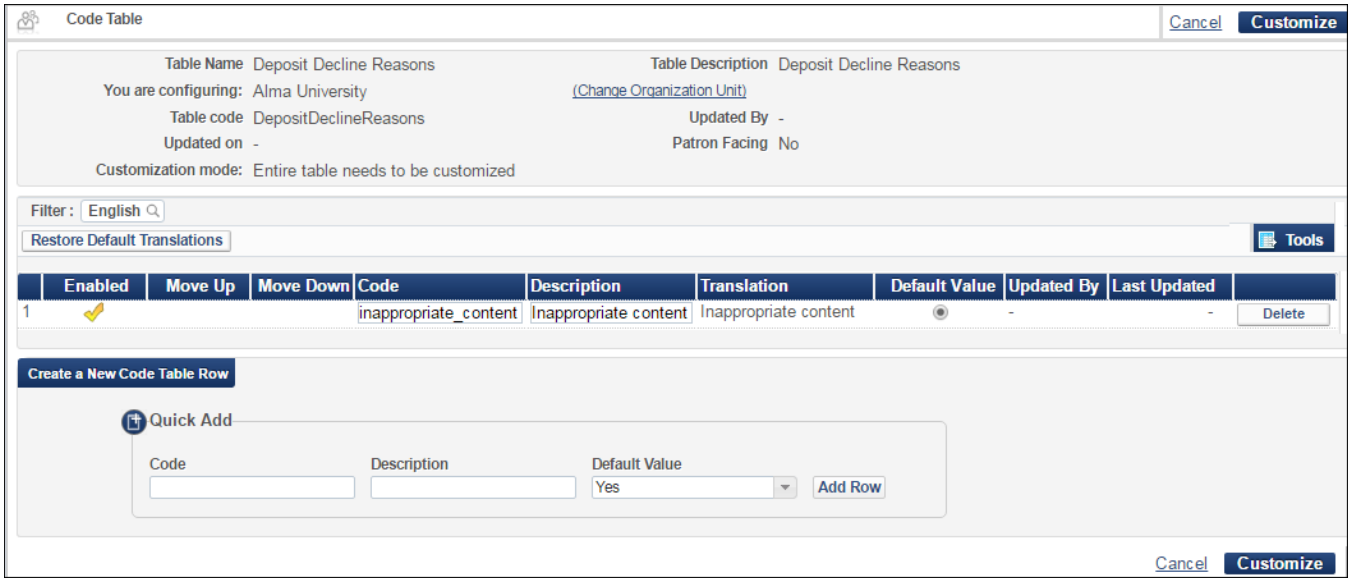
Configuring Deposit Decline Reasons

PERMISSIONS: To configure deposit profiles, you must have one of the following roles:

- Deposit Administrator
- General System Administrator

You can configure the email message sent to depositors when their deposit is declined.

To configure deposit decline reasons, click **Deposit Decline Reasons** (**Resource Management > Resource Configuration > Configuration Menu > Deposit**). The following appears:



Deposit Decline Reason

You can add, edit, and delete deposit decline reasons. The reason you select as the default appears in the email sent to the depositor when you decline a deposit. When you are finished, click **Save**.

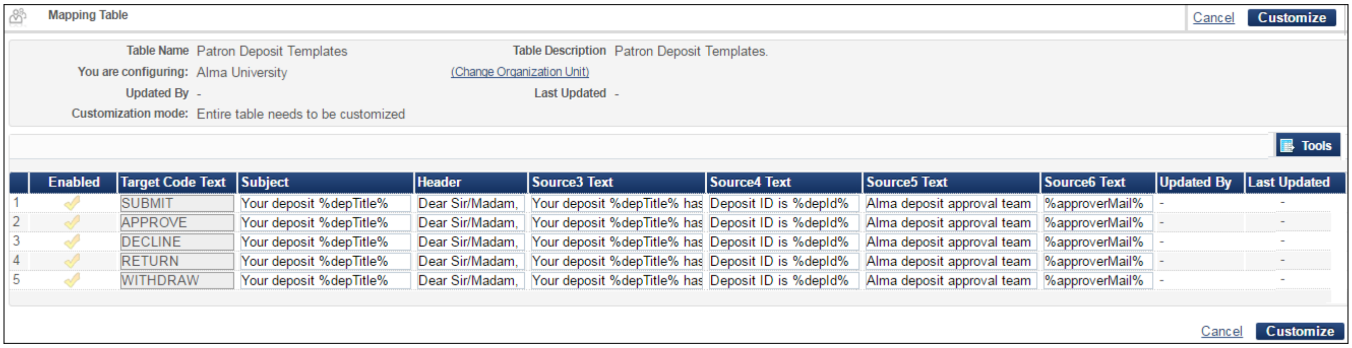
Configuring Patron Deposit Templates

PERMISSIONS: To configure deposit profiles, you must have one of the following roles:

- Deposit Administrator
- General System Administrator

You can configure the template of the email sent to depositors when their deposit is submitted, approved, declined, returned, or withdrawn.

To configure the template of the email sent to depositors, click **Patron Deposit Templates** (**Resource Management > Resource Configuration > Configuration Menu > Deposit**). The following appears:



Patron Deposit Templates

You can edit the elements of the email. When you are finished, click **Save**.

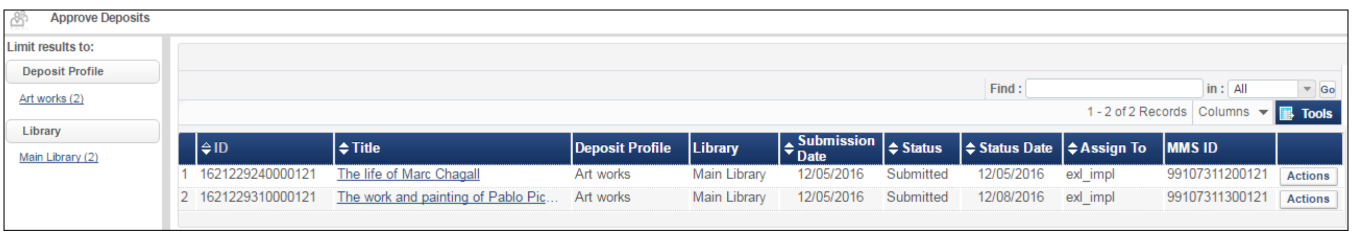
Search for Deposit

PERMISSIONS: To search for deposits, you must have one of the following roles:

- Deposit Manager
- Deposit Operator
- Deposit Administrator
- General System Administrator

You can search for deposits to Alma.

To search for deposits, click **Search for Deposit** from the main Alma menu (**Resource Management > Deposits**). The following appears:



Search for Deposit

The deposits to Alma appear.

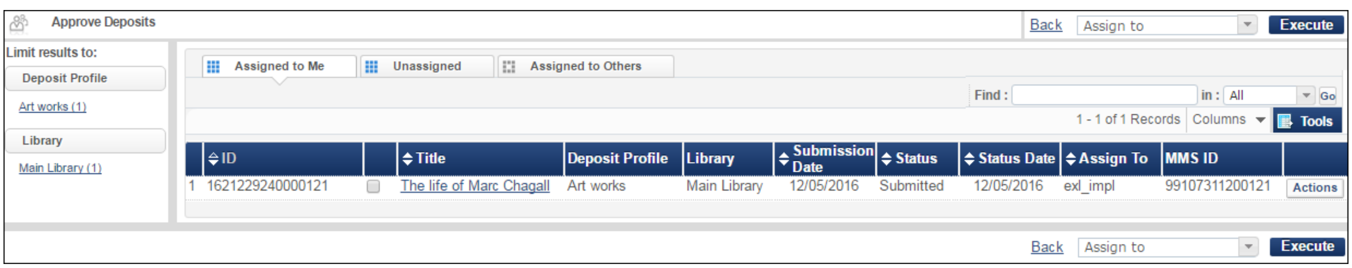
Approve Deposits

PERMISSIONS: To approve deposits, you must have one of the following roles:

- Deposit Manager
- Deposit Operator
- Deposit Administrator
- General System Administrator

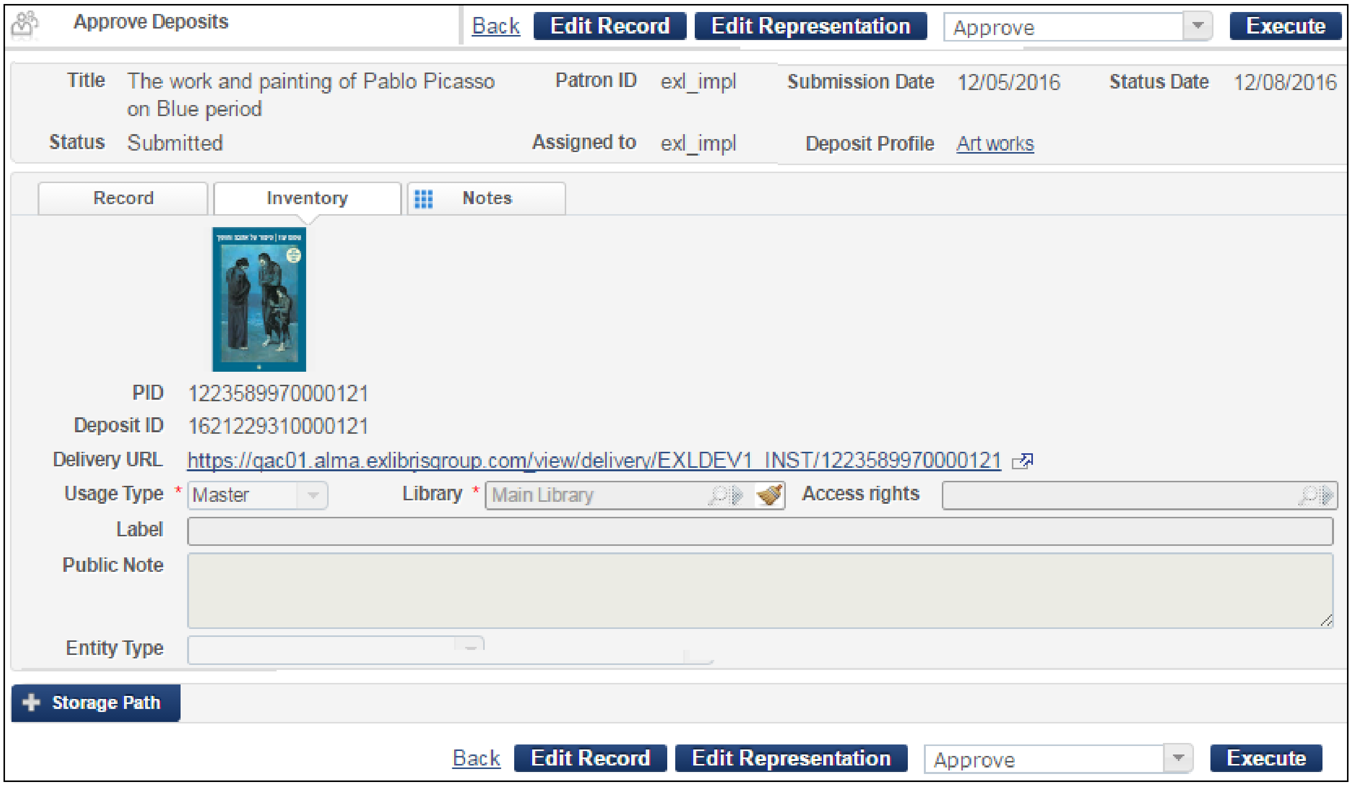
When a deposit is performed by a patron, it must first be approved before it can enter the repository.

To approve deposits, click **Approve Deposits** from the main Alma menu (**Resource Management > Deposits**). The following appears:



Approve Deposits

A list of the deposits assigned to you is displayed. Click the title of a deposit. The following appears:

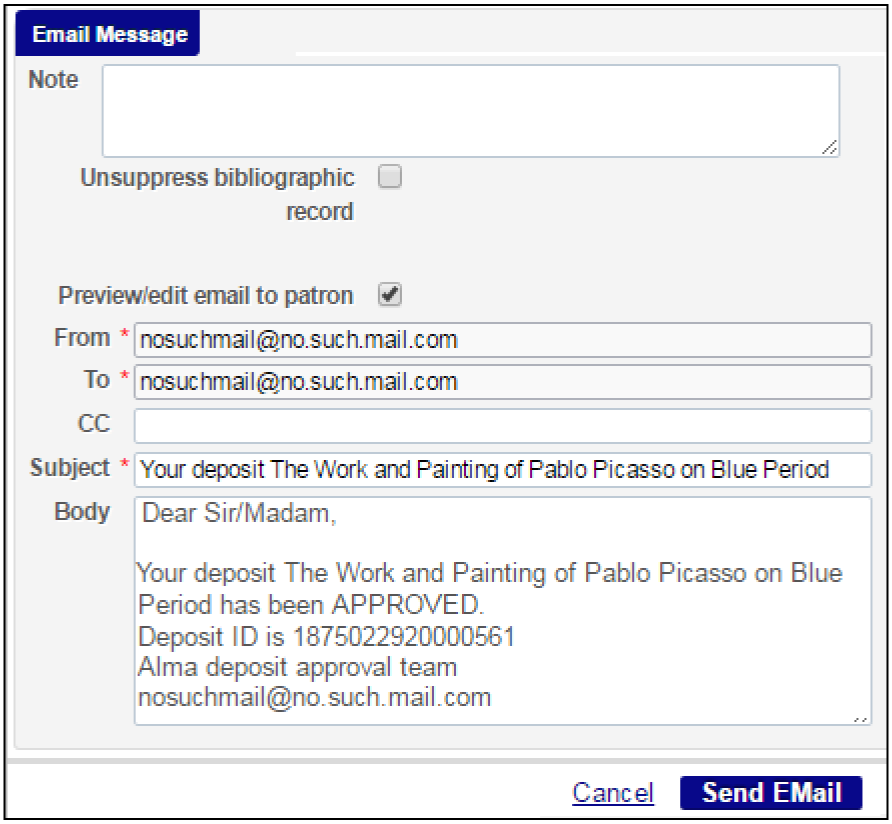


Approve Deposits Information

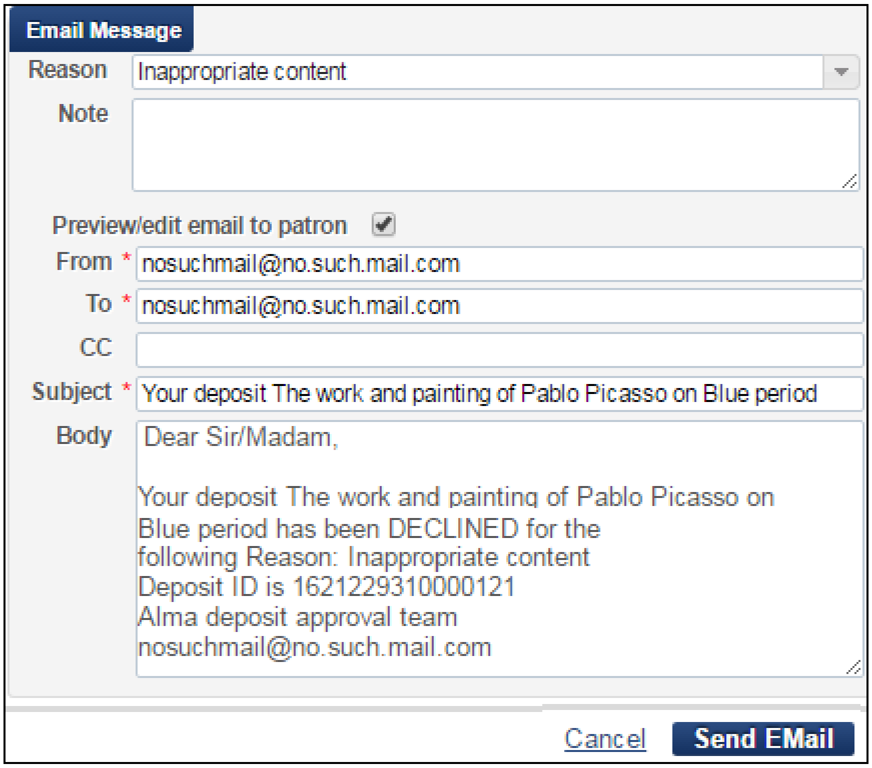
The following actions are available on this page:

- From the **Approve** drop-down list you can perform the following actions on the deposit:
  - Approve – Approve the deposit
  - Decline – Reject the deposit. A rejection email is sent to the depositor
  - Return – return the deposit to the depositor for correction
- Storage Path – View the storage location of the digital file
- Edit Record – open the MD editor (requires cataloging permissions)
- Edit Representation – open the Digital Representation Editor (requires digital inventory editing permissions)
- Record tab – View the bibliographic record of the deposit
- Notes Tab – Add notes concerning the deposit

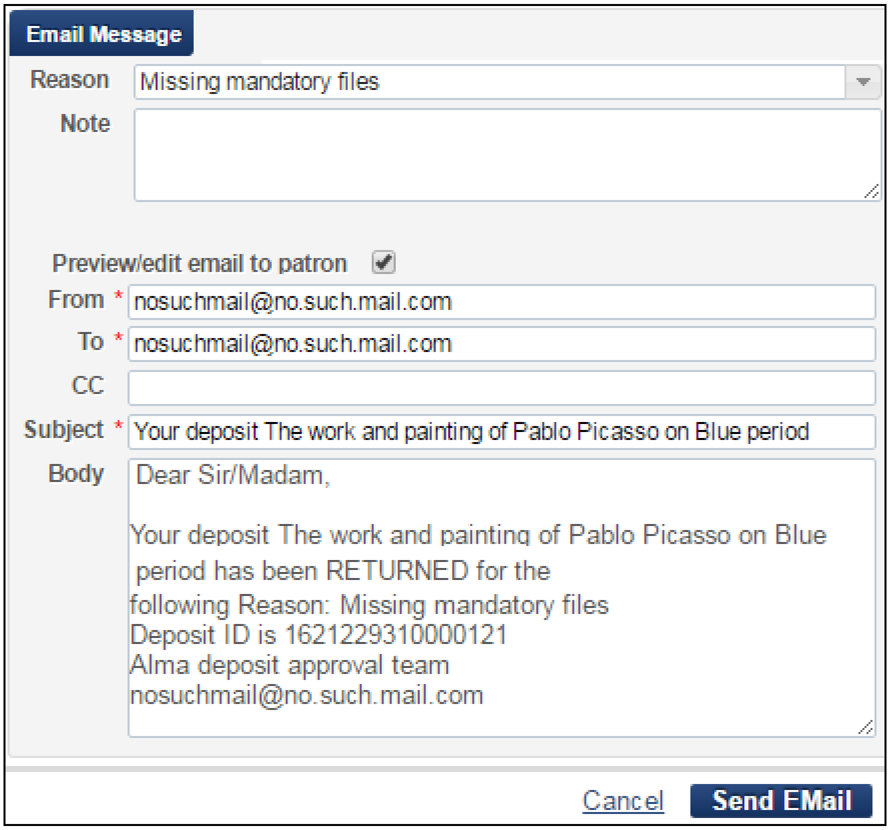
If you approve, decline or return a deposit, a preview of the email that will be sent to the depositor appears. For the decline and return emails, you can select a reason from the drop-down list. You can also edit the text of the email.



Approved Email Message



Declined Email Message



Returned Email Message

If the deposit is approved, declined, or returned, an email is sent to the depositor. For information on configuring the text of these emails, see Configuring Deposits.

Staff-Mediated Deposit

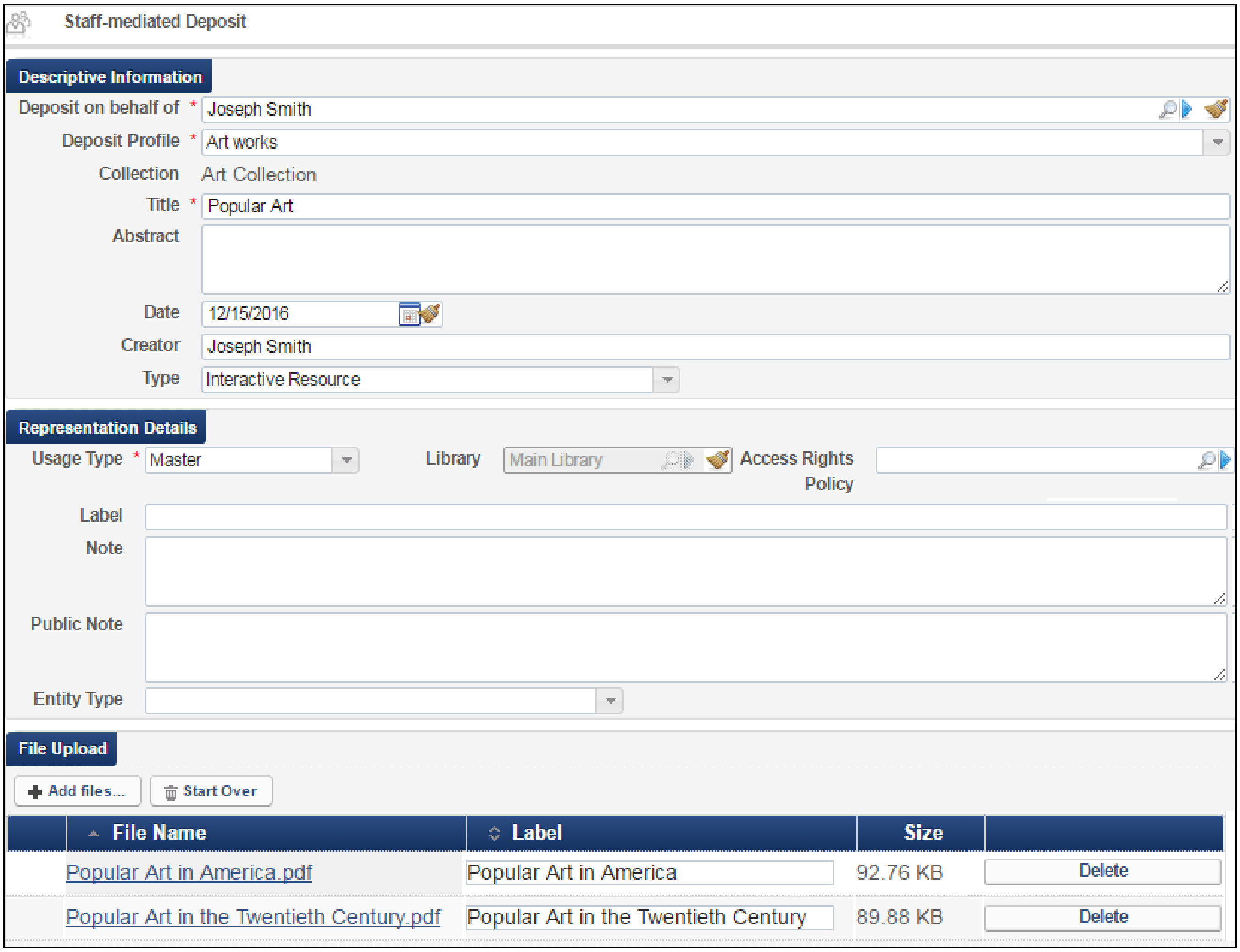
PERMISSIONS: To perform staff-mediated deposits, you must have one of the following roles:

- Deposit Manager
- Deposit Operator
- Deposit Administrator
- General System Administrator

Library staff can submit deposits on behalf of patrons. This is called staff-mediated deposit. With this feature, staff create a brief bibliographic record for the deposit and upload the digital files for it.

To perform a staff-mediated deposit:

1. From the main Alma menu, select **Staff-Mediated Deposit** (**Resource Management > Deposit**). The following appears:



Staff Mediated Deposit

2. Fill in the fields according to the information in the following table:

Staff Mediated Deposit

Field	Description
Deposit on Behalf of	Select or enter the patron's name.
Deposit Profile	Select a deposit profile for the record. Inactive profiles are marked as `(inactive)`. Library staff can still perform submissions without reactivating the profile, but caution is advised before using inactive profiles.

Field	Description
Title	Enter the title of the record.
Abstract	Enter an abstract of the record.
Date	The date that the record was submitted. Automatically populated with the current date, editable.
Creator	The creator of the record. Automatically populated with the name of the patron, editable.
Type	Select the type of the record.
Usage Type	Select the usage type of the representation, either Master or Derivative.
Library	The library of the representation (read-only).
Access Rights Policy	Select the access rights policy for the representation. Automatically populated with the access rights policy assigned to the profile (if any), editable.
Label	Enter a label for the representation.
Note	Enter a staff note or the representation.
Public Note	Enter a public note for& the representation.
Entity Type	Select the entity type and related fields for the representation.
File Upload	Select the files that you want to include in the representation.

3. Click **Submit**.

A bibliographic record is created with the representation information and the files you uploaded. An email is sent to the patron, confirming the deposit.

Deleting Unused Bibliographic Records in the Network Zone

New for January!

Deleting unused bibliographic records in the Network Zone is a two-step process. First, you need to identify the unused bibliographic records. After you have identified the bibliographic records that are not being used, you can delete them. The following jobs in Alma can be used to manage/delete unused bibliographic records in the Network Zone:

- **Identify records that are not used in the Network** (see Identifying Unused Records in the Network Zone for more information)
- **Delete Bibliographic records** (see Deleting Unused Bibliographic Records for more information)

Identifying Unused Records in the Network Zone

The **Identify records that are not used in the Network** job helps you to identify which bibliographic records are not being used. From a titles set of records that you provide, the **Identify records that are not used in the Network** job creates a new set that identifies the unused bibliographic records from the set that you provided. The job evaluates if a bibliographic record is not being used based on the criteria of no inventory (physical, electronic, or digital) and any of the following criteria that you may select:

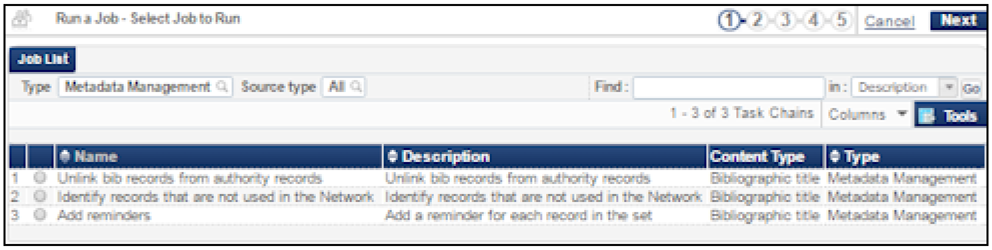
- No associated collections
- No associated PO line
- No resource requests
- No resource sharing lending requests
- No reading list citations
- No boundwith relationship

The **Identify records that are not used in the Network** job needs to be run from your Network Zone.

To identify unused records in your Network Zone:

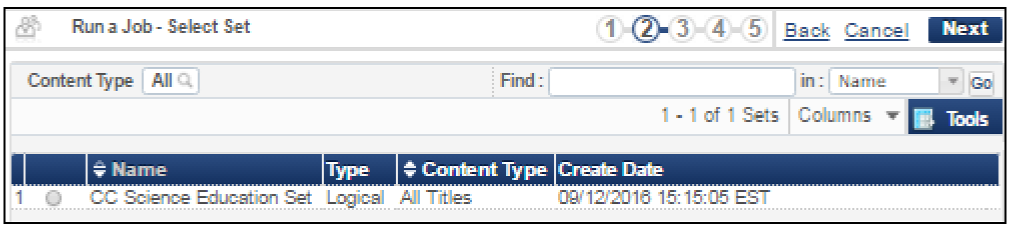
1. Using Repository Search, create a set of records to be evaluated using a titles search (All titles, physical titles, electronic titles, and/or digital titles).
2. Open the Run a Job - Select Job to Run page (**Administration > Manage Jobs > Run a Job**).

3. Locate the **Identify records that are not used in the Network** job by filtering the job list by selecting the **Metadata Management** type.



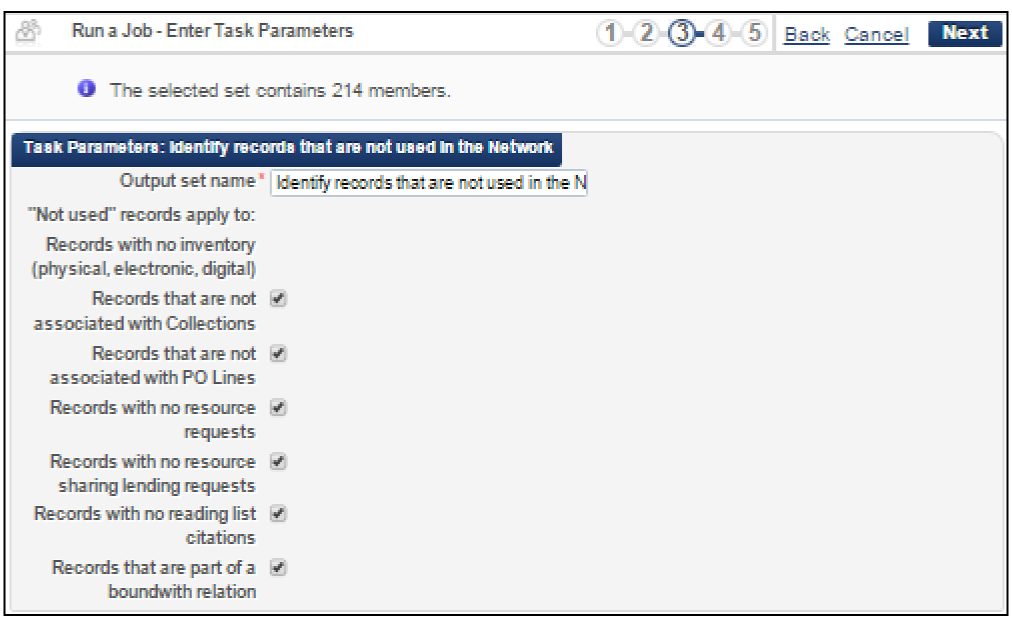
Metadata Management Job List Filter

4. Select the **Identify records that are not used in the Network** job and click **Next**. The Run a Job - Select Set page appears.



Run a Job - Select Set Page

5. Select the set that you want to use to evaluate unused bibliographic records and click **Next**. The Run a Job - Enter Task Parameters page appears.

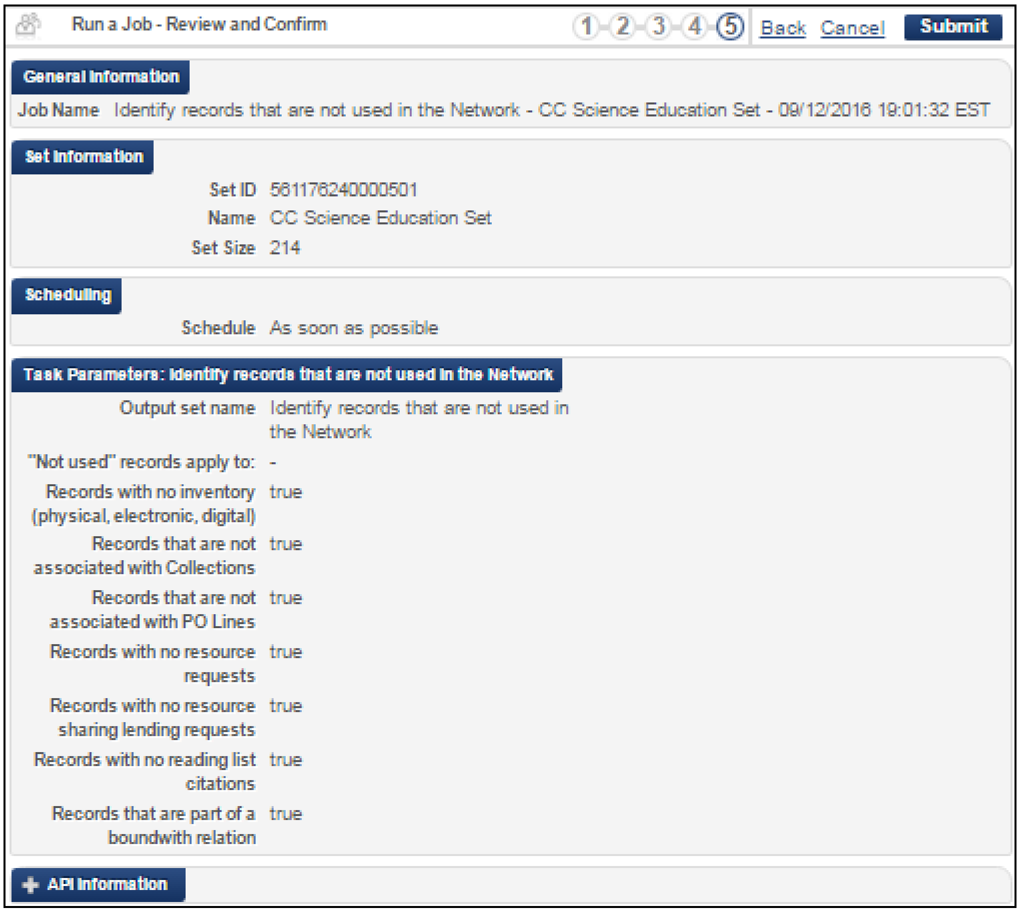


Run a Job - Enter Task Parameters Page

6. Enter an output set name or use the default name that is provided, select the criteria that you want the system to use to evaluate if a bibliographic record is unused, and click **Next**.

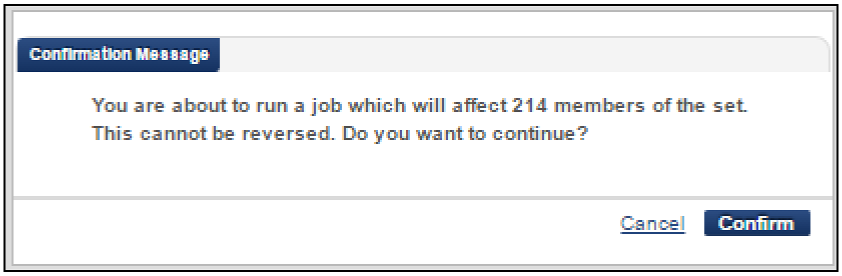
   By default, the set will include all records with no inventory (physical, electronic, and/or digital).

7. On the Run a Job - Job Details and Schedule page that specifies **As soon as possible** for the job schedule, enter a job name or use the default name provided and click **Next**. The Run a Job - Review and Confirm page appears.



Run a Job - Review and Confirm Page

8. Review the job details, make corrections if needed, and click **Submit**. The system prompts you with a confirmation message.

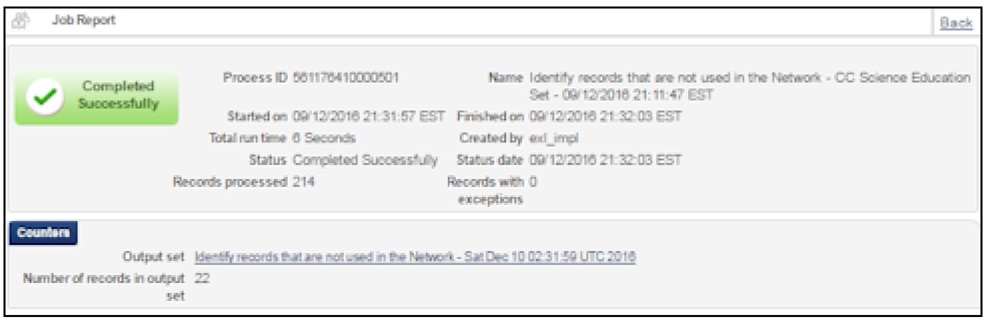


Job Confirmation Message

9. Click **Confirm** to continue. The Monitor Jobs page appears.

10. Select the **History** tab to view the completed job.

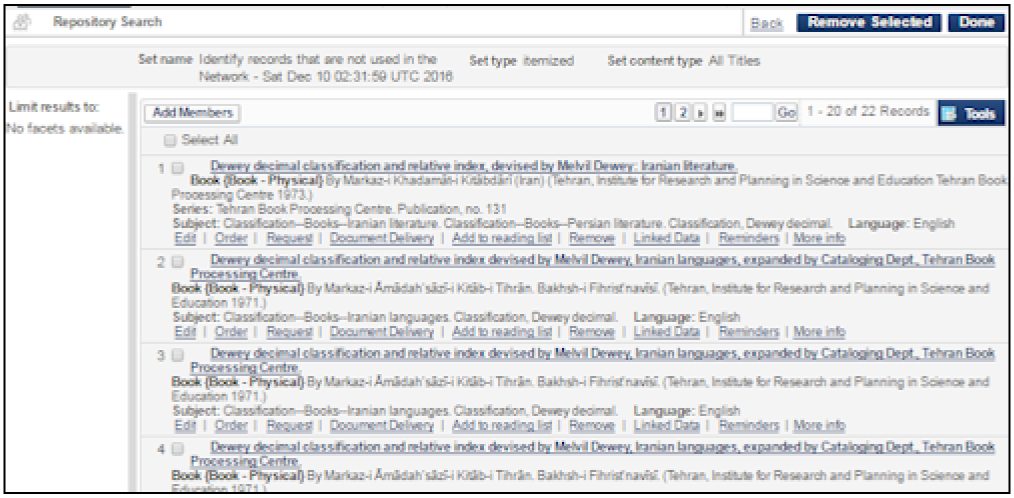
11. Select **Actions > Report** to view the job report.



Identify Unused Records Job Report

In the Counters section of the report, there is a link to the set that has been created that identifies the unused bibliographic records. It also shows the number of records identified in the set.

12. Click the link to the output set. The records identified in the new set appear.

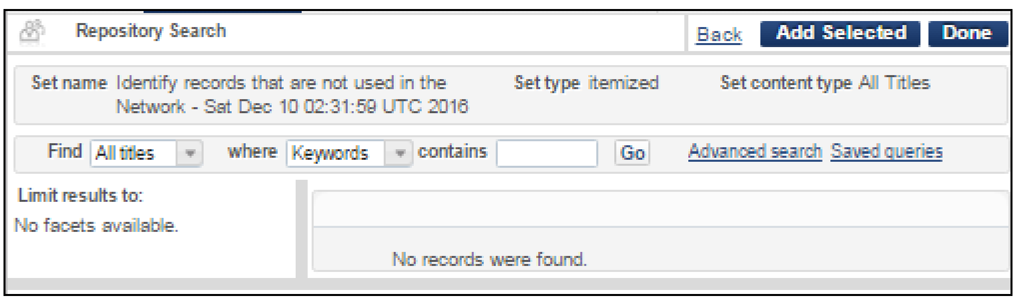


New Output Set Results

13. Review the output results and do the following:

   - Select records and click **Remove Selected** for the records that you do not want to delete from the set.

   - Click **Add Members** to add records to the set. The Repository Search page appears where you can search for the record(s) that you want to add.

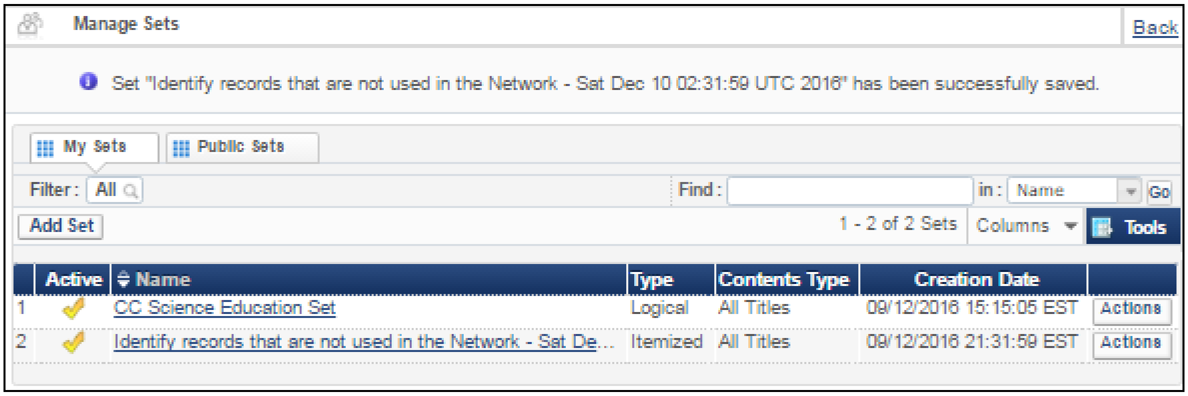
   

   Add Members

   Search for records to add, click **Add Selected**, and when you are finished, click **Done**.

   - Click **Done** from the output results page when you have finished reviewing the output set results.

The Manage Sets page appears.



Manage Sets Page with Identify Records

The **Identify records that are not used in the Network** set has the following row action options:

- Edit
- Catalog Set
- Members
- Duplicate
- Combine sets
- Filter set
- Delete

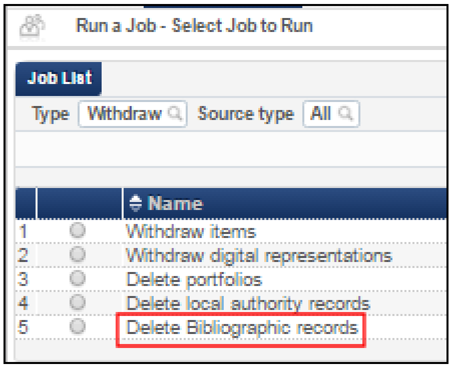
Use the **Actions > Members** option if you want to view your output set from the **Identify records that are not used in the Network** job again.

To delete the unused records using the new output set that you just created, see Deleting Unused Bibliographic Records.

Deleting Unused Bibliographic Records

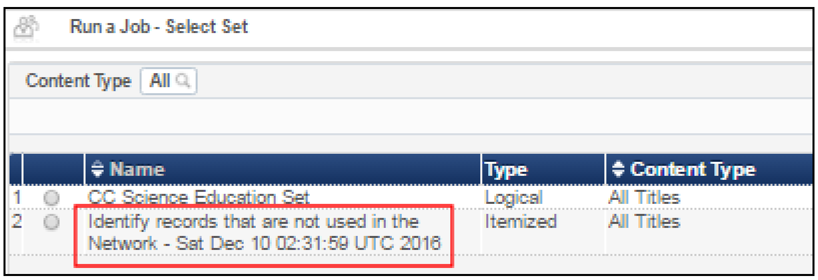
In order to delete unused bibliographic records from the Network Zone, you first need to identify which records are not used. See Identifying Unused Records in the Network Zone for information regarding how to do that.

After you have identified/created the unused records set using the **Identify records that are not used in the Network** job, use the **Delete Bibliographic records** job (**Administration > Manage Jobs > Run a Job**) to delete the unused bibliographic records from the Alma database.



Delete Bibliographic Records Job

On the Run a Job - Select Set page, select the set that was created from the **Identify records that are not used in the Network** job and complete the remaining job parameters as you normally would.



Unused Records Set

See Deleting Sets of Bibliographic Records and Running Manual Jobs on Defined Sets for more information.