

Alma November 2017 Release Notes



This Alma release provides numerous new features and enhancements. Some of these enhancements are a result of 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
<p><input type="checkbox"/> Updating Community Zone Contributed Electronic Collections – This new functionality enables both contributors and users of contributed collections to benefit from ongoing updates and more accurate information in these collections.</p>
<p><input type="checkbox"/> Move PO Lines and/or Licenses from an Existing Electronic Collection to a New Electronic Collection – This new functionality enables you to move PO lines and/or licenses from an existing electronic collection to a new electronic collection facilitates publisher and content provider changes, while providing you with tools to keep your existing acquisitions records in place.</p>
<p><input type="checkbox"/> Alma Viewer Metadata Now Configurable – You can now configure the metadata fields that patrons will view alongside the digital content in the Alma Viewer, as well as the order in which these fields appear.</p>
<p><input type="checkbox"/> Customize Order of Representation Delivery Service – Using new configuration options, you can control whether digital content is displayed to patrons before electronic content, and determine the order in which digital services are displayed.</p>
<p><input type="checkbox"/> Direct Transit for Remote Storage Items – You can now further streamline the workflow for managing requested items that are shelved at a remote storage location. If you use this new option, checking in items that are shelved at the remove storage location immediately puts these items in transit to their shelving desk, rather than requiring them to first be put in transit to the owning library.</p>
<p><input type="checkbox"/> Distribute Fulfillment Units from the Network Zone – If you want to manage a single set of fulfillment configurations among institutions working with a Network Zone, you'll be interested in this new option of centrally managing fulfillment units (which comes in addition to the previously existing options to centrally manage fulfillment terms of use and policies).</p>
<p><input type="checkbox"/> Date Filters Added – Have you ever wanted to retrieve records by the last 7 days? Or perhaps by the previous fiscal year? Until now, you've needed to either hard code the date each time or write an SQL query. Now you can quickly and easily choose the new date filter in the Analytics date folders. You can automatically retrieve by predefined periods such as Current Fiscal Year, Last 30 Days, or Two Years Ago.</p>
<p><input type="checkbox"/> View Only Catalog, Repository, and Acquisitions Administrator Roles – New read-only roles for Acquisitions, Catalog and Repository Administrators allow you to expand access to configuration and setup, providing staff users with information they require.</p>

What's New

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

New Alma User Interface

More than 12,000 staff users and 500 institutions worldwide are now using Alma's new interface. If you haven't yet started using the new interface, now is the time to try it out. You can turn it on gradually for specific staff users, or decide to turn it on for your entire institution (Click [here](#) for more information about enabling the new UI).

Note that the new interface will be turned on automatically for all Alma customers in January 2018, so take advantage of the next few months to start using the new UI at your institution and share your feedback with us.

Acquisitions

- [Requiring ERP Numbers for POs](#) – Alma now supports an additional option for integrating POs with your ERP. You can now require that POs have an ERP approval number before they are sent to the vendor.
- [Additional Acquisitions Enhancements](#)

Resource Management



- **Idea Exchange:** [Updating Community Zone Contributed Electronic Collections](#) – Community Zone contributed electronic collections can now be updated and maintained.
- [Alt+F3 Switching to F3](#) – The Alt+F3 function announced in August (see [Browsing a Full Authority Headings List](#)) is now accessible using F3, and the functionality accessed using F3 is now available using Alt+F3.
- [Deleting Holdings Using Indication Rules to Filter a Set](#) – A new filtering option was added to the **Delete holdings records with no items** job that enables you to filter the set selected for the job using indication rules.
- [Cataloging Level Default Setting](#) – A new customer parameter was added to Alma for setting a cataloging level default preference.
- [Record Format Identified in KERIS External Search Results](#) – The information that appears in the KERIS external search results was enhanced to identify the record format (MARC 21 or KORMARC) for each record listed in the results.
- [Access Holdings-Level or Item-Level Records in the Browse Shelf Listing](#) – The Browse Shelf Listing (**Resources > Browse Shelf Listing**) function was expanded to include holdings-level and item-level record access that can be edited in split screen mode for holdings, or the Physical Item Editor for items.
- [Move PO Lines and/or Licenses from an Existing Electronic Collection to a New Electronic Collection](#) – Alma now provides the capability to move PO lines and/or licenses from the existing electronic collection to a new replacement electronic collection.
- [Additional Resource Management Enhancements](#)

Digital Resource Management

- [Alma Viewer Metadata Now Configurable](#) – You can now configure the metadata fields that are displayed when viewing digital content in the Alma Viewer, as well as the order in which these fields appear.
- [Customize Order of Representation Delivery Service](#) – You can now determine whether electronic or digital services appear first in the View It tab. Additionally, you can determine the order of digital services according to the available viewer.
- [Additional Digital Resource Management Enhancements](#)

Fulfillment

- [Direct Transit for Remote Storage Items](#) – A scanned remote storage item can now be sent directly to the remote storage desk for re-shelving (that is, the desk that has a re-shelving relation with the item's location), even if the scan-in desk is not the owning library.
- [Control Patron Renewal](#) – A new privilege can be used if you want to limit the existing ability of users to renew a patron record when the patron record has expired, there is no patron role, or the patron role has expired. In addition, the block **User does not have a patron role or the role has expired** can now be controlled in Block Preferences.
- [Additional Fulfillment Enhancements](#)

Resource Sharing

- [Copyright Payment Support for BLDSS](#) – If the **Willing to Pay** field is selected on a BLDSS borrowing request, the request is now sent with the **payCopyright** field set to **True**.
- [View Borrowing Requests from the Fund Transactions List](#) – It is now possible for Fund/Ledger Managers to view a borrowing request from the fund transactions list.
- [Update Shipping Costs with a Row Action](#) – Borrowing requests contain a new row action, **Edit Shipping Costs**, which allows you to update the shipping cost without opening the full edit form for the borrowing request.
- [Additional Resource Sharing Enhancements](#)

Collaborative Networks



- **Idea Exchange:** [Viewing Network Activities](#) – The Patron Services page can now display a patron's activity across all linked institutions.
- [Centrally Managed Licenses in a Network Zone](#) – The Network Zone can now define a license on behalf of its member institutions, enabling each member institution to use it for their electronic resources and related purchases.
- [Classification Enrichment for Network Zone Publishing to Primo](#) – For Network Zones that have classification enrichment enabled by Support for Publishing to Primo, there is a new classification enrichment option in the Network Zone **Publish bibliographic records from Network Zone to Primo** profile.

- [Member Access to Network Zone Reminders](#) – Member institutions may now manage reminders for Network Zone records.
- [Distribute Role Profiles and Role Assignment Rules from the Network Zone](#) – User profiles and role assignment rules may now be created centrally in the Network Zone and distributed automatically to the member institutions.
- [Distribute Fulfillment Units from the Network Zone](#) – Fulfillment units may now be created centrally in the Network Zone and distributed automatically to the member institutions.
- [Distribute S/FTP Profiles from the Network Zone](#) – S/FTP profiles may now be created centrally in the Network Zone and distributed automatically to the member institutions.
- [Additional Collaborative Network Enhancements](#)

Analytics

- [Load File and Uploading Vendor Dimensions Added to Usage Data](#) – The **Load File** and **Uploading Vendor** dimensions were added to the Usage Data subject area.
- [Additional Analytics Enhancements](#)

Mobile

- [Alma Mobile Logout and Language Enhancements](#) – The Alma Mobile app now provides a logout action. In addition, the Getting Started pages are presented in the language identified as the default language on your mobile device.

Administration and Infrastructure



- **Idea Exchange:** [View Only Catalog, Repository, and Acquisitions Administrator Roles](#) – As was added in the [September release](#) for Fulfillment and User Management, a read-only role parameter was added for the Catalog, Repository, and Acquisitions Administrator roles. A user who has this role with the role parameter enabled can view configuration options but not edit them. This feature exists in the new UI only.
- [Support for Multiple CAS Profiles in a Single Institution](#) – Multiple CAS integration profiles may now be created so that a single institution can authenticate with two or more separate CAS IdPs.
- [Viewing a MARC Record as a BIBFRAME Record](#) – You may now publish and view MARC records as BIBFRAME records.
- [Additional Administration and Infrastructure Enhancements](#)

APIs

- You can now update a borrowing resource sharing request's shipping cost and fund using a POST API.
- New APIs are available to create, update, or delete licenses. For detailed information, see <https://developers.exlibrisgroup.com/alma/apis/acq>.
- If webhook attempts fail, emails are sent to all the email addresses stipulated in the Webhooks profile's **Contact Information** tab.

Alma-Summon Integration

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

- As part of the Alma Configuration menu realignment, the **Discovery** menu was moved between the Resources and Fulfillment menus in both the classic and new Alma UIs.
- Added support for authentication via email link.

Content Operations

- [Library of Congress Authorities Community Zone Updates](#)
- [New Electronic Collections Added to the Alma CKB](#)
- [New External Search Resources](#)

Known Issues

No known issues were identified for the November release.

Next Release Sneak Preview

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

Acquisitions - November 2017 Enhancements

Requiring ERP Numbers for POs

Alma now supports an additional option for integrating POs with your ERP. You can now require that POs have an ERP approval number before they are sent to the vendor.

- Select **Integrate by ERP Number** for the **Export Orders (PO)** job when configuring the [financial integration profile](#). When this option is selected, POs do not require a PO number (this is the default and previous behavior). When this option is selected, POs without ERP numbers are sent only to the ERP.
- A new job **Import PO Approvals** in the financial integration profile re-imports POs from the ERP. POs that are missing an ERP number generate an alert (**ERP Number is Missing**) and require manual handling. This job appears on the **Running** and **Completed** tabs of the Monitor Jobs page (and the **Scheduled** tab, when it is scheduled).

If the PO was rejected by the ERP, Alma generates the alert **Rejected by ERP** with the reason that was sent by the ERP.

- The field **ERP number** appears on the [PO Summary page](#). It can be edited whenever you can edit the PO.
- The ERP number was added as an XML field in the Order list letter or to the EDI file sent to the vendor.
- On pages that contain a secondary search for POs (including Purchase Orders in Review, Approve Orders, Delete POs > **Select PO** quick pick list, Change Vendor in Order > **Add Job** > **PO** quick pick list), you can now search for PO by ERP number.

Additional Acquisitions Enhancements

- Values from MARC field 880 (alternate fields) are sent to the vendor in the following letter XSLs: Order list letter, PO line cancellation letter, PO line claim letter, PO line renewal letter. The fields are:

Alternate Field Name	Used in XML
alternate_creator	<creator_alternate_graphic>
alternate_title	<title_alternate_graphic>
alternate_complete_edition	<acqterms_edition_alternate_graphic>

Example:

```
<b>@@alternate_title@@: </b><xsl:value-of
select="notification_data/title_alternate_graphic" />
```

For more information, see [Letters - How to add the bibliographic alternate graphic representation fields to acquisitions letters.pptx](#).

- When searching for vendors (see [Searching in Alma](#)), you can now search by SUSHI account name. For information on SUSHI accounts, see [Managing SUSHI Accounts](#).
- The vendors American Mathematics Society, Compendex Engineering Village, and SPEI (Society of Photo-Optical Instrumentation Engineers) were added to the list of SUSHI-certified vendors.
- The order of the fields in the summary header that appears when editing a fund or ledger was rearranged. For more information on funds and ledgers, see [Managing Funds and Ledgers](#).
- When deactivating a summary fund, all funds under the summary fund are also deactivated.

Resource Management - November 2017 Enhancements

Updating Community Zone Contributed Electronic Collections



Idea Exchange: You are now able to update electronic collections that you contributed to the Community Zone. Previously, only Ex Libris was able to maintain Community Zone contributed electronic collections. See [Updating Community Zone Contributed Electronic Collections](#) for more information.

Alt+F3 Switching to F3

The Alt+F3 function announced in August (see [Browsing a Full Authority Headings List](#)) is now accessible using F3, and the functionality accessed using F3 is now available using Alt+F3. The section in the online help call **Using Alt+F3** has the new heading [Using F3 \(previously known as Alt+F3\)](#).

Deleting Holdings Using Indication Rules to Filter a Set

A new filtering option was added to the **Delete holdings records with no items** job that enables you to filter the set selected for the job using indication rules. See [Delete holding records with no items](#) for more information.

Cataloging Level Default Setting

A new customer parameter was added to Alma for setting a cataloging level default preference. This setting determines if the cataloging level already stored in the record is to be used as the default cataloging level when editing records. See [use_record_cataloging_level_by_default](#) for more information.

Record Format Identified in KERIS External Search Results

The information that appears in the KERIS external search results was enhanced to identify the record format (MARC 21 or KORMARC) for each record listed in the results. See [Working with Search External Resources in the MD Editor and Using KERIS](#) for more information.

Access Holdings-Level or Item-Level Records in the Browse Shelf Listing

The Browse Shelf Listing ([Resources > Browse Shelf Listing](#)) function was expanded to include holdings-level and item-level record access that can be edited in split screen mode for holdings, or the Physical Item Editor for items. See [Editing Holdings-Level Records](#) and [Editing Item-Level Records](#) on the [Browsing the Shelf Listing](#) page for more information.

Move PO Lines and/or Licenses from an Existing Electronic Collection to a New Electronic Collection

For situations in which a vendor is replacing an electronic collection with a newer one, or you have decided to change vendors of an electronic collection, Alma now provides the capability to move PO lines and/or licenses from the existing electronic collection to the new electronic collection. See [Move electronic portfolio information](#) for more information.

Additional Resource Management Enhancements

- Field 440 (obsolete - Series Statement/Added Entry-Title) subfield \$p (Name of part/section of a work) now appears after subfield \$a in the **Series** field of the staff search results.

Digital Resource Management - November 2017 Enhancements

Alma Viewer Metadata Now Configurable

You can now configure the metadata fields that are displayed when viewing digital content in the Alma Viewer, as well as the order in which these fields appear.

Farmhouse in Provence

Farmhouse_in_Provence.jpg

Descriptive Information

Descriptive Data - IE DC

Title :	Farmhouse in Provence
Creator :	Vincent Willem van Gogh
Type :	text
Type :	event
Date :	1888
Description :	Farmhouse in Provence also known as Entrance Gate to a Farm with Haystacks was made in 1888 by Vincent van Gogh in Arles in Provence at the height of his career.

Alma Viewer Metadata

You can configure the fields from the Delivery Profiles Metadata page ([Configuration > Fulfillment > Digital Fulfillment > Delivery Profiles Metadata > MARC Profile or Qualified Dublin Core](#)). You can enable or disable a field and reorder the fields.

Code Table Cancel Customize

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

DC Profile Qualified Dublin Core ?

Table code: DCProfileQualifiedDublinCore Table Description: DC fields description for the viewer

Patron Facing: Yes

Customization mode: Entire table needs to be customized

[Restore Default Translations](#)

Filter: English

	Enabled	Move Up	Move Down	Code	Description	Translation	Default Value	Updated By	Last Updated
1	<input checked="" type="checkbox"/>			dc:title	Title	Title	<input type="radio"/>	-	-
2	<input checked="" type="checkbox"/>	▲	▼	dc:creator	Creator	Creator	<input type="radio"/>	-	-
3	<input checked="" type="checkbox"/>	▲	▼	dc:subject	Subject	Subject	<input type="radio"/>	-	-
4	<input checked="" type="checkbox"/>	▲	▼	dc:description	Description	Description	<input type="radio"/>	-	-
5	<input checked="" type="checkbox"/>	▲	▼	dc:type	Type	Type	<input type="radio"/>	-	-
6	<input checked="" type="checkbox"/>	▲	▼	dc:date	Date	Date	<input type="radio"/>	-	-
7	<input checked="" type="checkbox"/>	▲	▼	dc:publisher	Publisher	Publisher	<input type="radio"/>	-	-

Delivery Profiles Metadata

For more information, see [Configuring Delivery Profiles Metadata](#).

Customize Order of Representation Delivery Service

You can now determine whether electronic or digital services appear first in the View It tab. Additionally, you can determine the order of digital services according to the available viewer.

The order between digital and electronic services is configured in **Configuration > Fulfillment > Discovery Interface Display Logic > Other Settings**. Select **Electronic, Digital** or **Digital, Electronic**.

Other Settings

Enable Display of License Information

Include Representation services in link resolver statistics

Max. Number of Representations in ViewIt

Order of ViewIt Services

Order of ViewIt Services

The order of digital services according to the available viewer is configured in **Configuration > Fulfillment > Discovery Interface Display Logic > Viewer Services**. Drag the services and rearrange their order to change the order in which they appear on the View It tab.

Viewer Services					Back
					+ Add Service
Active	Service Name ▲	Service Code ▼	Service Description		
1	<input checked="" type="checkbox"/>	Alma Viewer	AlmaViewer	Digital Version(s)	...
2	<input checked="" type="checkbox"/>	Universal Viewer	UniversalViewer	Digital Version(s) - IIIF	...

Order of Viewer Services

Additional Digital Resource Management Enhancements

- The Alma viewer now displays all formats that are natively supported by the browser. If a format is not compatible, the user is given an option to download the file.

Fulfillment - November 2017 Enhancements

Direct Transit for Remote Storage Items

A scanned remote storage item can now be sent directly to the remote storage desk for re-shelving, even if the scan-in desk is not the owning library. When the **Transit Scheme** field is defined as **Requested Pickup**, the item is sent directly to the desk that has a reshelving relation with the item's location. When **Transit Scheme** is set to **Owning Desk**, the item is delivered to the owning library, which can then transit the item to the requested reshelving desk. See [Adding a Remote Storage Facility](#).

Control Patron Renewal

A new privilege can be used if you want to limit the existing ability of users to renew a patron record when the patron record has expired, there is no patron role, or the patron role has expired. To enable this option, contact Ex Libris Support.

In addition, the block, **User does not have a patron role or the role has expired**, can now be controlled in the Block Preferences. The standard block options are available for the loan block. See [Editing Block Preferences](#).

Additional Fulfillment Enhancements



- **Idea Exchange:** The following classes were added to the Get It holding/items list, allowing you to customize them separately:
 - holdingLibraryName
 - holdingLocationName
 - holdingAccessionNumber
 - holdingCallNumber
 - holdingAvailabilityInfo
 - itemLibraryName
 - itemLocationName
 - itemAccessionNumber
 - itemAvailabilityInfo
 - itemBarcode
 - itemMaterialType
 - itemPolicy
 - itemAltCallNumber
 - itemDescription

- itemPublicNote
- itemStatus
- You can now configure additional reading list statuses (just as you already can for citations). See [Configuring Additional Reading List Statuses](#).
- The Course's Reading List page now includes up and down arrows so that you can reorder the way in which the lists appear within a course in Leganto. See [Managing a Course's Reading Lists](#).
- The number of students and the name of the instructor are added to the purchase request note when one is created from a citation. The note now appears as: Required for course <course name> (<course code>), Instructor: <instructor name>, Number of participants: <number of participants>, Number of total copies: <number of total copies>. For more information about purchase requests generated from citations, see [Configuring Automatic Purchasing Requests from Citations](#).
- On the Citations Copyright Default Status mapping table (see [Configuring the Default Copyright Status of Reading List Citations](#)), the **repository_citation** attribute was removed and replaced with the **digital_repository**, **electronic_repository**, and **physical_repository** attributes. This allows you to define the default copyright status for each type of citation.
- When creating a digitization request (patron, staff, library or ship), if there is only one available department to manage the request, it is automatically selected. See [Creating a Request](#).
- The author and publication year were added to all of the lists in patron services (loans, returns, and requests). The columns are hidden by default and can be added by changing the list display configuration. In the loans and returns lists, the publication year is displayed only for items that were borrowed after the November 2017 release. See [Managing Patron Services](#).
- On the Reading Lists Task List page, the columns **Visibility** and **Create Date** were changed to **Reading List Visibility** and **Creation Date**, respectively.
- You can now click **Expand** on the Edit Reading List page to have the alerts, physical, or electronic inventory information appear expanded by default for every citation. For more information on this feature, see the similar feature for search results in [Viewing Inventory/Other Details](#).

Resource Sharing - November 2017 Enhancements

Copyright Payment Support for BLDSS

If the **Willing to Pay** field is selected on a BLDSS borrowing request, the request is now sent with the **payCopyright** field set to **True**: `<payCopyright>true</payCopyright>`

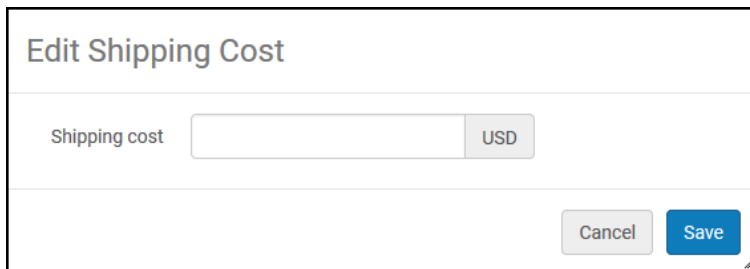
Willing to Pay was also added as an optional field on the new Primo borrowing request form. It is disabled by default and can be added from the Resource Sharing Form Customization page. Note that the field can be added only to the new request form, that is, when the **rs_use_new_mashup_form** parameter is set to **True**. See [Customizing Primo Resource Sharing Forms](#).

View Borrowing Requests from the Fund Transactions List

It is now possible for Fund/Ledger Managers to view a borrowing request from the fund transactions list. For users with these roles, the requester information is hidden. See [Borrowing Requests Associated with Funds](#).

Update Shipping Costs with a Row Action

Borrowing requests contain a new row action, **Edit Shipping Costs**.



Edit Shipping Cost Dialog Box

This allows the user to update the shipping cost without opening the full edit form for the borrowing request. This option is also available for completed requests. See [Workflow Actions](#).

Additional Resource Sharing Enhancements

- When creating a move request (ship physically/digitally) to fulfill a lending request, the following fields are added in a note:

- Article\Chapter Title
- Volume
- Issue
- Chapter
- Pages
- Year
- Note

For more information, see [Placing Requests](#).

- A new customer parameter, **rs_specific_edition_only_default**, was added (**Configuration > Fulfillment > General > Other Settings**). When the value of this parameter is **True** (which is the default), the **Specific Edition Only** check box is selected when opening the resource sharing request form in Primo (which is the current default). See [Configuring Other Settings \(Fulfillment\)](#).

Collaborative Networks - November 2017 Enhancements

Viewing Network Activities



Idea Exchange: The Patron Services page can now display a patron's activity across all linked institutions. A new section of the page, **Network Activity**, contains the loan, request, and fines and fees balance data for the linked accounts for view purposes only. It is visible only from the patron's home institution if the institution is part of a fulfillment network, and the user has the consortial services privilege. A filter allows you to select a transaction for a specific institution, or for all institutions that have a linked account for the patron. All active loans and requests are displayed, with no option to filter the view for the current session only.

See [Viewing Network Activities](#).

The screenshot shows the 'Patron Services' interface for user 'azulay, shlomi'. The 'Network Activity' tab is selected, displaying a table of 'Patron Balances' and 'Patron Loans'.

Patron Balances	
Institution Name	Balance
1 Alma University	30.00 USD

Patron Loans								
Institution Name	Title	Due Date	Barcode	Loan Date	Loan Status	Item Policy	Library	Loan Notes
1 Alma University	Crime.	08/07/2017 01:24:42 PDT	39352079471348	08/07/2017	Normal	game	Main Library	
2 Western University	Cult movies / Karl French and Philip French.	08/14/2017 23:59:00 PDT	35132501516884	08/07/2017	Normal	game	Western Library	

Patron Services Network Activity Tab

Centrally Managed Licenses in a Network Zone

Until now, a Network Zone could negotiate a license on behalf of its member institutions (a *negotiation license*). The Network Zone would then acquire the resource, and member institutions could link to the Network Zone's resource and the Network Zone license.

Now the Network Zone can define a license on behalf of its member institutions (a *centrally managed license*), enabling each member institution to use it for their electronic resources and related purchases. The Network Zone pushes the license to each member institution using the existing **Distribute Network Acquisition Changes to Members** job. The member institution can then acquire resources linked to the local copy of the license.

To add a centrally managed license, select **Central office negotiated** when adding the license. For more information, see [Centrally Managed Licenses for Electronic Resources in a Network Zone](#). The license is pushed to member institutions when it is created or edited, and it can be pushed manually by selecting **Distribute to member** from the list of Licenses and Amendments. For more information, see [Editing Licenses or Amendments](#).

Classification Enrichment for Network Zone Publishing to Primo

For Network Zones that have classification enrichment enabled by Ex Libris Support for publishing to Primo, there is a new classification enrichment option in the Network Zone **Publish bibliographic records from Network Zone to Primo** profile. See the [Content Options section](#) for more information.

Member Access to Network Zone Reminders

Member institutions may now manage reminders for Network Zone records. See [Managing Network Reminders](#) for more information.

Distribute Role Profiles and Role Assignment Rules from the Network Zone

Role profiles and role assignment rules may now be created by the Network Zone and distributed automatically to the member institutions. A new job, **Distribute network user management changes to members**, was created to copy the profiles and assignment rules from the Network Zone to its members. The member institutions will have view permission to the records but will not be able to edit or delete them. The job is accessed from **Admin > Distribute User Management Configuration**. When the job completes successfully, the run date updates the `distribute_user_management_changes_last_run` parameter with the date for use the next time the job runs. For more information, see [Centrally Managing Configuration Tables in a Network Zone](#).

Distribute Fulfillment Units from the Network Zone

Fulfillment units may now be created by the Network Zone and distributed automatically to the member institutions. The existing job, **Distribute Network Fulfillment Changes to Members**, now includes distribution of the fulfillment unit.

The member institutions have view permission to the records but are not able to edit or delete them. When the Network Zone fulfillment unit has been distributed, the local Fulfillment Units configuration pages contain two new fields, **Use Rules from Network Fulfillment Unit** and **Use Network Rules First**.

The screenshot shows the 'Edit Fulfillment Unit' interface. At the top, it indicates 'You are configuring: Training - Member 1 - Clean'. Below this, the unit name is 'Closed Stack' with a code of 'Closed Stack'. The form is divided into three tabs: 'Fulfillment Unit Details', 'Fulfillment Unit Locations', and 'Fulfillment Unit Rules'. The 'Fulfillment Unit Details' tab is active, showing a 'Name' field with 'Closed Stack' and a 'Description' field. Under 'On Shelf Request Policy', there are five radio button options: 'Request for pickup anywhere regardless of availability' (selected), 'Request for pickup in different library only', 'Request for pickup in different campus only', 'No Requesting from available holding', and 'No Requesting'. At the bottom, there are two new fields: 'Use Rules From Network Fulfillment Unit' with a dropdown menu set to 'Network Zone Rule', and 'Use Network Rules First' with a checked checkbox. A red box highlights these two fields.

Edit Fulfillment Unit Details

Use Rules from Network Fulfillment Unit displays a drop-down list containing all of the fulfillment units that were distributed from the Network Zone. Selecting **Use Network Rules First** instructs Alma to check the rules from the selected Network Zone fulfillment unit before processing the rules from the local fulfillment unit. When this check box is selected, Alma also considers the **On Shelf Request Policy** from the selected Network Zone fulfillment unit instead of the local **On Shelf Request Policy**. Additionally, the local fulfillment rule uses the Network Zone rule as the local default.

For more information, see [Configuring Fulfillment Units](#).

Distribute S/FTP Profiles from the Network Zone

S/FTP profiles may now be created by the Network Zone and distributed automatically to the member institutions. The distribution is handled by the **Distribute network administration changes to members** job. When the S/FTP profile is distributed, the member institutions are able to edit only the subdirectory, username, and password. The job is accessed from **Admin > Distribute Administration Network Configuration**. For more information, see [Centrally Managing Configuration Tables in a Network Zone](#).

Note

Private/public keys are not supported for distribution by the Network Zone.

Additional Collaborative Network Enhancements

- In the MD Editor, when deleting the last holdings record (for a bibliographic record) in the Institution Zone, a pop-up message now appears enabling you to delete the cached bibliographic record linked to the Network Zone.

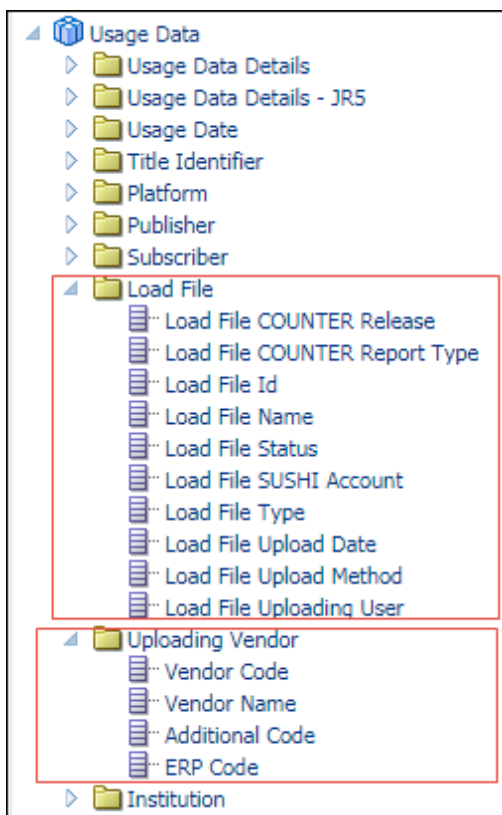


Delete Bibliographic Record Pop-Up Message

Analytics - November 2017 Enhancements

Load File and Uploading Vendor Dimensions Added to Usage Data

The **Load File** and **Uploading Vendor** dimensions were added to the Usage Data subject area. With the fields in these dimensions, you can create reports about the file that contains the usage data and the vendor used during the upload process.



Load File and Uploading Vendor

Additional Analytics Enhancements

- Date filter fields were added to the following locations. These filters make it easier to filter report results by date:
 - Borrowing Requests > Borrowing Creation Date
 - Course Reserves > Current Course Start Date, Current Course End Date
 - Events > Event Date
 - Fines and Fees > Transaction Date, Creation Date

- Funds Expenditure > Periods Outer
- Lending Requests > Lending Creation Date
- Link Resolver Usage > Request Date
- Requests > Request Date, Request Completion Date
- Title > Title Creation Date, Title Modification Date
- The **Reading List Order** field was added to Course Reserves > Reading List. It indicates the order of the reading list in the course.
- The **Electronic Collection Public Name** field was added to E-Inventory > Portfolio Details for Consortia > Electronic Collection. It contains the public name of the electronic collection.
- The following fields were added to the **Reading List** dimension in the Course Reserves, Leganto Student Usage, and Leganto Instructor Usage Events subject areas:
 - **Reading List Locked** – indicates whether the reading list is locked (yes/no)
 - **Reading List Associated to a Course** – indicates whether the reading list is associated to a course (yes/no)
- The **Leganto Publication Status** field (Course Reserves > Reading List) was deprecated. The **Leganto Publication List Visibility** field should be used instead.
- The **Citation Representation URL** field was added to Course Reserves > Reading List Citation. It contains the URL of the digital representation of the citation.
- The following event types, displayed as values for the **Event Type** field (Leganto Instructor Usage Events > Instructor Usage Events) now display the tag value, which is more meaningful, instead of the tag code:
 - **Add Section Tag**
 - **Add Citation Tag**
 - **Remove Section Tag**
 - **Remove Citation Tag**

Mobile - November 2017 Enhancements

Alma Mobile Logout and Language Enhancements

The Alma Mobile app now provides a logout action. See [Logging Out of Alma Mobile](#) for more information.

In addition, the Getting Started pages are presented in the language identified as the default language on your mobile device (as long as that language is one supported by Alma). See [Getting Started and Logging In](#) for more information.

Administration and Infrastructure - November 2017 Enhancements

View Only Catalog, Repository, and Aquisitions Administrator Roles



Idea Exchange: In the new UI, if you want Catalog, Repository, or Acquisitions Administrators to be able to view but not edit catalog or repository configuration settings, you can now select the **Read only** parameter for these roles. For more information, see [User Roles - Descriptions and Accessible Components](#).

The screenshot shows the 'User Roles Details' form. At the top, there are 'Cancel' and 'Save Role' buttons. Below is a header section with a user icon and the text 'readonly, readonly'. A table below lists role details: Primary identifier (readonly), Record type (Staff), Account Type (Internal), and User group (*). The 'Manage fulfillment activities' link is also present. The 'Role information' section includes Role name (Catalog Administrator), Scope (QA - Provisioning), Status (Active), and Expiry Date. The 'Role parameters' section at the bottom has a 'Read only' checkbox which is checked and highlighted with a red box.

Read Only Role Parameter

Support for Multiple CAS Profiles in a Single Institution

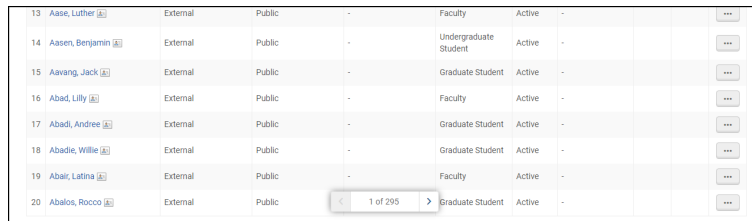
A single institution may need to authenticate with two or more separate CAS IdPs. You can do this by creating multiple CAS integration profiles. You can then use a `/cas/[profile code]` suffix in the Alma URL. Alma uses the profile identified by the URL. When using a URL without the profile code in the suffix, Alma uses the CAS profile that is marked as the default. See [CAS-Based Single Sign-On/Sign-Off](#).

Viewing a MARC Record as a BIBFRAME Record

You can now publish and view MARC records as BIBFRAME records. For more information on publishing and viewing MARC records in BIBFRAME, see the [Developer's Network](#). Also see [Resource Management - How to view and publish MARC records in BIBFRAME format.pptx](#).

Additional Administration and Infrastructure Enhancements

- When viewing a list that has pagination, if the pagination element at the bottom of the list is not visible, a small pagination pane now appears to float over the bottom of the list. Click the right or left arrow (or press **Alt-** or **Alt-**) to view the next or previous page. To view a specific page, click the page number, enter a new page number, and press **Enter**.



The screenshot shows a table with 10 columns and 8 rows of user data. A floating pagination pane is overlaid on the bottom of the table, displaying a left arrow, the text "1 of 295", and a right arrow.

13	Aase, Luther	External	Public	-	Faculty	Active	-	-	-	...
14	Aasen, Benjamin	External	Public	-	Undergraduate Student	Active	-	-	-	...
15	Aavang, Jack	External	Public	-	Graduate Student	Active	-	-	-	...
16	Abad, Lilly	External	Public	-	Faculty	Active	-	-	-	...
17	Abadi, Andree	External	Public	-	Graduate Student	Active	-	-	-	...
18	Abadie, Willie	External	Public	-	Graduate Student	Active	-	-	-	...
19	Abair, Latina	External	Public	-	Faculty	Active	-	-	-	...
20	Abalos, Rocco	External	Public	-	Graduate Student	Active	-	-	-	...

Floating Pagination Pane

- The customer parameter **email Updating new user** (see [Configuring Other Settings](#)), which was not in use, was removed.
- If Hebrew or Arabic is enabled (see [Configuring Institution Languages](#)), the language appears as an option in the user menu's **Language** drop-down list. Note that the translations of these languages are still in progress and they should not be used until they are officially released.
- The default password generated by the [Update/Notify Users job](#) is now 10 random characters. In addition, the notification about a new password is now sent only to users whose password was changed.
- The **Plugin** field was removed from several integration profiles (bursar, student information systems, finance) because they were not used.
- Additional color schemes were added in the new UI. See [Configuring the Alma Logos and Color Scheme](#).

Content Operations - November 2017 Enhancements

Library of Congress Authorities Community Zone Updates

The following are the Library of Congress subject authority updates for the period of September 18th through October 18th:

- Number of records updated: 182
- Number of records added: 432
- Number of records deleted: 104

The following are the Library of Congress name authority updates for the period of September 18th through October 18th:

- Number of records updated: 17925
- Number of records added: 28793
- Number of records deleted: 374

The following are the Canadian name authority updates for the period of September 18th through October 18th:

- Number of records updated: 77
- Number of records added: 922
- Number of records deleted: 16

The following are the Library of Congress Genre/Form Terms (LCGFT) updates for the period of September 18th through October 18th:

- Number of records updated: 1
- Number of records added: 4

New Electronic Collections Added to the Alma CKB

The following electronic collections were added to the Alma Community Zone from September 18th through October 22nd:

- Alexander Street Press 20th century North American drama second edition
- Alexander Street Press art and architecture in video outside North America
- Alexander Street Press Asian film online volume 1 outside North America
- Alexander Street Press Asian film online volume 2 outside North America
- Alexander Street Press Australasian literature online outside North America
- Alexander Street Press Australasian video online outside North America
- Alexander Street Press border and migration studies online video all titles
- Alexander Street Press border and migration studies online video Australia
- Alexander Street Press border and migration studies online video Canada
- Alexander Street Press border and migration studies online video outside North America

- Alexander Street Press border and migration studies online video United States
- Alexander Street Press British and Irish women's letters & diaries first ed
- Alexander Street Press Caribbean studies in video the Banyan archive all titles
- Alexander Street Press Caribbean studies in video the Banyan archive Australia
- Alexander Street Press Caribbean studies in video the Banyan archive Canada
- Alexander Street Press Caribbean studies in video the Banyan archive outside North America
- Alexander Street Press Caribbean studies in video the Banyan archive United States
- Alexander Street Press counseling and therapy in video volume iv all titles
- Alexander Street Press counseling and therapy in video volume iv Australia
- Alexander Street Press counseling and therapy in video volume iv Canada
- Alexander Street Press counseling and therapy in video volume iv outside North America
- Alexander Street Press counseling and therapy in video volume iv United States
- Alexander Street Press criminal justice and public safety in video all titles
- Alexander Street Press criminal justice and public safety in video North America
- Alexander Street Press criminal justice and public safety video outside North America
- Alexander Street Press dance online dance in video vol 2 outside North America
- Alexander Street Press dance online dance in video volume 2 all titles
- Alexander Street Press dance online dance in video volume 2 Australia
- Alexander Street Press dance online dance in video volume 2 United States
- Alexander Street Press demand driven acquisition exclusive content all titles
- Alexander Street Press demand driven acquisition exclusive content Australia
- Alexander Street Press demand driven acquisition exclusive content outside North America
- Alexander Street Press demand driven acquisition exclusive content United States
- Alexander Street Press demand driven acquisition feature film outside North America
- Alexander Street Press demand driven acquisition feature film United States
- Alexander Street Press demand driven acquisition feature film Australia
- Alexander Street Press education in video volume 2 outside North America
- Alexander Street Press engineering case studies online video all titles
- Alexander Street Press engineering case studies online video Australia
- Alexander Street Press engineering case studies online video Canada
- Alexander Street Press engineering case studies online video outside North America
- Alexander Street Press engineering case studies online video United States
- Alexander Street Press environmental studies in video outside North America
- Alexander Street Press ethnographic video online volume 1 North America
- Alexander Street Press ethnographic video online volume 1 outside North America
- Alexander Street Press ethnographic video online volume 2 outside North America
- Alexander Street Press ethnographic video online volume 3 outside North America
- Alexander Street Press ethnographic video online volume 3 United States
- Alexander Street Press ethnographic video online volume 4 outside North America
- Alexander Street Press ethnographic video online volume 4 United States
- Alexander Street Press fashion studies online the video fashion library
- Alexander Street Press filmmakers library online volume 1 North America
- Alexander Street Press filmmakers library online volume 1 outside North America
- Alexander Street Press filmmakers library online volume 2 North America
- Alexander Street Press food studies online video outside North America
- Alexander Street Press health and society in video outside North America
- Alexander Street Press human resource management online video all titles
- Alexander Street Press human resource management online video Australia
- Alexander Street Press human resource management online video Canada
- Alexander Street Press human resource management online video outside North America
- Alexander Street Press human resource management online video United States
- Alexander Street Press human rights studies online video all titles
- Alexander Street Press human rights studies online video outside North America
- Alexander Street Press human rights studies online video United States
- Alexander Street Press international business online video all titles

- Alexander Street Press international business online video Australia
- Alexander Street Press music online classical scores library volume 4
- Alexander Street Press music online jazz music library outside North America
- Alexander Street Press new world cinema independent features and shorts 1990 United States
- Alexander Street Press new world cinema independent short 1990-present Canada
- Alexander Street Press psychological experiments online text all titles
- Alexander Street Press psychological experiments online video all titles
- Alexander Street Press psychological experiments online video Australia
- Alexander Street Press psychological experiments online video Canada
- Alexander Street Press psychological experiments online video China
- Alexander Street Press psychological experiments online video outside North America
- Alexander Street Press psychological experiments online video United States
- Alexander Street Press sports medicine and exercise science in video volume 2
- Alexander Street Press the BBC video collection outside North America
- Alexander Street Press the PBS video collection second edition all titles
- Alexander Street Press theatre in video North America pre-June 2011 purchasers
- Alexander Street Press theatre in video volume 2 outside North America
- Alexander Street Press twentieth century religious thought Judaism all titles
- Alexander Street Press women and social movements in modern empires 1820 video
- Alexander Street Press women and social movements modern empires since 1820 text
- BL 19th Century
- Bloomsbury Collections Anthropology 2017
- Bloomsbury Collections Biblical Studies 2017
- Bloomsbury Collections Classical Studies And Archaeology 2017
- Bloomsbury Collections Education 2017
- Bloomsbury Collections Film And Media Studies 2017
- Bloomsbury Collections Hart Publishing 2017
- Bloomsbury Collections History 2017
- Bloomsbury Collections Linguistics 2017
- Bloomsbury Collections Literary Studies 2017
- Bloomsbury Collections Philosophy 2017
- Bloomsbury Collections Religious Studies 2017
- Bloomsbury Collections Theology 2017
- Early English Books Online (EEBO)
- Literature and Cultural Studies E-Books Online, Collection 2017
- Springer Journals Database Optimum 2017

New External Search Resources

The following external search resources were added to Alma Community Zone for the November release:

- City University of Hong Kong
- Israel Digital Information Service Center
- National Taiwan University Main Library
- University of Oxford (ADVANCE)
- Waseda University Library

Next Release Sneak Preview

Note

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

Acquisitions

- PO Line Letters – There will be an option to select whether to send the PO line to the vendor. New PO line purchase types will be added to the **Acquisition Method** list in order to define whether the PO line includes a letter or does not include a letter to the vendor.
- Add License to PO Line with No Inventory – When creating a PO line without inventory in Alma, the PO line is created without an option to add or attach inventory to it. For PO lines of the type **Electronic Service**, it will now be possible to add a license to the PO line.
- License per Group Setting – It will now be possible to associate a license per group setting.

Resource Management

- Support Publishing in RDA/RDF – General Publishing will have an option to provide a RDA/RDF record based on the MARC record that is retrieved in the API. A new tab, **Group Setting**, will be added to the license record and will hold the link between the license and its groups. It will be possible to search licenses by group setting in the advanced search, and to filter the license list by group setting.

Digital Resource Management

- Enhanced DC Handling of SRU – There will be a number of new options related to enhancing the DC handling of SRU.

Fulfillment

- Fine and Fee Notification Profile - Fees – The fine/fee notification profiles will have an additional **Notification Fee** field that will enable you to configure a fee for the notice.

Resource Sharing

- Activity Status on Resource Sharing Requests – It will now be possible to define an **Active/Inactive** status for a resource sharing library. If set to **Inactive**, incoming lending requests will be rejected, and patrons will not be able to place borrowing requests.

Collaborative Networks

- Negotiation License – Currently it is not possible to define a negotiation where the content is different for each member. It will now be possible to indicate for each member the relevant content that was negotiated for the member.
- Network Zone Configuration - General Electronic Service – It will now be possible to define General Electronic Services centrally in the Network Zone, and to distribute these settings to the member institutions.
- General Publishing from the Network Zone – The publishing platform will be enhanced to provide the option for publishing records from the Network Zone, and from all member institutions directly from the Network Zone.

Analytics

- New Subject Area - OBI Usage – This new subject area will allow you to view which users accessed which reports in Analytics.

Mobile



- **Idea Exchange:** Restore Functionality – The Scan In Items area will be enhanced to include a restore option.

APIs

- API to Combine Sets – It will be possible to use a POST call to create a new set based on a Boolean operator between two sets (logical/itemized). The output is always an itemized set.
- Analytics API for Report List – This will be able to be used in Tableau Web Data Connector, among other uses.
- BIBFRAME API – This API will expose catalog records as BIBFRAME.