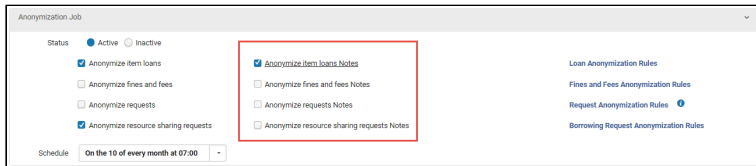


2023 RN 05 Main

Anonymization of Notes in Requests and Other Records

May 2023 Fulfillment

At times, personal information is entered into the Notes attached to requests and other records related to patrons. Alma's anonymization feature has therefore been expanded to make it possible to delete Notes as well as other patron information from closed loans, fines and fees, requests, and resource-sharing requests. Institutions can configure the anonymization job (Fulfillment - Handle Historical Archiving) to remove Notes from any or all of these sources. For additional information, see [Configuring Fulfillment Jobs](#).



New anonymization options

Option for Items Returned from Reading Rooms to Be Restored to Permanent Locations Immediately

May 2023 Fulfillment

A new option in the configuration of a reading-room circulation desk, **Restore from reading room at checkin**, makes it possible for items that have been temporarily moved to reading rooms to appear in Alma and in Primo as being restored to their permanent locations as soon as they are checked in for final return at the reading rooms. When this option is not selected, these items are only restored to their permanent locations when they are checked in at those destinations. The terms of use (TOU) of these items are set in accordance with their current locations, so this setting affects the time at which the TOU revert to their permanent settings, including the levels of fees and fines. For additional information, see [Configuring Circulation Desks](#).

Watch the [Reading Room Functionality in Alma](#) video (54:45 minutes).

Additional Optional Fields Can Be Added to Resource-Sharing Task Lists

May 2023 Fulfillment - Resource Sharing

New optional fields are now available for inclusion in the rows of resource-sharing task lists in the New Layout.

The following optional fields can now be added:

Lending Request Task Lists		Borrowing Request Task Lists	
Column 1	Column 2	Column 1	Column 2
<ul style="list-style-type: none"> • OCLC Number • LCCN • Issue • Volume (book) • Volume (article) • Pages • MMS ID 	<ul style="list-style-type: none"> • Internal Identifier • Additional Infor • Pickup Location • Level of Service • Barcode • Request printed • Date for Reply • Update date 	<ul style="list-style-type: none"> • OCLC Number • LCCN • Issue • Volume (book) • Volume (article) • Pages • Request Note • MMS ID 	<ul style="list-style-type: none"> • Internal Identifier • Additional Infor • Pickup Location • Level of Service • Barcode • Update date

These fields are hidden by default. You can choose which fields to include in your task-list displays, and where in the record display they should appear, thereby improving the visibility of those fields that are most important to you. To do so, in the task-list page, open the **Customization menu** (

), and then select **User customization > Record customization**. For additional information, see [New Layout 2022](#).

Borrowing Requests with "Ready to Be Sent" Status in Tasks List

May 2023 Fulfillment - Resource Sharing



NERS Enhancement (ID #7934)

The **Tasks** list of **Borrowing Requests** now includes links for borrowing requests that have the status **Ready to be sent** ("unassigned" and "assigned to me"). For additional information, see [The Alma User Interface](#).

The screenshot shows a 'Tasks' list with the following items:

- 39 Purchase Requests
- 109 Borrowing Requests (expanded)
 - 29 New - with no partner - unassigned
 - 1 Recalled - unassigned
 - 58 Returned by patron - unassigned
 - 1 Shipped digitally - unassigned
 - 1 With active notes - assigned to you
 - 13 With active notes - unassigned
 - 5 Ready to be sent - unassigned
 - 1 Ready to be sent - assigned to me
- 5 Lending Requests
- 68 Other Requests

"Ready to be sent" borrowing requests in the Tasks list

New Layout for Resource-Sharing Task Lists Is Now the Exclusive Option

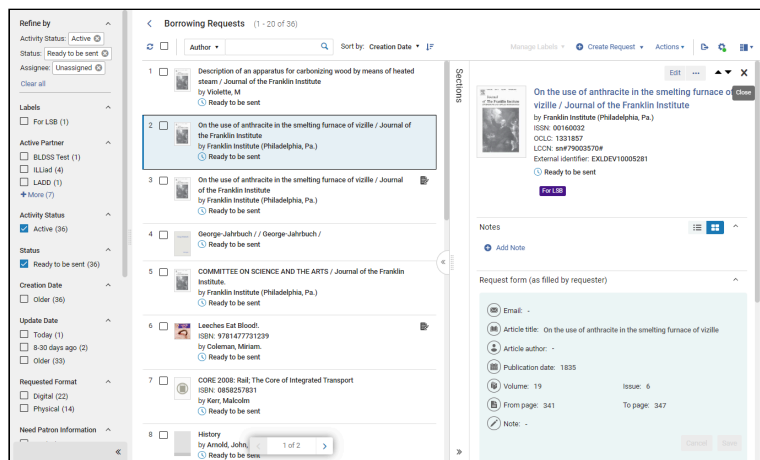
May 2023 Fulfillment - Resource Sharing

The New Layout of Alma task lists is now the only available interface for the Borrowing Requests and the Lending Requests task lists. Users can no longer opt-out of this layout and use the previous layout.

The main new features of the new layout are:

- **Details pane:** A work area can be opened in a pane on the right side of the request list. This makes it possible to edit most aspects of the request without losing sight of the request list, and also speeds up the editing process.
- **Multiple facet selection:** Multiple criteria can be selected in each facet category, providing more flexibility in the creation of a filtered request list.
- **Streamlined access to notes and patron queries:** Notes and patron queries can be seen, added, and edited in the new right pane. This makes these important elements more noticeable and easier to manage when reviewing the request list or processing requests.
- **Status and assignee information as facets:** Activity status and assignee information are facet categories, enabling searching for requests by specifying multiple activity statuses and a number of specific assignees.
- **Sliding panel:** When access to the full request form, with all of its tabs, is required, it opens in a panel that "slides" out from the right side of the right panel, only partially covering the task list. This enables work on all aspects of the request without losing sight of the request-list context.

Watch the [New Resource Sharing Task List](#) video (3:34 minutes).



Borrowing Requests task list - New Layout with Details pane open

Enhanced Notes Section in Resource-Sharing Task Lists

May 2023 Fulfillment - Resource Sharing

The **Notes** section that appears in the **Details** pane of the resource-sharing task lists has been enhanced. It now provides an additional display mode, **List layout** mode, in addition to the **Notes layout** mode, which was previously available. The new layout mode supports searching within and sorting of the existing notes, as well as an alternative view of the notes themselves. To switch between the modes, select an option at the top of the section (



). For additional information, see [New Layout 2022](#).

Watch the [Enhanced Notes Section in Resource Sharing Task Lists](#) video (1:18 minutes).

Notes (1 - 4 of 4)

Edit ... ▲ ▼ ✕

☰ ☱ ▲

Contact Jenny for more details.

Created: Ex Libris Staff 03/30/2023

Modified: Ex Libris Staff 03/30/2023

Failed to send Send Request message to Rapid ILL, Reason is: Unable to find matching Journal

Created: 10/19/2021

Modified: 10/19/2021

[Rapid ILL] Unfilled reason:

Created: 10/19/2021

Modified: 10/19/2021

Unable to find matching Journal

Created: 10/19/2021

Modified: 10/19/2021

+ Add Note



Notes in Notes layout mode (left) and the new, List layout mode (right)

Unused Labels Automatically Removed from Resource-Sharing Task Lists

May 2023 Fulfillment - Resource Sharing



Idea Exchange

Labels in resource-sharing task lists that are not attached to any records are now automatically removed from the list of available labels. This clears unnecessary clutter, making it easier to work with the list of labels. For additional information, see [New Layout 2022](#).

Ship Digitally Directly from Download Electronic Resource Screen

May 2023 Fulfillment - Resource Sharing

Alma now enables you to ship a digital request directly from the **Download Electronic Resource** screen. After downloading a digital request (**Lending Request > Download Electronic Resource** action), you can now use the **Ship item digitally** action to upload the electronic resource directly from the **Download Electronic Resource** screen. Additionally, more metadata is now available on this screen.

Download Electronic Resource

4 Trends In Food & Beverage Formulation / Food manufacturing

ISSN : 1558-576X
OCLC : 49780442
Issue : 1
Publication Year : 2018
External Identifier : 20207816

1 ABU/INFORM Collection
Available from 03/01/2002 until 06/30/2006.
Internal Description: 2012/04/23: turned on target for Default. CEM

Ship item digitally

Drop a file or browse

Cancel Ship

Ship item digitally

The borrower then receives the **Notification Item Letter** with the resource attached or a link to download the resource.

For more information, see [Handling Requests for Digital Resources](#).

Sunset of the Classic Metadata Editor

May 2023 Resource Management

After many years of service, the Classic Metadata Editor is retired and all work now continues in the new and improved Metadata Editor.

For more information on the new Metadata Editor, see [Navigating the Metadata Editor Page](#).

Personalized Quick Links to Favorite Actions in Metadata Editor

May 2023 Resource Management

It is now possible to create single-click shortcuts to your most commonly used actions in the Metadata Editor. The first actions also have a dedicated keyboard shortcut.

This enables each cataloger to customize the editor to suit their workflows and needs, increasing efficiency and ease of work in the Metadata Editor.

The Metadata Editor **Quick Links** menus are similar to the Alma menus. There are separate menus for records, templates, and rules (as the available actions differ). The **Quick Links** menu, opened at any given time, is according to the action menu displayed on screen. Each cataloger can add, remove or re-order their own quick links as they prefer.

For more information, see [Personalized Quick Links to Favorite Actions](#).

Watch the [Metadata Editor Quick Links](#) video (1:17 minutes).

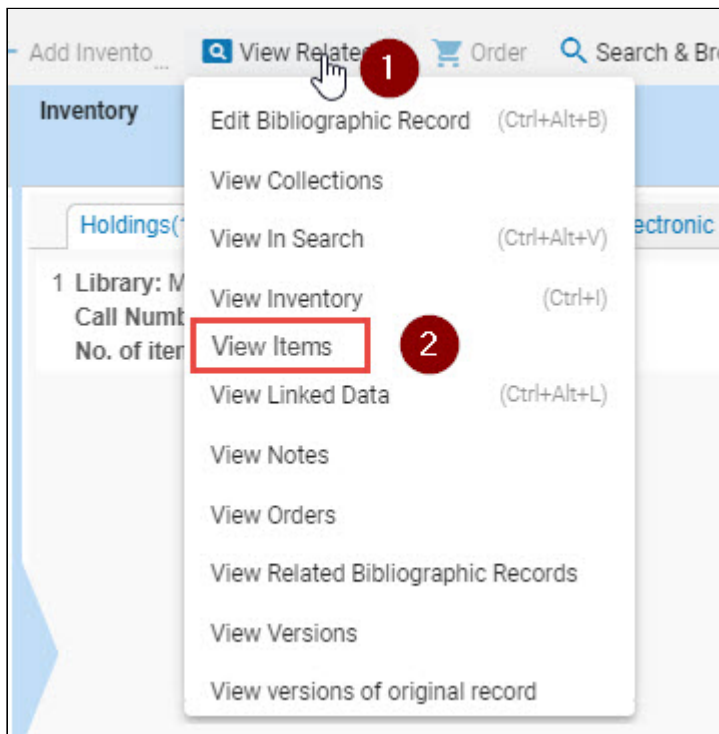
New View Items Workflow in the Metadata Editor

May 2023 Resource Management

The **View Related Data** menu now includes a new option called **View Items**, which enables quick access to the items list of the holdings record. This feature is particularly beneficial for cataloging physical resources and can enhance the efficiency of the process.

For more information, see [Metadata Editor - View Related Data Menu](#).

Watch the [View Items Action in the Metadata Editor](#) video (1:02 minutes).



View Items option

Shortcut Customization UI Preference for Alt+Number Applied to Metadata Editor Menu Shortcuts

May 2023 Resource Management

Users that select to disable the Alt+Number shortcut in their UI preference customization will also disable it for the Metadata menus. For users who rely on the Alt+Number shortcuts, we suggest using the Numbers Row on the keyboard instead of the Numpad numbers. This is because Numpad numbers may trigger external keyboard shortcuts as well.

For more information, see [Global Alma Hot Keys](#).

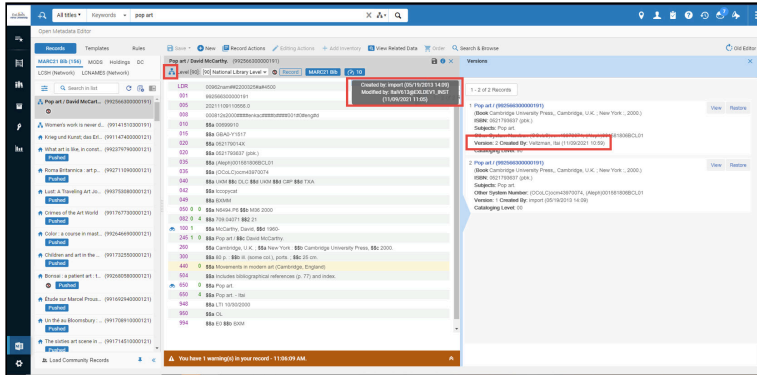
Adding Cataloger Information to Record Versions from Other Network Members in Metadata Editor

May 2023 Resource Management

When looking at the version information of a Network Zone record in the Metadata Editor that was created by another member institution, the cataloger could previously only see the member institution information. Networks can now enable seeing both the member institution and the name of the cataloger that created the version in it, by setting the customer parameter `show_version_cataloger_name_for_other_members` in their Network Zone institution (this will affect all members in the network).

For changes made by catalogers within the network, the version they create displays the network institution information.

This feature enables catalogers in consortia to easily identify the correct cataloger from the correct institution who updated the record, making cooperation and collaboration in the shared catalog more efficient.



Record versions in consortia

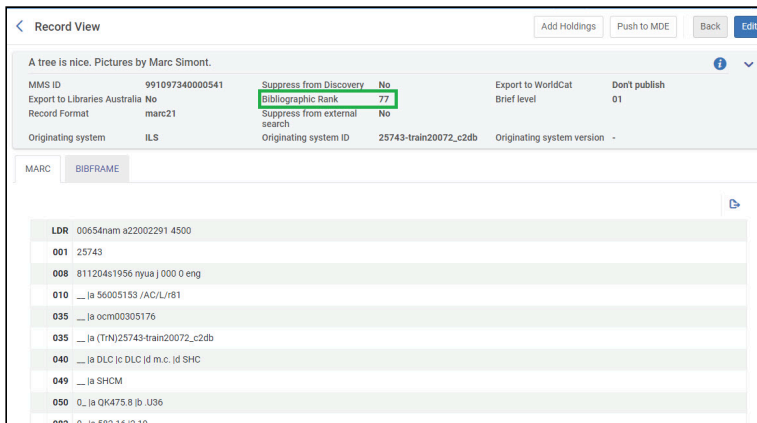
Bibliographic Ranking in Metadata Editor and Record View

May 2023 Resource Management

Alma now evaluates the completeness and richness of MARC 21 bibliographic records based on information that includes identifiers, names, subjects, informative LDR and 008 fields, publication details, etc. This is reflected in a new Bibliographic Rank, meant to provide a helpful tool for libraries to identify records that may need attention. The new bibliographic rank is displayed in the record view and in the Metadata Editor.

For more information on the bibliographic ranking, refer to:

- For Record View, see [Record View Summary](#).
- For Metadata Editor, see [Creating a MARC 21 Bibliographic Record](#).



Bibliographic Ranking in Record View

A tree is nice. Pictures by Marc Simont. (991097340000541)	
Record	01 77 MARC21 Bib
LDR	00 Bibliographic Rank - 77 500
001	25743
008	811204s1956####nyua####j#####000#0#eng
010	\$\$a 56005153#/AC/L/r81
035	\$\$a ocm00305176
035	\$\$a (TrN)25743-train20072_c2db
040	\$\$a DLC \$\$c DLC \$\$d m.c. \$\$d SHC
049	\$\$a SHCM

Bibliographic Ranking in Metadata Editor

Searching Records by Bibliographic Rank

May 2023 Resource Management

A new search option for titles is added to aid libraries in identifying records that require attention. This option enables librarians to search for titles within a specific range of the new Bibliographic Rank. The search option is available after the completion of the May indexing process.

Enhanced Support for Parallel Description in Another Language of Cataloging Related Records Using MARC21

May 2023 Resource Management

The MARC21 standard added a new type of analytical linking called "Parallel Description in Another Language of Cataloging" (788). Alma's workflows, such as publishing profile enrichment which considers analytical linking, now support this new type.

Skip Validations Option Added to the Import Mechanism

May 2023 Resource Management

Previously, users were required to manually resolve import validation errors that occurred during the import process. This caused the import process to stop from the point the validation process occurred. The remaining records to be imported were not processed as a result. Now, the import mechanism was enhanced to provide an option to skip validations and enable the process to complete automatically without requiring manual handling.

For more information on the import profile configuration, see [Creating/Editing an Import Profile](#).

Skip records with validation issues option

Refine Related Records Enrichment as Part of the General Publishing Profile

May 2023 Resource Management

As part of the general publishing process, the process of enriching related records is more sophisticated. It now involves creating an inventory of related records based on the data provided in the bibliographic record.

Pointing to a specific item of a related record is cataloged as follows:

	Value in \$g (MARC21 / KORMARC) \$v (Unimarc / CNMARC)	Item field
Year	yr:	Chron I
Volume or barcode	no:	Enum A
Issue	iss:	Enum B
Part	pt:	Enum C
Pages	p:	pages

For more information, see [Add holdings/items of related records](#).

Searching for Standard Number Source

May 2023 Resource Management

Once the semi-annual indexing is complete in your environment, a new advanced search index called **Standard Number Source** will be available. This index enables you to search for the standard number source indicated in the following fields:

- 015 \$\$2
- 016 \$\$2
- 022 \$\$2
- 024 \$\$2

General Publishing at the Campus Level

May 2023 Resource Management

(**Updated - November 19, 2024**) Institutions with multiple campuses are able to configure their publishing profile to publish their bibs per campus (in addition to the existing options of per institution or per holdings record), using their campus codes or OCLC symbols. This is especially useful for institutions that want to share the availability of resources on their different campuses.

For more information, see:

- [Publishing Information](#)
- [Publishing Profile Details > Publish on \(Bibliographic records only\) > Campus level](#)

Semi-Annual Re-indexing

May 2023 Resource Management

During May, the semi-annual re-indexing (described in greater detail in [Updates](#)) will be run. Features or resolved issues that require re-indexing to be fully functional will be addressed by the May semi-annual re-indexing. See the list below:

- Searching for Standard Number Source, see [here](#).
- Searching Records by Bibliographic Rank, see [here](#).
- Edition Information Display in Search Results Enhanced to Support ISBD Cataloging, see [here](#).
- Field 070 Added to NAL Call Number Index, see [here](#).
- Enhanced Support for Parallel Description in Another Language of Cataloging Related Records Using MARC21, see [here](#).
- UNIMARC Bibliographic 7XX \$4 Includes a Closed List of Values, see [here](#).

New Authority Index: **Other Standard Identifier (024)**

May 2023 Resource Management

The staff search now includes a new identifier called **Other Standard Identifier (024)** as part of its authority index. For more information, see [MARC 21 Authority Search Index Mapping](#).

Import Report Enhancement

May 2023 Resource Management

Enhancements have been made to the import reporting process, with the addition of separate reports for single matches and multi-matches. For more information, see [Viewing an Import Profile Job Report](#).

New Authorized Field CNMARC 702

May 2023 Resource Management

An additional access point is incorporated into the CNMARC 702 field.

Add **Not Contains** or **Not Equals** to Alma Titles and Inventory Search Indexes Where **Contains** or **Equals** Currently Exist

May 2023 Physical Resource Management



NERS Enhancement (ID #7948)

It is now possible to run **Not Equals** and **Not Contains** searches in the titles, inventory & authority searches, enabling more powerful and detailed searches in the catalog. As part of the development:

1. **Not Contains** search operators were added to indexes where the index supported a "Contains" search.
2. **Not Equals** search operators were added to indexes where the index supported an "Equals" search.

Note

When searching with a lower-level index (an index that belongs to an entity contained in the searched entity, for instance, searching for physical holdings by item data, searching for electronic titles by portfolio data, etc.), a **not contains** or **not equals** search retrieves results where one or more entity matches the query. For example, when searching for physical titles where holdings' location "not equals" stacks - if a title has two holdings, one fulfilling the condition (location=reference) and another not meeting it (location=stacks) - the search finds this title since it has holdings that match the search criteria.

The indexes indicated below remain as is and do not have the option to search by **Not Equals**, **Not Contains**, and **Not Empty**:

- CDI Search Rights
- CDI Fulltext Rights
- CDI Fulltext Link
- CDI Types
- CDI Newspapers
- CDI Collection ID

Due Date Added to Items List

May 2023 Physical Resource Management



Idea Exchange

Presently, operators cannot easily view the due date of items in the **Items List** and need to check each loan individually. A new column can now be added to the physical items table, containing the due date of items on loan.

The new column can be added to the physical items table by clicking on the cogwheel icon in its top right corner.

Han guk misul yon gam. : Korea art annual. Han guk Misul Yon gam Sa [S0ul] : 19uu

Location Main Library; General; B 0-11 /1335 MMS ID 99128402000121 View all holdings

1 - 4 of 4 Barcode Sort routine 0 rows selected Manage Selected Add Item

Status: All Year: All Volume: All Description: All Receive Date: All

Barcode	Library	Location	Call Number	Item Call Number	Year	Volume	Description	Temporary Location	Status	Process type
1. AU45890	Main Libr...	General	B 0-11 /1335	-	-	a	Vol. a no. b	No	Item in place	-
2. AU45888	Main Libr...	General	B 0-11 /1335	-	12	33	Vol. 33 no. 44 (12 5)	No	Item not in place	Transit
3. AU5306	Main Libr...	General	B 0-11 /1335	-	-	3	Vol. 3 no. 1	No	Item in place	-
4. AU28705	Main Libr...	General	B 0-11 /1335	-	-	-	-	No	Item not in place	Acq Main

Process type
 Access Number
 Receiving date
 Inventory Number
 Inventory Price
 Due Date
 Committed to Retain (sorted)

List of Items - Column Configuration - Due Date added

For more information, see [Working with the List of Items](#).

New and Generic Physical Items Material Types

May 2023 Physical Resource Management



Idea Exchange

Alma now offers an increased range of physical material types, including generic options that libraries can customize according to their requirements. This update is particularly advantageous for libraries with specialized materials, such as medical libraries that lend anatomical models, as they can now tailor the available type descriptions to their specific needs.

Institutions can activate several new material types in their Alma environment, including HathiTrust Material, Fascicule, Microphone, Locker, and Musical Instrument.

For more information, see [Configuring Physical Item Material Type Descriptions](#).

Community Zone Updates Task List to Include Indication Regarding Collection Level Management

May 2023 Electronic Resource Management

Currently, Community Zone (CZ) operation planned activity such as deletion of electronic collections are communicated in advance to Alma customers via Community Zone Release Notes. The existing **CZ Update Task List** now indicates to the institution the changes made to the CZ collection's management level, users can focus on these changes by selecting the "Electronic Collection **Management Level in Community Zone** field updated" option from the **Report Type** filter.



This is mostly relevant for institutions to see what the planned changes are to CZ content, by reviewing collections that are planned to be deleted in the near future. This enables institutions to prepare in advance for any potential change which have an impact on the institution's electronic CZ linked inventory.

Additionally, a new **Management Level in Community Zone** search index can be found under "E collection" and users can search under the Institution Zone (IZ), Community Zone (CZ), and the Network Zone (NZ).

For more information, see [Actions on a Collection Following a Community Zone Update](#).

Report Type	Electronic Collection Name	Title	Identifier	Submit Date	Asset able For	Before Change	After Change	Local Information
5	Electronic Collection Management Level in Community Zone field updated	McGraw Hill Fa Davis Pt Video	-	08/02/2023 10:44:22 AM IST	All	Ex Libris	Contributed	...
6	Electronic Collection Management Level in Community Zone field updated	Popular Culture in Britain and America 1950-1975 Module I	-	08/02/2023 10:44:22 AM IST	All	Ex Libris	Community	...
7	Electronic Collection Management Level in Community Zone field updated	EBSCOhost Jewish Studies Source	-	08/02/2023 10:44:22 AM IST	All	Ex Libris	Not Maintained	...
8	Electronic Collection Management Level in Community Zone field updated	Catalog of Digital Historical Newspapers (NewspaperCat)	-	08/02/2023 10:44:21 AM IST	All	Ex Libris	Pending Deletion on 08/02/2023	...
9	Electronic Collection Management Level in Community Zone field updated	US Government Documents	-	08/02/2023 00:12:29 AM IST	All	Community	Ex Libris	...

Indication in the Community Zone Updates Task List for management level changes

The screenshot shows a search interface with a search bar containing 'manage'. Below the search bar, there is a dropdown menu for 'Managed by Provider (Electronic Collection)'. The dropdown menu is open, and the option 'Management level in Community Zone (Electronic Collection)' is highlighted with a green box. Other options visible include 'Electronic Portfolio' and 'Managed by Provider (Electronic Portfolio)'.

New search index on the level of the collection

Note

This functionality of searching for the Management Level of an Electronic Collection is fully functional only after the semi-annual Alma re-indexing.

Overlap Analysis Job Supports Physical as well as Electronic Titles

May 2023 Electronic Resource Management



NERS Enhancement (ID #6947)




Idea Exchange

Customers have the ability to upload a list of titles and compare it with the institution's Electronic (supported) and Physical holdings (or both). This enables the institution to make informative decisions regarding titles/collections that they own or would like to purchase and as a result, potentially assist the institution to manage the financial budget expenses/savings.

For more information, see [Enhanced Overlap and Collection Analysis Tool](#).

Watch the [Overlap Analysis for Physical Titles](#) video (2:19 minutes).

Look up Titles - report options

Upload input file 

Drop a file or [Select or drag an Excel File \(.xlsx or .xls\)](#)

Select the populations you would like to compare the titles from the input file with:*

- Institution Zone electronic resources (including Community Zone activated electronic resources)
- Community Zone non-activated electronic resources
- Institution Zone physical resources

Overlap Analysis job supports physical titles

Public Access Model to Support Subscription Titles

May 2023 Electronic Resource Management

For the **Upload Electronic Holdings** of **ProQuest Ebook Central**, the only titles that were previously passed to Alma with the **Public Access Model** information are "**Owned**" titles. Now Alma facilitates the ability to attain the **Public Access Model** value also for "**Subscription**" titles. This enhancement automatically adds a "UA (Unlimited Access)" access model for all Subscription titles.

For more information, see [Proquest Ebook Central Upload Electronic Holdings - Addition of Public Access Model Information](#).

Note

The data for existing portfolios in your institution is updated gradually.

Alma Integration with InCites

May 2023 Electronic Resource Management

The Alma Collection Report in InCites is intended to help institutions to get insights about their holdings regarding publication types, research areas, usage, and publication model trends. Data shared from Alma is used exclusively to generate this report for institutions using Alma and is not shared with other Clarivate products or services.

Note

InCites data is refreshed on the last Friday of each month. As such, from the time a customer opts in, they either see the report showing up with data at the end of the month, or, they should see the report with data the following month.

For general information on the Alma integration with InCites, see [InCites and Alma integration enhancements on collection development reporting](#).

For more information on how to share your data with Web of Science, see [How to activate and use the Journal Citation Reports \(JCR\) cloud app](#) and the Developers Network blog regarding [Journal Citation Reports \(JCR\) cloud app](#).

HAN Integration Enhancement

May 2023 Electronic Resource Management

Users of the HAN proxy who are utilizing HAN's multi-license functionality can now manage various licenses in Alma to accommodate the scenario where an electronic resource can have a distinct service per license, in the **View It** section. For example, this feature is intended to address situations where different levels of access to the E-Resource are required depending on the type of patron, such as researchers or external users. The option to enable this enhancement is controlled by the customer parameter: `han_proxy_multi_license` (located in [Alma Configuration > Resources > General > Other Settings](#)).

Note

Display logic rules handle these as one bulk.

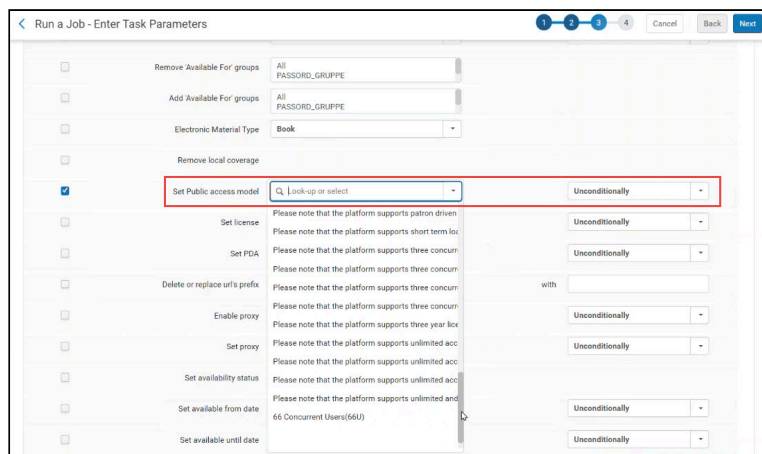
For more information, see [Configuring Other Settings \(Resource Management\)](#).

Change Electronic Portfolio Information Job Now Supports the Public Access Model Field

May 2023 Electronic Resource Management

The existing job **Change Electronic Portfolio Information** is enhanced by supporting the **Public Access Model** field. This enables updating the **Public Access Model** field on a predefined set of portfolios.

For more information, see [Manual Jobs and Their Relevant Parameters](#).



The screenshot shows the 'Run a Job - Enter Task Parameters' window. The 'Set Public access model' parameter is selected and highlighted with a red box. The dropdown menu is open, showing 'Look-up or select' and 'Unconditionally' options. Other parameters include 'Remove Available For groups', 'Add Available For groups', 'Electronic Material Type', 'Remove local coverage', 'Set license', 'Set PDA', 'Delete or replace url's prefix', 'Enable proxy', 'Set proxy', 'Set availability status', 'Set available from date', and 'Set available until date'.

Set Public Access Model field

Editable Lines in Closed Invoices

May 2023 Acquisitions



Idea Exchange

It is now possible to edit certain fields in the lines of closed invoices. This allows institutions to handle data corrections

caused by manual errors and/or in cases in which some data did not migrate to the invoice record as it should have (relevant mostly for subscription management).

The following fields of an invoice line can be edited when an invoice is closed:

- Subscription dates range (unless *Accrual mode* is enabled)
- Additional information
- Check subscription date overlap
- Price note
- Note
- Reporting Codes 1-5

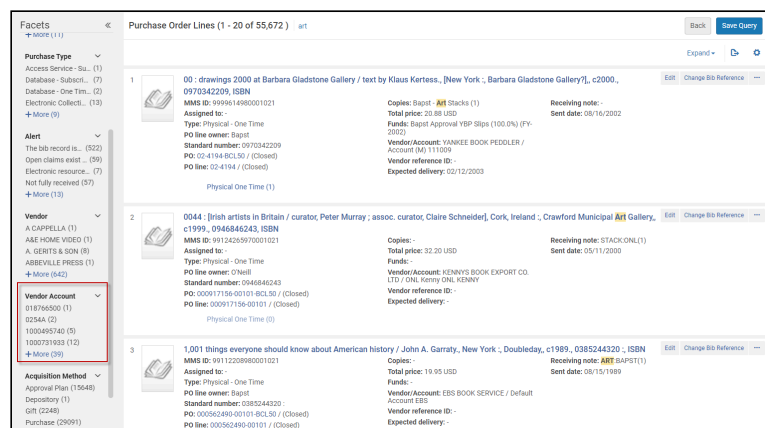
Editing of closed invoice lines can be performed manually in Alma or through the API (except for Reporting Codes 4 and 5). Institutions can block the option to edit closed invoice lines by changing the setting of the `allow_edit_closed_invoice_line` Customer Parameter to `false`. For additional information, see [Creating Invoices](#).

Watch the [Edit Closed Invoice Lines](#) video (1:04 minutes).

New PO Line Facet: Vendor Account

May 2023 Acquisitions

A new facet has been added for PO lines: *Vendor Account*. This facet is now available in the **Order lines** search results and in the **PO Lines** tab of the Vendor details page (**Acquisitions > Acquisitions Infrastructure > Vendors > [select vendor] > PO Lines tab**). Institutions can now very easily and quickly filter a list of PO lines by vendor accounts, which can improve workflows when there is a need to focus on PO lines from a specific vendor account. For additional information, see [Reviewing PO Lines](#).

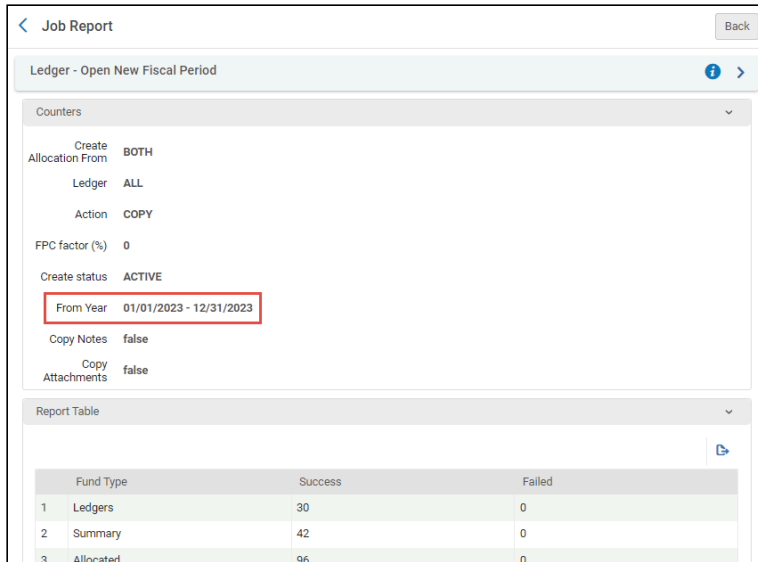


Vendor Account facet in Purchase Order Lines search results

From Year Now Included in Rollover Ledgers Report

May 2023 Acquisitions

The **From Year** of the Rollover Ledgers job report is now displayed in the report results. This can be helpful for analysis as well as for customer support. For additional information, see [Viewing Completed Jobs](#).



From Year in Rollover Ledgers Job Report

New SAML Certificate

May 2023 Administration and Infrastructure

The current DigiCert SAML Certificate will expire on June 8th. If your institution uses this certificate, Ex Libris recommends that you consult with the IT dept. in your institution, and if required, replace the certificate for Alma and/or Primo VE. If replacing the certificate, this must be done in coordination with your IDP. For more information, see [Replacing a Signed Certificate](#).

Note

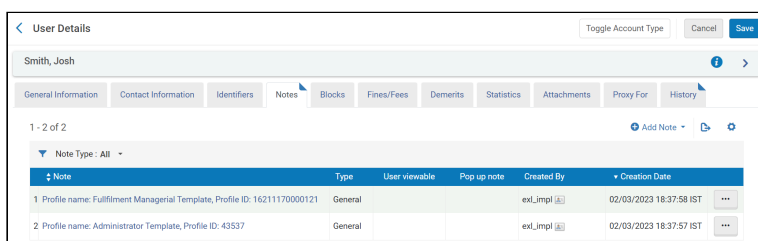
If your institution uses ADFS, Ex Libris highly recommends that you replace the certificate to avoid any complications.

User's Role Profiles Now Recorded in Account Notes

May 2023 Administration and Infrastructure

May 4 Update - The feature was not included in the release on May 7. It will be released with the Release Update on May 14.

Users' role profiles are now recorded in the user-account's **Notes** tab when they are applied. This makes it possible to find all users to which a particular role profile was applied in the past, by searching for the role profile's name or ID number. A logical set of these users can also be saved, and used as input for the Update/Notify Users job, which can update the roles assigned to the users in the set. For additional information, see [Roles and Registration Configuration](#).



Note	Type	User viewable	Pop up note	Created By	Creation Date
1 Profile name: Fulfillment Managerial Template, Profile ID: 16211170000121	General			ex_limpl	02/03/2023 18:37:58 IST
2 Profile name: Administrator Template, Profile ID: 43537	General			ex_limpl	02/03/2023 18:37:57 IST

Enhanced Sections Component for New Layout of Record Lists

May 2023 Administration and Infrastructure

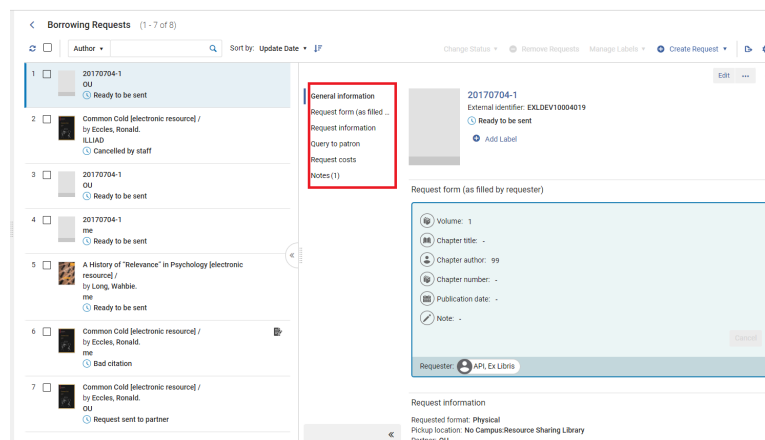
In the New Layout of record lists, the **Sections** menu of the **Details** pane, which provides quick navigation between record sections, has been redesigned and enhanced. It is now located in the center of the page and can be expanded and collapsed as desired, making it more flexible and easier to work with. In addition, it provides a variety of convenient features, including:

- Display in Split-view mode, with panes that can be resized
- Counters in parentheses indicating the number of entities currently defined in the section (for sections that may or may not contain any data - e.g., **Notes (2)** to indicate that two notes exist in the **Notes** section)
- Indicators (*) beside sections that contain mandatory fields (in Edit mode only)

The new **Sections** menu has thus far been implemented in the following record lists:

- Resource-sharing task lists
- PO line lists (early testers only)
- Analytics object lists
- Physical Holdings search results

For additional information, see [New Layout 2022](#).



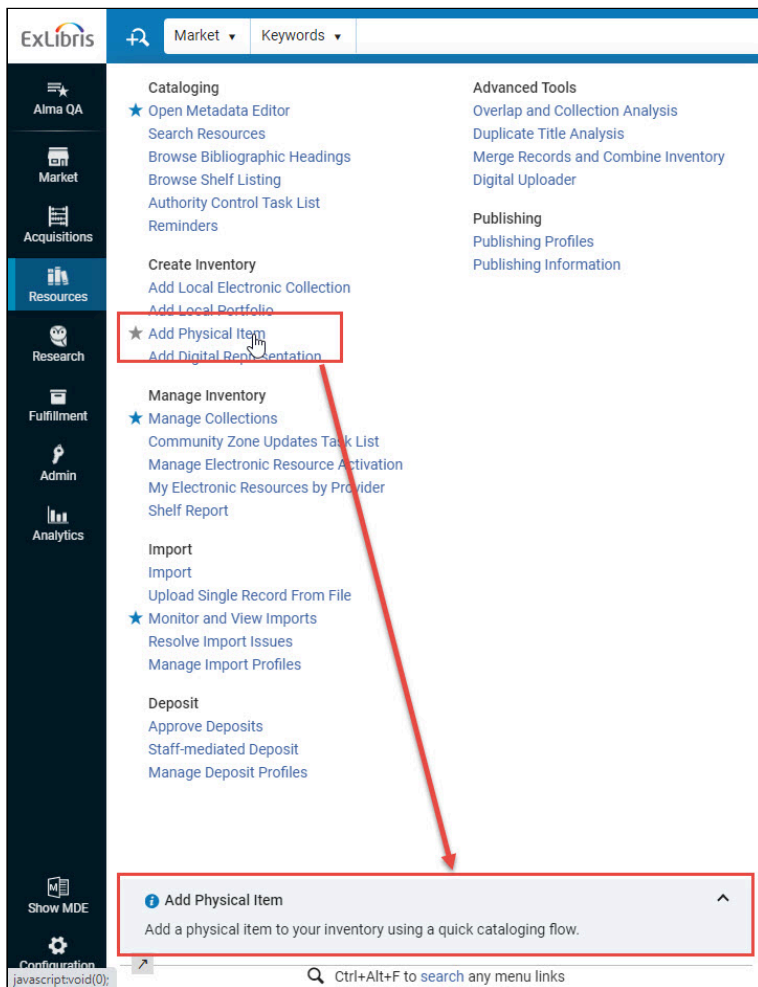
Enhanced Sections menu

Detailed Description for Menu Items

May 2023 Administration and Infrastructure

In order to enhance ease of use and clarity in the Alma menu, a new feature has been implemented. Users can now hover over a link (before clicking it) to view a brief description in the "Additional Information" area, located at the bottom of the menu. To activate or deactivate this feature, simply click the arrow in the "description" box.

Watch the [Detailed Description for Alma Menu Items](#) video (0:49 minutes).



Additional Information for menu items

Enhanced Advanced Search Functionality with Fast Erasing Capability

May 2023 Administration and Infrastructure

The "fast erasing" new feature is implemented in Advanced search, enabling users to expedite their search process. The feature includes the ability to "erase" search fields by clicking an "X" rather than selecting the text and then deleting it.

Note

This functionality is currently only available in the updated Advanced search sections such as Physical Holdings.

Library Independence for Alma Analytics

May 2023 Analytics

The **Library Independence** feature allows you to restrict the data that appears in Analytics reports to include only data from a specific library. This prevents the users from viewing unauthorized data and enables librarians to focus only on the relevant data for their libraries.

For more information, see [Working with Library Independence](#).

Analytics New Layout Developments

May 2023 Analytics

The following new features are released relating to the new Alma Analytics Layout:

Change to Analytics New Layout Rollout Schedule and Known Issues

The schedule of the phased rollout of the new analytics layout was changed. The new schedule is as follows:

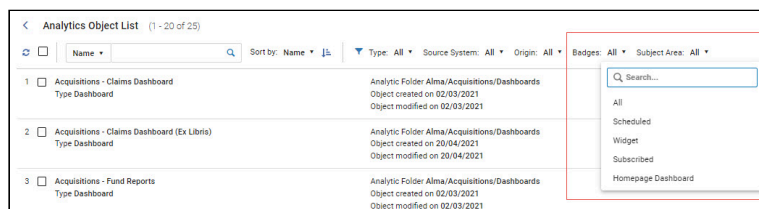
- May release – The previous version of the layout is displayed by default, but you can configure Alma Analytics to display the new version.
- August release – The new version of the layout is displayed by default, but you can configure Alma Analytics to display the previous version.
- November release – The new version of the layout is the only version available.

There are several known issues regarding scheduling reports when moving to the new analytics layout. For more information, see [Transitioning to the New Analytics User Interface](#).

Filter Analytics Object List by Badges

You can now filter the Analytics Object List by the following badges:

- Scheduled
- Widget
- Subscribed
- Homepage Dashboard



For more information on the Analytics Object List, see [Working with Analytics Objects](#).

Analytics Object List Now Customizable

You can now customize many elements of the Analytics Object List and determine which section appear and in what order. To customize the Analytics Object List, select the customization icon



at the top right of the page. The following options are available that enable you to configure the sections of the edit view, the actions available for the records, and the elements displayed in the record view:

Customization
User customization
Details sections customization
Actions customization
Record customization

Analytics Object List Customization

For more information, see [Customizing the Analytics Object List](#).

Out-of-the-Box Reports Removed from Analytics Objects List

Out-of-the-box reports no longer appear in the drop-down list when creating analytics objects, since they cannot be used to create analytics objects. If you want to share or schedule an out-of-the-box report, save the report in your institution folder with a new name and create the analytics object with that copy.

For more information on analytics objects, see [Creating an Analytics Object](#).

Exporting Analytics Object List to Excel

You can now export the Analytics Object List to Excel format. You do this by selecting the export icon



located above the list. The following fields are exported:

- Type
- Display Name
- Report Name
- Description
- Subject Areas
- Analytic Folder
- Add as widget
- Out of the Box Reports
- Schedule Report
- Add as dashboard
- Source System
- Object Creator
- Object Creation Date

Report Preview Available for Data Visualization Reports

The Report Preview area of the Analytics Objects List now also displays Data Visualization reports. This enables you to view a preview of the report without having to open it in the analytics interface.

Scheduling Data Visualization Reports

You can now schedule Data Visualization (DV) reports as you can for analytics dashboards and reports. Users subscribed to receive the DV reports receive a link to the DV report that they can select to display the report. Since sending DV reports as an attachment is not possible, the only option is to send a link to the live report. Note that opening the link requires the receiver having the appropriate role or permissions to view the report.

For more information, see [Scheduling and Subscribing to Reports and Dashboards](#).

Alma Menu Features Now Support Analytics

The following Alma menu features now support Alma Analytics:

- Quick Links
- Recent Pages
- Search for Any Link

Out-of-the-Box Dashboard Prompts for Library Independence

May 2023 Analytics

You can now add an out-of-the-box prompt that is pre-configured for library independence to dashboards. If the user has the Library Level Analytics Consumer role scoped to specific libraries, the prompt displays the library names within the user's scope from which the user can filter the reports of the dashboard. The prompts are located in the same location as the Library Code Active filters (**Shared Folders > Alma > Subject Area Contents > SUBJECT AREA**).

DV Dashboard Templates for Library Independence

May 2023 Analytics

Out-of-the-box DV dashboard templates are now available with the Library Code Active filter already configured. You can use these templates to create dashboards that are filtered to the scope of the user. The dashboards are located in the same location as the Library Code Active filters (**Shared Folders > Alma > Subject Area Contents > SUBJECT AREA**). To use these dashboards, you must save them to a local location.

For CLA Users (UK): Course Synchronization Between Leganto and the DCS

May 2023 Fulfillment - Course Reserves

Librarians who have courses in the DCS that do not match the Leganto courses can now override the course in the DCS with information from Leganto. When the integration profile Digital content store is active, the option to update DCS courses is now available from the **Course Bulk Update** job (**Admin > Manage Jobs and Sets > Run a Job**). When **Update course in DCS** is checked in the **Course Bulk Update** job, librarians can now update their DCS courses in bulk to match their Alma courses.

Remove list association

Update course in DCS

Leganto create list - reminder email

Set Course visibility

Archiving a course will also archive all lists associated with the course

Update course in DCS

The following parameters are all automatically updated in the DCS course based on the values in Alma:

- Course code
- Course name
- Number of weeks
- Number of participants
- Processing department
- Instructor name
- Instructor email
- Course status
 - Active - sets the DCS course to Active
 - Archived - sets the DCS course to Archived
 - Inactive - sets the DCS course to Archived

The job event now includes a **Failed to update DCS** event.

For more information, see [Course Synchronization Between Leganto and the DCS](#).

Customize Copyright Approval and Reject Reasons

May 2023 Fulfillment - Course Reserves

You can now customize the copyright approval and reject reasons (**Fulfillment > Resource Requests > Approval Requests List**).

The image contains two side-by-side screenshots of a web application interface. The left screenshot shows a 'Reason' dropdown menu with a search bar and a list of reasons: Automatic, Covered by License, Creative Commons, Direct Permission Obtained, Legal Exception, Open Access, Other, Out of Print, Preprint, Primary License, and Self-Declared. Below this is the caption 'Copyright approval reasons list'. The right screenshot shows a 'Reason' dropdown menu with a search bar and a list of reasons: Other, Rejected By Manager, and Rejected by CCC. Below this is the caption 'Copyright rejection reasons list'.

You can customize the approval and reject reasons using the **Configuration > Fulfillment > Copyright Management > Copyright approval reasons** and **Configuration > Fulfillment Copyright Management > Copyright reject reasons** tables. You can edit any of the existing reasons or use the **Add Row** button to add new reasons. The

reasons can now be translated to the Alma display language.

Code Table

Values Notes

Import Restore Default Translations Add Row

Filter: English

Enabled	Move Up	Move Down	Code	Description	Translation	Default Value	Updated by	Last Updated
<input checked="" type="checkbox"/>			CoveredByLicense	Covered by License	Covered by License	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>			LegalException	Legal Exception	Legal Exception	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>			DirectPermissionObtained	Direct Permission Obtained	Direct Permission Obtained	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>			OpenAccess	Open Access	Open Access	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>			SelfDeclared	Self-Declared	Self-Declared	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>			Automatic	Automatic	Automatic	<input checked="" type="radio"/>	-	-
<input checked="" type="checkbox"/>			CreativeCommons	Creative Commons	Creative Commons	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>			Preprint	Preprint	Preprint	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>			OutofPrint	Out of Print	Out of Print	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>			Other	Other	Other	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>			PrimaryLicense	Primary License	Primary License	<input type="radio"/>	-	-

Copyright approval reasons configuration

Code Table

Values Notes

Import Restore Default Translations Add Row

Filter: English

Enabled	Move Up	Move Down	Code	Description	Translation	Default Value	Updated by	Last Updated
<input checked="" type="checkbox"/>			RejectedByCCC	Rejected by CCC	Rejected by CCC	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>			Other	Other	Other	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>			RejectedByMNGR	Rejected By Manager	Rejected By Manager	<input type="radio"/>	-	-

Copyright rejection reasons configuration

For more information, see [Customizing Copyright Approval and Reject Reasons](#).

Enrich Multiple Citations Using DOI

May 2023 Fulfillment - Course Reserves

Leganto can now automatically enrich citations containing a DOI with additional metadata in bulk by checking **Enrich by DOI** in the **Reading List Citation Update Task** job (**Admin > Manage Jobs and Sets > Run a Job**). The default setting for this checkbox is unchecked.

Run a Job - Enter Task Parameters

Reading List Citation Update Task

Delete citations

Citation status

Citation type

Due date

Remove tags

Add tags

Remove alerts

Delete public note

Detach from repository

Remove files

Enrich by DOI

Use Leganto viewer (PDFs only)

Sticker Price from Rialto Unconditionally

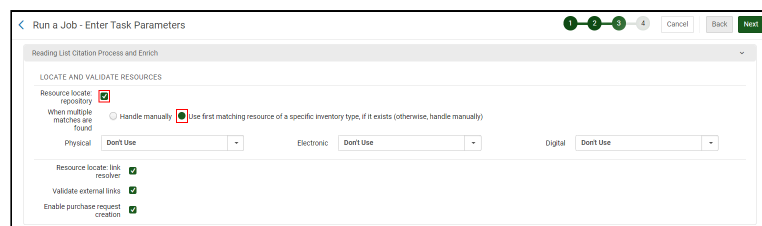
Option to Enrich by DOI

For more information, see [Enriching Citation Metadata](#).

Find Matching Bibliographic Records for Multiple Citations - Run Resource Locate on Citation Sets

May 2023 Fulfillment - Course Reserves

It is now possible to locate a set of citations by using the new **Reading List Citation Process and Enrich** job ([Admin > Manage Jobs and Sets > Run a Job](#)). **Perform locate on type** is not included in this new version of the Process and Enrich Citations job ([Fulfillment > Advanced Tools - Reading Lists > Process and Enrich Citations](#)). When **Resource locate repository** is checked (this checkbox is unchecked by default), you can choose to either manually handle citations when multiple matches are found or use the first matching resource for a specific inventory type. When **Use first matching resource of a specific inventory type, if exists (otherwise handle manually)** is selected, drop-down lists for **Physical**, **Electronic**, and **Digital** are displayed. The default priority selections for these drop-down lists are set according to your priority settings in **resource_locate_multiple_matches_priority** ([Configuration Menu > Fulfillment > General > Other Settings](#)).



Reading List Citation Process and Enrich job

Note

The Process and Enrich Citations job ([Fulfillment > Advanced Tools - Reading Lists > Process and Enrich Citations](#)) is still available for use.

You can use the **Reading List Citation Process and Enrich** job to perform a resource locate on a specific set by selecting a specific facet, such as the new **Not located** facet, which returns all citations that do not have a **Resource located** status.

Easily Identify Citations that are Not Located

May 2023 Fulfillment - Course Reserves

The **Resource Locate** facet ([Fulfillment > Course Reserves > Citations](#)) now includes a **Not Located** facet which accounts for all resources with the statuses **Multiple Resources Located**, **Locate Not Run**, **No Resources Located**, **Locate Failed**, and **Information Incomplete**.

Facets <<

Publication List Visibility ▾

- Published (57)
- Draft (55297)
- + More (2)

Section Tags ▾

- Mandatory Reading (17)
- Recommended (5)
- Further Reading (4)

Citation Status ▾

- Not Complete (31404)
- Being Prepared (31141)
- + More (5)

Resource Locate ▾

- Not located (298)**
- Resource Loc... (55056)
- Multiple Resourc... (219)
- Locate Not Run (38)
- No Resources Loc... (22)
- Information Inco... (19)

— Less

Not located

For more information, see [Reading List Citation Process and Enrich](#) and [Manual Jobs on Defined Sets](#).

Alma Support for Japanese Library Systems

May 2023 Fulfillment

As part of Ex Libris's commitment to the Japanese market, we have developed a range of Alma features that are specifically geared to the requirements of Japanese libraries. The primary developments in this sphere are described below.

Integration of Alma with the NACSIS Catalog

Alma can incorporate the NACSIS central catalog in its metadata management system, and supports the following NACSIS-catalog features:

- Holdings management (NACSIS Cloud App)
- Bibliographic and authorities management:
 - Copying of cataloging from NACSIS to Alma (NACSIS Cloud App)
 - Contributions from Alma to NACSIS
- NACSIS member-information management (NACSIS Cloud App)
- MARC21 to/from CAT-P crosswalk

For additional information, see [Integration with NACSIS-CAT/ILL](#).

Integration of NACSIS-ILL Resource Sharing

The integration of the Japanese NACSIS-ILL Resource Sharing system with Alma makes it possible to create new NACSIS-ILL borrowing and lending requests in Alma, and to manage the entire workflow of borrowing and lending requests within Alma. It supports the following features and processes:

- Ability to create new NACSIS borrowing requests (NACSIS Cloud App)
- A sync job to retrieve NACSIS ILL request statuses into Alma
- Resource Sharing workflow is performed within Alma, and actions are pushed to NACSIS, including the following actions:
 - Borrowing-request actions: Receive, Return, Cancel, Renew Request, Accept, Callback
 - Lending-request actions: Ship, Check In, Reject, Renew Reply, Accept, Callback

For additional information, see [Integration with NACSIS-ILL](#).

JP-KBART Support

The Alma portfolio loader can import JP-KBART portfolios of electronic resources from vendors to the library's electronic collections. For additional information, see [Managing Electronic Resources](#).

Watch the [Load Portfolios to a Collection Using KBART Format](#) video (2:00 minutes).

Option for Identifying the Creator or Modifier of an API Request

May 2023 API

When API requests are sent to Alma, and an entity (an item, user, invoice, etc.) is created or updated, the modifier/creator is recorded. Until now, this was always **API, Ex Libris**. Alma can now be configured to register the modifier/creator of an entity as the **application/API-key** instead of this default user name. This makes it possible to identify which application updated an entity when multiple applications use the API for this purpose. To turn this option on, under **General Configuration > Other Settings**, set the **detailed_creator_and_modifier_for_api_changes** Customer Parameter to **true**. For additional information, see [Registering updates by API according to the API-key name](#).




Created by
API, Ex Libris 

Created on
29/05/2023 13:30:51 BST

Last updated by
API, Ex Libris 

Last updated on
29/05/2023 13:30:51 BST



Created by
API, Library Mobile App

Created on
30/05/2023 12:52:44 BST

Last updated by
API, Library Mobile App

Last updated on
30/05/2023 12:52:44 BST

Default Creator/Modifier

Creator/Modifier from API-Key