


## 2020 RN 01 Main


### DARA Now Recommends Configuring Description Templates

#### January 2020 DARA

DARA now identifies that you have not configured description templates, which are used to generate descriptions for physical items based on ENUM/CHRON information, and directs you to configure them.

1 Use Alma feature: Description Templates  
**Category:** Use physical inventory features  
**Type:** Description Templates

 Your institution did not configure description templates. Description templates can help generating an item description based on the ENUM/CHRON information. For more information about this feature click [here](#).

 Click [here](#) in order to configure and start using this feature.

#### DARA – Description Templates

For more information, see [DARA – Data Analysis Recommendation Assistant](#).

For more information on configuring Description Templates, see [Configuring Description Templates](#).

### Role Configuration for DARA Recommendations

#### January 2020 DARA

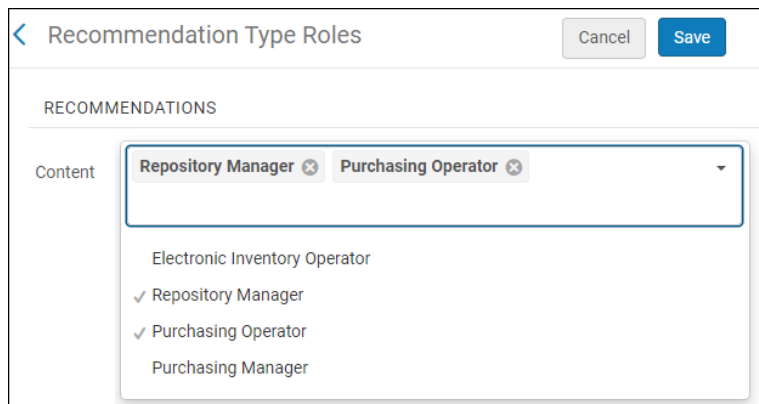
You can now configure DARA Recommendations on the new Configuring DARA Recommendations page (**Configuration > General > General Configuration > DARA Recommendations**):

Active	Type	Category	Roles	
<input checked="" type="checkbox"/>	Description Templates	Use physical inventory features	Physical Inventory Operator, General System Administrator	...
<input checked="" type="checkbox"/>	Unavailable Portfolios	Unavailable Portfolios	Electronic Inventory Operator, Repository Manager, Purchasing Operator, Purchasing Manager	...
<input checked="" type="checkbox"/>	Upload Electronic Holding	Use Electronic Inventory Features	General System Administrator	...
<input checked="" type="checkbox"/>	Local Portfolios in Community-Linked Collection	Link Electronic Resources to the Community	Electronic Inventory Operator, Repository Manager, Purchasing Operator, Purchasing Manager	...
<input checked="" type="checkbox"/>	Automatic Usage Data	Automatic Usage Data	Vendor Manager	...
<input checked="" type="checkbox"/>	High Request Load	High Request Load	General System Administrator, Fulfillment Services Operator, Selector, Fulfillment Administrator, Purchasing Operator, Purchasing Manager, Acquisitions Administrator	...
<input checked="" type="checkbox"/>	Media Conversion	Use digital inventory features	Digital Inventory Operator, Editor Full, Repository Manager	...
<input checked="" type="checkbox"/>	Validate Order Information	Use Acquisitions Features	General System Administrator	...
<input checked="" type="checkbox"/>	Load Usage Data	Load Usage Data	Vendor Manager	...

#### DARA Recommendations Configurations

Move the slider to activate/deactivate a recommendation for your institution. When deactivating a recommendation, an option to dismiss all existing recommendations of that type is displayed. This functionality was moved to this page from the Data Sharing profile page.

Select the **Actions** button to display the list of roles that are configured for the recommendation. You can remove or add one of the configured roles.

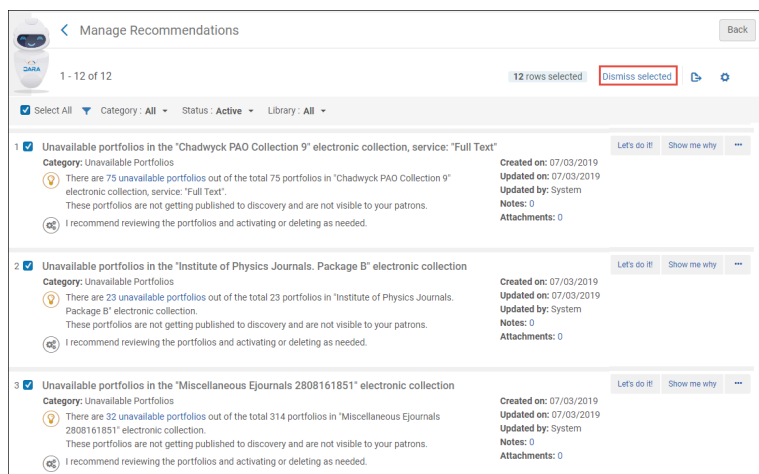


## Recommendations Roles

# Bulk Dismissal of DARA Recommendations

## January 2020 DARA

You can now dismiss several recommendations at one time by selecting the recommendations and clicking **Dismiss selected**.



## DARA Bulk Dismiss

# Create Order API - Improved Matching and Creation of Portfolios to work with Community Zone

## January 2020 Resource Management

When the **New Order API** runs, Alma now uses the vendor proprietary identifier number or the ISBN/ISSN to search and match the incoming order to an existing portfolio in an electronic collection. If no match is found Alma will attempt to activate the relevant portfolios from the collection in the Community Zone.

The newly created PO line will be associated to the existing portfolio as the main PO line, and if a PO line already existed on the portfolio this PO line will be set as an additional PO line. The access model description, as defined in the [Access Model](#) table, is added to the PO line **Notes** tab and to the portfolio's **Public Notes** field for display in Primo.

The access model description is only added to the portfolio's Public Notes field if the **Include access model in portfolio public note** check box is selected on the New Order API integration profile.

This functionality is currently supported for orders originating from OASIS for ProQuest EBook Central content. A future release will include additional providers.

See [Real Time Ordering](#).

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## New Purchase Type License Upgrade Available for Purchase Order Lines

### January 2020 Acquisitions

A New purchase type **License Upgrade** is available for Purchase Order lines, this will enable institutions to record purchases which reflect license upgrades purchase model. Additionally, a PO line can now be created without a fund and price for scenarios such as described above where a **License upgrade** has no charge and needs to be recorded in the system. The option to set a PO line as no charge is compatible with the following acquisition methods: **Purchase**, **Approval Plan**, and **Purchase at Vendor System**. When selecting any of these values in the **Acquisition Method** of the PO line, the **No Charge** check box appears. When this check box is selected, the **Funding** and **Pricing** sections are hidden.

See [Manually Creating a PO Line](#).

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## COUNTER Release 5

### January 2020 Acquisitions

With the January 2020 release Alma is now fully compliant [with COUNTER release 5](#). COUNTER Release 4 will continue to be supported along with COUNTER release 5. This is the case for both Alma as well Alma Analytics. For more information, see video [COUNTER Release 5 in Alma and Alma Analytics](#) as well as Knowledge Center entry [Managing COUNTER-Compliant Usage Data](#).

As COUNTER Release 5 is a new functionality for both Alma as well as for multiple vendors which supports this and other which will support this in the future, there may be several issues which can raise during the initial adjustment period. Below you can find a few scenarios and their possible solution. At any case if you are unable to work as expected with a certain vendor it is recommended to approach the vendor as well as contact ExLibris support so that both parties can try and investigate.

#### Possible Issues/Solutions:

- Issue: I cannot harvest from a specific vendor.

Possible solution: Determine if the "test connection" functionality works as expected (at the level of the SUSHI account). If not, confirm that the following credentials are configured correctly:

- Vendor URL, it is recommended to use certified SUSHI vendors from the "quick pick" list, if one does not exist and you manage to configure a new vendor and harvest the data successfully, please help other members of the community by contributing this vendor as a certified SUSHI vendor.
- Customer ID
- Requester ID
- User name / Password
- API key (for vendors which support this type of connection)

Possible solution: If the **Test Connection** works as expected, manually harvest each report configured on the account (each report has a "harvest now" row action). Possible analysis to provide to ExLibris support or the vendor: use the URL below, substituting the vendor-supplied information to see if the report is presented. If the report cannot be retrieved, an error is displayed in the **Exception** section with details from the vendor (for example: **Requestor is Not Authorized to**

### **Access Usage for Institution).**

If the report is retrieved, save the downloaded report in JSON format and manually upload it to Alma. If the manual upload fails, this may be a phrasing issue either at Alma or the vendor. The URL format is:

`https://<Vendor_SUSHI_Harvest_URL>/reports/<report_type>?customer_id=XXXXX&api_key=XXXXX&begin_date=YYYY-MM-DD&end_date=YYYY-MM-DD`. To form the URL, use the credentials supplied by the vendor, and omit redundant or superfluous parameters (for example, when API\_key is not needed).

- Issue: Alma cannot "Save" newly created account.

Possible workaround: This issue may occur for vendors which use an API key as an identifier. This is caused by a wrong structure of the vendor's "Reports" API which Alma calls to check if the configured reports on the vendor accounts are supported by the vendor. To solve this, create an account and configure the reports, save it, edit it again and add the API key.

For any issue with COUNTER 5, please contact ExLibris support.

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## Phrase Search in the Simple Search Box

### January 2020 Resource Management



#### **Idea Exchange SF: 00668493**

Alma now supports phrase search in the simple search box. All entities and index types that have the option to use phrase search in Alma's advanced search also have this capability with simple search when using double quotation marks to identify the phrase. See [Performing a Simple Search](#) for more information.

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## BIBFRAME Added to the Export Bibliographic Records Job

### January 2020 Resource Management

Alma now supports exporting bibliographic records in the BIBFRAME and RDA/RDF output formats. See [Export Bibliographic Records](#) for more information.

Watch the [Export Records in BIBFRAME Format](#) video (1:31 minutes).

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## Community Zone Set Management

### January 2020 Resource Management

In addition to the Community Zone set management announcements made in the December release (see [Community Zone Set Management](#)), the January release adds the following Community Zone sets features:

- Cataloging an authority record set of Community Zone records
- Exporting a set of Community Zone records (with Export Authority Records or Export Bibliographic Records)
- Creating or updating a set of Community Zone records via API (see [Rest APIs – Configuration and Administration](#) in the Developer Network)

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## Note

This option is only visible if your institution has the ability to contribute authority records to the Community Zone.

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See [Managing Search Queries and Sets](#) for more information.

Watch the [Community Zone Set Management](#) video (2:38 minutes).

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## Alma-Based Authority Management

### January 2020 Resource Management

Alma now supports contribution of authorities that are managed in an Alma institution. For an institution that manages local authority records and publishes them to the Community Zone, there is now the option to have the Alma community contribute to these authority records (like the National Library of Israel (NLI) implementation). If you are an institution that 1) currently manages an authority file locally, 2) publishes it to the Community Zone, and 3) wants to have other authorized members of the Alma community contribute changes to this authority file, contact Ex Libris to analyze the feasibility of your request. If your authority requirements match the criteria for this functionality, Ex Libris will work with you to implement this capability. See [Working with NLI Integrated Authority Records](#) for an example of how this feature is used, and see [Alma-Based Authority Management](#) for more information.

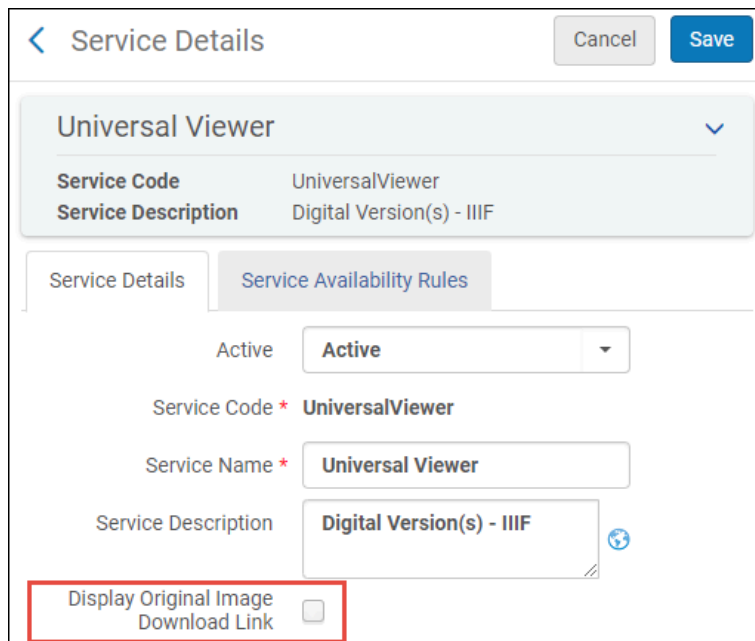
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## Download Original File in Universal Viewer

### January 2020 Digital Resource Management SF: 00700969

You can now download a file from the Universal Viewer in the original format in which it was uploaded to Alma. To download the original file, select the download icon.

You configure the icon to appear from **Configuration > Fulfillment > Discovery Interface Display Logic > Viewer Service > Universal Viewer**. Select the **Display Original Image Download Link** checkbox:



The screenshot shows the 'Service Details' configuration page for 'Universal Viewer'. The page has a header with a back arrow, the title 'Service Details', and 'Cancel' and 'Save' buttons. Below the header, there is a dropdown menu for 'Universal Viewer' with a downward arrow. Underneath, there are two rows of information: 'Service Code' with the value 'UniversalViewer' and 'Service Description' with the value 'Digital Version(s) - IIIF'. Below this, there are two tabs: 'Service Details' (selected) and 'Service Availability Rules'. In the 'Service Details' tab, there is a form with several fields: 'Active' with a dropdown menu set to 'Active', 'Service Code \*' with the value 'UniversalViewer', 'Service Name \*' with the value 'Universal Viewer', and 'Service Description' with the value 'Digital Version(s) - IIIF'. At the bottom of the form, there is a checkbox labeled 'Display Original Image Download Link' which is currently unchecked. A red rectangular box highlights this checkbox.

### Display Original Image Download Link

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## Deposit Interface Customization

January 2020 Digital Resource Management



**Idea Exchange SF: 00593963 00709116**

You can now customize the Deposit user interface. To support this feature, a new configuration page was created at **Configuration > General > User Interface Settings > Alma Viewer and Deposit Customization**:

### Alma Viewer and Deposit Customization

You can perform the following customizations from this page:

- Upload a customization package created in Primo Studio
- Upload a logo image file
- Enter a URL that is opened when you select the logo

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#### Note

In a future release, you will be able to customize the Alma Viewer from this page as well.

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## Network Zone Import with Local Extensions

**January 2020 Collaborative Networks SF: 00474265 00490469 00510530 00537427 00549465 00694413 00200674 00210745 00018526 00105104 00106863 00119947**

For Network Zone member institutions, import can now be used for adding / managing local extensions in the Network Zone. See [Adding Local Extensions Using Import](#) for more information.

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## Fulfillment Network Pickup Locations

January 2020 Fulfillment / Collaborative Networks

The calculations of a pickup location for a Primo patron request will now be modified for institutions that are part of more than one fulfillment network. As an example, institutions A and B are a fulfillment network, while institutions A and C are a separate fulfillment network:

Previously, when a patron from institution B finds a title in institution A, the pickup locations presented are from all three institutions because A is the owner of the item and A is in networks with both B and C.

Now, rather than displaying all possible pickup locations based on the item owner, Alma will also utilize the Primo login institution, institution B, and only display the pickup locations that can serve both item owner (A) and login institution (B), in this scenario, A and B.

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## Leganto Configuration Menu

### January 2020 Fulfillment

All Leganto configuration links that previously appeared in the Leganto sub-section of the Fulfillment tab in the Alma configuration menu are now moved to a single Leganto tab on the configuration menu (for those institutions that are configured for Leganto). The Settings mapping table now appears in each of the Leganto tab's sub-sections. Only those customer parameters that are pertinent for that section are displayed in each link.

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## More Possibilities for the Alma Color Theme

### January 2020 Administration and Infrastructure



#### Idea Exchange

Adding to the existing 11 color schemes on the Branding Management Page ([Configuration Menu > General > User Interface Settings > Alma Logo and Color Scheme](#)), you can now select from the following new colors: Denim Blue, Pine Green, Teal Green, Cerise, Violet, and Brown.



#### Alma Color Palette

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## Cloud Passwords

### January 2020 Administration and Infrastructure

In the next step of the move to Ex Libris Identity Service, which launched in January 2019, we are removing all passwords from the Alma database. See the [Ex Libris Identity Service](#) in the Developer Network.

This change only affects users that have not logged in since the beginning of 2019. However, if you have Primo/PDS which hasn't been upgraded for some time, there could be active users which still have passwords in the Alma database. This will only be users whose passwords are not strong enough to be written into the Identity Service automatically.

To handle users without passwords, you can do any of the following:

1. Add a "forgot password" link to Primo which will be useful also for users without password. See the Knowledge Article, [How to add a 'Forgot My Password' link to the login page in the new UI when using Alma for authentication](#).
2. Create a list of the relevant users using an Analytics report and send them an email using the Update/Notify Users job (with a link to page where they can create a new password). See [Editing/Messaging Users in Bulk](#).
3. Do nothing. The patrons who cannot login will approach a librarian who will set a new password for them.