
2020 RN 02 Main

Real Time Ordering - Purchase Type License Upgrade as an Additional PO Line

February 2020 Acquisitions

PO lines with a **Purchase Type** of **License Upgrade** created via New Order API will be associated to the relevant portfolio as an additional PO line. Previously, PO lines with a **Purchase Type** of **License Upgrade** were associated to the relevant portfolio as a main PO line. Now, the main PO line reflects the original PO line that initiated the order, while the PO line with a purchase type of License Upgrade complements the main PO line.

See [Real Time Ordering](#).

Suppress Access to PO Line Summary Information

February 2020 Acquisitions

You can now disable access to review a PO line and view in-depth acquisitions information for users with the roles of Repository Manager, Physical Inventory Operator, or Electronic Inventory Operator. To do so, contact Ex Libris customer support.

Improved Claiming Functionality for Continuous PO Lines

February 2020 Acquisitions



Idea Exchange Previously, if an item's due date arrived and the item was not received, a claim letter was sent to the vendor. Now, if the next expected item also does not arrive, you can send an additional letter to the vendor which includes details for both items which did not arrive. This function is enabled when the **claim_continuous_item_level** parameter is set to true.

See [Configuring Other Settings \(Acquisitions\)](#).

Entering PO Line Number in Item Editor

February 2020 Resource Management

When entering the PO line number in the Item Editor page, the number is now validated, even when typing the number instead of selecting it from the pick list.

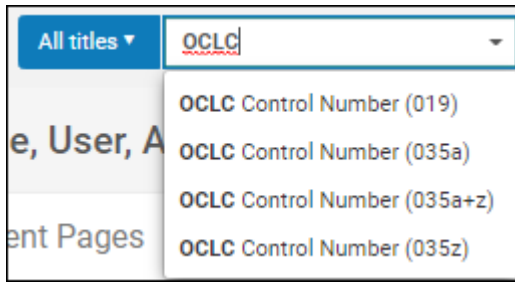
Watch the [Entering PO Line Number in Item Editor](#) video (0:48 minutes).

Search Indexes for Specific OCLC Numbers

February 2020 Resource Management

For simple and advanced titles searches (All titles, Physical titles, Electronic titles, and Digital titles), the following search indexes were added: OCLC Control Number (019), OCLC Control Number (035a), OCLC Control Number (035a+z), and

OCLC Control Number (035z).



Search Indexes for Specific OCLC Numbers

With these new indexes, you can now locate specific OCLC numbers for improved search results and improved Excel exports.

See [OCLC Control Number](#) for more information.

Local Extensions for Community Zone Bibliographic Records

February 2020 Resource Management SF: 00475068 00660007 00666609 00686792 00740123 00173800 00223460 00108985 00134538

All institutions can now create and maintain local extensions to Community Zone bibliographic records in order to record their own proprietary information.

With this capability, institutions can enter and maintain local information in the MARC 21 77X/78X, 09X, 59X, 69X, and 9XX fields. This can be done with the MD Editor for one record at a time, or for multiple records by running a job with a normalization process that updates local extension fields. Local extension data can be searched, exported, published (general publishing and to Primo) and handled using APIs (see [Bibliographic Records and Inventory](#) in the Developer Network). When linked bibliographic records are synchronized during Community Zone updates, the local extension content is not overridden.

See [Working with Local Extension Fields for Community Zone Records](#) for more information.

Please note that the March release will include the ability to load local extensions to Community Zone records via the import process.

Suppress Bibliographic Record from External Search

February 2020 Resource Management

You can configure Alma to suppress bibliographic records from external searches. To perform this configuration, first configure the SRU or Z39.50 integration profiles to suppress searches of records with the Suppress from External Search tag:

[←](#) Integration Profile

Z39

Code	Z39
Integration Type	Z39.50 Server

General Information Actions Contact Info

EXPORT

User Name

Password

Allow Access

Enrich with Holdings

Enrich with Representations

Enrich with Remote Representations

Apply Normalization

Suppress records based on "Suppress from external search" tag

Suppress Records from External Searches - Integration Profile

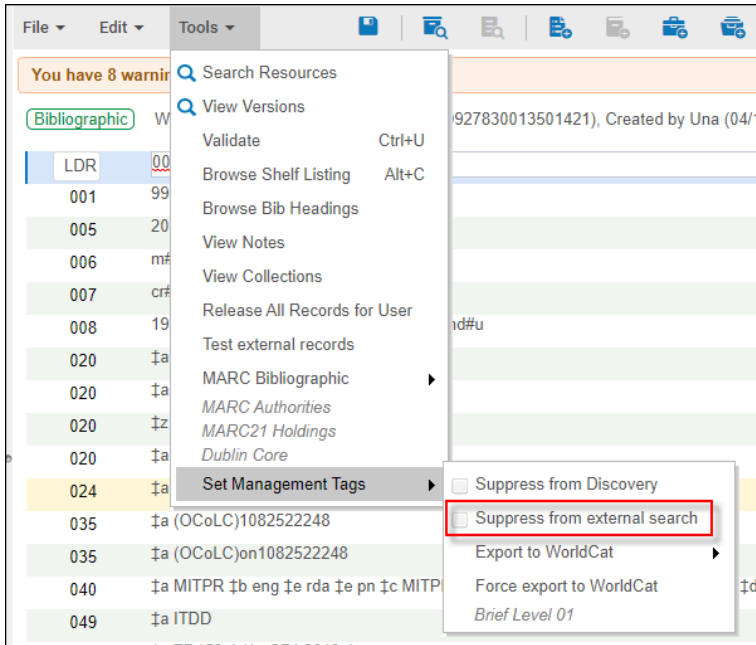
Note

The Z39.50 and SRU protocols have different behavior when the **Suppress records based on "Suppress from external search"** option is selected:

- Z39.50 – Records that are tagged as Suppress Records from Publish/Delivery are also suppressed from external searches even if they do not have the Suppress from External Search tag.
- SRU – Only records tagged as Suppress from External Search are suppressed from external searches.

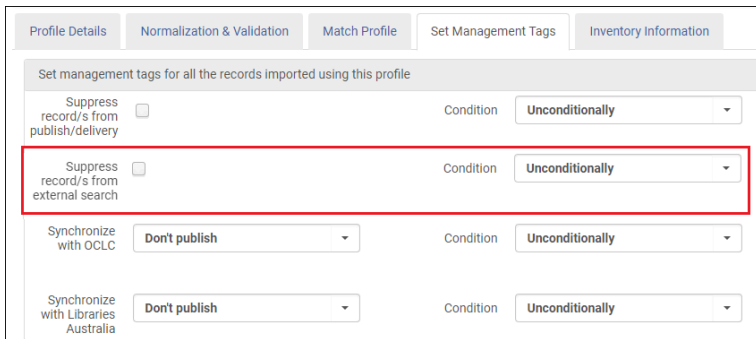
You can tag records to be suppressed from external searches in the following areas:

- From the Metadata Editor – select **Suppress from External Searches (Tools > Management Tags)** for a record.



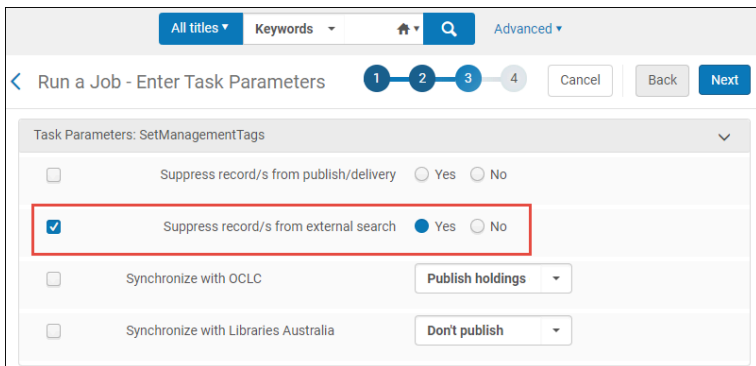
Suppress from External Searches - MD Editor

- In the Set Management Tags tab of import profiles (all types except Update Inventory, Authority, Initial Authority) for records imported using the profile:



Suppress Records from External Searches - Import Profile

- From the new Set Management Tags job:



Set Management Tags

In addition, it is possible to search for bibliographic records that are suppressed from external search:

All titles Zone: Institution Community

Tag Suppressed From External Search Equals No +

Clear form Search

Searching for Records Suppressed from External Search

Watch the [Suppress Bibliographic Records from External Search](#) video (4:53 minutes).

Enhanced Configuration of Deposit Status Update Letter

February 2020 Digital Resource Management SF: 00709117

You can now customize the **Deposit Status Update Letter** using the same workflow as other Alma letters from **Configuration > General > Letters > Letters Configuration**. This allows you to configure additional elements of the letter, including a reason for the letter, a delivery URL, and a note.

Deposit Status Update Letter Preview Letter Cancel Save

Labels Template Letter Examples

Customize All Restore Default Translations

Filter: English

	Enabled	Code	Description	Translation	Updated By	Last Updated	
1	<input checked="" type="checkbox"/>	subject	<Your Deposit>: deposit_title	<Your Deposit>: deposit_title	-	-	...
2	<input checked="" type="checkbox"/>	department	Alma deposit approval team	Alma deposit approval team	-	-	...
3	<input checked="" type="checkbox"/>	deposit_id	Deposit ID is:	Deposit ID is:	-	-	...
4	<input checked="" type="checkbox"/>	letterName	Deposit Status Update	Deposit Status Update	-	-	...
5	<input checked="" type="checkbox"/>	Bcc	None	None	-	-	...
6	<input checked="" type="checkbox"/>	decline_text	None	None	-	-	...
7	<input checked="" type="checkbox"/>	approve_text	None	None	-	-	...
8	<input checked="" type="checkbox"/>	return_text	None	None	-	-	...
9	<input checked="" type="checkbox"/>	submit_text	None	None	-	-	...
10	<input checked="" type="checkbox"/>	withdraw_text	None	None	-	-	...
11	<input checked="" type="checkbox"/>	Cc	None	None	-	-	...
12	<input checked="" type="checkbox"/>	note	Note:	Note:	-	-	...

Deposit Status Update Letter

For more information, see [Configuring Alma Letters](#).

Improved Performance For Alma Analytics

February 2020 Analytics

Ex Libris is currently implementing performance upgrades to the Alma Analytics infrastructure. These upgrades will greatly improve performance when running analytics reports. These upgrades will be rolled out gradually. For the February release, the upgrades will be made available to NA04.

Last Patron Activity Date

February 2020 Administration and Infrastructure



NERS Enhancement (ID #5631)



Idea Exchange

You can now view the last activity date for specific activities in the **Last Patron Activity Date** field of the User Details Page. The field is display only and will be available for analytics in an upcoming release. Due to privacy concerns, data will only be collected from activation of this new feature onward. If the option is disabled, all data collected in this field will be deleted for all users. When enabled, this field is updated when any of the following activities are executed:

- Placing a request of any type - hold, booking, digitization, acquisition, resource sharing
- Borrowing an item (all workflows, including self-check / API)
- Returning an item (all workflows, including self-check / API)
- Loan renewal (except automatic renewal), or renewal request (for resource sharing loans)
- Update of user information from Primo

The following activities do NOT update the Last Patron Activity Date field:

- Using the **Pay** button on the Manage Patron Services page
- Canceling a request in Alma or Primo
- Patron Purchase Request sent from Primo - this will be added in a later release

To enable this option, select **yes** in the new **Record Last Patron Activity Date** page (**Configuration > User Management > General**).

Watch the [Last Patron Activity Date](#) video (1:36 minutes).

See [Managing Users](#) and [Configuring Last Patron Activity Date](#).

Absolute and Relative Paths in the S/FTP Definition

February 2020 Administration and Infrastructure SF: 00736685

Alma now supports the ability to indicate both an absolute and a relative path to the input directory in the S/FTP import protocol when creating import profiles to third-party systems. See [Managing Export Profiles](#).

UPDATE: This feature has been temporarily disabled. It will be reinstated in the future. For now, indicate the output path to the FTP as a relative path: do not preface the path with the '/' sign.

Quick Printing Option for Multiple Records

February 2020 Fulfillment

When printing call slips for multiple items, you can select several items and print slips for all of them in one action with the Quick Print functionality. The quick print functionality aggregates all the slips into a single PDF (within a popup window) and allows the operator to either send these to a designated printer or save the created PDF to a file. See [Pickup at Shelf](#).


DARA Recommends Local Standalone Portfolios to Link to the Community Zone


February 2020 DARA

Based on ISSN / ISBN matching, DARA now recommends local standalone portfolios for linking to the Community Zone. Linking to the Community Zone enables you to receive updates automatically without the need to update the portfolio

manually.


1 Local standalone portfolio "My title" can be linked to the community
Type: Link electronic inventory to the CZ


 "My title" is a local standalone portfolio. Based on ISSN/ISBN matching, I identified that this portfolio exists in the community.
Linking to the community zone will enable you to receive updates automatically, without the need to update the portfolio manually.


 I recommend linking this local electronic portfolio to the community.

DARA Recommendation to Link Standalone Portfolio to the Community Zone

Show Me Why





 I generated this recommendation after reviewing your Electronic inventory. Based on ISSN/ISBN matching, I identified that the local portfolio "My title" exists in the community.


 You can view the local Eportfolio by pressing **Let's see**. In order to implement the recommendation and link to the community, select **Let's do it!**

Show Me Why for Linking a Standalone Portfolio to the Community Zone

Lets do it!



 I generated this recommendation after reviewing your electronic inventory. Based on ISSN/ISBN matching I identified that "My title" portfolio exists in the community.

 Press "I'm ready" to implement the recommendation and link the local portfolios to the CZ. I will display a list of matching portfolios from the community, and you will be able to select the portfolio from the relevant electronic collection.

Let's Do It for Linking a Standalone Portfolio to the Community Zone

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


For more information about linking, see [Link to Community](#).


DARA Recommends Linking Local Electronic Collections to the Community Zone

February 2020 DARA

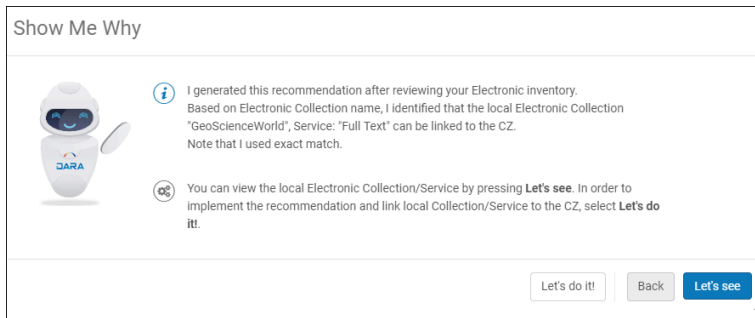
Based on the electronic collection name, DARA now recommends local electronic collections for linking to the Community Zone. Linking to the Community Zone enables you to receive updates automatically without the need to update manually.

Link local Electronic Collection "GeoScienceWorld", Service: "Full Text" to CZ
Type: Link Electronic inventory to the CZ

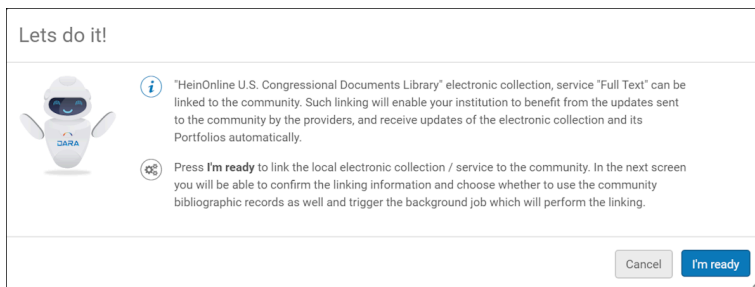
 GeoScienceWorld Electronic collection is defined locally in your institution. I identified that this Electronic collection exists in the Community Zone.
Linking the local Electronic Collection to the CZ Electronic Collection will enable you to receive updates automatically, without the need to update the collection and its portfolios manually.

 I recommend linking this local Electronic Collection to the CZ. Note that this is done using a background job.

DARA Recommendation to Link Electronic Collection to the Community Zone



Show Me Why for Linking an Electronic Collection to the Community Zone



Let's Do It for Linking an Electronic Collection to the Community Zone

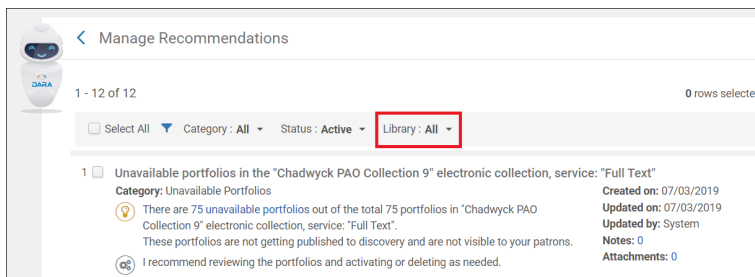
For more information, see [DARA – Data Analysis Recommendation Assistant](#).

For more information about linking, see [Linking a Local Electronic Collection to the Community Zone](#).

Library Filter Added to Recommendations List

February 2020 DARA

A new **Library** filter was added to the List of Recommendations that you can use to filter the list by library. This feature is relevant for recommendations such as Unavailable Portfolios, Missing Items, and Local Electronic Collections.



Library Filter

New Columns Added to DARA Export File

February 2020 DARA

The following columns were added to the Excel file that is produced when you export recommendations using the Export icon:

- Entity Type – for example: Electronic Service, Physical Item, Electronic portfolio
- Entity ID – for example: the Electronic Service ID, the Item PID, or the Electronic portfolio PID

- Additional Info – for example: the columns of the analytics report or the Access type, Authentication note, and Public note of the electronic collection