
2020 RN 05 Main

Ability to create/update the vendor details on a purchase order line using APIs

May 2020 Acquisitions

An option to create and/or update the fields within the **Vendor Details** section have been added to the Update PO Line and Create PO Line APIs.

See [Rest PO Line](#) in the Developer Network.

Monthly Run Option for SUSHI Harvesting Job

May 2020 Acquisitions



Idea Exchange

The SUSHI Harvesting job can now be run on a monthly schedule, in addition to the weekly scheduling option. The monthly schedule offers four predefined optional dates across the month. This will save institutions from trying to harvest usage data each week, which can result in redundant failures in case reports are not ready yet.

See [Managing SUSHI Harvesting](#).

Ability to Activate Portfolio from CZ using Create Order API

May 2020 Acquisitions



Idea Exchange

The functionality, which was originally introduced in the [January release](#), is designed for orders originating from OASIS. It is now available for 11 providers (see [complete list](#)).

This functionality eliminates the need to load full MARC records via an Import process, due to the fact that the ordered resources are activated from the Community Zone (which includes full bibliographic records for the ordered electronic resource).

Pre-requirement: The relevant Community Zone collection must be active in your Institution Zone. If the collection is not available in the Institution Zone, a standalone electronic resource (portfolio) is created and the order is associated to it, requiring the use of a full MARC update via an [Update Inventory](#) import profile for complete descriptive information and access information.

Example:

An order is sent from OASIS for an electronic resource "1,000 Comic Books You Must Read" from ProQuest Ebook Central. Alma associates the OASIS order with the relevant portfolio by activating the relevant portfolio from the collection "Ebook Central Perpetual, DDA and Subscription Titles", including complete descriptive information and access information.

See [Real-Time Ordering](#).

New Metadata Editor

May 2020 Resource Management

The new Metadata Editor is now available for your review in the sandbox. See the [Metadata Editor](#) and [Rollout Plan](#) sections on the [Usability Improvements](#) page for more information.

Watch the [New Alma Metadata Editor](#) video (4:40 minutes). To view the video on an alternate video host, click [here](#).

View Community Zone Portfolio Linking Information

May 2020 Resource Management



NERS Enhancement (ID #5790)



Idea Exchange

In order to assist with the decision of activating Community Zone portfolios, you can now view portfolio linking information from search results in the Community Zone tab. Previously in order to view the linking information of a Community Zone portfolio, you had to activate the portfolio. See [Linking Information](#) on the [Searching in Alma](#) page for more information.

UTF-8 Special Character Handling

May 2020 Resource Management

Alma offers a new method of handling UTF-8 special characters (with diacritics). UTF-8 special characters may be represented in both the composed or decomposed version of the character in bibliographic or authority records. Now, you have the option to configure your system with normalize on save always to save the composed version of special characters. This may be especially useful to implement to avoid the use case where multiple records are changed due to their conversion to composed representation. Such records are marked for preferred-term correction (PTC) and cause heading updates (the only difference is the composed/decomposed nature of a special character).

For more information, see [UTF-8 Special Character Handling in Alma.docx](#)

Statistical Notes

May 2020 Resource Management



Idea Exchange

In advanced search for **Physical titles** and **Physical items**, you can now search for statistical notes. See [Searching for Statistical Notes](#) for more information.

Note

Full inventory indexing needs to be run to enable this functionality.

MARC 21 and UNIMARC Updates

May 2020 Resource Management

The following MARC 21 holdings and authority configuration profile updates have been completed:

- MARC 21 Holdings – Update No. 28 (May 2019)
- MARC 21 Authority – Update No. 26 (April 2018) and Update No. 28 (May 2019)

The following UNIMARC bibliographic configuration profile updates have been completed:

- 135 \$a/1 Special Material Designation
 - New codes: d – computer disc, type unspecified, e – computer disc cartridge, type unspecified, k – computer card, s – standalone device
 - Renamed: j – magnetic disk, r – online
- New field 214
- New subfield 2 for the following fields: 200, 225, 510, 532, 541
- The following new subfields for the 602 field: c, d, o
- The following new subfield for the 604 field: 2
- The following new subfield for the 623 field: 3

The following UNIMARC authority configuration profile updates have been completed:

- 101
 - Repeatable
 - New indicator 2 – Source of code
 - # – ISO 639–2 language code
 - 7 – Source specified in subfield 2
 - New subfield 2 – System Code (NR)
- The following new subfields for the 123 field: q, r, s, t, 2
- The 106 field renamed to 106 CODED DATA FIELD: ENTITY NAME AS SUBJECT ACCESS POINT
- The following new fields: 180, 370, 822
- The following new X23 fields: 223, 423, 523, 723

API Usage Subject Area

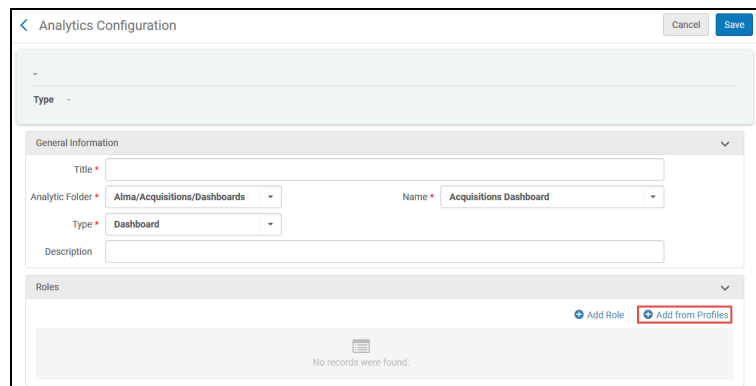
May 2020 Analytics

The new API Usage subject area is now available. You can use the fields of this subject area to create reports that display usage of Alma Analytics by API. For more information, see [API Usage](#).

Add Roles from Profiles For Widgets and Dashboards

May 2020 Analytics

When creating Analytics Widgets and dashboards ([Configuration Menu > Analytics > Analytics Objects List or Analytics > Analytics Objects > Analytics Objects List](#)) you can now select a profile of roles to assign to the widget or dashboard.



The screenshot shows the 'Analytics Configuration' window. The 'Roles' section is expanded, showing two buttons: 'Add Role' and 'Add from Profiles'. The 'Add from Profiles' button is highlighted with a red box. The 'General Information' section above it shows fields for Title, Analytic Folder (set to 'Alma/Acquisitions/Dashboards'), Name (set to 'Acquisitions Dashboard'), Type (set to 'Dashboard'), and Description.

Add from Profiles

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

For more information on role profiles, see [Configuring Role Profiles](#).

Improved Performance For Alma Analytics

May 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 May release, the upgrades will be made available to NA02.

Normalization of Generic XML to Alma XML

May 2020 Digital Resource Management

Alma now supports XSL transformer rules to convert generic XML files in a DCMI schema to an XML format recognized by Alma. This enables a RESTful API to load the file into Alma. For example, you can load an ETD Admin file with a SWORD API into Alma in ETD-DCAP format.

Recent Entities for Digital Resources

May 2020 Digital Resource Management

Actions performed for the following digital resources are now indicated on the Recent Entities pane:

- Digital Collections
- Digital Representations
- Digital Files
- Digital Deposits

For more information, see [Recent Entities List](#).

Material Type Mapping

May 2020 Digital Resource Management

You can now map Alma material types to DCMI types that you configure. The DCMI types that you configure are available in the Material Type drop-down lists wherever they exist in Alma. Additionally, when the DCMI types that you configure are the value in the `dc:type` or `dcterms:type` fields in a DC bibliographic record, Alma will display the record with the mapped Alma material type. To support this feature, a new mapping table is available at **Configuration > Resources > Cataloging > DCMI Material Type Mapping**:

	Enabled	Material Type	DCMI Type	Updated By	Last Updated	
1	<input checked="" type="checkbox"/>	Book	Text	-	-	...
2	<input checked="" type="checkbox"/>	Music	Sound	-	-	...
3	<input checked="" type="checkbox"/>	Visual material	Image	-	-	...
4	<input checked="" type="checkbox"/>	Visual material	Moving Image	-	-	...
5	<input checked="" type="checkbox"/>	Visual material	Still Image	-	-	...
6	<input checked="" type="checkbox"/>	Computer file	Dataset	-	-	...
7	<input checked="" type="checkbox"/>	Computer file	Software	-	-	...
8	<input checked="" type="checkbox"/>	Mixed material	Event	-	-	...
9	<input checked="" type="checkbox"/>	Mixed material	Interactive Resource	-	-	...

Material Type Mapping

Related Digital Records

May 2020 Digital Resource Management



Idea Exchange

Related digital records are now indicated when clicking View It.

The New York times book review. Arno Press, Oct. 10, 1896-

Source: The New York times book review. [0028-7806]

Full text available at: [ProQuest Regional News Northeast New Platform_CreateLicenseTest_0308151459](#)
Available from 1997.

Full text available at: [ProQuest Regional News Northeast New Platform 0305151228](#)
Available from 1997.

Full text available at: [ProQuest Regional News Northeast New Platform 0401151226](#)
Available from 1997.

Digital Version(s)
The New York times 1 file/s (jpg, 16.83 KB)

Services For Related Titles

Digital Version(s)
Picasso work 1 file/s (jpg, 80.78 KB)

Related Records

To support this feature, the new **Disable Related Record Services for Digital** configuration option is now available (**Configuration > Fulfillment > Discovery Interface Display Logic > Related Records**).

Related Record Services Configuration

View It

Enable related record services Yes No

Display related services if full text is available

Display related services for serials

Display related services for monographs

de-duplicate electronic collection services

Enable direct link for related services

Disable Related Record Services for Digital

Display closely related records services as part of the original services Separately from original record services

Get It

Enable related record holdings Yes No

Display related holdings for serials

Display related holdings for monographs

Display closely related records holdings as part of the original holdings Separately from original record holdings

Disable Related Record Services for Digital

Clear this option to allow the related records indication for digital records to be displayed

Multiple Viewers Available for Staff Delivery

May 2020 Digital Resource Management

Library staff can now select which viewer is used to display a digital file. To support this feature, a new Delivery section was added to the Digital Representation Resource Editor that displays the available viewers. Unavailable viewers are marked as Disabled.

Digital Representation Resource Editor

Relink to another bibliographic record Cancel Save

Sunset in the desert Single file in Representation Desert 1981

Label Single file in Representation View all representations

Representation ID 124829920000121

General Information Files List Notes History

Properties

Active Inactive

Usage Type * Master Library * Access rights

Label Single file in Representation

Public Note Desert

Entity Type Provenance ID

Thumbnail Upload Thumbnail Selection Use default thumbnail

Delivery

Alma Viewer

Universal Viewer

Internet Archive Book Reader (disabled)

Storage

Note

The Delivery URL is no longer displayed.

Option for Locate of Electronic Resources

May 2020 Fulfillment Resource Sharing

You can now set a policy to not send a borrowing request to a lender that has only an electronic version of the requested resource, if the request has been requested for a physical format. When the new parameter, **rs_ignore_electronic_for_physical_request**, is set to **true**, the borrowing locate process for physical requests ignores lenders' electronic inventory, as shown in the table below. Lenders which have the requested resource only in electronic form are then removed from the rota by the locate process.

If the **Allow other formats** check box is selected, when creating a new borrowing request, electronic resources are allowed, regardless of the value in the parameter.

The below table describes how the locate process runs with regard to the possible combinations of the **Ignore Electronic and Digital Resources** option in the locate profile and the new **rs_ignore_electronic_for_physical_request** parameter

		Allow other formats is not selected	Allow other formats is selected
rs_ignore_electronic_for_physical_request = false	Ignore Electronic and Digital Resources is not selected in Locate Profile Details	Allow electronic regardless of format	Allow electronic regardless of format
	locate profile ignore electronic is selected in LocateProfile Details	ignore electronic regardless of format	ignore electronic regardless of format
rs_ignore_electronic_for_physical_request = true	locate profile ignore electronic is not selected in Locate Profile Details	ignore electronic if physical / physical non-returnable	Allow electronic regardless of format
	locate profile ignore electronic is selected in Locate Profile Details	ignore electronic regardless of format	ignore electronic regardless of format

See [Borrowing Locate Process](#).

Control the presentation of related holdings in Primo

May 2020 Fulfillment



NERS Enhancement (ID #5340)



Idea Exchange

New configuration options are available for the Get It display, these options provide institutions the control of whether or not to present related holdings for patrons using Primo/PrimoVE. A more granular option provides the institutions with the option to present related records only for serials or only for monograph titles.

See [Enabling the Display of Related Records in Primo](#) for more information.

'Printouts Queue' Link Visibility

May 2020 Administration and Infrastructure

Now you can grant access to the Printouts Queue link (Admin > Printing) only to specific users. To support this, two new user roles were added:

- The Printout Queue Operator - can access the Printouts Queue, but can see only the letters they have printed (which means they do not have access to the Printed By filter).
- The Printout Queue Manager - can access the Printouts Queue, and can see all the letters there. Have access to the Printed By filter.

The change in Alma will be implemented gradually, over the May and June releases, as follows:

- In May release: No change in behavior. All users can still access the Printouts Queue link.
- In June release:
 - The Printout Queue link becomes hidden for all users without one of the above roles.
 - The Printout Queue Operator role is automatically added to all the users who have printed to the Printout Queue within the previous 30 days.

To manage this change, Ex Libris recommends that you do the following within the duration of the May release:

- If grant access to the Printouts Queue link to existing users, make sure to add one of the above roles to all users that need to receive access to the link.
- To grant access to the link to new users, add the new Printout Queue Operator role to a Role Profile. This will make the link available for all users created with the relevant job category or user group, and a corresponding role-assignment rule for the Role Profile in place. For details about Role Profiles, see [Configuring Role Profiles](#).

In addition, in the May release the retention period for items in the Printout Queue will be increased from 7 days to 30 days, after which the Alma cleaning job will clean the items. There is currently no way for customers to control the retention period.

See [Managing User Roles](#).

Keyboard Shortcuts Enhancements

May 2020 Administration and Infrastructure

Now you can view the full list on the **Shortcut Customization** page (User menu > Shortcut Customization).

You can also disable global Alma keyboard shortcuts. You may want to do that in cases when your language requires usage of the same keyboard keys for typing accents or diacritics. Note that you can disable the Alma shortcuts, but cannot define other Alma shortcuts for the same action.

See [Global Alma Hot Keys](#).

Sorting Tables Alphabetically in All Languages

May 2020 Administration and Infrastructure

Continuing the enhancements introduced in March 2020, now you can sort additional tables alphabetically in Alma, regardless of the language of the data in the table. The data is sorted according to the alphabet of the selected language.

This was implemented in the following tables within Alma:

- Bulk Change Due Dates table – Material Type column
- Add Non-Repository Citation table - Material Type column
- Edit Reading List Citation - Material Type column
- Resource Sharing Borrowing Request table - Languages column
- Manage Course Information table - Academic Department column

New SAML Certificate

May 2020 Administration and Infrastructure

The current DigiCert SAML Certificate will expire in January 2021. 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](#).

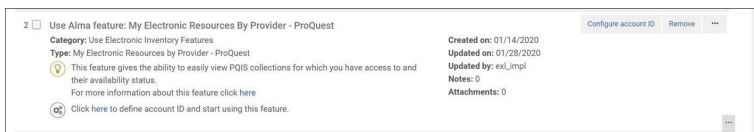
If your institution uses ADFS, Ex Libris highly recommends that you replace the certificate to avoid any complications.

Note: No immediate action is needed. Replacing the certificate can be done at any time till its expiry on January 5, 2021.

DARA Recommendations for My Electronic Resources by Provider

May 2020 DARA

The My Electronic Resources by Provider feature in Alma allows you to view your subscriptions with providers and their availability status in Alma and activate any resources that you access but have not activated. DARA can now determine if the feature is relevant for your institution, but is not in use, and recommend that you use it.



My Electronic Resources by Provider

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

For more information on the My Electronic Resources by Provider feature in Alma, see [My Electronic Resources by Provider](#).