
2020 RN 07 Main

Purchase Request Form Alert

July 2020 Acquisitions



NERS Enhancement (ID #5685)

When a patron in Primo enters an ISBN or EISBN number in a blank Purchase Request form, an alert now displays indicating whether a holdings for the resource exists in the library. Primo displays a message that a holdings does not exist for the identifier placed by the patron, which may be because the resource does not exist, because there is a location, bibliographic record, or holdings that is suppressed from discovery, or because, for electronic resources, the electronic portfolio is not active. This is also relevant for network and multi-campus.

This functionality is controlled by the customer parameter **PR_indicate_for_primo_if_ISBN_exists**, and is enabled by default. See [Configuring Other Settings \(Acquisitions\)](#).

This enhancement is available for Primo classic only and will be made available for PrimoVE users in a future release

See [Creating a Purchase Request](#).

Activating GOBI Real Time Orders Sent from the Relevant Portfolio in the Community Zone

July 2020 Acquisitions



Idea Exchange SF: 00596978 00713525 00426146

For orders originating from GOBI, Alma will attempt to locate the relevant portfolio located within a Community Zone collection using the vendor proprietary identifier number or the ISBN/ISSN and activate it within the relevant collection in the institution, for this functionality to work it is important that the relevant collection will be activated from the Community Zone in the institution. In cases where Alma does not find a matching portfolio in the relevant Community Zone collection **or** if the relevant collection was not activated in the institution, a stand-alone portfolio will be created in Alma will not be linked to a Community Zone portfolio. See [GOBI vendors list](#) for list of Community Zone collections which supports this functionality.

Additionally, three new collections are now available in the [OASIS vendors list](#).

Move Invoice Owner from an Institution to a Library

July 2020 Acquisitions



Idea Exchange SF: 00810848

You can now change the owner for an invoice after it is edited. The values for the **Owner** list depend on the owner of the linked PO line/s, user role scope, library availability for vendor, and vendor account and funds. When saving the invoice, if

the invoice owner is the institution but all the PO lines associated with the invoice lines are owned by a single library, a confirmation message displays that allows you to confirm or cancel your changes.

Watch the [Move Invoice from the Institution to a Library](#) video (1:20 minutes).

Platform Field Added to the SUSHI Account Details

July 2020 Acquisitions



Idea Exchange SF: 00799252 00800227 00801116 00802185 00802271 00807054 00810911 00814981 00818471 00831882

When configuring a SUSHI account for COUNTER 5, The SUSHI Account Details page now includes a **Platform** field. This field should be populated for vendors that require a platform code for successful harvesting of usage data. Note that the platform code is case sensitive. Only one platform code can be used per SUSHI account.

See [Managing SUSHI Accounts](#).

Advanced Search for Users

July 2020 Administration and Infrastructure



Idea Exchange SF: 00180020 00214711 00220450 00226302 00024637 00024650 00074581 00084395 00102382 00125857 00126248 00129769

You can now search for users by combining search criteria, using Alma advanced search. This is available only to users with the roles and privileges to search for users.

Note

The quick autocomplete search in the Patron Services Workbench currently uses the 'All' search, including the new indexes. In the upcoming Release Update, this will be changed so that the search will be limited to names, emails and identifiers.

In addition, there are new search options for user records. The new search options in advanced search are:

- User group - Equals, Is Empty, Not Equals, Is Not Empty - equals and not equals options display a multiple choice drop-down list.
- Create date - Equals, Before, After
- Birth date - Equals, Before, After, Is Empty
- Expiration date - Equals, Before, After, Is Empty
- Purge date - Equals, Before, After, Is Empty
- Last activity date - Equals, Before, After, Is Empty
- Statistical category - Equals, Is Empty, Not Equals, Is Not Empty - equals and not equals options display a multiple choice drop-down list.
- Note - Contains Keywords, Contains Phrase - this option is also available on the simple search
- Has note type - Equals, Not equals - displays a multiple choice drop-down list.
- Has block type - Equals, Not Equals - displays a multiple choice drop-down list with block types.

- Has Identifier type - Equals, Not equals - displays a multiple choice drop-down list.
- Fine/fee total sum - <, <=, >, >=
- Campus - Equals, Is Empty, Not Equals, Is Not Empty - equals and not equals options display a multiple choice drop-down list.

New options for existing search criteria in advanced search options are:

- Email - Equals, Is Empty
- First Name - Contains Keywords, Contains Phrase, Is Empty
- Identifiers - Equals
- Job Category - Equals, Is Empty, Not Equals, Is Not Empty - equals and not equals options display a multiple choice drop-down list.
- Last Name - Contains Keywords, Contains Phrase, Is Empty
- Middle Name - Contains Keywords, Contains Phrase, Is Empty
- Primary Identifier - Equals

This feature is not deployed in the sandboxes and will be available only on production environments.

See [Searching in Alma](#).

XSL Transformation as Part of an Integration Profile

July 2020 Administration and Infrastructure

Now when importing users to Alma from SIS systems that use other data formats than Alma, you can convert data format from the source system formats to the format required by Alma. Previously, the conversion had to be done outside of Alma, and demanded specific technical knowledge and resources from institutions.

To facilitate the conversion process, you can now do the following:

- Define an XSLT converter to be used by Alma
- Apply the XSLT converter to an Integration Profile that defines the way data is imported into Alma
- Manage XSLT converters in Alma:
 - Share converters between institutions
 - Preview results on a demo file
 - Validate converters

Currently, this is possible for the following integration (see [Student Information Systems](#)):

- SIS import
- SIS synchronization

The ability to define XSLT converters is disabled by default. If your institution would like to activate this behavior, please contact Ex Libris customer support.

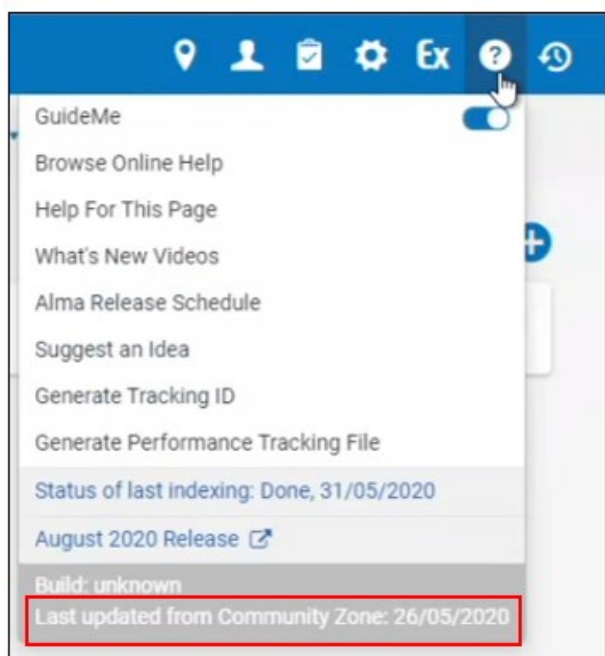
To manage XSLT converters, a new page **Integration XSL Converters** was introduced (available from [Configuration > General](#)). This page allows creating and editing EXSL converters, as well as allows institutions to share converters in the Community Zone.

See [Integration XSL Converters](#).

Notification on Last Community Zone Update

July 2020 Administration and Infrastructure

A notification about the date of the most recent Community Zone update was added to the Help menu located in the **Main Menu Icons**.



Institutions that work with the Community Zone expect that Community Zone resources will be up-to-date to the most recent Community Zone update. To this effect, the [Synchronize Changes from CZ](#) job runs daily in each institution updating authorities and resources from the Community Zone to the local institution.

However, if the number of updates in the Community Zone is very large, the job cannot complete on the same day. Every day the job attempts to close the gap. Thus, in cases of very large Community Zone updates, a delay of a few days might occur in the synchronization of CZ and the local institution. However, when customers do not see the relevant resources updated in their institutions on the day of the Community Zone update, or on the next day, the discrepancy might cause alarm.

The new notification in the Help menu lets you know the date of the last Community Zone update that was implemented in your system. If the date indicated is not today's date, the reason you do not see some Community Zone updates in your system is due to this delay. You need to wait for the following runs of the job to update your resources.

Note

In July-deployed environments where the Community Zone Harvesting job has not run yet this notification is not displayed. It will be displayed once the Synchronize Changes from Community Zone job has run.

See [Synchronize Changes from CZ](#) and [The Alma User Interface](#).

New Alma Layout Enabled

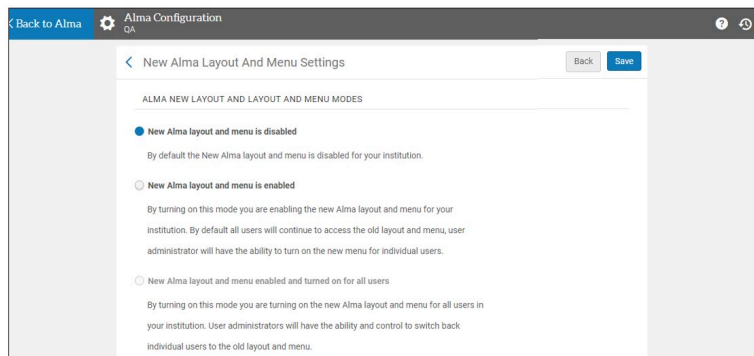
July 2020 Administration and Infrastructure

Continuing the rollout of the new Alma layout, starting from the July release, the new layout will be available for Alma users in the sandbox. For a full list of changes, see [Layout Improvements](#).

Alma Administrators can turn the new functionality on for a specific user (Opt-in). Ex Libris will introduce the new layout gradually over several Alma releases (See Rollout Plan), giving users enough time to understand, experience, and get used to the changes. As part of the rollout plan, we encourage as many users as possible to get themselves familiarized with the new layout. For instructions for the Alma Administrator, see [Turning On the New Layout for Users](#).

Note

Ex Libris recommends that all users gain experience with the new Alma layout prior to the new layout Go-Live, which is planned to take place with the deployment of the September 2020 release.



The new layout increases your working area, improves navigation, gives you more options to customize your menus, and facilitates improved user workflows. For a full list of changes, see [Layout Improvements](#).

Creation of Several Itemized Sets From File in Parallel

July 2020 Administration and Infrastructure

When creating itemized sets, one of the options to add records to a set is uploading a file that contains the identifiers (MMS ID, ISSN, ISBN, and so forth). The **Add Members to Set** job runs and creates a set from the file. Previously, only one instance of the job could be run simultaneously. Now any number of instances of this job can run in parallel.

See [Creating Itemized Sets](#).

Skipped Job Status

July 2020 Administration and Infrastructure

The status of jobs that need to be skipped was changed to 'Skipped'. Previously, the status of these jobs was indicated as 'Failed', which was misleading.

Alma skips jobs in the below cases:

- Another instance of the job is currently running, and the job does not allow multiple instances.
- The job is dependent on the completion of another job, and that job is still running.

See [Viewing Running Jobs](#).

Dependent Job Waiting

July 2020 Administration and Infrastructure

The below dependent jobs now wait till the completion of the job they are depended on with the status 'Pending', and start

running after that job completion:

- Authorities - Link BIB Headings
- Authorities - Preferred Term Correction
- Authorities - Handle Local Authority Record Updates
- MMS - Build Record Relations

Previously these jobs were skipped with the status 'Failed', which was misleading. See [Overview of Jobs](#).

External Users with Internal Authentication

July 2020 Administration and Infrastructure

For institutions whose Student Information System (SIS) does not offer authentication services, it is now possible to create users as external in Alma, but assign passwords for them directly in Alma. In this case, all the user information, such as name, ID, etc, is managed from the SIS, but the passwords are stored in Alma and managed by the Ex Libris Identity Service.

When this behavior is active, changing a user from external to internal (and vice versa) does not reset the user password; the existing password the user used as an external user is retained.

This new behavior is activated by a customer parameter, upon request. If your institution's SIS does not offer authentication services and would like to activate this behavior, please contact Ex Libris customer support.

See [Registering Patrons](#) and [Mapping User Accounts to Other Systems](#).

Support Sending SHA-256 Logout Requests

July 2020 Administration and Infrastructure

Previously, SAML logout requests were always signed with SHA1 (also called SHA128) signature. Now the default for logout requests is to be signed with SHA2 (also called SHA256).

New profiles are now signed with SHA2, but this can be changed to SHA1, if needed.

Existing profiles continue to be signed with the SHA1 signature, but this can be changed to SHA2, if needed.

The screenshot shows the 'Integration Profile' configuration page. Under the 'SAML DEFINITIONS' section, there are several fields and options. The 'Apply SHA1 signature (Default SHA2)' checkbox is checked, indicating that SHA1 signature is currently selected. Other fields include 'Metadata upload method' (set to 'Metadata link'), 'Metadata file link', 'Default SAML profile', 'ForceAuthn', 'IdP issuer', 'IdP login URL', 'User ID location' (set to 'User ID is in an Attribute element'), 'User ID attribute name', 'IdP logout URL', 'IdP single logout service', and 'Sign single logout requests'.

See [SAML-Based Single Sign-On/Sign-Off](#).

Request Anonymization and Anonymization Rules

July 2020 Fulfillment



Idea Exchange

You can now define rules for all anonymization types, not just loans. The anonymization job, which runs once daily, is **Fulfillment - Handle Historical Archiving**. The rules are found in the Fulfillment Jobs Configuration page (**Configuration Menu > Fulfillment > General > Fulfillment Jobs Configuration**) next to each anonymization type. This is now the only place the anonymization rules are accessed. The link to Loan Anonymization Rules is no longer available on the Fulfillment Configuration menu.

The customer parameter, **should_anonymize_requests**, which previously anonymized a request as soon as it was completed, has been renamed to **should_anonymize_requests_immediately_when_complete**. Now, when set to **true**, Alma still anonymizes the request as soon as it is completed and also ignores the anonymization rules.

When creating a rule for request anonymization, if choosing **Library** or **Location** as input parameters, the library and location are calculated as follows:

When a request is completed, if there are multiple items available, if the request was attached to a specific item, for instance, item level request or item already fulfilled the request, the library and location of the item is used. If the request can still be fulfilled by multiple items, the library and location are taken from the holding selected automatically as preferred for fulfilling the request.

As previously, checking requests anonymize both borrowing and lending requests. However, rules can be applied only to borrowing requests.

See [Configuring Anonymization](#).

Watch the [Request Anonymization and Anonymization Rules](#) video (4:28 minutes).

Option to Exclude the Grace Period When Calculating Fee

July 2020 Fulfillment



Idea Exchange

Previously, when calculating fees, when the grace period ended, fines were immediately implemented and set for the entire period including the grace period. Now, the grace period can be set to not be included in the fine period at all. In the policy, currently, you can now configure new periods. Each of the prior periods now has a second period with excluded from day. When that period is selected, the fee calculations are the same, but they are based on the end time of the grace period instead of the due date.

See [Physical Fulfillment](#).

Watch the [Exclude the Grace Period when Calculating a Fine](#) video (1:23 minutes).

Digitization Request File Upload Limit

July 2020 Fulfillment

For attachment digitization requests, the file size limit was increased from 10 MB to 25 MB.

See [Digitization Processing](#).

ISO 18626 - Return Information

July 2020 Fulfillment - Resource Sharing

When using the **ISO 18626** resource sharing partner type, return information is now supported. The lending partner can select **Send ReturnInfo** on the Resource Sharing Partner page to include the information for the originating lending library instead of the resource sharing library. The ISIL code of the lending library is then included in the resource sharing request, if it is populated. The ISIL code is presented on the Resource Sharing Borrowing Task List as **Return Information**. It is also available in the XML for the ResourceSharingReturnSlipLetter. The field appears in the letter when populated. If the letter is customized, you must manually add the field to the XML in order for it to be populated.

When scanning an item through the Scan In Interface, the destination information is added to each line. When returning through Returns, it is added to the pop-up display.

Check-In for Shipped Items in the Scan In Interface

July 2020 Fulfillment - Resource Sharing



Idea Exchange

You can now set a message to warn the users if they are going to complete a lending process when scanning items. On the Scan In Messages Configuration page, the **Complete lending request** message, which defaults to none (no message), can be set to Popup message. When this is set, if an item is scanned in and is part of a Resource Sharing Request that is linked to a lending request in status **Shipped Physically**, the warning message will require a Confirm or Cancel action. This way the user cannot accidentally complete the lending request. If the message is set to Feedback message, rather than Popup, the feedback will tell them that the request will be completed, but the scan in action cannot be canceled.

See [Scanning Items](#).

Export Renew Allowed Indication in API to ILLiad

July 2020 Fulfillment - Resource Sharing

The ILLiad API now supports sending the **Renewals Allowed** field in a resource sharing request. The 'RenewalsAllowed' indication will be set according to the lending workflow profile that is attached to the ILLiad partner. If one of the following is enabled then Alma will send "RenewalsAllowed": true

- Patron renewal
- Staff renewal

If both patron and staff renewal are disabled then Alma will send "RenewalsAllowed": false.

Distribute Users from the Network Zone

July 2020 Collaborative Networks

Networks that share their user list in the Network Zone can create and update the network zone users manually using the Alma Manage Users menu, the API or the Update/Notify Users job. This is in addition to the previously only option to manage the Network Zone users using SIS feeds.

Users can now be updated in the Network Zone in the following ways, and the changes will be reflected in the Institutions that have a copy of the user record:

- The update/notify users job
- Using an API
- Manually updating the user in the User Edit form

See [Centrally Managing Users in a Network Zone](#).

Order Indication for Electronic Resources Ordered from NZ

July 2020 Collaborative Networks

In a Collaborative Network where electronic resources are managed centrally in the Network Zone and the orders are managed in the individual Institution Zones, institutions can order electronic collections or portfolios managed in the NZ.

In such cases, when using the staff search for electronic portfolio and electronic collection for Network Zone resources (both combined and NZ searches), Alma will now display the order icon by the records ordered from the Network Zone. Clicking on the link of the number of orders displays the list of the PO Lines of these orders.

The screenshot shows a search result for 'A Priori Justification' in the 'Electronic Portfolios' section. The record details include:

- Wiley Online Ebooks (Orbis Cascade Alliance): getFullTxt
- Creation Date: 06/02/2020 10:39:10 PM
- Modification Date: 06/02/2020 10:39:10 PM
- Portfolio ID: 53326476910001451
- Service ID: 62246217990001451
- Collection ID: 61246218000001451
- MMS ID: 99329223165501451

 A red box highlights the 'Orders: 2' icon next to the record title.

In Network search

The screenshot shows a search result for 'A Priori Justification' in a network search. The record details include:

- Wiley Online Ebooks (Orbis Cascade Alliance): getFullTxt
- ISBN: 9780195115055
- ISBN (13): 9780195115055
- Access Type: Current
- Creation Date: 06/02/2020 10:39:10 PM
- Modification Date: 06/02/2020 10:39:10 PM
- Portfolio ID: 53326476910001451
- Service ID: 62246217990001451
- Collection ID: 61246218000001451
- MMS ID: 99329223165501451

 A red box highlights the 'Orders: 2' icon next to the record title.

In combined search

Saving Local Sets in Network Zone

July 2020 Collaborative Networks



Idea Exchange

Now the Institution Zone staff can create a local set of bibliographic records in the Institution Zone and then save the set in the Network Zone.

This is useful in use cases where a set can only be built in the Institution Zone because the query uses search criteria from either localized fields in the bibliographic record or from the inventory (holdings, items, portfolio, etc.) However, you cannot run normalization rules on Network Zone bibliographic records from within the Institution Zone, since non-localized fields in the Network Zone bib records cannot be changed from within an Institution Zone.

The current development allows the Institution Zone staff to save a local set of bibliographic records to the Network Zone, where they can then perform any actions with the set, such as running normalization on the bib records.

To support this functionality, the Save in Network action was added to the Manage Sets page (Admin > Manage Jobs and Sets > Manage Sets). Choosing this action saves a local set of bibliographic records to the Network Zone. See [Saving Sets in Network Zone](#).

The new action runs a job that creates a set in the NZ containing only the records linked to the Network out of all records. See [Save Set in Network Report](#).

Sharing and Contributing General Electronic Services in the Community Zone

July 2020 Collaborative Networks

Users now can contribute their General Electronic Services to the Community Zone, where other institutions can copy and use these services.

Note

The current functionality of distributing general electronic services from Network Zone to Institution Zone using the Distribute Fulfillment Network Configuration job remains as is (see [Configuring Fulfillment Information in the Network Zone](#)).

See [Sharing General Electronic Services in the Community Zone](#) and [Community Zone Contribution Guidelines](#).

Note

The ability to share general electronic services in the Community Zone will become available a few days after the July installation.

Improvements to Electronic Collections Contributions

July 2020 Collaborative Networks

Electronic collection contribution was enhanced as follows:

- Now you can contribute to additional fields, including static and dynamic URLs.
- Now you can update additional fields of your contributed electronic collections and share your updates with the community.

Additional Electronic Collection Fields that You Can Contribute

The following additional fields can now be contributed:

Collection	Service	Portfolio
<ul style="list-style-type: none"> Type Interface name Level URL Is Free? Description Language Category 	<ul style="list-style-type: none"> URL type: Dynamic URL Linking level Service is free? Crossref supported 	URL type: <ul style="list-style-type: none"> Static URL Dynamic URL

See [Managing Electronic Collections](#).

Updating Your Contributed Electronic Collections

If you are the contributor to the electronic collection, now you can update additional fields and share these updates with the Community Zone. Your changes are submitted to a job that runs overnight to update the electronic collection, its portfolios, services, and bibliographic records in the Community Zone. This job copies the information from the override fields to the main fields and then removes the override values. This synchronizes your electronic collection with the Community Zone.

To update an electronic collection in the Community Zone:

1. In the Institution tab of the electronic collection, enter the new values in the override fields, and select **Update in Community**.
This updates the Community Zone with the new values.
2. In the confirmation message that appears, click **Yes**.

Confirmation Message

You are about to update the following electronic collection in the community: 08-06-2020 Contribution

Override

PORTFOLIOS:

New	0
Deleted	0
Updated	1

BIBLIOGRAPHIC RECORDS:

New	0
Deleted	0

IMPORTANT

Any populated override field will replace the corresponding main field value in the Community Zone, thus, it will affect all the customers that activated this electronic collection from the Community Zone. This action cannot be reversed.

Notice that this is true for any override field of Electronic Collection / Electronic Service / Electronic Portfolio.

Any value will be cleared from the override fields once the contribution process is finished.

Please make sure to contribute Portfolios with Static URLs that are free of institution specific information only!

Are you sure you would like to update this electronic collection in the Community Zone?

See [Updating Community Zone Contributed Electronic Collections](#).

Contributing Static and Dynamic URLs

Now Alma supports the contribution of portfolio Static/Dynamic URL and service Dynamic URL, in addition to the existing contribution of parser parameter URL. This way, you see in the Community Zone the exact URL that you contributed.

Override Fields of Community Zone Electronic Collections

All activated Electronic Community Zone Electronic collections are edited with your own information. Your edits are only local, no changes are made to the Community Zone record.

When editing the collection, you make your edits in the override fields. Any later updates to this electronic collection will update only the main values so that you know what the updates were. Your local override values remain unchanged.

The following additional fields can now be edited:

Collection	Service	Portfolio
<ul style="list-style-type: none"> Type (override) Interface name (override) Level URL (override) Is Free? (override) Description (override) Language (override) Category (override) 	<ul style="list-style-type: none"> URL type: Dynamic URL Linking level (override) Service is free? (override) Crossref supported (override) 	URL type: <ul style="list-style-type: none"> Static URL (override) Dynamic URL (override)

See [Managing Electronic Collections](#).

Audio Visual Media type Added to the Physical Material Type Description Table

July 2020 Resource Management

The Physical Material Type Description table now includes an **Audio visual media** option.

See [Configuring Physical Item Material Type Descriptions](#).

Additional Elements in Related Record for Physical Inventory

July 2020 Resource Management

For a child record, Alma now supports displaying a specific item when cataloging a specific issue, part or pages. Previously, Alma supported displaying specific items of the parent record only when cataloging a specific year, volume or barcode.

The following item specifications are now supported:

Item Specifications	Value in \$g (MARC21 / KORMARC) \$v (Unimarc / CNMARC)	Item Field
Issue	iss:	Enum B
Part	pt:	Enum C
Pages	p:	pages

MARC 21 example:

For the below record, two related holdings are shown:

1 The national student : conducted by the students of University College, Dublin.

Journal (Journal (Ceased publication) - Physical) text; unmediated; volume By University College, Dublin, ([Dublin] : The University, 1910.)

Language: English

Record number: (Aleph)002092734BCL01

MMS ID: 99110603250001021

Orders: 1

Subject: University College, Dublin--Students--Periodicals. Student newspapers and periodicals. Ireland--History--19th century--Periodicals, and others

Relation: Part Of.

Creation Date: 10/06/2018 13:21:09 PM IST

Modification Date: 21/06/2020 16:52:27 PM IDT

Physical (4) Electronic Digital Other details

4 Holdings | 14 of 14 items are available

Library	Location	Call Number	Accession Number	Item Availability	Related Record
BURNS	R111D	PB1001 .S72 IRISH	-	v.4no.1- v.5no.3(1913Nov-1915 May); v.6no.1- v.6no.2(1915Dec-1916 Mar.); new ser.:v.2no.2(1931-June)	-
BURNS	R111D	PB1001 .S71 IRISH	-	v.2 no.8- v.2no.9(1905Nov-1905D ec.)	✓ Related
BURNS	R111D	PB1001 .S7 IRISH	-	v.1 no.10(1903Feb.)	✓ Related
BURNS	R111D	PB1001 .S71 IRISH	-	v.1 no.1- v.3no.2(1910May-1913May)	-

The link in the child record is cataloged in field 773, including the new label **iss:** (issue):

Record View

650 _0 |a Nationalism iz Ireland iv Periodicals.

650 _0 |a Education iz Ireland iv Periodicals.

650 _7 |a Education. I2 fast 0 (OCoLC)fst00902499

650 _7 |a Nationalism. I2 fast 0 (OCoLC)fst01033832

651 _7 |a Ireland. I2 fast 0 (OCoLC)fst01205427

648 _7 |a 1800-1899 I2 fast

655 _7 |a History I2 fast 0 (OCoLC)fst01411628

655 _7 |a Periodicals. I2 fast 0 (OCoLC)fst01411641

710 2_ |a University College, Dublin, ie publisher.

773 18 |t St. Stephen's [w 9911060320001021 |g yr:1903 |g no:1 |g iss:10

After the filtering, only the holdings with the specific item pointed is shown:

1 The national student : conducted by the students of University College, Dublin.

Journal (Journal (Ceased publication) - Physical) text; unmediated; volume By University College, Dublin, ([Dublin] : The University, 1910.)

Language: English

Record number: (Aleph)002092734BCL01

MMS ID: 99110603250001021

Orders: 1

Subject: University College, Dublin--Students--Periodicals. Student newspapers and periodicals. Ireland--History--19th century--Periodicals, and others

Creation Date: 10/06/2018 13:21:09 PM IST

Modification Date: 21/06/2020 16:52:27 PM IDT

Uniform Title: National student (1910)

Physical (3) Electronic Digital Other details

3 Holdings | 13 of 13 items are available

Library	Location	Call Number	Accession Number	Item Availability	Related Record
BURNS	R111D	PB1001 .S72 IRISH	-	v.4no.1- v.5no.3(1913Nov-1915 May); v.6no.1- v.6no.2(1915Dec-1916 Mar.); new ser.:v.2no.2(1931-June)	-
BURNS	R111D	PB1001 .S7 IRISH	-	v.1 no.10(1903Feb.)	✓ Related
BURNS	R111D	PB1001 .S71 IRISH	-	v.1 no.1- v.3no.2(1910May-1913May)	-

UNIMARC example:

The parent record with many items in different years, volumes and issues:

← List of Items Back

Acupuncture & moxibustion / dir. Jean-Claude Dubois, Christine Recours-Nguyen . Marseille : Acupuncture & moxibustion, 2002. [1633-3454]

MMS ID: 990003826130304231 View all holdings

1 - 20 of 69 Sort routine - Manage Selected - Change Holdings - Re-link to another Bib -

▼ Status: All - Library: All - Location: All - Year: All - Volume: All - Description: All - Receive Date: All -

	Barcode	Call Number	Description	Item Call Number	Status	Process type	Access Number	Receiving date
1	alma92735	FJB96	v 19, no 4, 2020 (dec.)	-	Item not in place	Acquisit...	-	-
2	alma92734	FJB96	v 19, no 3, 2020 (sept.)	-	Item not in place	Acquisit...	-	-
3	alma92733	FJB96	v 19, no 2, 2020 (juin)	-	Item not in place	Acquisit...	-	-
4	alma92732	FJB96	v 19, no 1, 2020 (mars)	-	Item not in place	Acquisit...	-	-
5	ONIA0007120	FJB96	Vol. 18, n° 2 (2019, juil.)	FJB96	Item in place	-	-	30/01/2020
6	ONIA0007103	FJB96	Vol. 18, n° 1 (2019, janv.)	FJB96	Item in place	-	-	20/08/2019

The link in the child record is cataloged as follows, including the new label **iss:** (issue):

463 __ |1 001 (PPN)060893982 |t Acupuncture et moxibustion |v no:3 |v iss:3 |v yr:2004 |9 biu

The child record shows in the repository search only the holdings referred to by this field:

Action utérorelaxante du 6^{ème} trimestre durant la grossesse / Johan Nguyen Edit Record

Book (Undefined) By Nguyen, Johan (2004) Language: French

Subject: Rat Acupuncture ISBN: 220743363

Creation Date: 23/04/2018 12:38:21 CEST MMS ID: 990005134970304231

Modification Date: 11/03/2020 10:36:16 CET Record number: (PPN)220743363

Physical (2) Electronic Digital Other details

2 Holdings | 5 of 5 items are available

Library	Location	Call Number	Accession Number	Item Availability	Related Record
NBUM	MAG	FJB96	-	● vol. 1 no. 1 (2002)----	✓ Related
NBUM	MAG	FJB96	-	● 1 of 1 Available	-

Holdings | Items

See [Configuring Related Records for Physical Inventory](#).

MARC 21 Updates

July 2020 Resource Management

The following MARC 21 updates (for bibliographic, authority, holdings, classification, and community information formats) have been added to Alma in the July 2020 release:

- MARC21 BIB
 - Update No. 27 (November 2018)
 - Update No. 28 (May 2019)
- MARC21 Holdings
 - Update No. 28 (May 2019)
- MARC21 Authority
 - Update No. 26, April 2018
 - Update No. 28, May 2019

Refer to <http://www.loc.gov/marc/status.html> for additional details regarding these MARC 21 changes.

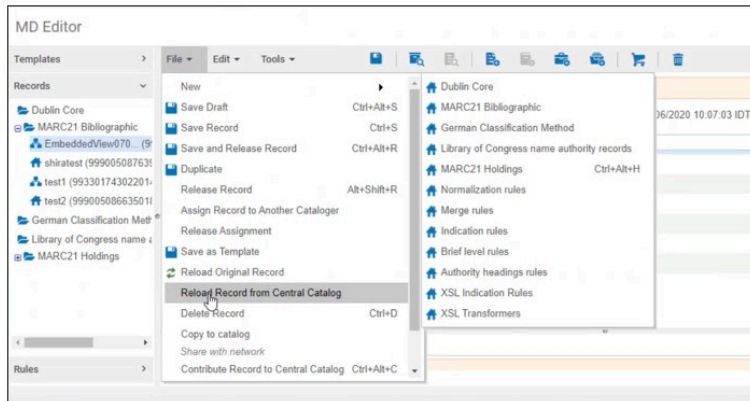
Reload Bibliographic Records from Central Catalog On Demand

July 2020 Resource Management

Users working on Bibliographic records in Central Cataloging (Aleph, SBN, CALIS, etc.) need to ensure that they view and update the most recent version of a Bibliographic record.

A new option **Reload Record from Central Catalog** was added to the Metadata Editor under the File menu. This option enables reloading the most recent version of the Bib record that was loaded previously from the Central Catalog. This restores the Bib entire record from the Central Catalog, removing any changes made by you.

This action is available for Bibliographic records that are managed centrally with the required prefix in 035, and the ones that are managed locally. However, only records managed centrally are reloaded.



Note

The Reload Record from Central Catalog option is available only when both below criteria are met:

- if you have configured a Central Catalog integration profile,
- when working on Bibliographic records.

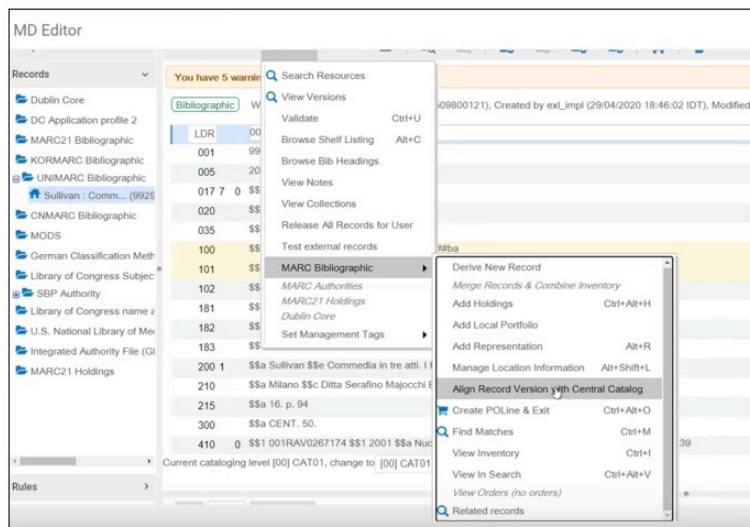
See [MD Editor Menu and Toolbar Options](#).

Align Record Version with SBN

July 2020 Resource Management

Now users working in SBN can align the local record version with the SBN record version, without making any additional changes to the local version. Since now the date is the same, SBN accepts the record contribution.

A new entry **Align Record Version with Central Catalog** was added to the Metadata Editor (**Tools > MARC Bibliographic**). Selecting this option updates the local version of the record with the SBN record version.



Note

The option is visible only if a central catalog integration profile for SBN is defined.

See [Integrating the SBN Italian Union Catalogue](#) and [MD Editor Menu and Toolbar Options](#).

Public Access Model on the Portfolio Editor

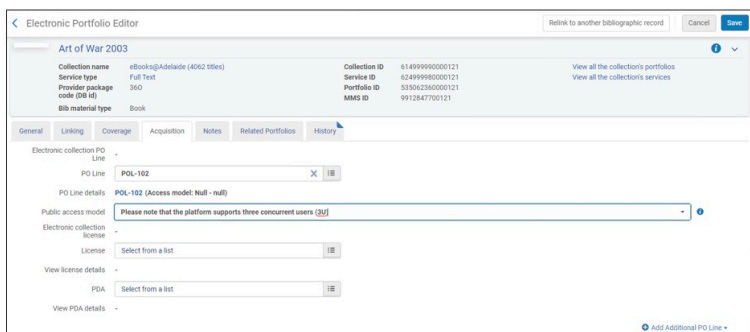
July 2020 Resource Management

Access Model defines how end-users can access the electronic resources. The access model has always been indicated in the PO line, but now it is also displayed in a new field **Public access model** that was added to the Acquisition tab of the portfolio editor. This field presets the active access model associated with the portfolio, as inherited from the PO line that created the portfolio. Any updates to the access model on the PO line are reflected in the **Public access model** field of the portfolio editor. See [Editing a Portfolio Using the Electronic Portfolio Editor](#).

You can also change the value of the **Public access model** field directly on the portfolio editor, and this determines the active access model of the portfolio. However, changing the access model value on the portfolio does not update the access model on the PO line.

Note

In case a PO line of type 'License Upgrade' was added to the portfolio as an additional PO line, the **Public Access Model** field on the portfolio displays the access model associated with the license-upgrade order.



"Public access model" field on the portfolio editor

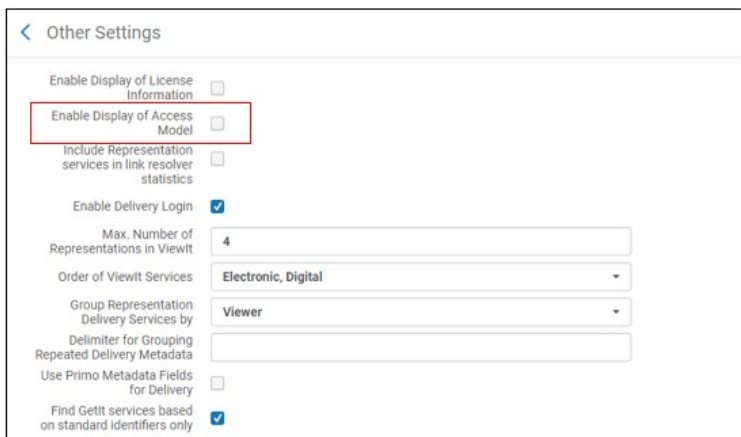
The **Include access model in portfolio public note** checkbox, which previously controlled the presentation of the access model on the portfolio's **Public Note** field in the Alma Link Resolver, was now removed from the New Order API integration profile. See [Real-Time Ordering](#).

To control the presentation of the access model to patrons via Alma Link Resolver, institutions now can use a designated configuration located under **Fulfillment > Discovery Interface Display Logic > Other settings**. Select the checkbox **Enable Display of Access Model** to display in Primo the access model information located on the portfolio.

Note

Primo VE will support this configuration in a future release.

The new **Enable Display of Access Model** option is disabled by default. Institutions that previously had the **Include access model in portfolio public note** check box enabled in their integration profile, will need to select the **Enable Display of Access Model** option in the new configuration screen. See [Configuring Other Settings](#).



The screenshot shows the 'Other Settings' configuration screen. The 'Enable Display of Access Model' checkbox is highlighted with a red box. Other settings include 'Enable Display of License Information', 'Include Representation services in link resolver statistics', 'Enable Delivery Login' (checked), 'Max. Number of Representations in Viewit' (4), 'Order of Viewit Services' (Electronic, Digital), 'Group Representation Delivery Services by' (Viewer), 'Delimiter for Grouping Repeated Delivery Metadata', 'Use Primo Metadata Fields for Delivery', and 'Find GetIt services based on standard identifiers only' (checked).

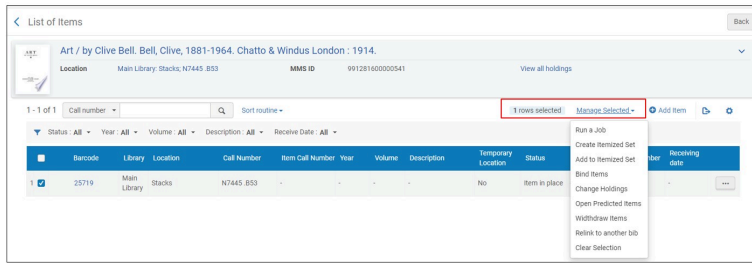
Manage Selected Physical Items

July 2020 Resource Management

Following the changes made in [June 2020](#) release, the actions that previously were displayed as links of the page actions, were now added to the Physical Items list, to enable you to perform actions on multiple physical items in bulk. In addition, when you select items from the list, the item counter above the list now provides an indication of the number of items selected.

Note

Due to changes required in the definition of columns, the default display will be restored as part of July release deployment. If display customization was applied, it will need to be redone.



Some of the actions that can be performed, such as running a job and creating/adding to the itemized set, can only be performed if you possess the required permissions.

See [Working with the List of Items](#).

Watch the [Manage Selected Physical Items](#) video (0:51 minutes).

Improvements to Electronic Collection and Portfolio Deletion

July 2020 Resource Management

The process of electronic collection and portfolio deletion was made more user-friendly. Now the options to edit records (add, edit or delete) are disabled on electronic collections, portfolios and services once these resources are marked for deletion. In addition, now you are blocked from attaching a stand-alone portfolio to a collection that is marked for deletion (unless the portfolio has some available services).

Using Community Zone Electronic Collections in Import Profiles

July 2020 Resource Management

Now Import Profiles can work with electronic collections activated from the Community Zone. This means that when importing to an CZ collection, and local portfolios do not exist, the CZ portfolios are imported.

For that purpose, a new checkbox "Use Community Zone portfolios" was added to the Inventory Information tab of the Import Profile Details page ([Resources > Import > Manage Import Profiles or Acquisitions > Import > Manage Import Profiles](#)). When selected, then upon import, Alma now attempts to match each bibliographic record against the bibliographic records that have portfolios that are part of the collection activated from CZ.

- If a matching bibliographic record is found, Alma imports the relevant portfolio.

Note

- Note that Alma does not activate this portfolio. You can activate this portfolio at any time. To activate upon import, click the "Activate resource" checkbox at the bottom of the Inventory Information tab.
- If a matching bibliographic record is found, its information is taken from the Community Zone. The information filled in the fields below ("Extract portfolio information from field", "Extract access URL from field", "Extract interface name from field", "Extract internal description note from field", "Extract authentication note from field", "Extract public note from field", "Extract library from field") are ignored.

-
- If a matching bibliographic record is not found - Alma creates a local portfolio that is associated to the CZ collection.
 - If multiple bibliographic records are found as a match in the CZ under the specific collection – no import takes place. The record is reported in the "Resolve import issues" list.

The screenshot shows the 'Import Profile Details' form with the following settings:

- Inventory Operations:** Electronic (selected), Mixed, Physical, None
- E-Book Mapping:**
 - Delete/deactivate portfolios:
 - Use Community Zone portfolios: (highlighted with a red box)
- Portfolio type:** Standalone, Part of an electronic collection (selected)

The "Use Community Zone portfolios" checkbox appears only when both the below conditions are true:

- The selected inventory operations are **Electronic** or **Mixed**.
- Portfolio type is **Part of Electronic Collection**.

See [Managing Import Profiles](#).

Enhancements to Forms

July 2020 Digital Resource Management

Several enhancements have been added to the Alma Forms feature ([Configuration > Resources > Metadata Configuration > MARC21 Bibliographic or Qualified Dublin Core > Forms tab](#)) when selecting **Add fields**:

- The **Checkbox** field type was added.
- The **Repeatable** field was added to the field types (when configured) to allow the user to add multiple instances of the field. This is available only for Patron Deposit forms.
- For date fields, if configured to be mandatory, the **Default Value** field is set to the current date.

Enhanced Sorting Support for Collections

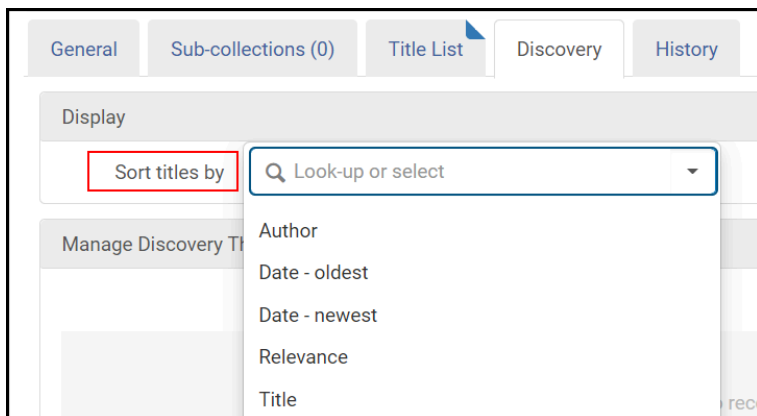
July 2020 Digital Resource Management



Idea Exchange

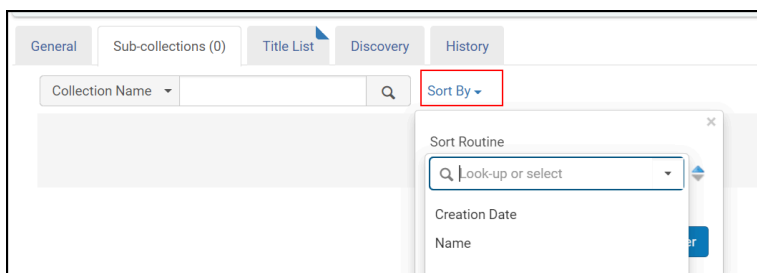
You can now configure the default sorting for titles and sub-collections in Primo VE, using a richer set of title-level sort routines.

- To configure the default sorting of titles in a collection, select an option from the **Sort titles by** drop-down list ([Resources > Manage Collections > Edit Collection > Discovery Tab](#)):



Sort Titles By

- To configure the default sorting of sub-collections in a collection, select an option from the **Sort by** drop-down list (**Resources > Manage Collections > Edit Collection > Sub-collections tab**):



Sort By

DARA Recommendation to Identify Missing Items

July 2020 DARA

DARA now identifies items that have been missing for a significant amount of time and recommends that you handle them.



Missing Items

By default, DARA identifies items missing for more than 12 months. You can customize DARA to produce recommendations that better suit the needs of your institution. For more information, see [DARA – Data Analysis Recommendation Assistant](#).