

---

## 2020 RN 12 Main

---

### Change vendor in order – send order to target vendor

#### December 2020 Acquisitions

Existing functionality of "Change vendor in order" was enhanced to allow sending the order to the new (target) vendor. When the user selects the source and target vendors, the user is now able to choose from the following options:

- 'Simply' change the vendor name on the order.
- Change the vendor name on the order and also send the order to the new vendor.

When selecting the "Send" option, the new functionality allows users to select whether to immediately send the order to the new vendor or stop the order for review for either one-time or continuous orders.

Additionally, an option to send a cancellation to source vendor is provided. This is relevant only if the orders were already sent to the source vendor. If selected, a cancellation letter will be sent to the source vendor containing all the canceled PO lines (can contain 'one-time' and / or 'continuous' PO lines).

---

#### Note

In cases where the user selected to 'Automatically send orders to the new vendor', and there was failure to progress the PO line in the workflow, the PO Line will remain "In Review" with the relevant alerts.

---

The screenshot shows a form titled "Add Job" with the following elements:

- Source Vendor/Account: A text input field with a dropdown arrow.
- Target Vendor/Account: A text input field with a dropdown arrow.
- PO: A text input field with a dropdown arrow and a refresh icon.
- Send orders to new vendor: Radio buttons for "Do not send (keep status of the PO/POL)" and "Send".
- Onetime orders handling: Radio buttons for "Automatically send orders to new vendor" and "Manual handling (Stop for review)".
- Continuous orders handling: Radio buttons for "Automatically send orders to new vendor" and "Manual handling (Stop for review)".
- Send cancellation to source vendor: A checkbox.
- Buttons: "Add", "Close", and "Add and Close" at the bottom right.

For more information, see [Changing Vendors in PO Lines and POs](#).

---

### Including vendor invoice number in POLs as part of EDI invoicing process

#### December 2020 Acquisitions

Invoices received by Alma via EDI will incorporate a vendor's invoice number in the PO line's "Vendor invoice number" field. In case this field was pre-populated, it will not be overridden by the incoming EDI information.

The vendor invoice number is indexed so there is an option to search PO lines by their vendor invoice number.

---

## New Advanced Search Option "Owning Library"

### December 2020 Acquisitions



#### Idea Exchange

An additional search field "Owning Library" was added to Alma advanced search when searching by PO Line. When searching order lines in an institution with multiple libraries, this allows limiting the search to specific libraries.

See [PO Line Search Fields](#).

---

## Patron Welcome Letter

### December 2020 Administration and Infrastructure

When adding a patron role to a user, whether manually, through a job, via API or SIS, the Patron Welcome Letter is now sent. The letter can be turned off for user records that are added via an SIS import or for linked accounts by configuring the XSL.

The document, [How to configure a letter to not be sent under certain circumstances](#), shows an example of how this can be done.

See [Patron Welcome Letter](#).

Watch the [Patron Welcome Letter](#) video (1:27 minutes).

---

## Enhanced Staff Audit Capabilities

### December 2020 Administration and Infrastructure

A new option allows audit of the public IP address of the users that logged into Alma. This new option now appears on the Staff Login Report (**Alma Configuration > General > Staff Login Report**). This is useful if the institution needs to be able to track from which IP address a staff user logged in for security audit reasons.

The option Excel (User IP Address) was added to the Export option on the Staff Login Report page. Click this option to download an Excel file with the user names, last login times and IP addresses of all logged in users.

User Name	Last Login
1 aabs	09/09/2020
2 aabscom	09/09/2020
3 aaronson	-
4 admin30	-
5 ajohnson	09/03/2020
6 ex_lmpl	29/09/2020
7 ex_support	-

If desired, you can prevent the retention of the public IP addresses of users that logged into Alma. Then new entries will not be added to the list, and after a week the list will empty. To do that, enter 0 (zero) in the `staff_login_ip_address_retention` parameter in the **Other Parameters** table (**Configuration > Other Parameters > User Management**).

See [Staff Login Report](#) and See [Configuring Other Settings \(User Management\)](#).

---

## On Hold Shelf Letter Reminder

### December 2020 Fulfillment

Currently, when an item is placed on the hold shelf a notification is sent to the patron. Once the notification was delivered, no other notification is sent. It is now possible to send a reminder notification to the patron after a set number of days. The new letter (On Hold Shelf Letter Reminder) is sent by the new scheduled job Send Hold Shelf Reminders, and it is possible to configure how many days after being placed on the hold shelf the reminder will be sent, and whether the reminder will continue to be sent at the configured interval until the Hold Shelf expiry.

---

## Add a new privilege that controls the view of active balance in the Manage Patron Services screen

### December 2020 Fulfillment

A new privilege (enabled by default) controls the presentation of:

- Visibility of the Fines/fees tab in the 'User details' screen.
- Searching by Fines/Fees in the 'Advanced Users' search.
- Presentation of the patron's 'Active balance' in the 'Manage patron services' screen.

Disabling this privilege for a role will prevent a user with this role from viewing a patron's fine/fees. To disable a role privilege, contact ExLibris support.

---

## Add new circulation desk configuration to control the appearance of the 'register new user' button

### December 2020 Fulfillment

A new configuration in the circulation desk will control the appearance of the "register new user" button in the manage patron services screen. This option is enabled by default. This is separate from the "Register new user" role privilege – both the role privilege and the desk configuration need to be enabled for the button to appear in Manage Patron Services (in the event a circulation desk role has the privilege but the desk does not support registering a new user, the button will not appear).

---

## Deliver Digital Documents

### December 2020 Fulfillment

To streamline the digital document delivery process, you can now deliver all digital documents on the **Document Delivery** page (**Fulfillment > Resource Requests > Deliver Digital Documents**) without needing to work through the complete Pick from Shelf workflow. After entering the request ID, you can view the item's information (in the summary tab), and add as many files as necessary and up to one URL. Once the files are added and you select Done, Alma verifies the sending parameters based on the digitization rules in **Digitization and Copyright Rules**, and sends an email to the patron. If there is an attachment and you have selected a file over 25MB, a warning is displayed. If the files are uploaded to the cloud, there is not a file size limit. Temporary system files cannot be added as attachments.



## Document Delivery

It is not necessary to create an item when handling a digitization or digitize another issue request. However, if an item is not created and attached to the request, terms of use such as digitization fees (which are applied according to item) will not apply.

Fees are applied as follows:

1. If the request is attached to an item, use the item's terms of use, as is currently done in the digitization task list.
2. If the request is attached to a holding with items, use the first item that has an **is digitizable = true** policy. If no items can be digitized, the digitization terms of use are irrelevant, including the fee.
3. For general digitization requests where no items exist, digitization fees are not added unless the operator creates an item and attaches it to the request.

To access the Document Delivery page, you must have the QUICK\_DOCUMENT\_DELIVERY privilege enabled.

See [Digitizing Items](#).

---

## Improved Shipping Interfaces

### December 2020 Fulfillment-Resource Sharing

The form that opens when using the 'Ship item digitally' action has been enhanced. It will now use the new digital document delivery page that will allow for a faster and more efficient upload. It is still possible to use the standard shipping interface for digital shipping by selecting the "Shipping Items" menu option.

---

## New 'Shipped Digitally' Task

### December 2020 Fulfillment-Resource Sharing

A new 'Shipped Digitally' task was added to the Tasks dashboard widget for digital resource sharing borrowing requests in Alma. This is especially useful when Alma is configured to not automatically send received files to patrons, but rather to allow staff to review received resources before forwarding them to the patron.

---

## Locate - Electronic Licenses

### December 2020 Fulfillment-Resource Sharing

An institution is now able to automatically reject lending requests if the electronic resource they have is not allowed for resource sharing as per signed license agreements. This was done by enhancing the existing "Reject request when only electronic available" with the option to add rejection rules based on the license attached to the electronic resource.

---

## Item Level Requesting in an Automated Fulfillment Network (AFN)

### December 2020 Fulfillment-Resource Sharing

Primo is now able to populate a list of requestable item descriptions from Automated Fulfillment Network (AFN) partners in the Resource Sharing Request form, when the requested resource is a multi volume/serial issue. AFN partners will now have the same behavior as classic resource sharing partners, i.e. if the "Description" field is enabled in the Primo resource sharing request form, their descriptions will display in the list of item descriptions and the patron will be able to select the requested issue/volume. Only AFN partners with items matching the requested description will be part of the rota, and the hold request created in the AFN partner's Alma will be an item-level request for an item that matches the requested description.

This option is activated by turning on the Description field in the Resource Sharing Form Customization page.

---

## Z39.50 Look Up Electronic Inventory

### December 2020 Collaborative Networks

Now the Z39.50 Integration Profile supports the following:

- searching in electronic inventory of the institution,
- In a consortia environment, where electronic inventory can be managed on behalf of the members in the Network Zone, supports searching electronic inventory managed in the Network Zone.

To search in electronic inventory in the IZ, select the new "Enrich with electronic inventory" checkbox in the Actions tab of the Z39.50 integration profile. When chosen, the response includes information about the electronic inventory available in the institution.

In consortia environments that manage electronic inventory on behalf of the members in the Network Zone, select the "Include Results of E-resources Managed in the Network" checkbox to check the Network Zone for electronic inventory available for the Institution Zone. This option is available on Institution Zone-level only. When this option is selected, then when searching in the Institution Zone repository, not only the bibliographic data and inventory availability from the Institution Zone is retrieved, but also the Network's bibliographic data and inventory availability for the specific member (if exist).



In some consortia with many members, the configuration of Z39.50 integration profile is done by the Network and is distributed to all members, in order to reduce redundancy of the configuration by all members. In such cases, when the Z39.50 integration profile is marked as "Managed in Network", the new option "Include results of e-resources managed in the Network" is visible in the Network Zone institution as well. The network can determine whether this profile is distributed to members with this option activated or disabled.

Any member using this profile can decide to opt out and manage the profile locally by selecting **Unlink from Network** in the profile's row actions.

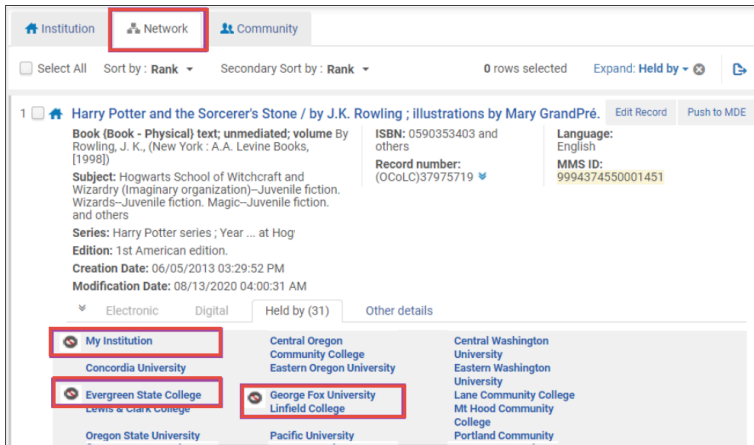
See [Z39.50 Search](#).

# Show Institution Zone-Level Suppress Icons in Network Zone Search

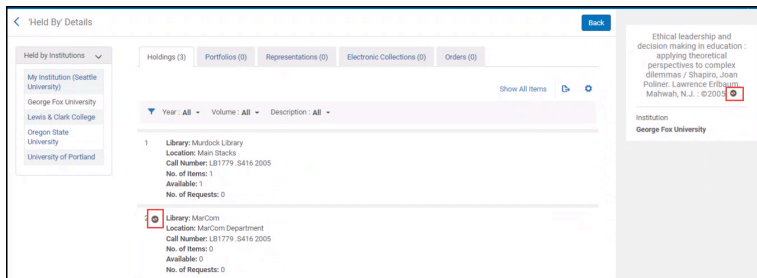
## December 2020 Collaborative Networks

When searching in the Network Zone, the status of bibliographic records and holding records in terms of suppression is now visible. This eliminates the need of the staff to log in to the individual Institution Zone in order to understand the suppression status.

- The Suppress icon is displayed in the Held By tab next to the institution that suppressed the Bib record:



- The Suppress icon is displayed next to the suppressed holding data of a specific institution. In addition, if the bib record is suppressed, the Suppress icon is displayed in the Summary panel.



# Add support for manual description with holding in create request

## December 2020 API

The Create Request API now supports adding a manual description, which together with a Holdings ID can be used instead of an Item barcode.

# KERIS ILL Integration

## December 2020 Fulfillment - Resource Sharing

Alma supports resource sharing integration with KERIS ILL system (Korea Education & Research Information Service). Alma is capable of importing ILL borrowing requests from Keris and updating KERIS upon receiving materials in Alma.

---

## CDI 'Selective Yes/No' read-only in case 'Full text in CDI only' is turned ON in Electronic collection editor

### December 2020 Resource Management

In Alma's Electronic collection editor, the 'Selective Yes/No' option is now greyed out. When a customer uses the option 'Activate for Full text in CDI only', which makes the whole collection active, the CDI configuration option 'We subscribe to only some titles in the collection Yes/No' becomes obsolete. As a result, the 'Selective Yes/No' option has been greyed out.

---

## SBN: Support of Authority Record Contribution, Including Links to Other Authorities

### December 2020 Resource Management

When contributing a new authority record or contributing an update of authority record to SBN, and that authority record is linked to another authority record, now Alma first checks whether the corresponding linked authority record exists in SBN, and does one of the following:

- if corresponding linked authority record exist in SBN - contributes the main authority record/update to SBN,
- if corresponding linked authority does not exist in SBN - creates the linked authority record in SBN and then contributes the main authority record/update to SBN.

Modification of a linked field recreates the link in SBN and updates the field in Alma.

See [Contributing an Authority Record with a Linked Field](#).

---

## Extended Lookup for Authority UNIMARC Classification

### December 2020 Resource Management

New access points were added to the UNIMARC classifications.

Lookup for Authority UNIMARC classification was added to fields 676 and 686:

- Bib 676\$a is mapped to Auth 250\$a
- Bib 676\$c is mapped to Auth 250\$j
- Bib 686\$a is mapped to Auth 250\$a
- Bib 686\$c is mapped to Auth 250\$j

---

#### Note

To implement this functionality over records that already exist, re-indexing of records and authorities should be run.

---

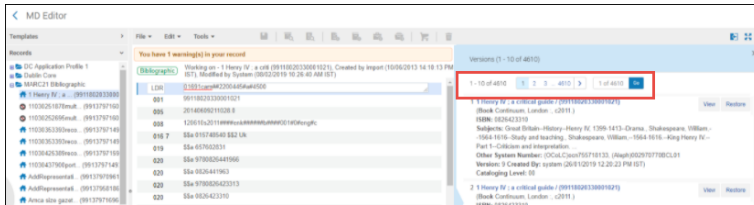
---

## New Metadata Editor Enhancements

### "Go to page" Option on the Pagination Bar

#### December 2020 Resource Management

The "Go to page" option was added to all related information tabs in the new MD Editor (versions, related records, etc). This allows users to jump to the desired page.



## Notes Accessible from the Notes Icon

### December 2020 Resource Management

Now users can open notes in the MD Editor by clicking the

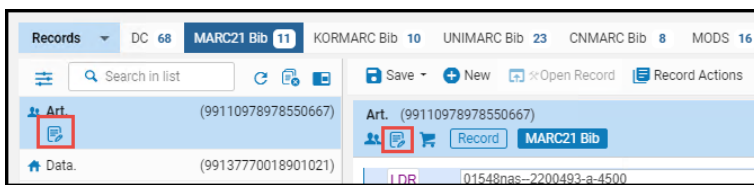


**Note** icon on the header of the Editing panel. The existing ability to open notes by selecting **View Related Data > View Notes** remains as well.

Note that the



**Note** icon appears both on the Records List and on the Editing panel's header. However, clicking it in the Editing panel's header opens the View Notes pane, and on the Records List it exists only for indication.



See [Menu Bar](#).

## Improved Control Over Relinking of Holdings and Items

### December 2020 Resource Management

To make sure that relinking of holdings and items is only done by authorized users, the following were added to Alma:

- A new role "Physical Inventory Operator – Limited".
- A new privilege "Relink Bib". This privilege was added to "Physical Inventory Operator", "Repository Manager", and the new "Physical Inventory Operator – Limited" roles. Note that all the other roles who had the option to relink as part of other privileges, will lose this capability with the addition of this new privilege.

The new "Physical Inventory Operator – Limited" role has the same privileges as "Physical Inventory Operator", and the new privilege "Relink Bib". However, this new privilege is True for the "Physical Inventory Operator" and "Repository Manager" roles, and it is False for the "Physical Inventory Operator – Limited" role. Thus, the new "Physical Inventory Operator – Limited" role allows limiting the ability to move inventory from one bibliographic record to the other to users with the "Physical Inventory Operator" and "Repository Manager" roles.

See [Managing User Roles](#), [Moving Holdings Between Bibliographic Records \(Relinking\)](#), [Relinking Items to Another Bibliographic Record](#).

---

## View Linked and Unlinked Bibliographic Headings

### December 2020 Resource Management

A new checkbox "Show authorized headings" was added to the "Headings from bibliographic records" tab in the ME Editor. When pressing F3, this allows you to see in the list of bibliographic headings both authorized and non-authorized headings, which allows you to view the full list of headings available.

- When the checkbox is clear, upon pressing F3 the Bibliographic Headings tab shows only unauthorized headings.
- When the checkbox is selected, all bibliographic headings are displayed for the vocabulary of the bibliographic field. If there are several vocabularies defined for the field (by the priority mechanism), the list includes bibliographic headings linked to all of them. Authorized headings have the binocular icon next to them. This indicates which headings are authorized and the type of authorization (

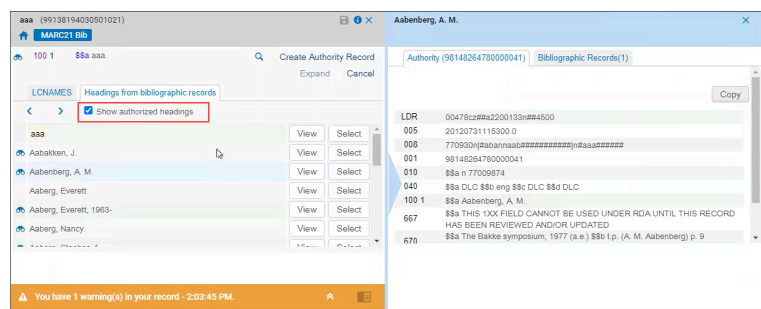


full or



partial). Unauthorized headings appear in the list without an icon.

For authorized headings, clicking the View option opens the right side of the split screen with the bib record(s), linked and unlinked, in one sub-tab, and the linked authority in the other sub-tab. For unauthorized headings, clicking the View option displays the right side of the split screen with the bibliographic record.



See [Viewing Bibliographic Records Linked or Available for a Suggested Authority Record](#).

---

## Relink Holdings of In Process Items to Bibs with Requests

### December 2020 Resource Management



#### Idea Exchange

Now you can re-link holdings to target bib, even if there are some item requests on this bib. Previously it was not possible to re-link holdings if the holdings' items had requests on them.

See [Moving Holdings Between Bibliographic Records \(Relinking\)](#).

---

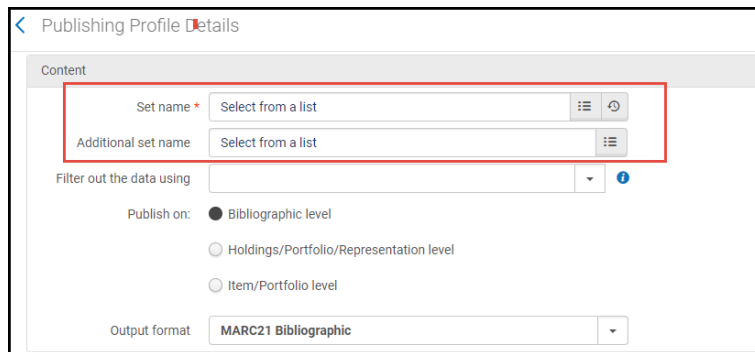
## General Publishing Enhancements

### Support for Configuring Two Sets

#### December 2020 Resource Management

Now you can configure two sets in the General Publishing profile. The sets can be of any type, and you can choose sets of different types, for example, one set of electronic titles, and one set of physical items.

If the publishing is on the Bibliographic level, the output will include one title, with all the information--Physical / Electronic (Network Zone) / Electronic (Institution Zone)--linked to a single title.



The screenshot shows the 'Publishing Profile Details' form. The 'Content' section is highlighted with a red box, containing two dropdown menus for 'Set name' and 'Additional set name', both set to 'Select from a list'. Below this is a 'Filter out the data using' dropdown and a 'Publish on' section with three radio buttons: 'Bibliographic level' (selected), 'Holdings/Portfolio/Representation level', and 'Item/Portfolio level'. At the bottom, the 'Output format' is set to 'MARC21 Bibliographic'.

See [Publishing and Inventory Enrichment \(General Publishing\)](#).

Watch the [Publishing Content from Two Sets of Records](#) video (2:06 minutes).

## Support for Combined Sets

### December 2020 Collaborative Networks

In a consortia where electronic resources are centrally managed in the Network Zone, the member libraries view/search the e-resources that are available for them via the standard Alma staff search result using 'Search Scope: Combined results'. In order to publish centrally-managed resources as well as the locally-managed resources to member discovery system, Alma now supports publishing a set with combined results in the General Publishing profile. The output includes Electronic Network Zone and Institution Zone records, as well as physical Institution Zone bibliographic records, with their configured normalizations and enrichments.

If the set contains duplications of NZ records and IZ records, then only one bibliographic record is published, including enrichment from both scopes (IZ, NZ). This means that the NZ record is published with all its information - NZ e-inventory, IZ e-inventory, and IZ local extension.

When publishing a combined-results set, the data enrichment may include elements both from the member institution and from the Network. To differentiate between local information and Network Zone information, the "Institution Code Enrichment" field was added to the General Publishing profile, where the institution code can be entered. This institution code is then added to all enriched entities, including all types of inventory and local extensions.



The screenshot shows the 'Publishing Profile Details' form with buttons for 'Republish', 'Run', 'Cancel', and 'Save'. The 'Institution Code Enrichment' section is expanded, showing a dropdown menu and a text input field labeled 'Institution code subfield'.

See [Publishing and Inventory Enrichment \(General Publishing\)](#), [Combining Institution and Network Zone Search Results](#).

---

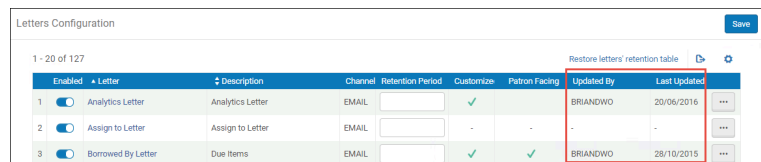
## Letters Configuration Page Enhancements

### December 2020 Administration and Infrastructure



#### Idea Exchange

The columns "Updated By" and "Last Updated" were added to the Letters Configuration page. This helps you troubleshoot issues with letter customization and know which staff user last updated the configuration.



Enabled	Letter	Description	Channel	Retention Period	Customize	Patron Facing	Updated By	Last Updated
<input checked="" type="checkbox"/>	Analytics Letter	Analytics Letter	EMAIL		<input checked="" type="checkbox"/>		BRIANDWO	20/06/2016
<input checked="" type="checkbox"/>	Assign to Letter	Assign to Letter	EMAIL		<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Borrowed By Letter	Due Items	EMAIL		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BRIANDWO	28/10/2015

See [Configuring Letters](#).

---

## New Ex Libris Secure FTP Service

### December 2020 Administration and Infrastructure

Ex Libris now provides out-of-the-box secure FTP capabilities using Ex Libris Secure FTP service for file transfer between Alma and external systems. This is an alternative to using institution's own FTP solutions, although this option remains available (see [Configuring S/FTP Connections](#)).

The Ex Libris Secure FTP services provides a separate directory for each customer. This folder contains two sub-directories: Production and Sandbox. You have a Read/Write access to these directories. Alma also has R/W access to these directories.

Limitations to the Ex Libris FTP server directories:

- Max 1GB for the directory
- Data retention period - 30 days

See [Configuring Ex Libris Secure FTP Service](#).

---

## Improvements to Concurrent Usage Access Rights

### December 2020 Digital Resource Management

The functionality of the Concurrent Usage parameter for digital access rights has been improved with the following developments:

- The user session now times out after the number of minutes configured.
- Only the configured number of users can view the representation concurrently.
- A countdown warning message is displayed 60 seconds before the session expires.
- When a user closes a session, the slot opens up for a different user to view the representation.

---

## Allowing starting Course Load jobs via API

### December 2020 API



#### Idea Exchange

The API has been expanded to allow starting Course Load jobs. To start the job:

1. Find the job ID that should be used for submitting the job. GET /almaws/v1/conf/jobs?type=SCHEDULED
2. Submit the job:{{POST /almaws/v1/conf/jobs/ {job id}  
?op=run}} with the payload: <job/> (no parameters)