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Table of Contents

Alma March 2016 Release Highlights

Resource Management

- **Publishing Headings Enrichment to Primo -** Alma publishing to Primo now includes the option for heading enrichment data. For each MARC 21 or UNIMARC record published to Primo, Alma enables you to include the authority headings information to be used in Primo.
- ****Idea Exchange** Sharing Normalization Rules in the Community Zone -** In the Alma Community Zone, a dedicated area is being provided for sharing normalization rules between institutions. From the **Rules** tab in the MD Editor, private or shared normalization rules can be contributed to the Community Zone. In addition to the option to share normalization rules, merge rules and indication rules can now also be shared in the Community Zone.
- **CJK Transliterations for Cataloging -** For institutions using CJK languages, CJK transliteration capability has been implemented in the Alma MD Editor for cataloging CJK records.

Digital Resource Management

- **Added Support for Special Representations -** It is now possible to create representations for part of a bibliographic record—for example, a chapter of a book or a track of a CD. This is useful when the library does not own a fully digitized version of the item or when fulfilling digitization requests for part of an item, such as just one chapter in a book. These partial representations are discoverable and deliverable.
- **Target Format for Digital Import Profiles Now Configurable -** The target format is now configurable when creating a digital import profile. The options available are determined according to your institution's configurations.

Fulfillment

- **Enhanced Form for Partial Digitization Requests -** Fields for partial digitization have been added to the digitization request form, non-repository citation form, and the Primo (Get It) digitization request form.

Resource Sharing

- Filtering for the Audit Tab - It is now possible to select which audit fields will be visible in the resource sharing requests **Audit** tab. The Audit tab may be viewed in a full or brief mode. The library can configure the type of audit lines that will be included in the brief mode.

Analytics

- **Member Details Anonymized in Network Zone -** Fields that contain identifying information of users can be anonymized for the Network Zone when creating reports for member institutions. This setup and functionality is relevant only for analytics run from a Network Zone institution. It has no influence on the Analytics reports created in member institutions.
- **Other Analytics Enhancements -** The **Lifecycle** field has been added to the existing **Bibliographic Details** folder in all subject areas. Possible values are **Deleted** and **In Repository**. This enables the creation of reports only for records that have (or have not) been deleted from the repository.

Alma Show Me How and Videos

The following sections describe Alma Show Me How and videos for this release of Alma.

Alma Show Me How

Description

Alma Show Me How provides a menu-driven interface to prompt you through the steps of new or common tasks, or to point out new options, such as a check box, and direct you to the documentation that describes the new options in further detail.

Step-by-Step Instructions

Each Show Me How scenario may address different areas of Alma. The authorizations required to access the Show Me How scenarios are specific to the functional areas of the scenario.

To access Show Me How:

1. From the Alma home page, click **Show Me How**.

   The How Can We Assist You? pop-up window displays.

2. Select one of the processes in order to start the prompted step-by-step instructions.

Alma Videos

The following new video is available from the Show Me How menu, and when you select **Help > What's New Videos** in Alma:

- Lender Workflow Optimization

Making the Most of This Release

The following release note features require actions or decisions on the part of your institution in order to implement:

Action Items	
☐	Do you need to send invoices for payment to multiple financial systems? If so, this new feature can help you enhance and streamline the process by splitting approved invoices by library (that is, by owner of the invoice).
☐	Publishing Headings Enrichment to Primo - With this great new feature, you can enrich the users' discovery experience by publishing additional, non-preferred formats of authorized headings to Primo.
☐	Sharing Normalization Rules in the Community Zone - Check the Community Zone for community contributed normalization rules that can meet your needs before creating your own. If you have any normalization rules that can benefit others, share them with the wider community by contributing them to the Community Zone.
☐	Enhanced Form for Partial Digitization Requests - Do you process digitization requests? If so, you no longer need to communicate partial digitization information using note fields. You can now make use of dedicated request fields, such as article title and page range, to indicate the exact scope of the request.
☐	Lender Workflow Optimization - If you're manually creating lending requests before shipping requested items, you can now benefit from an optimized workflow option. With this new feature, you can skip the manual creating of the lending request before shipping the item, and enjoy an automatic creation of the request at shipping time.

Acquisitions

The following enhancements were made in the Acquisitions functional area for this release of Alma:

- Instead of sending a single XML file with invoices to an ERP system, you can now split the file into separate files, one for each invoice owner (library). To do this, select **Split by owner** in the **Export Invoices For Payment** area on page 2 of the wizard when adding a finance integration profile. For more information, see http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_%28English%29/Integrations_with_External_Systems/Acquisitions/Financial_Systems.

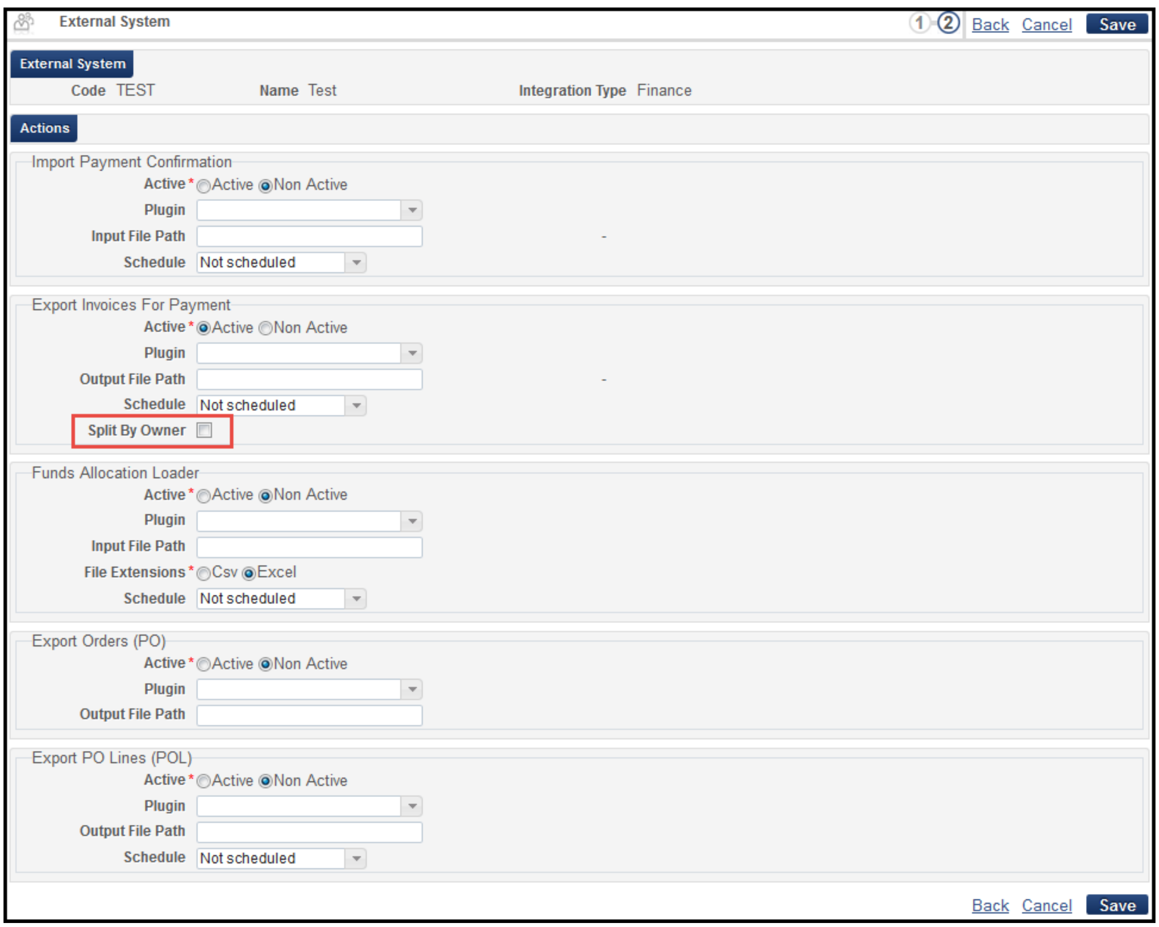


Figure 1 - Adding a Finance Integration Profile, Page 2 of the Wizard

When split by owner, the exported file names are named `<LibraryCode>_<OwnershipType>…xml` where `<OwnershipType>` is `LBR` for library or `INT` for institution. For example, `BC01_LBR`.

- An exchange rate details area was added to the Transaction Details page for disencumbrances (**Acquisitions > Acquisitions Infrastructure > Funds and Ledgers**; click **Edit** beneath an allocated fund; click the **Transactions** tab; click **View** in a disencumbrance row). The fields in the area include:
  - **Source Amount** – The amount of the source currency.
  - **Exchange Rate** – The exchange rate between the fund's currency and that of the invoice.
  - **Exchange Rate Date** – The date that the exchange rate was calculated.
  - **Explicit Ratio** – A set exchange rate between the fund's currency and that of the invoice.

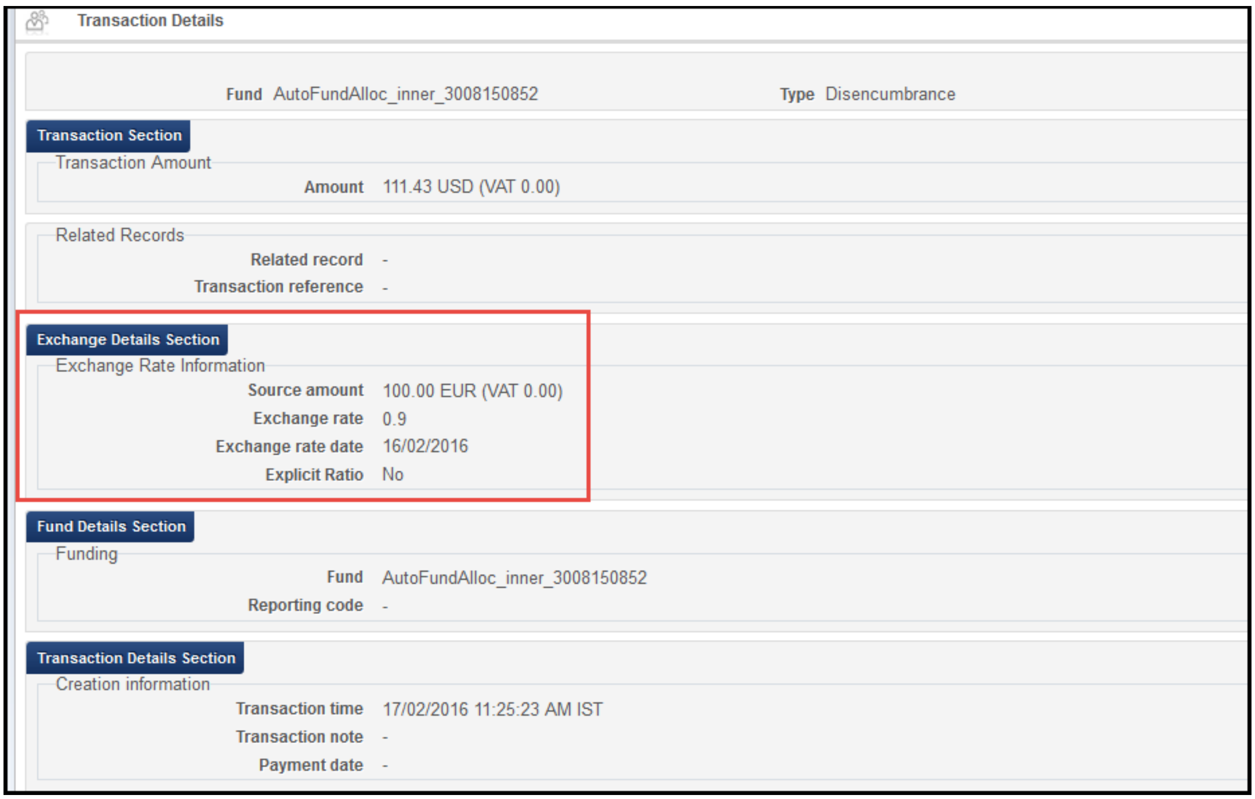


Figure 2 – Disencumbrance Transaction Details Page

Note that this is the same section that already appears on the encumbrance and expenditure transaction details pages.

- See Other Infrastructure and Usability Enhancements for an additional Acquisitions-related enhancement.

Resource Management

The following sections describe new or changed Resource Management features in this release of Alma.

Publishing Headings Enrichment to Primo

Note: This feature is not available in the Alma sandbox environment.

Description

Alma publishing to Primo options now include the capability to include headings enrichment data. For each MARC 21 or UNIMARC record published to Primo, Alma enables you to include the authority headings information to be used in Primo.

This feature is implemented with a new customer parameter. In order to publish headings enrichment data to Primo, contact Support to have this customer parameter enabled.

The focus of this feature description details Alma's implementation of publishing headings enrichment data. In addition, there are implementation considerations for integrating this capability with Primo. The procedure section below directs you to the Primo information you'll need to complete your implementation.

Note: Publishing headings enrichment data to Primo for Alma collaborative networks will be included in a future release.
In Primo, UNIMARC records are not currently supported out-of-the-box and require manual configuration. Out-of-the-box support is planned for a future release of Primo.

Step-by-Step Instructions

The following roles can configure Alma for publishing headings enrichment data to Primo:

- Catalog Administrator
- Repository Administrator
- General System Administrator

Headings Enrichment Overview

MARC 21 and UNIMARC records are enriched with information from related Alma authority records (either local or Community Zone authority records) for the following bibliographic record authorization fields:

- MARC 21 – 100-199, 600, 610, 611, 630, 648, 650, 651, 654, 655, 700, 710, 711, 730, 751, 752, 754, 800, 810, 811 or 830
- UNIMARC – 410, 411, 416, 500, 600, 601, 602, 605, 606, 607, 616, 617 700, 701, 702, 703, 710, 711, 712, 713, 720, 721, 722, 723, 730, 740, 741, or 742

Specifically, the enrichment includes the 1XX and 4XX, preferred and nonpreferred, information when available in the related authority record. This enrichment is provided with the selection of the **Headings enrichment** publishing parameter described in the procedure below.

This especially enhances the Primo search capability of nonpreferred (4XX) terms so that, for example, Mark Twain can be found with Samuel Clemens; and with the cross references to the Primo author and subject browse list, when the heading Samuel Clemens appears, it displays "See Twain, Mark."

Optionally, headings enrichment authorization can also include the following 5XX **see also** authority fields when the **Heading enrichment – enrich with "See Also" fields** publishing parameter is selected as described in the procedure below:

- MARC 21 – 500, 510, 511, 530, 548, 550, 551, 555, 562, 580, 581, 582, or 585
- UNIMARC – 500, 510, 511, 515, 530, 550, 580

See the table below for a description of how the enrichment is implemented.

Field/Subfield Change	Description
$2	Contains the vocabulary code used for authorization. The current supported values include: ▪ LCSH ▪ LCNAMES ▪ MESH ▪ LCAC If the second indicator of the field is 4 or 7, $2 is not overwritten.

Field/Subfield Change	Description
$0 (subfield zero)	Contains the Alma authority record ID. If the field in the MARC 21/UNIMARC record is authorized using authority records in Alma (either local or Community Zone authority records), $0 is added. Other $0 considerations include: ▪ If the original field already has a value in $0 (from another system), it is replaced with Alma's authority record ID. ▪ If Alma does not have an authority record for a heading, no $0 is added to the field ▪ If the field has a value in $0, but the field is not authorized in Alma, $0 is deleted.
$9	Contains **Y**, **N**, or **R** ▪ Y=The term in the authorized field is preferred. ▪ N=The term in the authorized field is nonpreferred. ▪ R=The term in the authorized field is from a 5XX see also field $9 is added to every field in the original MARC 21/UNIMARC record that is authorized.

For fields associated with authority records that contain preferred and nonpreferred terms, record enrichment processing is handled in the following manner:

- A field with the same tag as the original, authorized field is added to the MARC record.
- $0 and $2 are added to this new field with the same values as the ones contained in the original field.
- $9 is added to the new field with the value **Y** for preferred and the value **N** for nonpreferred (as described in the table above).
- The values of the other subfields for the new field are copied from the authority record field.

If you optionally select the **Heading enrichment – enrich with "See Also" fields** publishing parameter (as described in the procedure below), record enrichment processing is handled in a similar manner with $9 containing the value **R** to indicate that the content is from a 5XX see also field.

See the table below for an example of the headings enrichment implementation.

Headings Enrichment Implementation Example:

```
<datafield tag="100" ind2=" " ind1="1">
<subfield code="a">Schumaker, Ward.</subfield>
<subfield code="2">LCNAMES</subfield>
<subfield code="0">41-LIBRARY_OF_CONGRESS-n 93026393</subfield>
<subfield code="9">Y</subfield>   (preferred)
</datafield>
<datafield tag="245" ind2="0" ind1="1">
<subfield code="a">Dance! /</subfield>
<subfield code="c">Ward Schumaker.</subfield>
</datafield><datafield tag="250" ind2=" " ind1=" ">
<subfield code="a">1st ed.</subfield>
</datafield>
<datafield tag="260" ind2=" " ind1=" ">
<subfield code="a">San Diego :</subfield>
<subfield code="b">Harcourt Brace,</subfield>
<subfield code="c">©1996.</subfield>
</datafield>
<datafield tag="300" ind2=" " ind1=" ">
<subfield code="a">1 volume (unpaged) :</subfield>
<subfield code="b">color illustrations ;</subfield>
<subfield code="c">21 x 28 cm</subfield>
</datafield>
<datafield tag="336" ind2=" " ind1=" ">
<subfield code="a">text</subfield>
<subfield code="b">txt</subfield>
<subfield code="2">rdacontent</subfield>
```

Headings Enrichment Implementation Example:

```
</datafield
<datafield tag="337" ind2=" " ind1=" ">
<subfield code="a">unmediated</subfield>
<subfield code="b">n</subfield>
<subfield code="2">rdamedia</subfield>
</datafield>
<datafield tag="338" ind2=" " ind1=" ">
<subfield code="a">volume</subfield>
<subfield code="b">nc</subfield>
<subfield code="2">rdacarrier</subfield>
</datafield>
<datafield tag="520" ind2=" " ind1=" ">
<subfield code="a">A number of animals demonstrate some of the many different ways to dance, from bumping and romping to swirls and pliés.</subfield>
<datafield tag="650" ind2="0" ind1=" ">
<subfield code="a">Dance</subfield>
<subfield code="v">Juvenile fiction.</subfield>
<subfield code="2">LCSH</subfield>
<subfield code="0">41-LIBRARY_OF_CONGRESS-sh2009122820</subfield>
<subfield code="9">Y</subfield>  (preferred)
</datafield>
<datafield tag="650" ind2="0" ind1=" ">
<subfield code="a">Stories in rhyme</subfield>
<subfield code="v">Juvenile fiction.</subfield>
<subfield code="2">LCSH</subfield>
<subfield code="0">41-LIBRARY_OF_CONGRESS-sh2005008473</subfield>
<subfield code="9">Y</subfield>  (preferred)
</datafield>
```

Headings Enrichment Implementation Example:

```
<datafield tag="650" ind2="0" ind1=" ">
<subfield code="a">Rhymed stories</subfield>
<subfield code="2">LCSH</subfield>
<subfield code="0">41-LIBRARY_OF_CONGRESS-sh2005008473</subfield>
<subfield code="9">N</subfield>  (nonpreferred)
</datafield>
<datafield tag="650" ind2="0" ind1=" ">
<subfield code="a">Rhyming stories</subfield>
<subfield code="2">LCSH</subfield>
<subfield code="0">41-LIBRARY_OF_CONGRESS-sh2005008473</subfield>
<subfield code="9">N</subfield>  (nonpreferred)
</datafield>
<datafield tag="650" ind2="0" ind1=" ">
<subfield code="a">Stories in verse</subfield>
<subfield code="2">LCSH</subfield>
<subfield code="0">41-LIBRARY_OF_CONGRESS-sh2005008473</subfield>
<subfield code="9">N</subfield>  (nonpreferred)
</datafield>
<datafield tag="650" ind2="0" ind1=" ">
<subfield code="w">g</subfield>
<subfield code="a">Fiction</subfield>
<subfield code="2">LCSH</subfield>
<subfield code="0">41-LIBRARY_OF_CONGRESS-sh2005008473</subfield>
<subfield code="9">R</subfield>  (see also)
</datafield>
<datafield tag="650" ind2="0" ind1=" ">
<subfield code="w">g</subfield>
<subfield code="a">Narrative poetry</subfield>
```

Headings Enrichment Implementation Example:

```
<subfield code="2">LCSH</subfield>
<subfield code="0">41-LIBRARY_OF_CONGRESS-sh2005008473</subfield>
<subfield code="9">R</subfield>  (see also)
</datafield>
<datafield tag="650" ind2="0" ind1=" ">
<subfield code="w">g</subfield>
<subfield code="a">Dogs</subfield>
<subfield code="2">LCSH</subfield>
<subfield code="0">11-LIBRARY_OF_CONGRESS-sh2012004443</subfield>
<subfield code="9">R</subfield>  (see also)
</datafield>
```

To configure Alma for publishing headings enrichment data to Primo:

Note: This functionality is relevant for Primo version 4.1.1 and later.
Before configuring Alma for publishing headings enrichment data to Primo, you need to update your normalization rules in Primo. Additional Primo information is referenced below.

1. In Resource Management configuration (**Resource Management > Resource Configuration > Configuration Menu**), open the Publishing Profiles page (**Record Export section > Publishing Profiles**).
2. Select **Built-in Profiles** from the **Publishing Profile Type** drop-down list.
3. For the **Publish bibliographic records to Primo** profile, select **Actions > Edit**.
4. Select the **Headings enrichment** check box in the **Content Options** section. Once you have selected this option, the **Heading enrichment – enrich with "See Also" fields** check box appears.

Note: The addition of related terms is not supported out-of-the-box in Primo. Before activating this option, make sure that you have decided how to use the related terms in Primo and have updated your normalization rules as necessary.

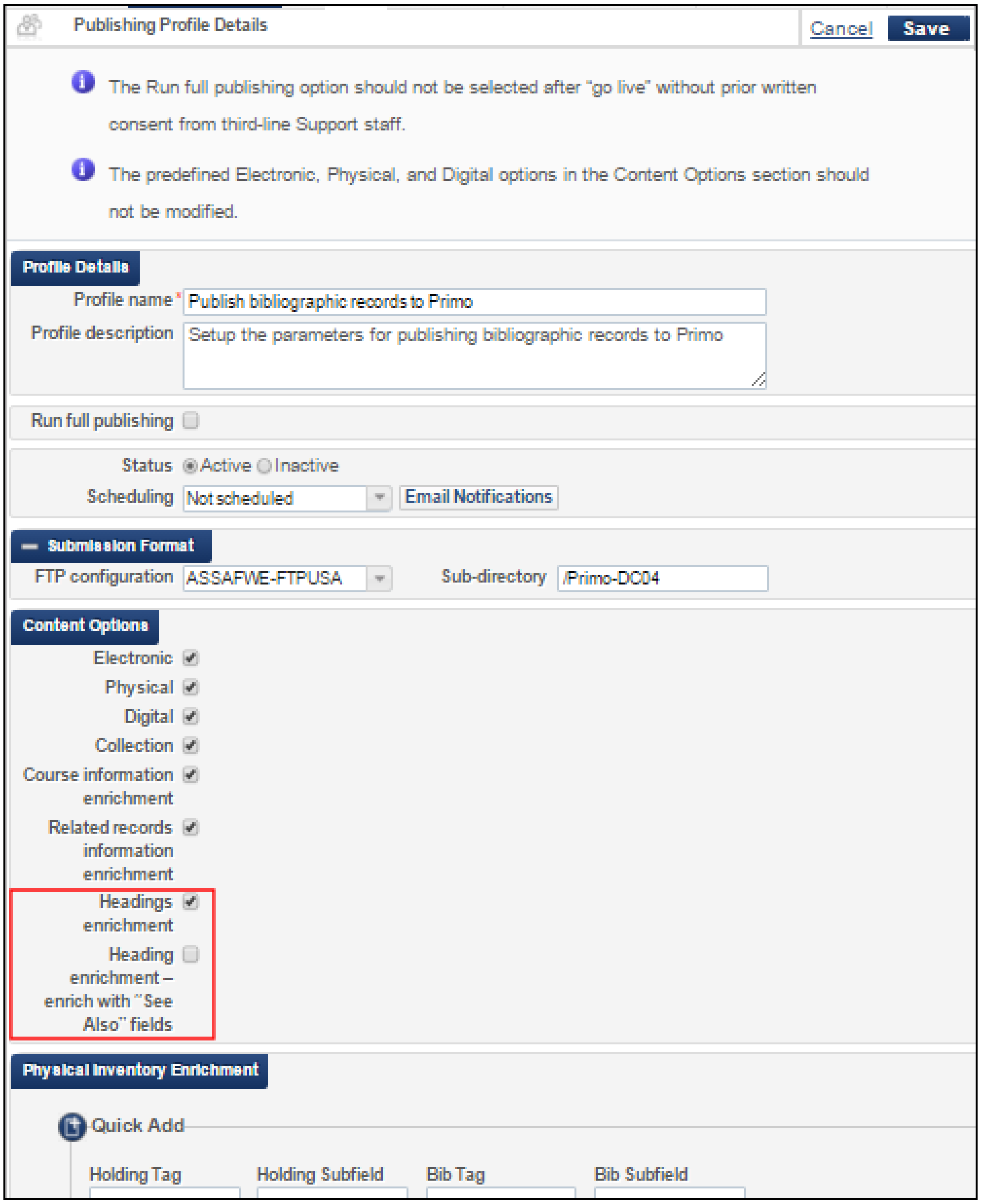


Figure 3 - Publishing to Primo Headings Enrichment

5 Optionally, select the **Heading enrichment – enrich with "See Also" fields** check box to include the 5XX see also fields in the MARC 21/UNIMARC bibliographic records when publishing to Primo.

6 Click **Save**.

After you select and save the headings enrichment configuration option(s), your incremental publishing to Primo includes headings enrichment in the harvested records. This, of course, assumes that your **Publish bibliographic records to Primo** publishing profile is selected as an **Active** profile.

If you decide that you need to run a full publishing of records to Primo, contact Support.

Other Implementation Considerations

You need to verify that your Primo normalization rules are tailored to address the additional headings enrichment fields to align with your requirements. Use the following link to access Primo documentation for more information:

https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Technical_Guide/Browse_Functionality/Configuring_the_Normalization_Rules#ww1059005

This documentation first explains the browse section and then explains the rules per template including the Alma MARC Template.

Also note that:

- In general, the rules need to be updated in the following ways:
  - The Browse section needs be updated so that Browse headings including cross-references can be created.
  - A number of rules (detailed in the Primo documentation) have to be updated to prevent nonpreferred terms from being used in display, facets, dedup, and sort.
- The Alma MARC Template (in Primo) has been updated to support the Alma headings enrichment from Primo V4.1 with some corrections added in V4.5. As a result, it is likely that you already have the necessary rules in place; or if not, possibly you may have already updated your rules. To verify the status of your rules, first check the Browse section. If there are no rules in the Browse section, the rules will have to be updated. If there are rules in the Browse section, the rules are most likely updated but you should also check that the other fields as identified in the Normalization Rules Template section of the Primo documentation

(https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Technical_Guide/Browse_Functionality/Configuring_the_Normalization_Rules#Normalization_Rules_Templates) have been updated.

You can update your Primo normalization rules using the following options:

- **Synchronize with Template**

  This option is described in: https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Technical_Guide/Browse_Functionality/Implementation_and_Upgrade_Information

- **Copy this Target to another Mapping Set**

  This option is described in: https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Technical_Guide/Working_with_Normalization_Rules/Editing_Normalization_Rules_Sets

For Primo Total Care installations, follow the usual procedure of contacting Support for template normalization rule changes (non-preconfigured feature changes) to have your normalization rules updated to incorporate headings enrichment data published from Alma.

IdeaExchange: Sharing Normalization Rules in the Community Zone

Description

In the Alma Community Zone, a dedicated area is being provided for sharing normalization, indication, and merge rules between institutions. From the Rules tab in the MD Editor, private or shared rules can be contributed to the Community Zone.

Step-by-Step Instructions

The following roles can share normalization, merge, and indication rules in the Community Zone:

- Cataloger
- Catalog Manager

▪ Catalog Administrator

(Contribution privileges for the roles will be provided in a future release.)

To share normalization rules in the Community Zone:

(Merge rules and indication rules are shared in a similar manner as described in the procedure below.)

1 Open the **MD Editor** (**Resource Management > Cataloging > Open Metadata Editor**).

2 Select the **Rules** tab, expand the **Normalization rules** folder, and expand the **Private** or **Shared** folder where the rule that you want to share in the Community Zone is located.

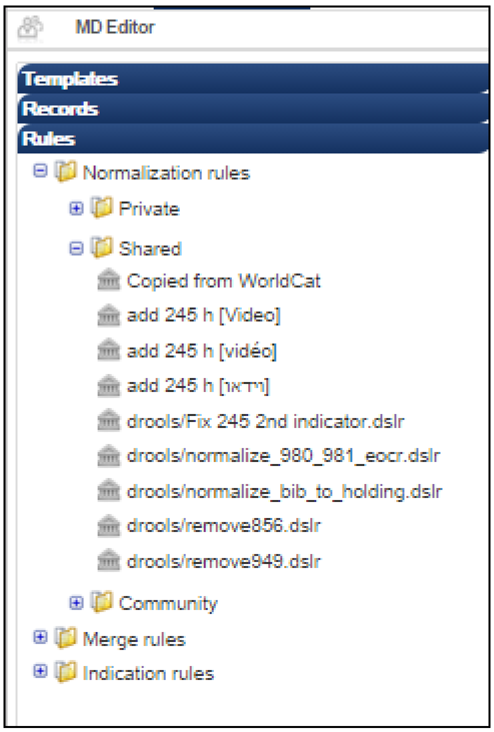


Figure 4 - MD Editor Rules Tab with Expanded Normalization Rules Folder

3 Select the rule to be shared in the Community Zone. The list of actions that can be performed appears.

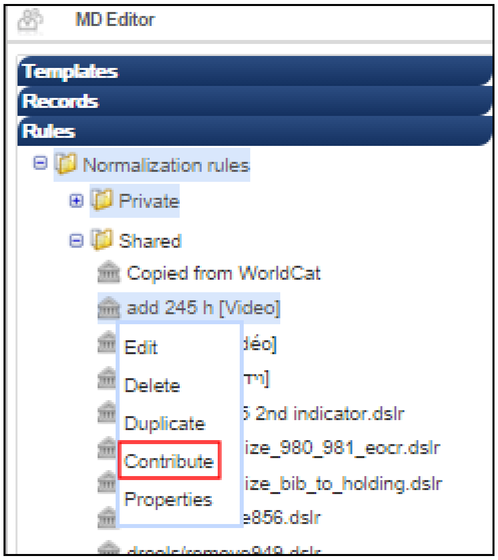


Figure 5 - Rules Actions

4 Select **Contribute** to share the rule in the Community Zone. The Rule Sharing dialog box appears.

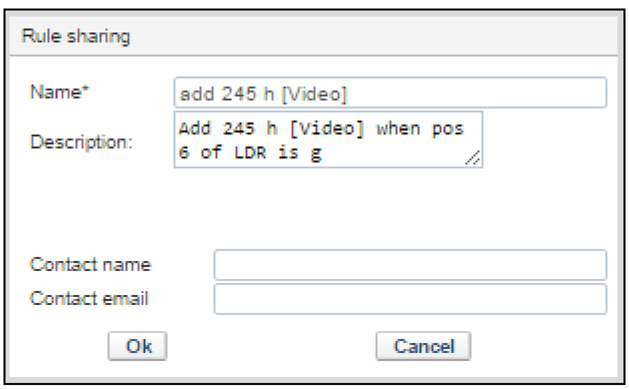


Figure 6 - Rule Sharing Dialog Box

The **Name** parameter is required and needs to be unique. If the system finds another rule by the same name in the Community Zone, it will apply a numeric suffix (Contributed 1, Contributed 2, Contributed 3 and so forth) to make the name unique.

Even though the following parameters are optional, they provide key pieces of information that enable the most effective use of the shared rule and should be completed as part of your best practices for rule sharing:

- Description
- Contact name
- Contact email

When rules are stored in the Community Zone, other users can see this information. A full, detailed description can enable interested users in determining/confirming whether a rule meets their needs without having to open and review the rule details. The Description parameter can be a maximum of 4,000 characters in length.

Providing contact information enables users to collaborate, perhaps, to develop extensions to a rule or provide an alert if the rule becomes broken.

5 Click **OK**. The rule is copied to the Community Zone and appears in the Community folder when you expand it.

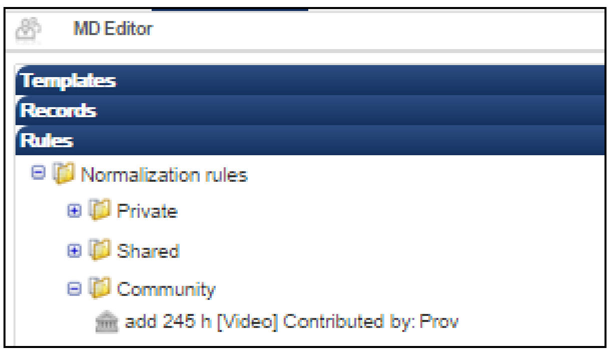


Figure 7 - Shared Rule Appears in the Community Folder

In the Community folder the rule is identified with the following components:

- Rule name
- Contrib <numeric suffix>, if required to make the name unique
- Contributed by: <institution name>

  For rules contributed by Ex Libris, it displays Contributed by: Alma Community Zone

To copy a shared normalization rule from the Community Zone:

1. Expand the **Community** folder in the **Normalization rules** folder under the **Rules** tab in the **MD Editor** (**Resource Management > Cataloging > Open Metadata Editor**).
2. Select the rule that you want to use. When you point to the rule, the Description for the Rule appears. This provides additional information to help you identify the rule that you want to copy.
3. Click **Copy** from the list of actions. The Normalization Rules Properties dialog box appears. In addition to the rule name and description, the properties provide the following information:
   - Name of the institution that created and contributed the rule
   - Contact name and email address for the contributed rule
   - Date that the rule was last updated

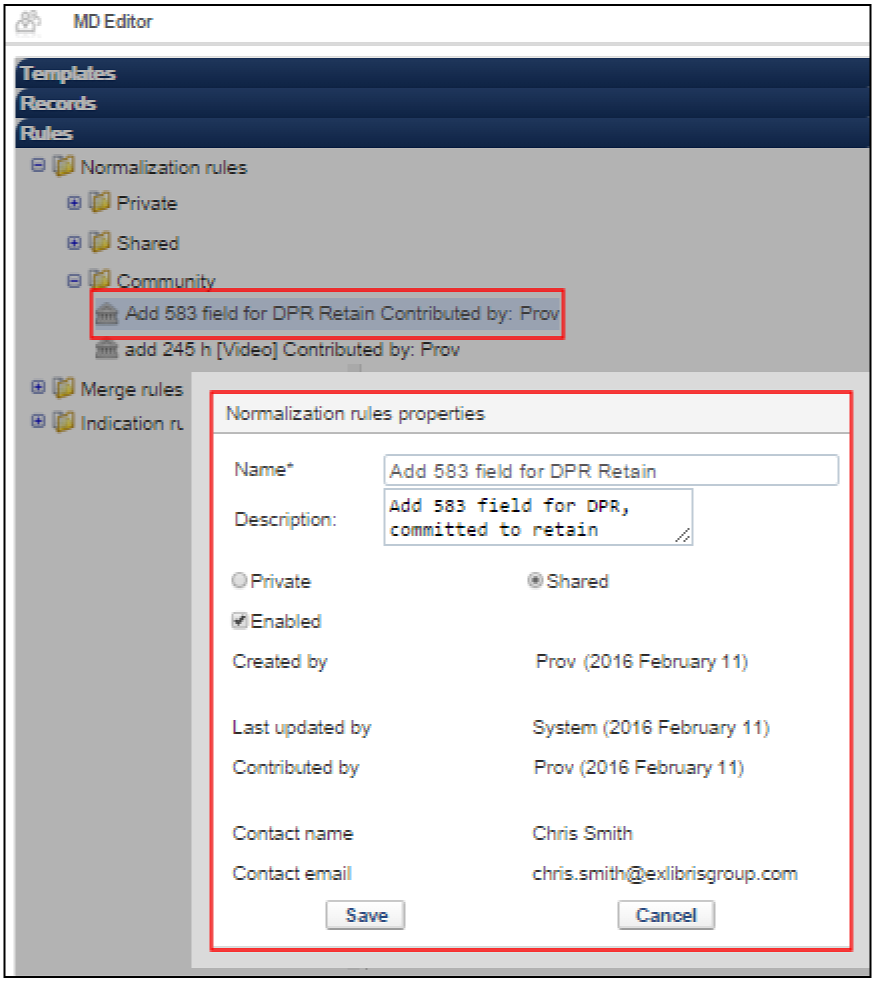


Figure 8 - Copy Normalization Rule from the Community Zone

4 Select from the **Private**, **Shared**, and **Enabled** options to identify the attributes for the rule after it is copied from the Community Zone to your institution.

5 Click **Save**. The rule opens in the MD Editor working space.

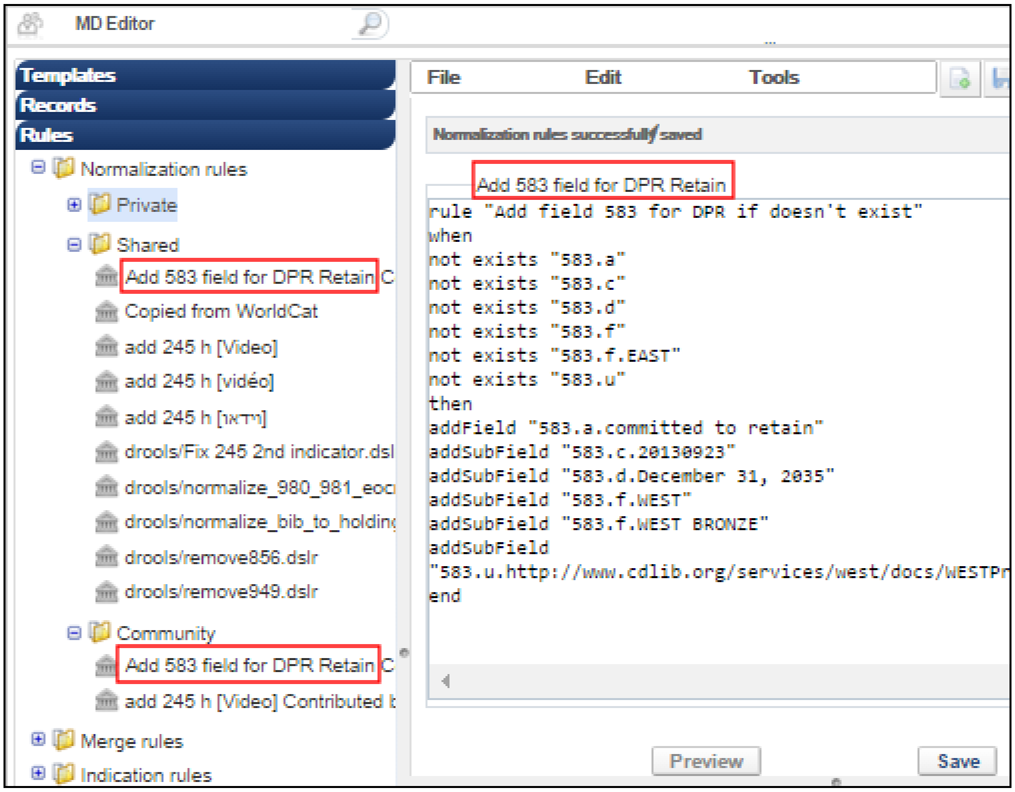


Figure 9 - Copy of the Normalization Rule from the Community Zone Opens in the MD Editor

6 Click **Save**.

In addition to the **Copy** action:

- If you are the contributing institution, you have the option to **Delete** the rule from the Community Zone.

  If you try to delete a contributed normalization rule from the Community Zone and it is being used by any other process, import profile, and so forth, there is a validation check that prevents it from being deleted and a pop-up message appears indicating that the normalization rule cannot be deleted and that you need to remove the related process first.

  For institutions that have a copy of a rule that is subsequently deleted from the Community Zone, the copy may continue to be used as if it was one created by the institution.

- All institutions have the **View** action option.

In a collaborative environment, if you would like to copy normalization rules from the Community Zone to the Network Zone and not the Institution Zone, copying should be done in the Network. That is, from the Network system, you need to perform the **Copy** action and copy from the Community folder to the Shared folder in that system. When copied in this manner, the Network copy appears in the Shared folder of the member institutions.

In a future release:

- A **Properties** action will be provided for viewing the rule properties from the Community Zone.
- The icons for each rule will be updated to reflect whether the rule is from the Community Zone or institution.
- A filter/search capability will be provided in the **Rules** tab to be used for locating specific rules.

CJK Transliterations for Cataloging

Description

For institutions using CJK languages, CJK transliteration capability has been implemented in the Alma MD Editor for cataloging CJK records. Specifically, this initial implementation of CJK transliteration function addresses:

- Hanja To Hangul
- Hanja To Hangul CK
- Hanja To Hangul MOE
- Hanja To Pinyin

This applies to cataloging both bibliographic and authority records and is handled through the use of normalization processes that you customize for your needs.

Step-by-Step Instructions

The following roles can configure cataloging normalization processes for CJK transliteration:

- Catalog Administrator
- General System Administrator

The following roles can catalog records using CJK transliteration:

- Cataloger
- Catalog Manager
- Catalog Administrator

To configure cataloging normalization processes for CJK transliteration:

1. From the **Cataloging** section of Resource Management Configuration (**Resource Management > Resource Configuration > Configuration Menu**), click **Metadata Configuration**.
2. Click the **MARC21 Bibliographic** link.

   (**MARC21 Bibliographic** is being used as an example for this procedure. This procedure can also be used for **MARC21 Authority** configurations and any variety of MARC configurations such as KORMARC, UNIMARC, CNMARC, and so forth).
3. Select the **Normalization Processes** tab and click **Add Process**.

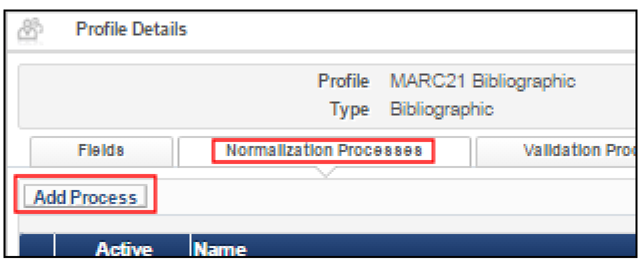


Figure 10 - Add Process Button on the Normalization Processes Tab

4. Enter the **Name** and **Description** for the process that you are creating. These are both required parameters.

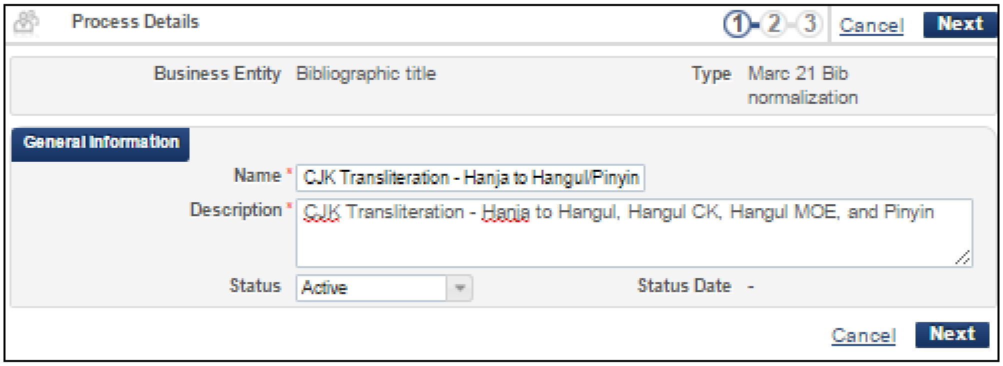


Figure 11 - Normalization Process Name and Description

5 Click **Next**, and select the transliteration tasks that you want included in the normalization process that you are creating.

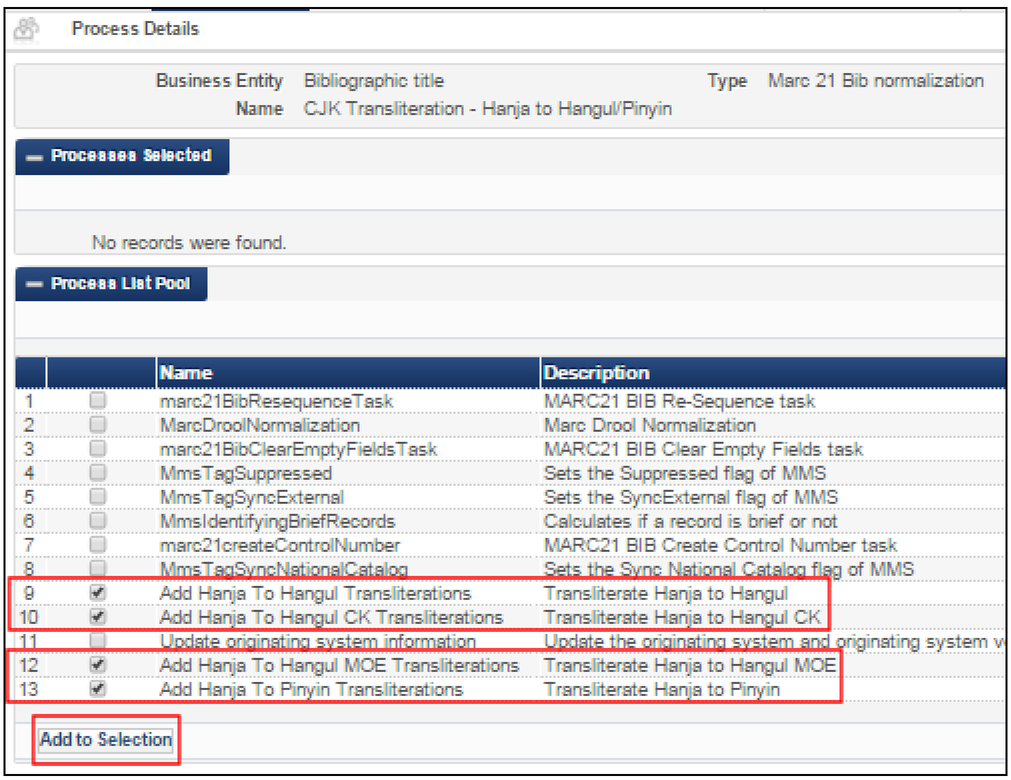


Figure 12 - Select Transliteration Tasks

6 Click **Add to Selection** and in the **Processes Selected** section, arrange the tasks in the order you prefer.

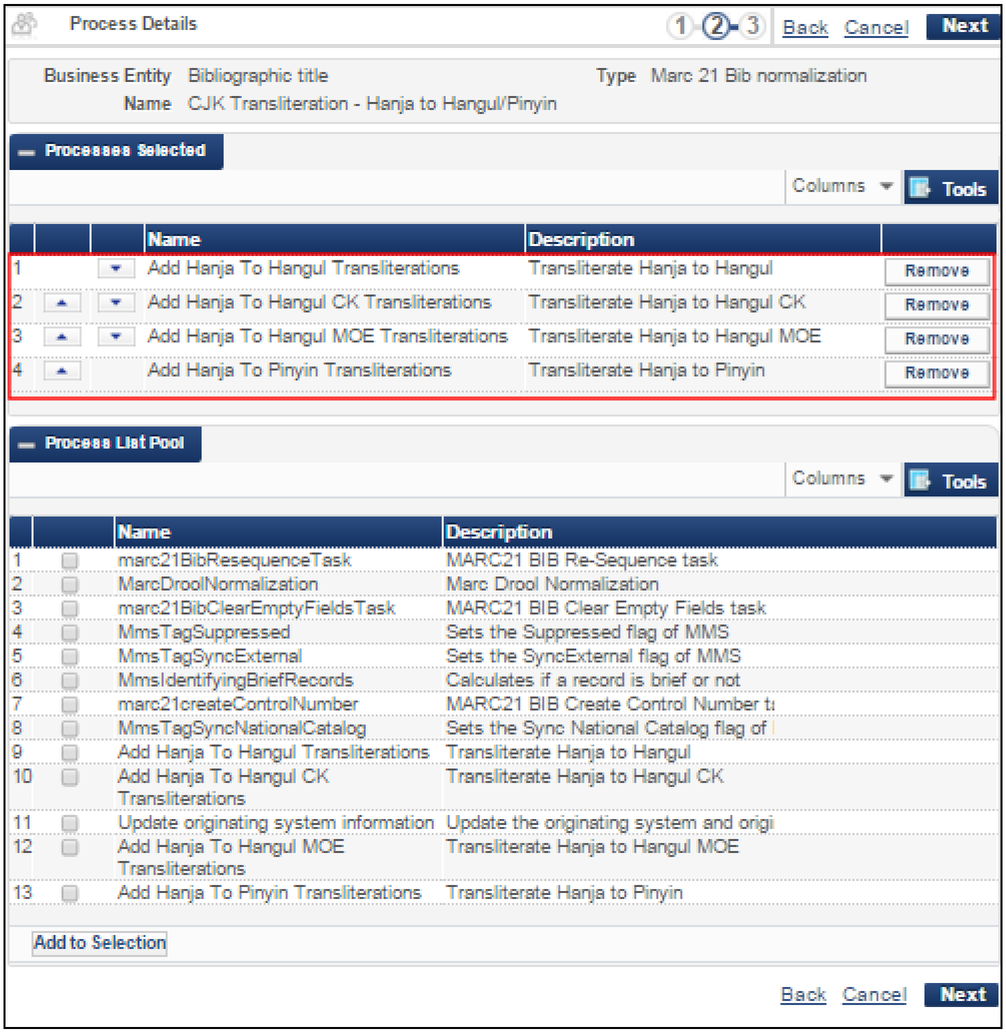


Figure 13 - Added to the Processes Selected Section

7 Click **Next**, and enter the source and target fields for the transliteration.

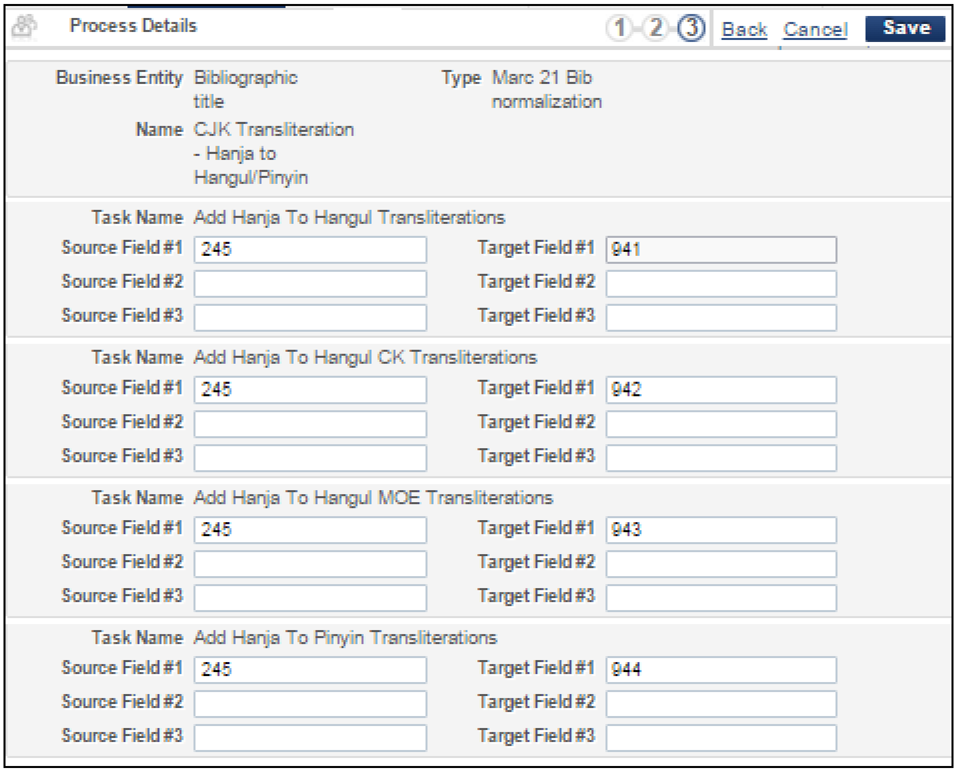


Figure 14 - Enter Source and Target Fields

8 Click **Save**.

To catalog records using CJK transliteration:

1 Open the bibliographic record that you want to transliterate in the **MD Editor**.

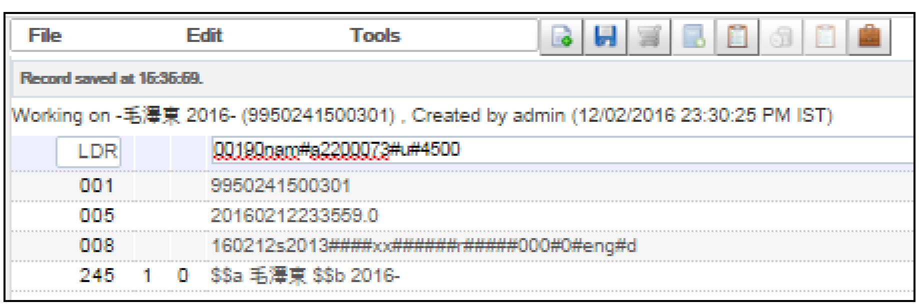


Figure 15 - Record to Transliterate

2 Enhance the record (**Edit > Enhance the Record**). The **Enhance the Record** dialog box appears.

3 From the drop-down list, select the normalization process that you created for transliteration and click **OK**.

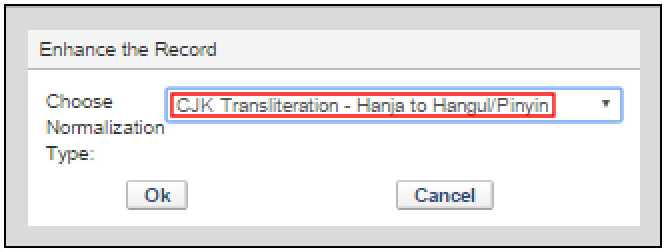


Figure 16 - Select the Normalization Process to Enhance the Record

The record is updated and displays the transliteration. The CJK text is converted, and the Latin text remains the same in the new transliterated records. The system also automatically adds subfield 9 ($$9) to the transliterated records with a notation of the type of transliteration that was processed.

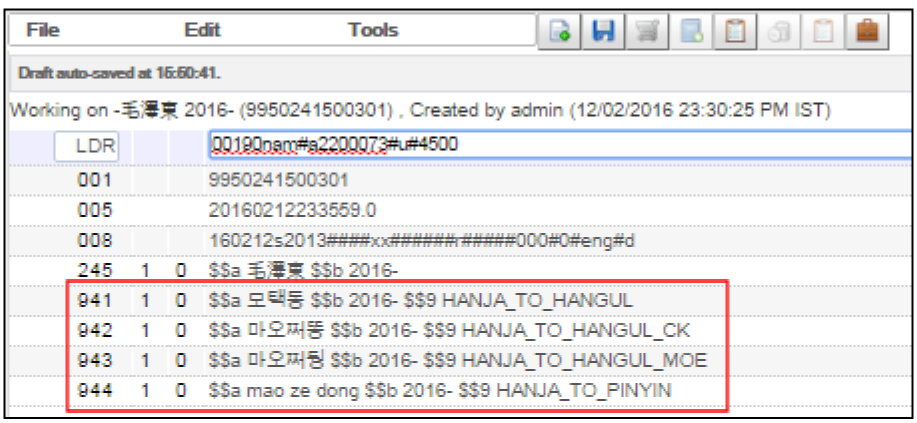


Figure 17 - Transliteration Completed

4 Save the record.

Prefix Option Added for Matching on the 035 Field in the Import Profile

Description

The import profile configuration settings have been enhanced to include a new parameter for the **035 (Other System Identifier) Match Method** that makes the match processing more granular. The parameter that has been added enables you to specify a 035 prefix that filters the matching process based on the prefix that you enter. For example, you can enter OCLC as a prefix setting and the match processing would then focus on the 035 fields with OCLC as the prefix and ignore the other 035 fields.

Step-by-Step Instructions

The following role can configure import profiles with the new 035 prefix parameter:

- Catalog Administrator

To configure an import profile with a 035 prefix setting:

1. From the Record Import section of Resource Management configuration (**Resource Management > Resource Configuration > Configuration Menu**), click **Import Profiles**. The Import Profiles page appears.
2. Click **Add New Profile**.
3. Select the profile type and click **Next**.
4. Enter the **Profile name**, complete the other parameters in the Profile Details section as you normally would, and click **Next**.
5. Complete the Filter, Normalization, and Validation Exception Profile sections as you normally would, and click **Next**.
6. In the Match Profile section, select the **035 (Other System Identifier) Match Method** from the drop-down list of options for the **Serial match method** and the **Non-serial match method**. The system dynamically refreshes the screen to display the new **System Identifier Prefix** parameter.

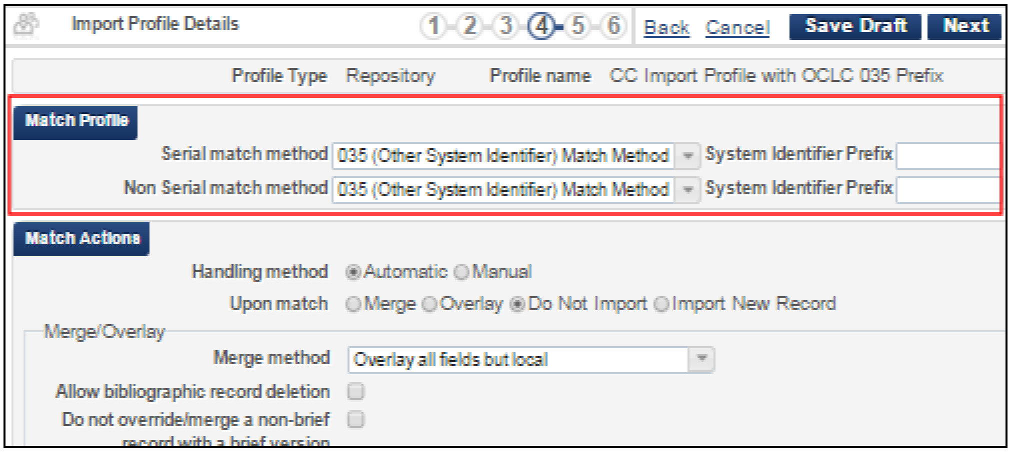


Figure 18 - Match Profile Section

7 Enter the 035 prefix text on which you want to filter the 035 fields when importing.

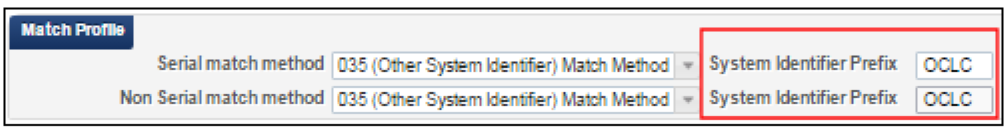


Figure 19 - System Identifier Prefix

8 Complete the rest of the import profile as you normally would and click **Save**.

Other Resource Management Enhancements

- The Drools condition `contains` was added for merge rules. The following is a sample rule:

```
rule " Sample"
    when
       merge
    then
       replace MARC."035" when MARC."035"."a" contains "(OCLC)" excluding
MARC."035"("9","9")
end
```

- The first indicator and second indicator were added to the prediction pattern template for all 853 subfields.
- See Other Infrastructure and Usability Enhancements for an additional Resource Management-related enhancement.

Digital Resource Management

The following sections describe new or changed Digital Resource Management features in this release of Alma.

Added Support for Special Representations

Description

The representation data model has been expanded to accommodate use cases where a bibliographic record is not fully represented by a single representation. This is a typical scenario for partial digitization requests. In a future Alma release, we will be adding various features to support end-to-end workflows around these representations, including digitization flow improvements, resource management tools, and a dedicated discovery interface for optimal end-user experience.

To support this enhancement, the **Entity Type** field has been added at the representation level with the following possible values:

- (Journal) Issue
- Article
- (Book) Chapter
- Audiovisual

Each value has its own parameters.

Step-By-Step Instructions

The following roles can access this feature:

- Digital Inventory Operator
- Collection Inventory Operator

This feature is available from the Representation Details page (**Resource Management > Create Inventory > Add Digital Representation**).

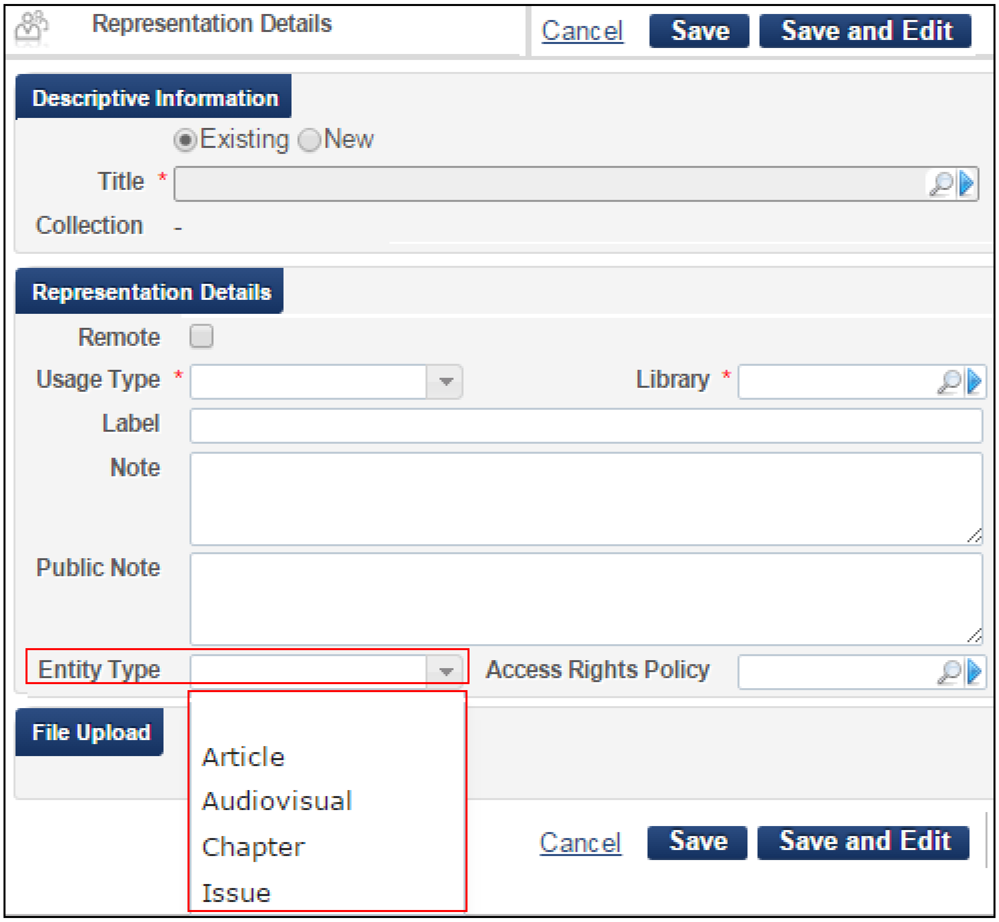


Figure 20 – Entity Type

When editing the representation, additional fields are available. For example:

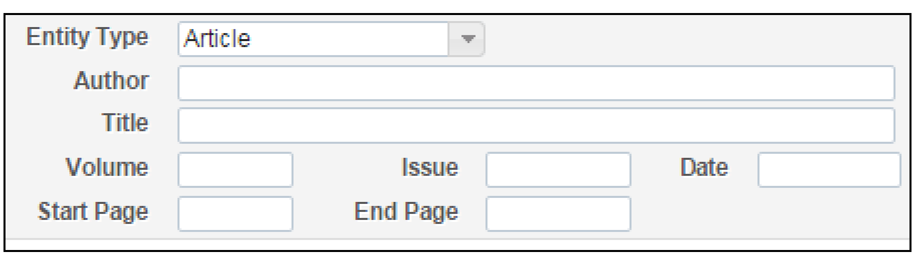


Figure 21 – Entity Type – Article

The **Entity Type** field is available as a condition when performing an advanced search in the repository:

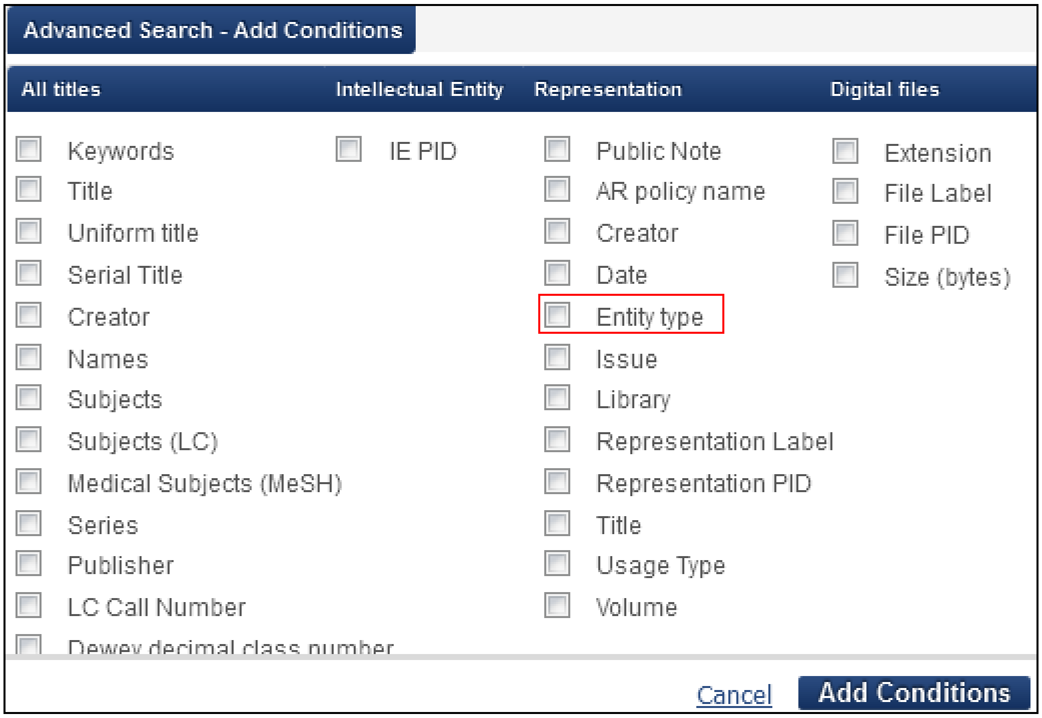


Figure 22 – Advanced Search – Entity Type

Target Format for Digital Import Profiles Now Configurable

The target format is now configurable when creating a digital import profile (**Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles > Add New Profile > Digital**). The options available are determined according to your institution's configurations.

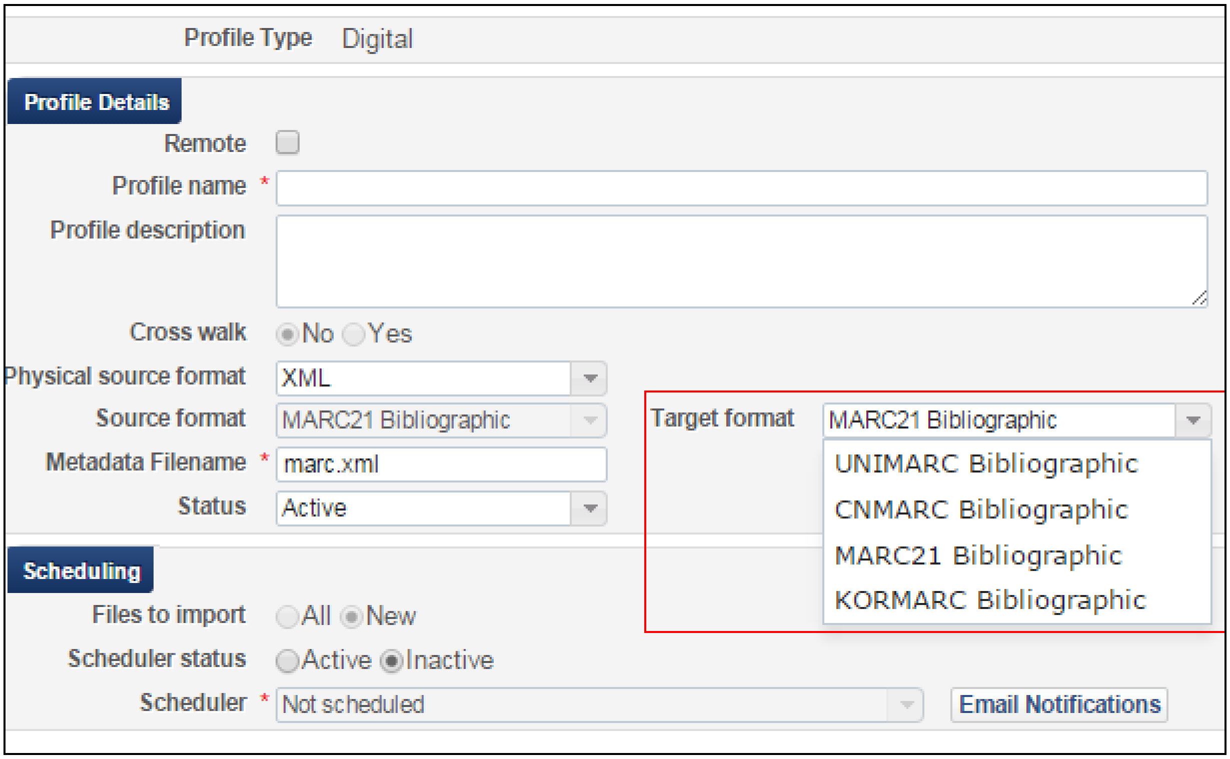


Figure 23 – Digital Profile Target Format

Other Digital Resource Management Enhancements

- The `group_id` column must now be used when using a csv file to import multiple digital representations that relate to the same bibliographic record and occupy separate lines in the file.

Fulfillment

The following sections describe new or changed Fulfillment features in this release of Alma.

Enhanced Form for Partial Digitization Requests

Description

Fields for partial digitization have been added to the digitization request form, non-repository citation form, and the Primo (Get It) digitization request form. The fields are:

- Chapter/Article Title
- Chapter/Article Author
- Start Page
- End Page
- Full Chapter

Three note fields have also been added to the Alma staff digitization request form and the add/edit non-repository citation form.

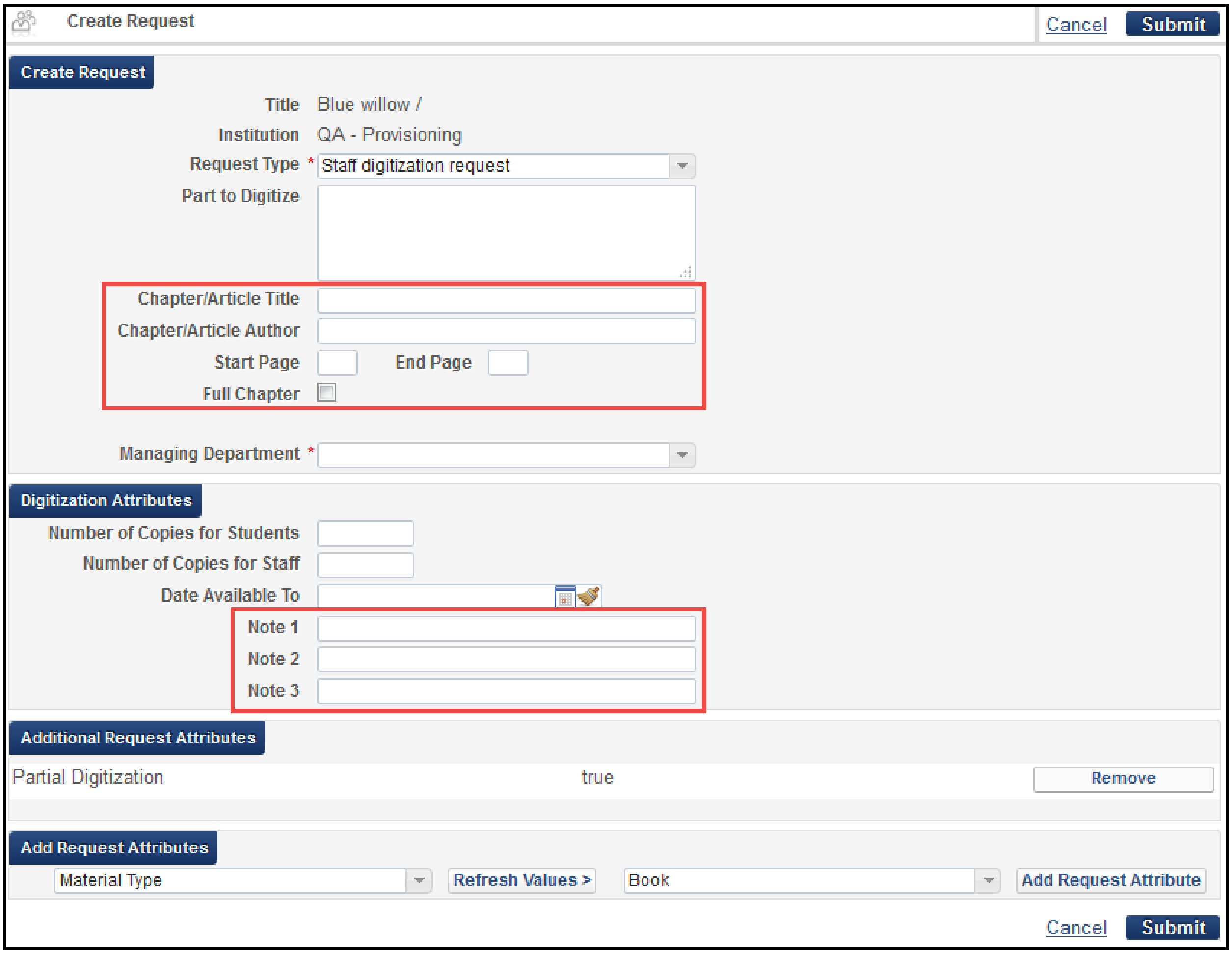


Figure 24 – Staff Digitization Request Form

A new customer parameter has been added, **display_additional_digitization_attributes**, to control the display of the fields on the Get It form. The parameter defaults to false, which suppresses the fields from the display.

Step-By-Step Instructions

The following roles can configure the display of the partial digitization fields:

- General System Administrator
- Fulfillment Administrator

To configure the display of the partial digitization fields:

1 Access **Fulfillment > Fulfillment Configuration > Configuration Menu > General > Other Settings** and locate the parameter **display_additional_digitization_attributes**.

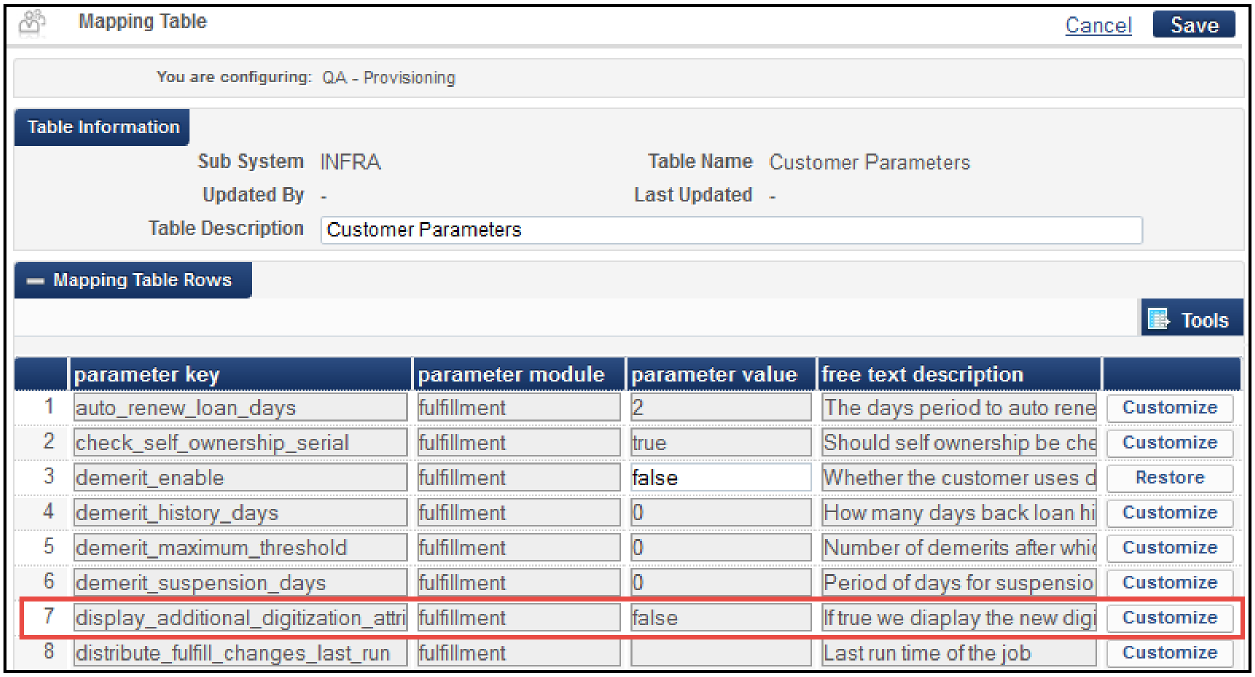


Figure 25 - Other Settings

1 Click customize and set **display_additional_digitization_attributes** to `True` in order to show the partial digitization fields. Enter `False` to suppress the fields.

Deleting Courses Using the Course Loader Integration Profile

A new last column, **Operation**, was added to the input file for the Course Loader integration profile. When this column is set to `DELETE`, the associated course (identified by the first and third columns (**Code** and **Section ID**) is deleted from Alma.

In addition, a new check box was added to the second page of the wizard used to configure the Course Loader integration profile.

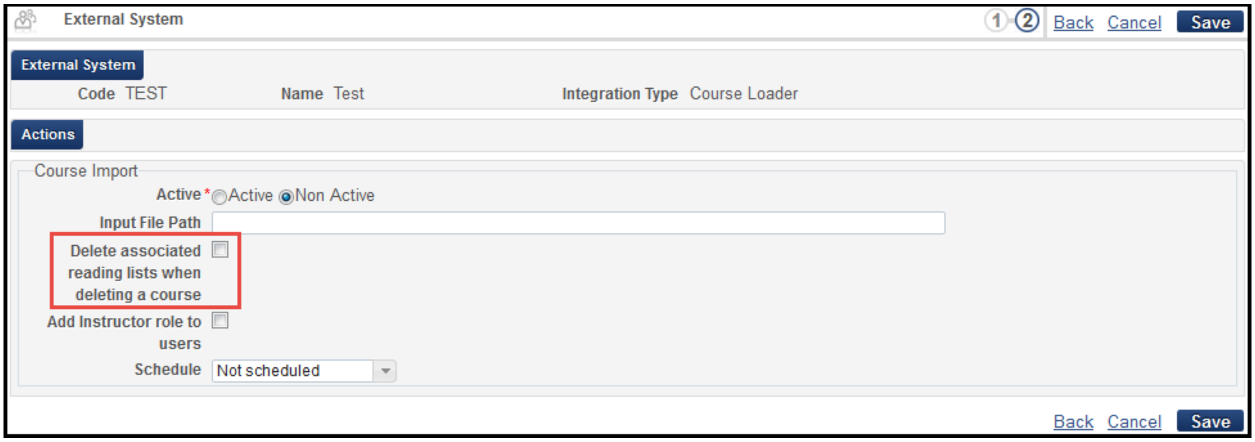


Figure 26 - Course Loader Integration Profile Configuration Wizard, Page 2

When selected, reading lists (and associated sections and citations) are deleted from Alma when their associated course is deleted. When not selected, the reading list remains in Alma without a course association.

Note: This check box is cleared for existing Course Loader integration profiles that were created before this release.

If any courses are deleted, the profile's job report indicates the number of deleted courses.

Other Fulfillment Enhancements

- The Primo Get It and View It tabs now support Hebrew for patrons whose preferred language is defined as Hebrew.
- The **System** drop-down list was added to the Course Loader integration profile. Although the field is for Ex Libris' information purposes only, it is mandatory.
- Alma now adds the **Instructor** role to any instructor added using the Course Loader integration profile.

- The Course Loader integration profile now includes the scheduling option **Every 6 hours, starting at 05:00**.
- See Other Infrastructure and Usability Enhancements for an additional Fulfillment-related enhancement.

Resource Sharing

The following sections describe new or changed Resource Sharing features in this release of Alma.

Lender Workflow Optimization

Description

The manual lender workflow has been optimized, allowing staff to create the lending request when shipping the already retrieved item. This enables libraries that manage lender requests manually to perform two steps in one action.

A **Partner** field has been added to the Shipping interface. The field appears if the **Automatic Creation** attribute has been turned on for the resource sharing library. The partner field is mandatory if the request ID entered does not exist. Attempting to leave the partner field blank results in an error message, “Selecting a partner is mandatory when the request has not been previously created.” After selecting the partner, a new pop-up window warns, "Lending request does not exist in the system. A new request will be created". The pop-up window optionally may be turned off in the customer parameters.

The new lending request is created and marked as shipped.

Step-By-Step Instructions

The following role can configure automatic creation of lending requests:

- General System Administrator

The following roles can configure the warning pop-up window:

- General System Administrator
- Fulfillment Administrator

The following roles can create a shipping item:

- Fulfillment Services Operator (for the resource sharing library)

- Fulfillment Services Manager (for the resource sharing library)

To configure automatic creation of lending requests:

1 Access **Administration > General Configuration > Configuration Menu > Libraries > Add a Library or Edit Library Information.** Click the **Libraries** tab and edit the resource sharing library.

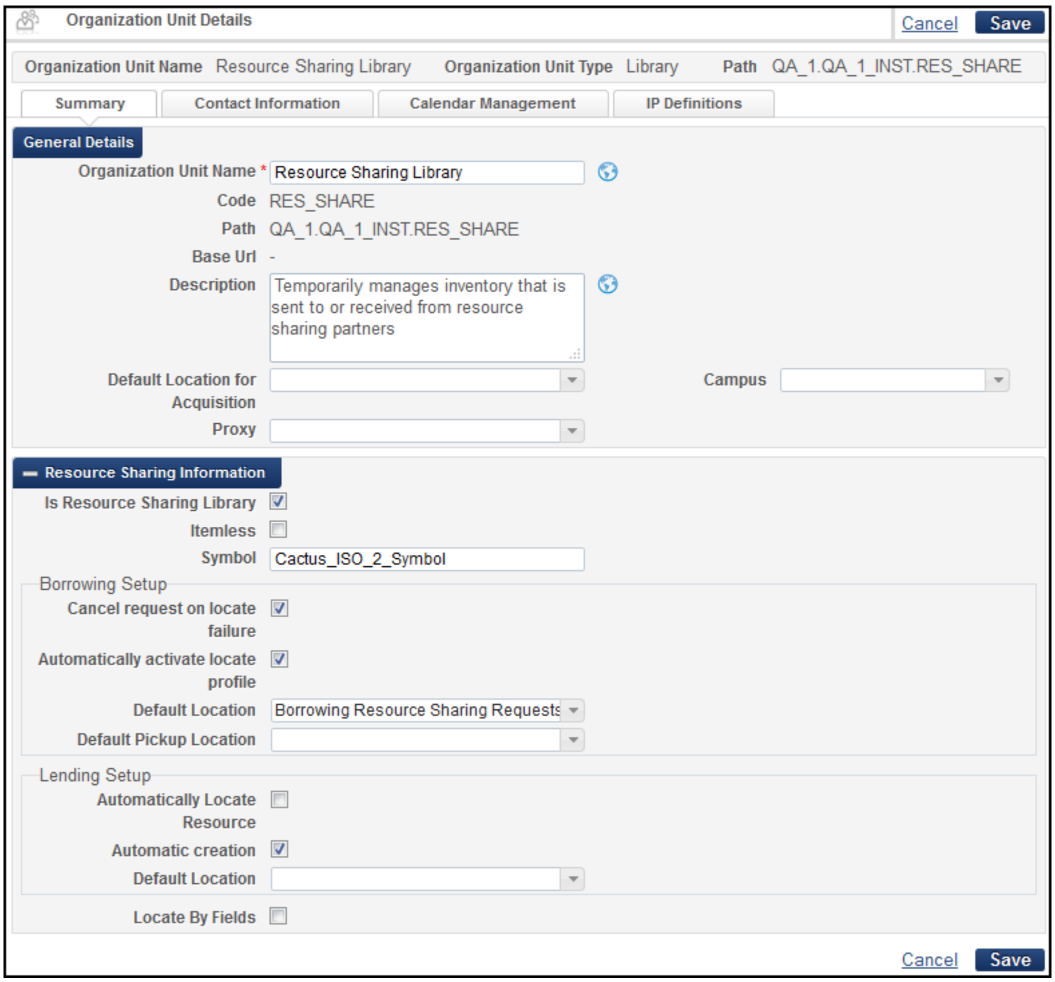


Figure 27 - Resource Sharing Library Summary

2 Select the **Automatic creation** check box.

To configure the warning pop-up window:

1 Access **Fulfillment > Fulfillment Configuration > Configuration Menu > General > Other Settings** and locate the parameter **rs_enable_lending_ship_warn_popup**.

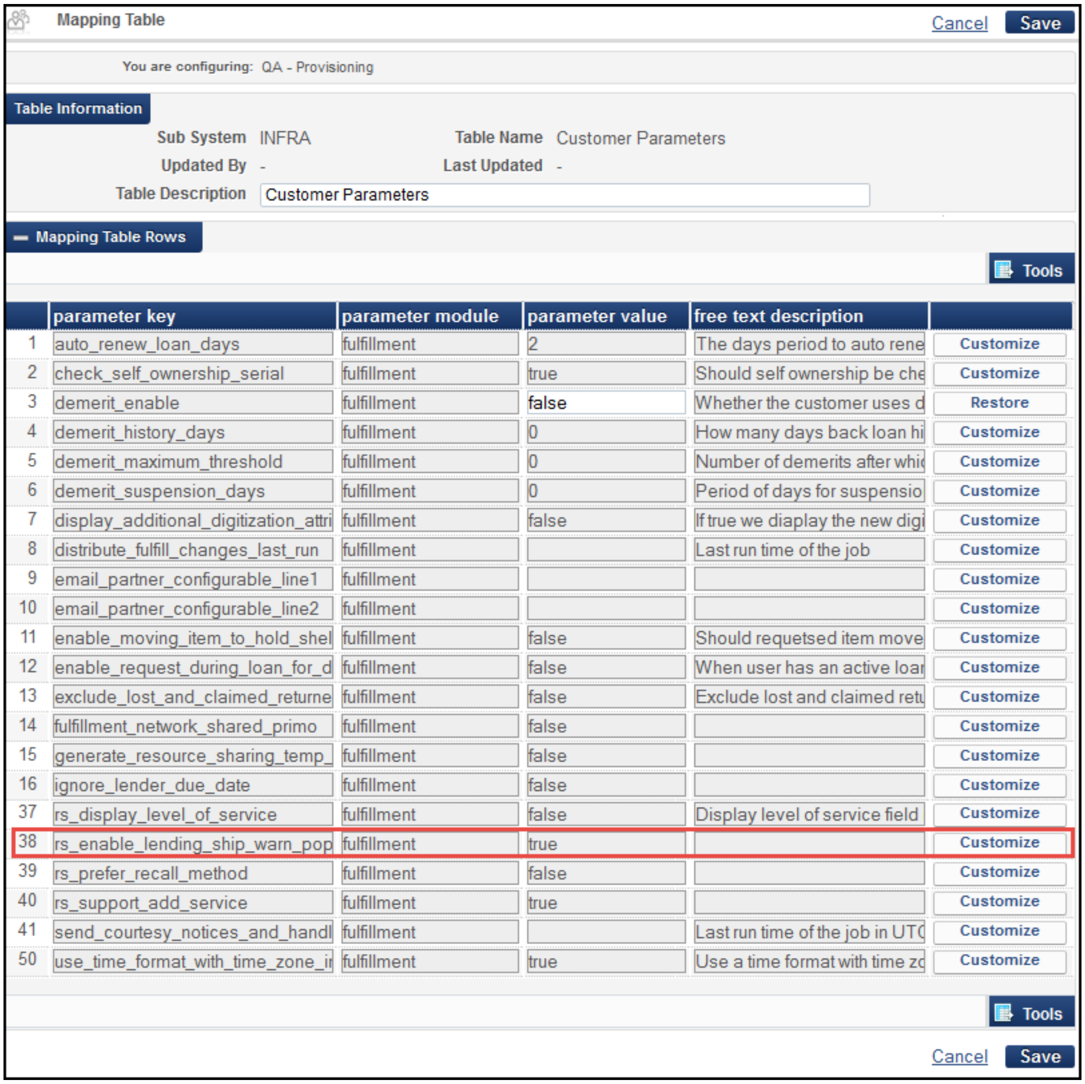


Figure 28 - Other Settings

2 Set **rs_enable_lending_ship_warn_popup** to `True` in order to show the warning pop-up before creating the lending request. Set it to `False` to automatically create the request without a warning message.

To create a shipping item and lending request:

1 Access shipping items from **Fulfillment > Resource Sharing > Shipping Items**.

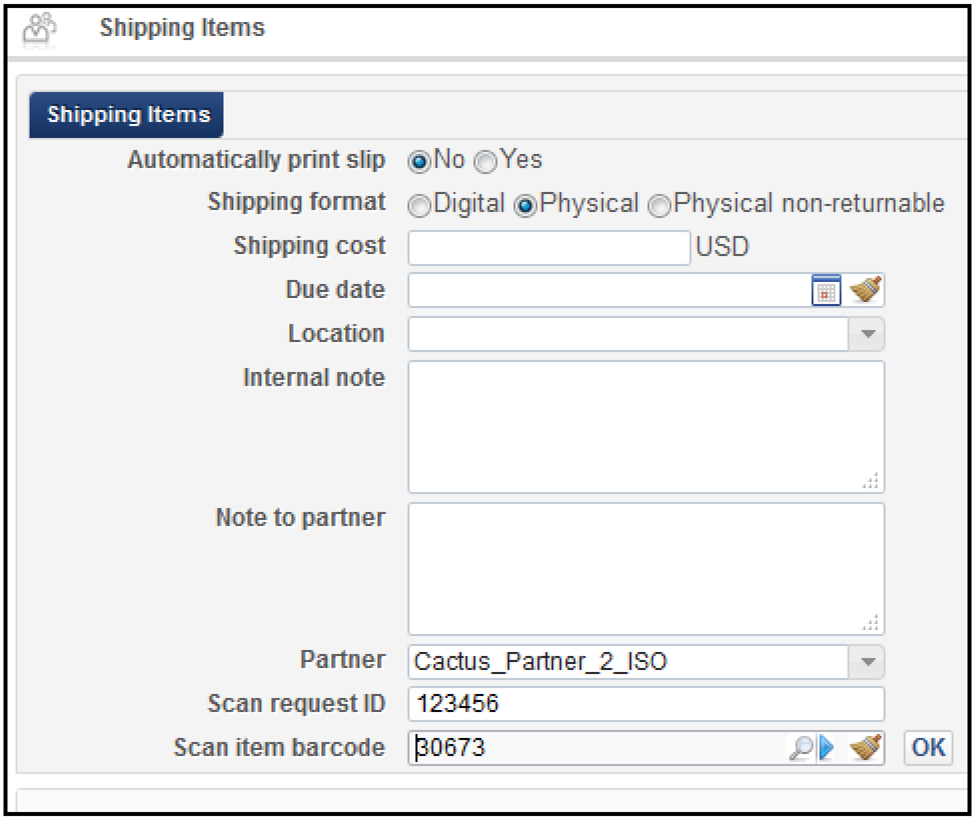


Figure 29 - Shipping Items

2 Enter the partner, a scan request ID, and the item barcode, and click **OK**. The confirmation pop-up appears if configured to be shown.

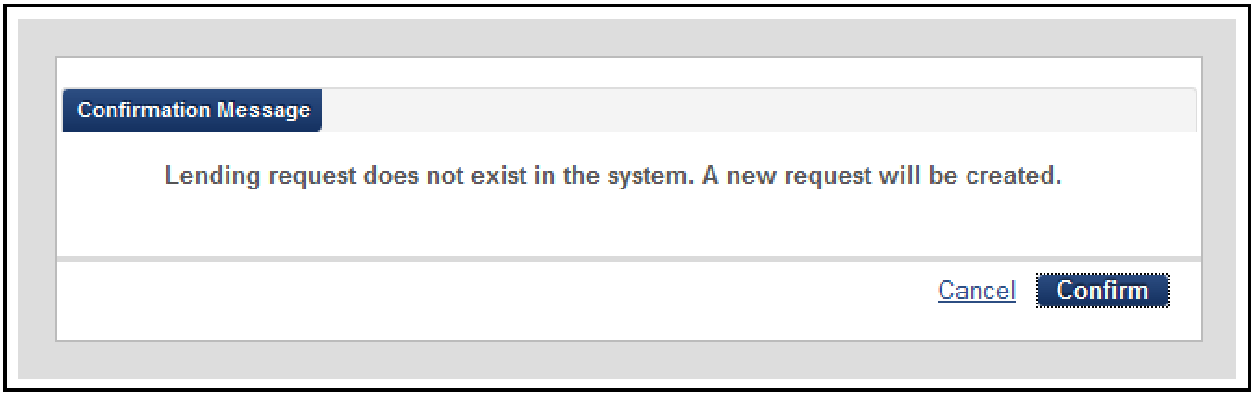


Figure 30 - Confirm Lending Request Creation

3 Click **Confirm**. The lending request is created.

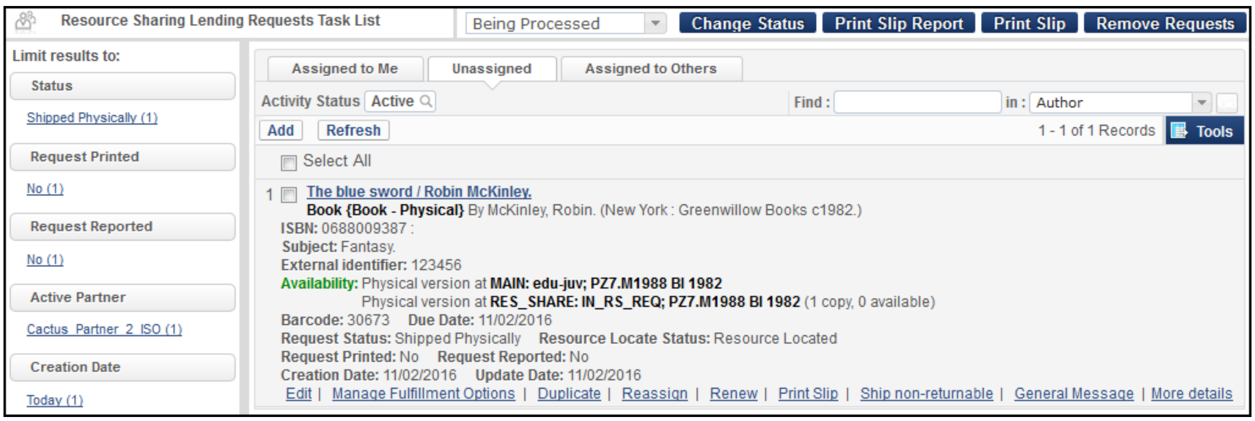


Figure 31 - Auto-Created Lending Request

Filtering for the Audit Tab

Description

It is now possible to select which audit fields will be visible in the resource sharing requests Audit tab.

Note: The Audit tab may be viewed in full mode or in brief mode. You can configure what type of audit lines are included in the brief mode.

Step-By-Step Instructions

The following roles can configure what type of audit lines are included in the brief mode:

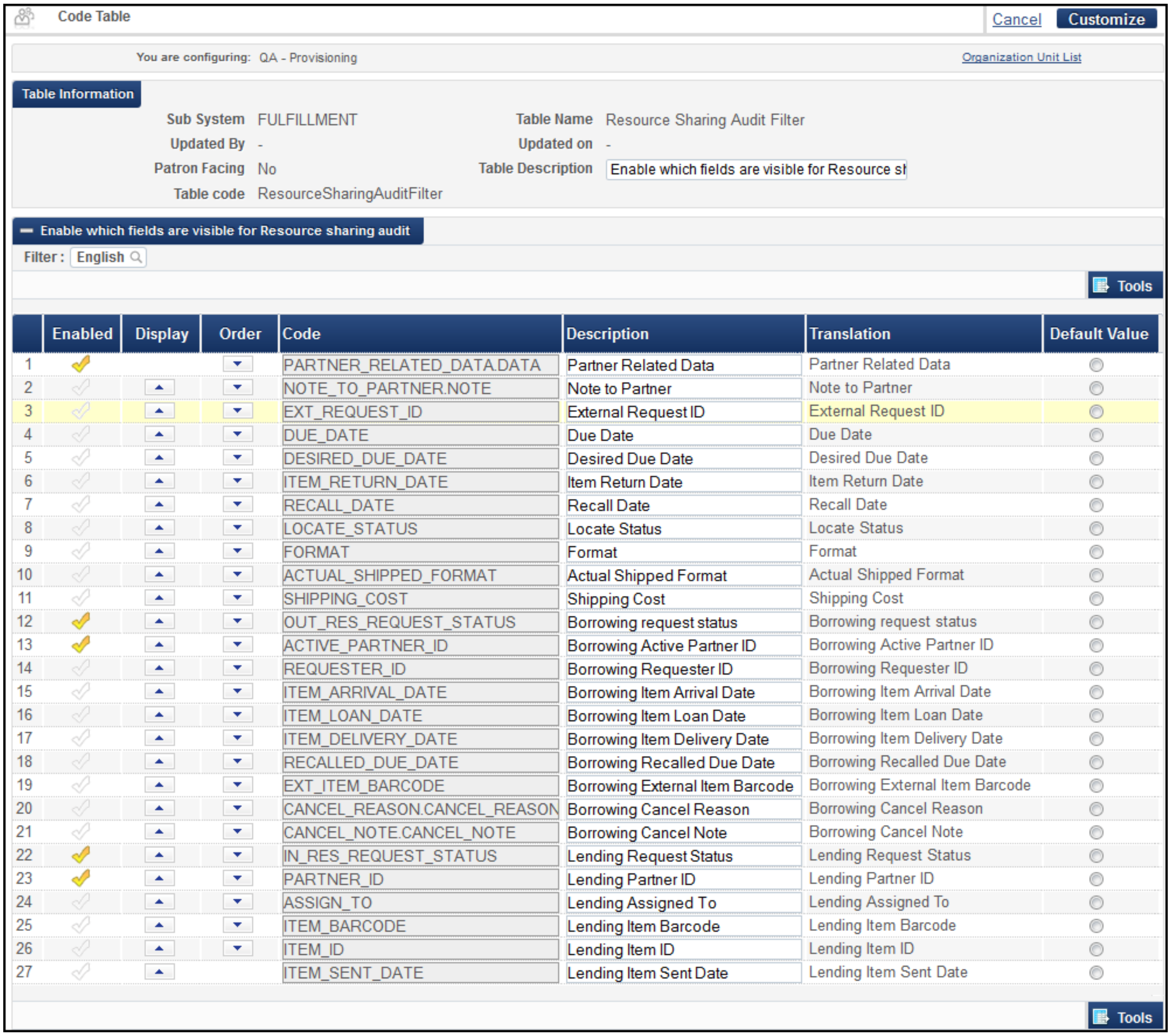
- Fulfillment Administrator
- General System Administrator

The following roles can choose the view mode of a request's audit:

- Fulfillment Services Operator (at the scope of a resource sharing library)
- Fulfillment Services Manager (at the scope of a resource sharing library)

To configure what type of audit lines will be included in the brief mode:

1. Access **Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Brief Audit Fields.**


Code Table

Cancel | Customize

You are configuring: QA - Provisioning

Organization Unit List

Table Information

Sub System	FULFILLMENT	Table Name	Resource Sharing Audit Filter
Updated By	-	Updated on	-
Patron Facing	No	Table Description	Enable which fields are visible for Resource sh
Table code	ResourceSharingAuditFilter		

Enable which fields are visible for Resource sharing audit

Filter : English

Tools

	Enabled	Display	Order	Code	Description	Translation	Default Value
1	✓			PARTNER_RELATED_DATA.DATA	Partner Related Data	Partner Related Data	
2				NOTE_TO_PARTNER.NOTE	Note to Partner	Note to Partner	
3				EXT_REQUEST_ID	External Request ID	External Request ID	
4				DUE_DATE	Due Date	Due Date	
5				DESIRED_DUE_DATE	Desired Due Date	Desired Due Date	
6				ITEM_RETURN_DATE	Item Return Date	Item Return Date	
7				RECALL_DATE	Recall Date	Recall Date	
8				LOCATE_STATUS	Locate Status	Locate Status	
9				FORMAT	Format	Format	
10				ACTUAL_SHIPPED_FORMAT	Actual Shipped Format	Actual Shipped Format	
11				SHIPPING_COST	Shipping Cost	Shipping Cost	
12	✓			OUT_RES_REQUEST_STATUS	Borrowing request status	Borrowing request status	
13	✓			ACTIVE_PARTNER_ID	Borrowing Active Partner ID	Borrowing Active Partner ID	
14				REQUESTER_ID	Borrowing Requester ID	Borrowing Requester ID	
15				ITEM_ARRIVAL_DATE	Borrowing Item Arrival Date	Borrowing Item Arrival Date	
16				ITEM_LOAN_DATE	Borrowing Item Loan Date	Borrowing Item Loan Date	
17				ITEM_DELIVERY_DATE	Borrowing Item Delivery Date	Borrowing Item Delivery Date	
18				RECALLED_DUE_DATE	Borrowing Recalled Due Date	Borrowing Recalled Due Date	
19				EXT_ITEM_BARCODE	Borrowing External Item Barcode	Borrowing External Item Barcode	
20				CANCEL_REASON.CANCEL_REASON	Borrowing Cancel Reason	Borrowing Cancel Reason	
21				CANCEL_NOTE.CANCEL_NOTE	Borrowing Cancel Note	Borrowing Cancel Note	
22	✓			IN_RES_REQUEST_STATUS	Lending Request Status	Lending Request Status	
23	✓			PARTNER_ID	Lending Partner ID	Lending Partner ID	
24				ASSIGN_TO	Lending Assigned To	Lending Assigned To	
25				ITEM_BARCODE	Lending Item Barcode	Lending Item Barcode	
26				ITEM_ID	Lending Item ID	Lending Item ID	
27				ITEM_SENT_DATE	Lending Item Sent Date	Lending Item Sent Date	

Tools

Figure 32 - Brief Audit Fields

2 Enable or disable the displayed fields.

3 Click **Save**.

After the brief audit fields have been configured, select a view mode—**Brief** or **Full**—from the drop-down list in the Audit tab.

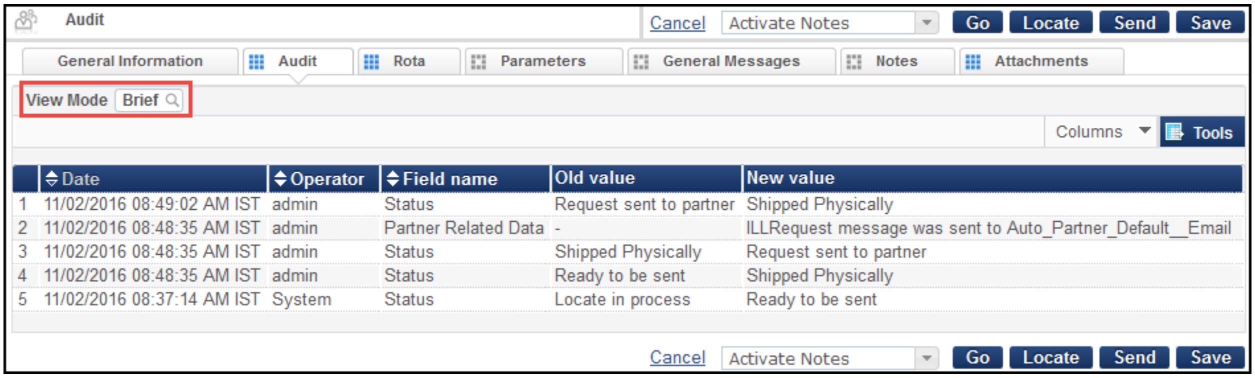


Figure 33 - Brief Audit Display

Other Resource Sharing Enhancements

- ISO-based resource sharing integration with LADD is now supported.
- When your requested format in the borrowing request form is **Digital**, the **Delivery format** field now defaults to the **Alternative address** option. The patron's preferred email address is used in this case, if such an email address exists.
- The title information for resource sharing requests was added to the FulCancelRequestLetter XML and can be added to letter using the XSL (see *Configuring Alma Letters* in the Alma online help).
- The partner code for resource sharing requests was added to the ResourceSharingShippingSlipLetter XML and can be added to letter using the XSL (see *Configuring Alma Letters* in the Alma online help).
- The following new resource sharing options were added to the Tasks list:
  - Lending requests - Overdue - assigned to you
  - Lending requests - Overdue - unassigned
  - Lending requests - Recalled - assigned to you
  - Lending requests - Recalled - unassigned
  - Borrowing requests recalled

- A new **General Message** button was added to the borrowing and lending request form to the right of the **Go** button. This enables you to send a general message without exiting the form. The button is visible if the General Message action is available. Note the following known issue: When you open an existing borrowing or lending request that has an active ISO partner and then open a new request, the General Message mistakenly appears. This issue will be fixed in the next Alma release.
- When renewing a resource sharing loan from Primo using the Mediated Patron Renewal workflow, the following changes are applied in My Account loan list:
  - When the Renew operation ends successfully, the status is: **The renew request will be handled by the appropriate library staff.**
  - Refreshing the loan list sets the status as **Not Renewable** and the **Renew** check box is disabled (if the resource sharing request status was Mediated Patron Renewal).
  - Clicking the loaned item link displays the loan status as: **The renew request will be handled by the appropriate library staff** (if the resource sharing request status was Mediated Patron Renewal).
- Requests with different OCLC numbers will not be considered as duplicates.

Analytics

The following sections describe new or changed Analytics features in this release of Alma.

Member Details Anonymized in Network Zone

Description

Fields that contain identifying information of users can be anonymized for the Network Zone when creating reports for member institutions. The advantage of being able to anonymize such data is that it enables a consortium to make reports for statistics and trends across all of the consortium without violating any privacy concerns or local privacy-related laws. This setup and functionality is relevant only for Analytics reports that are created in the Network Zone. It has no influence on the Analytics reports created in member institutions.

Step-By-Step Instructions

The following role can access this feature:

- Design Analytics

To access this feature:

1. From the Analytics configuration page of the Network Zone (**Administration > Analytics > Configuration Menu**), select **Analytics Network Settings**. The following appears:

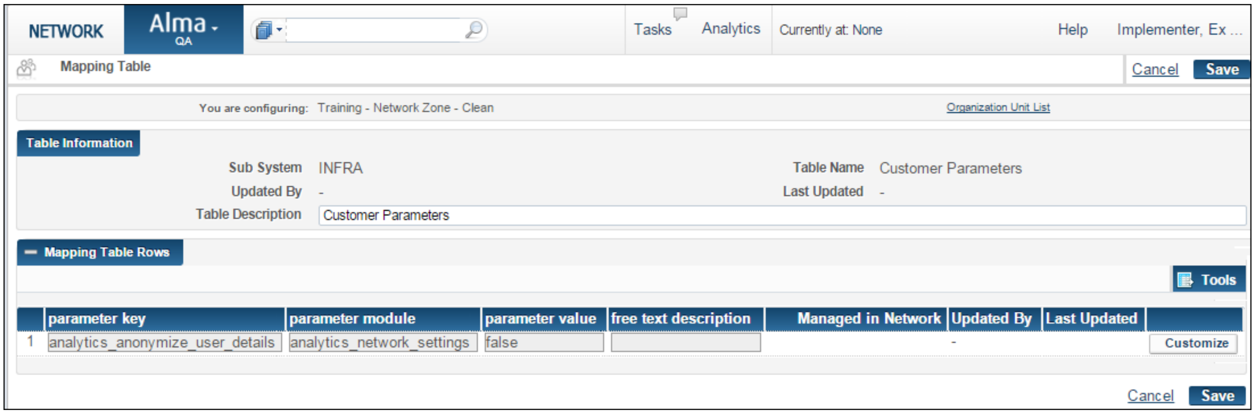


Figure 34 - Analytics Network Settings

2 Click **Customize** and change the parameter value of **analytics_anonymize_user_details** to `true`.

3 Click **Save**.

When the Network Zone creates a report, fields that usually contain identifying information of users are blank:

Institution Name	Loans	First Name	Last Name	User Group	User Type
[redacted]	36				
[redacted]	2			Alumni	External
	6			Faculty	External
	5			Graduate	External
	1			Staff	External
	34			Undergraduate	External
	11				
[redacted]	5			Alumni	External
	18			Faculty/Emeritus	External
	8			Grad/Honors	External
	11			ILL	Internal
	4			Staff/Family	External
	10			Undergraduate	External
	12				
[redacted]	31			Academic Faculty and Administration	External
	2			Cascadia Student	External
	63			Graduate Students	External
	7			Off-Campus Fee	Internal
	11			Off-Campus Non-Fee	Internal
	2			Retirees	External

Figure 35 - User Information Anonymized

Lifecycle Field Added to Bibliographic Details

The **Lifecycle** field was added to the existing Bibliographic Details dimension in all of the subject areas in which it exists. Possible values are **Deleted** and **In Repository**. This allows you to filter reports by In Repository/Deleted items. Statistics can be attained regarding, for example:

- The number of bibliographic records that were deleted and had an item with a particular material type
- The number of bibliographic records that were deleted and had an electronic portfolio with a particular vendor interface

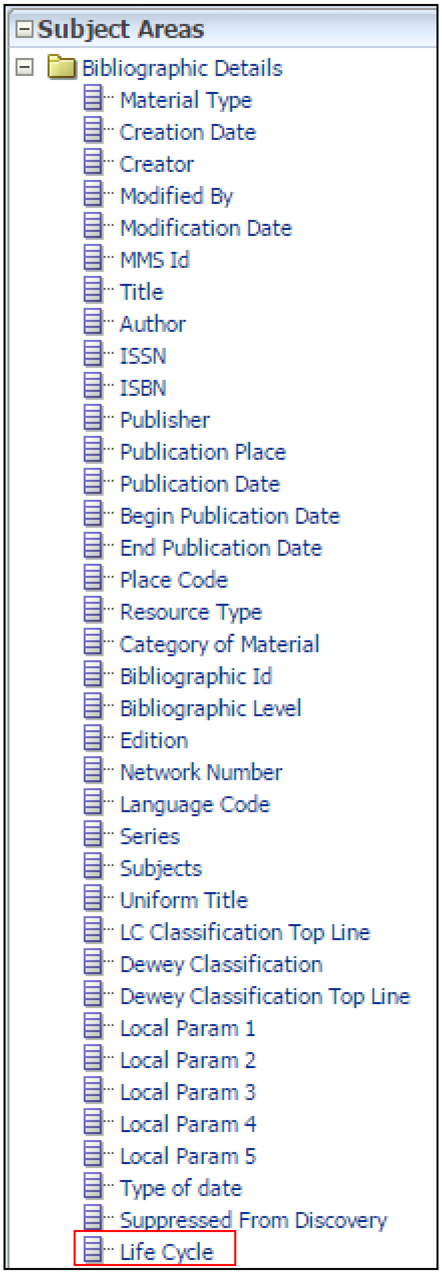


Figure 36 – Lifecycle

The following is an example of a report using the Lifecycle field:

MMS Id	Life Cycle
9910000001421	In Repository
991000001421	In Repository
9910000101421	Deleted
9910000201421	Deleted
9910000301421	In Repository
9910000401421	In Repository
9910000501421	In Repository
9910000601421	Deleted
9910000701421	In Repository
9910000801421	In Repository

Figure 37 – Lifecycle Report

Alma Infrastructure and Usability

The following Alma infrastructure and usability enhancements were made for this release of Alma.

- Microsoft IE version 11 is now certified for Alma.
- The primary and secondary "sort by" options that were available for the All Titles search results have been extended to the physical, electronic, and digital title search results in both the **Network** and **Community** tabs.
- In courses and reading lists, wherever a user's ID or name appears, the user's name now appears as `<last name>, <first name>` with a link to the user information pop-up.
- A new search option, **Vendor Account Code**, was added to the vendor Invoices tab. This enables you to filter according to invoice code. (Note, however, that the sort option is not working properly here. It will be fixed in a future Alma release.)
- The manual lender workflow has been optimized, allowing staff to manually create the lending request when shipping the already retrieved item. For details, see Lender Workflow Optimization.

Alma APIs

For this release, the following API enhancements were made:

- The storage location ID was added to the copy object in PO line APIs. For detailed information, see https://developers.exlibrisgroup.com/alma/apis/acq.
- The URL for the Task Lists API was renamed from tasks-lists to **task-lists**. Note that the original URL will continue working for backward compatibility purposes. It will become unsupported in a future Alma release.
- The GET Requested Resources API now has a parameter that allows for filtering by destination. For detailed information, see https://developers.exlibrisgroup.com/alma/apis/taskslists.

Known Issues

- When importing an EOD file using the New Order profile, if the location of the item does not have a call number type, the call number type of the institution should be used as the alternative call number type. Currently, however, no alternative call number is used.
- Related to merging bibliographic records in the MD Editor, if there are no requests, the Merge Records and Combine Inventory pop-up window does not display a count of 0 (zero) requests. The count appears for requests only when it is greater than 0 (zero). The count should also appear as 0 (zero) requests when they occur.
- Regarding the autocomplete/pop-up assistance being provided for several UNIMARC fields in the MD Editor, there is a known issue related to UNIMARC 327 $a and 327 $b. These subfields are based on the same functionality and as a result, the pop-up suggestions in the MD Editor suggests both subfields' values when entering content in either the 327 $a or the 327 $b.
- Fixed position fields cannot be modified using the extension loader (extension packs) at this time.
- When creating an OCLC Connexion import profile in a Network Zone member institution with the **Use NZ** option selected, the **Use NZ record** option is used upon finding a match. Currently, there is no possibility to select the **Merge**, **Overlay**, or **Do not import** options instead.

Data Services

The Alma February Central KnowledgeBase and Community Zone package was applied to the Alma environments.

Library of Congress Authorities Community Zone Updates

The following are the Library of Congress Subject authority updates for the period of February 5th through February 24th:

- Number of records updated: 263
- Number of records added: 192
- Number of records deleted: 15

The following are the Library of Congress Name authority updates for the period of February 5th through February 24th:

- Number of records updated: 14702
- Number of records added: 23450
- Number of records deleted: 389

The following are the Canadian name authority file updates for the period of February 5th through February 24th:

- Number of records added : 3220

New Electronic Collections Added to the Alma CKB

The following packages were added to the Alma Community Zone from February 1st 2016 through February 28th 2016:

- ebrary Social Sciences Subscription

- Elsevier Science Direct Open Access Books
- Elsevier Science Direct Open Access Journals
- Elsevier SD Book Series Package - Methods in Enzymology (1955-1999)
- Elsevier SD Book Series Package - Methods in Enzymology (2000-ongoing)
- man_EZB: Lexis-Nexis Jurion
- man_EZB: WISO Praxis Presse (via ReDI)
- ProQuest British Periodicals - British Periodicals Collection IV
- ProQuest Harper's Bazaar Archive
- ProQuest Historical Newspapers: Chinese Newspapers Collection
- ProQuest Historical Newspapers: The American Israelite
- ProQuest PAO Periodicals Online Foundation Collection 2
- ProQuest Periodicals Archive Online Jisc Collection 2
- ProQuest Periodicals Archive Online JSTOR Titles
- ProQuest Women's Magazine Archive
- ProQuest Women's Magazine Archive I
- Sage Clinical Medicine Backfile 2016
- Sage Clinical Medicine Package 2016
- Sage Complete Deep Backfile 2016
- Sage Deep Backfile Upgrade 2016
- Sage Health Sciences Backfile 2016
- Sage Health Sciences Backfile Upgrade 2014
- Sage Health Sciences Package 2016
- Sage HSS Backfile 2016
- Sage HSS Backfile Upgrade 2016
- Sage HSS Package 2016

- SAGE Knowledge A-Z (All Titles)
- Sage Premier 2008 For Ntu
- Sage Premier 2016
- Sage STM Backfile 2016
- Sage STM Backfile Upgrade 2016
- Sage STM Package 2016
- SpringerLink Open Access eBooks
- Wageningen Academic Publishers eBooks
- WestlawNext Campus Research Law + News + Business
- Wiley Online Library Database Model

Note: No new external resources were added for this release.