Alma July 2017 Release Notes

The Soul of Alma
Collaboration

This Alma release provides numerous new features and enhancements. Some of these enhancements are a result of Idea Exchange or NERS initiatives.

Download a PDF of the Release Notes - Note that the PDF includes the online help pages that describe the core functionality of the new features.

Make the Most of This Release

<table>
<thead>
<tr>
<th>Action Items</th>
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</thead>
<tbody>
<tr>
<td>□ Advanced Search Options Expanded – This enhancement (NERS request 4057) provides new possibilities for querying your catalog and inventory, using an expanded set of search operators.</td>
</tr>
<tr>
<td>□ Linked 880 Fields in Bibliographic Records – With the new feature, Alternate Graphic Representation (880) fields can also be used as fully fledged access points for purposes of authority control. This enables greater flexibility and control in maintaining your multilingual bibliographic records.</td>
</tr>
<tr>
<td>□ Prevent Reading Room Loans at Regular Desks – Are you making use of reading rooms in Alma? You can now easily manage open shelf items for reading room use only. This way, you can leave items on the open shelf, but allow them to be loaned only in reading rooms.</td>
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</table>
## Action Items

- **New Linked Account Rules Options** – Libraries that make use of fulfillment networks and linked accounts can now keep copied user account expiry and purge dates in sync with the original user account dates. Just use the new option to have every user account refresh also update the expiry and purge dates.

## What's New

The following sections present the new and changed features in this release of Alma.

### New Alma User Interface

- The new Alma user interface is now available on all institution sandboxes. For instructions on enabling the new UI for your institution's sandbox, see [Enabling Alma's New UI for Your Institution](#). For general information on Alma's new user interface, see [What's New in Alma's New User Interface](#).

- A "sneak peek" of the new Alma user interface is available from the classic Alma UI (on production environments). Click the **New UI Preview** button in the top-right corner of Alma to view selected pages of the new Alma UI.

- Note that as a result of preparations for the new Alma UI, some fields in the classic UI may have shifted position on the page. We will not report these cases for the classic UI.

### Acquisitions

- **Acquisitions Enhancements** – Several enhancements were made to the Acquisitions functional area for the July release.
Resource Management

- **Controlled Vocabulary Lists Filtered Dynamically** – In the MD Editor, the controlled vocabulary lists that appear are now dynamically filtered beginning with the first character that you type in the subfield.
- **MD Editor Usability** – The usability of the MD Editor was enhanced with a number of new developments.
- **Metadata Profile Updates** – A number of bibliographic and authority changes were made to the metadata profiles.

**Idea Exchange:** **Suppressed Record Identification Expanded** – The identification of suppressed records in different areas of Alma was expanded.

**NERS Enhancement (Request ID 4057): Advanced Search Options Expanded** – Certain advanced search query options were expanded to include **Not Contains Keywords, Not Contains Phrase, and Is Not Empty**.

- **Linked 880 Fields in Bibliographic Records** – Additional linked 880 field features, such as unlinking and changing the scripts, were implemented.
- **880 Field Implemented as an Access Point** – The 880 field can now be used as an access point with all its related capabilities.
- **Importing an EAD as a New Top-Level Collection** – You can now use EAD files as an exchange format for importing into Alma to create top-level collections with their sub-collections.
- **Additional Resource Management Enhancements**

Fulfillment

- **New Options in Fulfillment Configuration Utility** – The Fulfillment Configuration Utility was expanded to include request- and booking-related parameters.
- **Mark Work Order as Done When Using a Self-Check Machine** – You can now receive an ordered item (from a vendor) using a self-check machine.
- **Prevent Reading Room Loans at Regular Desks** – An institution may now specify that an item that is for use only in a reading room may be loaned only at a desk that is defined as a reading room desk.
- **Additional Fulfillment Enhancements**
NOTE: Since February 2016, it is possible to configure Alma to send a single overdue or lost item notification to a patron listing all of the patron's overdue or lost loans. If this option is configured (simply by setting the Fulfillment Other Settings configuration parameter `switch_to_overdue_and_lost_loan_new_job` to `True`), the patron receives a single notification, rather than multiple notifications, for each notification type. Note that if you have customized your previous notifications, you will need to customize the new notifications, **Ful Overdue And Lost Loan Letter** and **Ful Overdue And Lost Loan Notification Letter**. For instructions on customizing letters, see [Configuring Alma Letters](#).

Although support for multiple notifications will continue and this functionality will not be deprecated, Ex Libris will develop new features only for the aggregated notification method going forward.

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**Collaborative Networks**

- **New Linked Account Rules Options** – The Linked Account Rules page contains two new parameters in the Output Parameters section.

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**Analytics**

- **Assigned To Added to Borrowing and Lending Requests** – The **Assigned To** dimension was added to the Borrowing Requests and Lending Requests subject areas.

- **Support for COUNTER Type JR5 Added to Analytics** – To support COUNTER type JR5, the **Usage Data Details JR5** dimension was added to the Usage Data subject area.

- **Portfolio Modification Date Added to E-Inventory** – The **Portfolio Modification Date** dimension was added to the E-Inventory subject area.

- **Additional Analytics Enhancements**

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**APIs**

- **Idea Exchange:** A new API that allows you to create a user fine/fee is now available. For detailed information, see [https://developers.exlibrisgroup.com/alma/apis/users](https://developers.exlibrisgroup.com/alma/apis/users).

- The e-collections linked to bibliographic records can now be retrieved using the following syntax: `GET /bibs/mms_id/e-collections`
The Get Users API now enables fetching copied user records (linked accounts in other institutions) based on the `SOURCE_LINK_ID + SOURCE_INSTITUTION_ID` fields. The syntax is: `GET /almaws/v1/users/{user_id}?source_institution={institution_id}`. It also allows fetching the source record based on the linking ID, using the syntax `GET /users/x?user_id_type=linking_id`. The linking ID information was added to the Get Users API. See [https://developers.exlibrisgroup.com/alma/apis/users](https://developers.exlibrisgroup.com/alma/apis/users).

A new API that allows you to update the due date of a loan is now available. For detailed information, see [https://developers.exlibrisgroup.com/alma/apis/users](https://developers.exlibrisgroup.com/alma/apis/users).

An input parameter to all web services (`lang=XX`, where XX is the two-letter language code, such as `en` for English or `de` for German) now enables selecting the language in which response texts are generated for all APIs. The API response is now created according to the requested language. For detailed information, see [https://developers.exlibrisgroup.com/alma/api](https://developers.exlibrisgroup.com/alma/api).

The `external_id` field was added to the Get Jobs Instance API.

The reading list citation API now returns the following additional fields. `Visibility` and `sipx` fields are Leganto-only.

- `due_date`
- `license_type` – SIPX, SELFDECLARED, CREATIVECOMMONS, or CLA
- `visibility_start_date` – Citation appears in Leganto
- `visibility_end_date`
- `material_visibility_start_date` – Citation material's (uploaded file or electronic article) accessible from Leganto
- `material_visibility_end_date`
- `sipx_doc_id` – SIPX-related information
- `sipx_user_price`
- `sipx_list_price`
- `sipx_funded`
- `dcs_doc_id` – DCS related information
- `source1 ... source 10` – Taken from the values added in the last release on the Edit Reading List page

The reading list section API now returns the following additional fields. This API is Leganto-only.

- `start_date`
- `end_date`
- `visibility` – true/false
- * `tags` - `type` – PUBLIC or LIBRARY
- * `tags` - `description` – Tag code
Content Operations

- Library of Congress Authorities Community Zone Updates
- New Electronic Collections Added to the Alma CKB
- New External Search Resources

Known Issues

There are no known issues for the July release.

Next Release Sneak Preview

View a list of the features that are planned for the next Alma release.
Acquisitions - July 2017 Enhancements

- You can now receive an ordered item (from a vendor) using a self-check machine if your circulation desk contains an acquisitions department. This is a special case of the more general feature Mark Work Order as Done When Using a Self-Check Machine in Fulfillment. For more information, see Self-Check Machines.
Resource Management - July 2017 Enhancements

Controlled Vocabulary Lists Filtered Dynamically

In the MD Editor, the controlled vocabulary lists that appear are now dynamically filtered beginning with the first character that you type in the subfield. See the illustrations below.

![Dynamically Filtered Controlled Vocabulary List After Typing in the Subfield]

MD Editor Usability

The MD Editor was enhanced with the following features:

- Identify who last edited or modified a record
After a cataloger has saved a change to a record, the information provided above the record dynamically changes to display the name of the operator who changed the record and the date and timestamp of the change.

![Record Saved at 13:51:23. You have 4 warnings in your record](image)

**Modified by Operator Name and Date and Timestamp**

- Present only one duplicate warning when saving a record

When a duplicate record is saved in the MD Editor, a Confirmation Required warning message (see below) now appears only once. As you continue to work on the same record and click **Save**, the pop-up Confirmation Required warning message does not repeatedly appear.

![Confirmation Warning Required Message](image)

**Confirmation Warning Required Message**

- Deactivated the automatic switch to the Alerts tab when viewing information in the Info tab

The system no longer automatically switches to the Alerts tab from the Info tab when an auto-save of the record you are working on finds validation errors.

- Flexible Cursor Placement When Editing a Field

Now you can position your cursor anywhere within a field to begin editing. Previously, it would jump automatically to the end or beginning of the field, depending on the field type.

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**Metadata Profile Updates**

The Alma metadata profiles were updated with the following:

- **MARC 21 bibliographic** – Update No. 23, November 2016
- **MARC 21 authority** – Added subfield 0 to the 377 field
- **MARC 21 holdings** – Added subfields s, t, u, x, and z to the 852 field
GND authority – Added subfield 0 to the 377 field

UNIMARC bibliographic:

- 3rd edition – Updates 2012 and Updates 2016
- LDR position 8 – Replaced the value "#" with " "

100 $a:

- Added value x (=not applicable) to positions 17-19
- Removed value # (=blank) for positions 18-19
- Renamed description to Additional Character Sets for positions 30-33

104 $a:

- Replaced the value 1 (one) with l (lowercase L) for positions 4-7

110 $a:

- Replaced the value 1 (one) with l (lowercase L) for position 3

- Updated positions 4-6 each with a drop-down list containing the following values:
  - a – bibliography
  - b – catalogue
  - c – index
  - d – abstract or summary
  - e – dictionary
  - f – encyclopaedia
  - g – directory
  - h – yearbook
  - i – statistics
  - j – programmed texts
  - k – reviews
  - l – laws and legislation
  - m – law reports and digests
  - n – legal articles
  - o – legal cases and case notes
  - p – biography
- r – literature surveys/reviews
- t – cartoons or comic strips
- z – other kinds of contents
- # – position value not needed

- 115 $a$, position 7:
  Replaced the value \( z \) = Motion pictures and filmstrips - none of these \( a = 8\)mm with \( a = \) Motion pictures and filmstrips - 8mm
  
  Replaced the value \( l \) = Slides - 2 x 2 in. (5 x 5 cm.) \( r = 8 \times 10 \text{ in.} (20 \times 25 \text{ cm.}) \) with \( l = \) Slides - 2 x 2 in. (5 x 5 cm.)
  
  Added the value \( r \) = Transparencies - 8 x 10 in. (20 x 25 cm.)
  
  Added the value \( z \) = none of these

- 115 $a$, position 8:
  Replaced the value 1 (one) with l (lowercase L)

- 115 $b$, position 2:
  Replaced the value 1 (one) with l (lowercase L)

- 116 $a$, position 2 added the following values:
  - a = canvas
  - b = bristol board
  - c = cardboard/illustration board
  - d = glass
  - e = synthetics (plastic, vinyl, etc.)
  - f = skins (leather, parchment, vellum, etc.)
  - g = textiles (including man-made fibres)
  - h = metal
  - i = paper
  - j = plaster
  - k = hardboard
  - l = porcelain
  - m = stone
n = wood
u = unknown
v = mixed collection
z = other

116 $a:

Position 10-16 Technique (prints) is now 10-15

121 $b, position 5 added the following values:

- 5 = 5/8 cover
- 6 = 6/8 cover
- 7 = 7/8 cover
- 8 = completely covered by clouds

121 $b, position 5 changed the following values:

- 1 = 1/8 cover
- 2 = 2/8 cover
- 3 = 3/8 cover
- 4 = 4/8 cover

121 $b, position 6-7 - Mean value of ground resolution were split into:

- Position 6 - Mean ground resolution values
  - = less than 1 centimetre
  19 = numeric value
  + = greater than 9 kilometres
  x = not applicable

- Position 7 - Metric unit codes
  c = centimetres
  i = decimetres
  m = metres
  d = decametres
- h = hectametres
- k = kilometres
- x = not applicable

- 121 $b, position 8 was removed

- 123 $g, position 0 added the following values:
  - w = west
  - e = east
  - n = north
  - s = south

- 130 $a, position 2:
  Replaced the value 1 (one) with l (lowercase L)

**NOTE:** If you have customized any of the UNIMARC controlled data fields (1XX fields) that utilize a form editor when cataloging records, you will need to revert that customization in order to access the updates.

- 532 2nd indicator – Added the value 3

### Suppressed Record Identification Expanded

**Idea Exchange:** The identification of suppressed records in different areas of Alma was expanded. The manner in which suppressed records are identified varies. The following methods are used:

- Suppressed record icon
- New column with the heading **Suppressed**
- Text indicating **Yes** for suppressed
- Tooltips indicating the levels of suppression, such as **Holdings record suppressed**, **Bibliographic record suppressed**, or **Location's holdings suppressed**, since different levels may be suppressed

The following lists each of the changes that were made:

- Repository Search Results – Physical Titles – Availability
Physical Titles Search Results – Availability

Suppressed Record Tooltip

- List of Holdings

List of Holdings Suppressed Column

- Simple Record View
Suppressed Record Simple Record View

- Electronic Collection Editor

Suppressed Record Shown in the Electronic Collection Editor

- Electronic Portfolio Editor
Suppressed Record Shown in the Electronic Portfolio Editor

- PO Line Search Results

Suppressed Record Shown in the PO Line Search Results

- Physical Item Editor

Suppressed Record Shown in the Physical Item Editor
NERS Enhancement (Request ID 4057): Advanced search query options were expanded to include Not Contains Keywords, Not Contains Phrase, and Is Not Empty. In addition, some conditions now have other query options such as Not Equals, Is Empty, Starts With, and Equals. See the table below for a list of these changes and the Select the condition logic for your search step in the Performing an Advanced Search for a Repository Item section for more information.

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**NOTE:** Currently, there is a known issue with the query options refreshing when you make changes to your selections for Title (see below).
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Ex Libris, a ProQuest Company
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<td></td>
<td>- Title – Not Contains Keywords, Not Contains Phrase, Is Not Empty, Not Equals, and Is Empty</td>
</tr>
<tr>
<td></td>
<td>- Names – Not Contains Keywords, Not Contains Phrase, Is Not Empty, Not Equals, and Is Empty</td>
</tr>
<tr>
<td></td>
<td>- Series – Not Contains Keywords, Not Contains Phrase, Is Not Empty, Not Equals, and Is Empty</td>
</tr>
<tr>
<td></td>
<td>Electronic Collection</td>
</tr>
<tr>
<td></td>
<td>Electronic Portfolio</td>
</tr>
</tbody>
</table>
### Find Conditions
- Other System Number – Not Contains Keywords, Not Contains Phrase, Is Not Empty, Not Equals, and Is Empty
- Electronic location and note – Not Contains Keywords, Not Contains Phrase, Is Not Empty, Starts With, Equals, and Not Equals

### Conditions

<table>
<thead>
<tr>
<th>Conditions</th>
<th>Conditions</th>
<th>Conditions</th>
</tr>
</thead>
</table>

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**NOTE:**
This feature will be available in July after the re-indexing job has completed.

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**Linked 880 Fields in Bibliographic Records**

Expansion of the 880 linked field functionality was announced in the June 2017 release (see [Linked 880 Fields in Bibliographic Records](#)) with some features still under construction. These features were completed for the July release. Specifically, the following features were implemented:

- **Show Linkage Information**

  When fields are linked using the **Alternate Graphic Representation** option in the **Edit** menu of the MD Editor, the $6 information that is created can now be viewed and edited when you select **Show Linkage Information**.

  **NOTE:**
  The Show Linkage Information is a sticky feature that will remain selected from session to session until you clear this selection.

- **Unlink Fields**

  For 880 fields that were previously linked, you may now choose to remove the link using the **Unlink Fields** option that is part of the **Alternate Graphic Representation** feature in the MD Editor.

- **Change Script**

  For linked 880 fields, you may now change the script option from the one that was previously selected to any of the others available in the list. A script change can be applied to either of the linked fields.
The known issue with right-to-left languages (Hebrew, Arabic, and Persian) identified in the June release was fixed.

880 Field Implemented as an Access Point

The 880 field can now be used as an access point with all its related capabilities. This option needs to be configured by Ex Libris Support. If your institution does not already have this capability, contact Ex Libris Support for assistance. After your institution has been configured for this capability, the following functions are available for the linked 880 fields:

- F3 headings support
- Preferred term correction
- Browse bibliographic headings
- Authority control task list record management
- Editing the 880 field's indicators
- Publishing the 880 field's non-preferred terms to Primo

See Working with the 880 Field Implemented as an Access Point for more information.
Importing an EAD as a New Top-Level Collection

You can now use EAD files as an exchange format for importing into Alma to create top-level collections with their sub-collections. To support this feature, the new Collection import profile type was created. For more information on creating a Collections import profile, see Managing Import Profiles.

Additional Resource Management Enhancements

- The browse bibliographic headings index changes announced in the June 2017 release will be fully available after the completion of the July re-indexing. See Browse Bibliographic Headings Indexes for more information.
- You can now reorder the list of collections by dragging and dropping.
- For institutions that are configured to use a linking record ID placed in $0 of the 650 field and a matching ID located in the 035 $a of the authority record in order to use originating system IDs for linking bibliographic records to authority records, an enhancement was made for handling records that are missing the $0 of the 650 field when F3 is used in the MD Editor and an authority headings record is selected. Now, if the authority has a 035 $a with any prefix, and an identifier that equals the originating system ID, it will be copied to $0. See Authority Control Based on Multiple Authority Identifiers in a Bibliographic Record for more information.
- A non-qualified DC record can now be presented in MARC format with Z39.50.
- The Activation status field was added to the Electronic Inventory Enrichment section of the General publishing profile. Possible values are Available and Not Available.
- The Job History section of the Publishing Information page now displays only jobs that have run since January 2017 (to resolve an issue of load time for this section).

The following search indexes were added:

- 072 $a – Subject Category Code
- 773 $w – Other System Number
- 775 $w – Other System Number
- 300 $b – Other Physical Details
- 300 $e – Accompanying Material

The following additional electronic collection attributes were to the search index:

- Linking Level
- Interface Name

As part of the re-indexing process for the July 2017 release, a new key is being created that will enable the MMS - Build Record Relations linking job (Monitor Jobs > Scheduled tab > MMS - Build Record Relations) to successfully create and maintain boundwith links. After the July re-indexing has completed and,
subsequently, the first MMS - Build Record Relations linking job has been executed and run successfully, institutions with broken boundwith links should no longer have broken links.

- For sorting titles by creator, a single creator field is used for sorting from the following list of fields (in priority order): 100, 110, 111, 700, 710, 711.
Fulfillment - July 2017 Enhancements

New Options in Fulfillment Configuration Utility

The Fulfillment Configuration Utility now includes request and booking related parameters. The utility now also reports the Fulfillment Unit, Rule, Terms of Use and Policies that will control an item's requesting and booking. For more information, see Viewing Fulfillment Configuration Information.

Mark Work Order as Done When Using a Self-Check Machine

If your circulation desk is associated with a self-check machine and the relevant department, you can now select that a work order on an item is marked Done when you check in an item using the self-check machine. As noted in Acquisitions, this can be used to, for example, receive an item at a self-check machine at a circulation desk that contains a receiving department. For more information, see Self-Check Machines.

Prevent Reading Room Loans at Regular Desks

An institution may now specify that an item that is for use only in a reading room may be loaned only at a desk that is defined as a reading room desk. A new policy value, In Reading Room Only, was added to the Is Loanable policy type. For more information, see Adding Fulfillment Policies.

When loaning from a circulation desk not defined as a reading room desk, if the item's Is Loanable policy is In Reading Room Only, the staff will receive a new block message, This item can only be loaned from the reading room desk. The block can be configured in Alma Block Preferences to allow an override by Operator/Manager. See Editing Block Preferences. The block is also applicable to loaning from a self-check machine.

Additional Fulfillment Enhancements

- When rolling over courses using the course loader integration profile, you can now choose whether to roll over section tags separately from citation tags. See Configuring Course Loading.
- See the additional fields added to the reading list citation and section APIs in APIs.
- License Type appears for relevant citations on the Edit Reading List page. Possible values are: CLA, SIPX, a creative commons type (these types vary by region), or self-declared.
License Type

- You can now edit additional fields of a citation's copyright attributes at any time, even while the course is in progress (see Automatically Managing a Citation's Copyright Status). All fields except for Available From may be edited. After saving the information:
  - If there is no copyright request, a request is created.
  - If there is a request in process, you are prompted as to whether you want to cancel the existing request and create a new, updated request.
  - If there is an approved request, you are prompted as to whether you want to update the existing request (starting from today) or create a new request.

In all cases, if the updated/new request is not automatically approved, Alma creates an approval task for manual handing by a librarian.

- The filter Citation Type is now called Material Type on the Edit Citations and Edit Reading List pages. In addition, List Visibility was added as a filter on the Edit Citations page.

- The Reading lists - unassigned task was split into Reading lists - unassigned - Complete and Reading lists - unassigned - Incomplete. Incomplete was added to the Status filter on the Reading Lists Task List page (see Managing Reading Lists). Incomplete matches any reading list not marked as Complete (including Inactive or Declined).

- The Overdue and Lost Loan Job may be run without creating blocks or fines and fees, and without generating notifications. The affected loans will be marked to prevent them from getting the same notifications a second time when the job runs again. A new Overdue and Lost Loan Profile step, Status Update, has been added to the row actions. This is used to run the status update process for a single Overdue and Lost Loan profile. For more information, see Configuring Overdue and Lost Loan Profiles. The job can also be run for all Overdue and Lost Loan profiles. Loans Overdue Notification Status Update is visible on the Fulfillment Advanced Tools for users with the Fulfillment Administrator role. See Loans Overdue Notification Status Update.
The notes icon in loan and return lists of Patron Services is now clickable, leading to the notes display page. In addition, the notes icon was changed to the green check mark icon which is the Alma convention for notes columns.

The fines/fees notification letter has been added to the list of letters that may be enabled/disabled for a user in the Selected Patron Letters in Manage Users and on the Primo My Account page. See Selected Patron Letters.

A new customer parameter, **ful_network_default_pickup_inst**, controls the initial value of the pickup institution field in a fulfillment network request form.

- If the parameter's value is set to blank, the initial value of the pickup institution is blank.
- If the parameter's value is set to patron, the initial value is set to the patron's institution, meaning that linked account users will show the patron's source institution.
- If the parameter's value is set to local, the initial value is set to the local institution, as it has been in the past. This is the default.
  For more information, see Configuring Other Settings (Fulfillment).

Idea Exchange: The calculation of the fulfillment unit, **On shelf policy**, was changed for serial titles. For each item, if there are available items that have the same description and are requestable, then the request link should be suppressed.

A new customer parameter, **renew_all_loan_threshold**, controls how many items may be renewed simultaneously when using the Renew All action from the Primo My Account. Setting this parameter to anything higher than 0 defines that number as the maximum number of loans that may be renewed simultaneously with the Renew All action. If the user attempts to renew more loans than the threshold, Alma returns a new error code, 0037, and a new (translated) error message: **Renew All is allowed for loan lists with no more than X loans, where X is the customer parameter value.** The default value of 0, means no limit on the number of loans, which is the prior functionality. For more information, see Configuring Other Settings (Fulfillment).

The borrowing request cancellation notice to the patron now includes the full DC metadata if the request is linked to a resource sharing request. This is similar to the <request_metadata> section in the lending requests slips.
Collaborative Networks - July 2017 Enhancements

New Linked Account Rules Options

The Alma Linked Account Rules page contains two new parameters in the Output Parameters section. The parameters, **Refresh Expiry Date** and **Refresh Purge Date**, control the way Alma recalculates the expiry date and purge date of a linked account.

When the parameters are set to **No**, which is the default, Alma recalculates those dates only when linking a new account or when an account has expired.

When the parameters are set to **Yes**, the corresponding date is recalculated each time the linked record is refreshed from the source institution.

For more information, see [Configuring Linked Account Rules](#).
Analytics - July 2017 Enhancements

Assigned To Added to Borrowing and Lending Requests

The **Assigned To** dimension was added to the Borrowing Requests and Lending Requests subject areas. It contains fields relating to the user details of the staff member to whom the request is assigned.
Support for COUNTER Type JR5 Added to Analytics

To support COUNTER type JR5, the **Usage Data Details JR5** dimension was added to the Usage Data subject area.

The JR5 report is the number of successful full-text article requests by year-of-publication (YOP). The JR5 counter is calculated per period (year/several months), unlike all other counters, which are calculated per month.

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**Portfolio Modification Date Added to E-Inventory**

The Portfolio Modification Date dimension was added to the E-Inventory subject area. This allows you to create reports for the date a portfolio was modified.
### Additional Analytics Enhancements

- The **Copyright Status** field was added to the Lending Request Details dimension of the Lending Requests subject area. This field displays the copyright status – No copyright restriction, Copyright approved, or Copyright not approved. This field already exists in the Borrowing Requests subject area.

- In order for the following two fields in the **Link Resolver Usage** subject area to have data, you must select the **Include Representation services in link resolver statistics** check box (Configuration > Fulfillment > Discovery Interface Display Logic > Other Settings):
  - Number of Digital Services
  - Number of Digital Clicked Services

- The following changes were made to the **Usage Date** dimensions in the **Usage Data** and **Cost Usage** subject areas:
  - The **Periods** dimension of the **Cost Usage** subject area was renamed to **Usage Date**.
  - The fields of the **Usage Date** dimension in both subject areas have been changed to match similar date fields in other subject areas.
  - The **Usage Date Filter** field was added.
Fields that are deprecated were marked to be deprecated.
Content Operations - July 2017 Enhancements

Library of Congress Authorities Community Zone Updates

The following are the Library of Congress subject authority updates for the period of May 19th through June 15th:

- Number of records updated: 125
- Number of records added: 215
- Number of records deleted: 30

The following are the Library of Congress name authority updates for the period of May 19th through June 15th:

- Number of records updated: 15184
- Number of records added: 24598
- Number of records deleted: 479

The following are the Canadian name authority updates for the period of May 19th through June 15th:

- Number of records updated: 77
- Number of records added: 1368
- Number of records deleted: 12

The following are the Library of Congress Genre/Form Terms (LCGFT) updates for the period of May 19th through June 15th:

- Number of records updated: 4
- Number of records added: 14

New Electronic Collections Added to the Alma CKB

The following electronic collections were added to the Alma Community Zone from May 22nd through June 18th:

- 19th Century UK Periodicals: Series 2 - Empire
- 20th Century African-American Poetry
New External Search Resources

The following external search resources were added to Alma Community Zone for the July release:

- CSIC Archive
- CSIC Bibliographic
- Universita di Roma Tre
- University of Wales Trinity Saint David
Next Release Sneak Preview

Acquisitions

- Additional Reporting Code Fields – Two additional reporting code fields will be added to PO lines and invoice lines. Additional configuration tables will support this. If these tables are empty, the two additional fields will not display in the PO line record. Note that related Analytics capabilities will follow in a later release.

Resource Management

- Update to General Publishing Configuration – A new check box, **Exclude suppressed records**, will be added to the **Add Holdings Information** section of the General publishing profile.
- Browse Call Numbers – It will be possible to filter the browse call number by library and location.
- Auto Romanization of 880 (linked fields) – The first stage of the auto Romanization of 880 fields will be supported.

**Idea Exchange:** Enhancements to F3/Heading Lookup – It will now be possible to browse to the next/previous page when looking up authority headings. Twenty entries will display on a page, which will have separate tabs for authority and bibliographic headings.

Digital Resource Management

- New Status Email – A new status email will be sent regarding open/active deposits. The email can be configured to be sent on a weekly or monthly basis. Open deposits will differentiate between those waiting for input, draft, in process, and so forth.
Fulfillment

- Display RFID Security Status for Item – When fetching an item barcode using an RFID call, the retrieved item will have an additional label of **RFID Status**, which will be **Checked Out** or **Available**.

Resource Sharing

- Resource Sharing Limits – It will now be possible to define two types of resource sharing limits per user group: active requests limits and per year limits.

Collaborative Networks

- **Idea Exchange**: Linking Institution Zone to Network Zone Match Based on Prefix Qualifier – Linking from the Institution Zone to the Network Zone will be able to take into account a prefix qualifier when matching records. Match methods will allow you to define a **System Identifier Prefix**.
- Item Description Rules – It will be possible to define item description rules on the level of the network, allowing member institutions the option of inheriting these rules.

Analytics

- Additional Fields in the Course Reserve Subject Area – Additional fields will be added to the Course Reserves subject area.
- PO Line Material Type Field – This field will be added to all subject areas in which there is information about the PO line. This will greatly increase the effectiveness of cost usage reports.

Administration

- Retention Policy for Audit Trail/History – A new parameter will define the number of days that the audit trail/history of user record changes will be retained. The anonymization job will clean the audit records accordingly.
- One-Time Login to Primo – The August release will see support for a one-time login to Primo.
APIs

- New API for Deleting Bibliographic Records – A new API will enable the deletion of bibliographic records. The same validations and procedures that are run when deleting a bibliographic record from the UI will apply to this API.

- Create/Update/Delete API for Electronic Portfolios – A new API will enable the creation, update, and deletion of electronic portfolios.