



Alma March 2019 Release Notes

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Document released: March 2019

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Alma March 2019 Release Notes

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Make the Most of March's Release

Action Items
☐ OASIS Availability, Pricing, and Ordering – You can now configure OASIS as a target for checking pricing and availability from within Alma. It is also possible to push a PO line from Alma into OASIS without leaving the Alma interface.
☐ Managing Vendor Accounts at the Library Level – With this release, it is possible to assign Vendor Account Manager roles, allowing the assigned operator to manage only vendor accounts. The role can be assigned at the scope of a specific library.
☐ Include an Item Description in the Subject of the PO Line Claim Letter – Claim letters can be enhanced to include more information about the claimed resource in the email subject.
☐ Configure Images for Collection Discovery Lobby – You can significantly improve showcasing their special collections by manually selecting high quality images to be displayed in Primo VE's collection discovery lobby.
☐ XSL Indication Rules Added to Support Dublin Core – If you are cataloging in Dublin Core, you can filter your Dublin Core records with the same advanced capabilities that are available for MARC records, using XSL indication rules.
☐ General Electronic Service Availability Rules – General electronic services that are displayed in the Get It tab can now be configured to appear only for specific libraries/locations or for specific item types.
☐ Asynchronous BLDSS Requests – It is now possible to use the BLDSS APIs for sending resource sharing requests to BLDSS without first running a successful locate.
☐ Delete Completed Resource Sharing Requests – With this release, you can set the system to remove old and completed resource sharing requests.
☐ Perform Locate Based on Electronic Coverage – Fulfilling article resource sharing requests with document delivery is easier now, with the option to set the system to display accurate electronic resource availability on the lender side, based on local coverage for the electronic resource.

For information on Primo VE new release features, see the [Primo VE March 2019 Release Notes](#).

Reading List Set Changes

In the February release notes, we announced that a significant infrastructure change will be applied to reading lists that will greatly improve the reading list search function. This change was initially announced in the March release notes, but there were issues with it and it has been removed from the March release. It will be reinstated in one of the upcoming releases.

General Publishing – Full Publishing Improvements and New Republish Action

As part of our continued efforts to improve performance and efficiency, we are implementing changes to the general publishing process. These changes will ensure that your publishing jobs will complete more quickly and within predictable

timelines. The main effect of this improvement is that as of the April release, the General Publishing infrastructure will work in an incremental mode.

We recommend that you plan to test existing full publishing processes on your sandbox environments after the new function is released in April. Note the following:

- General publishing jobs that publish to an FTP server will have an option to include all records. This option will allow including the full set of records in the published FTP files. Existing FTP publishing profiles that were previously configured as full will have this option turned on by default.
- In cases where enriched information needs to be recalculated after enrichment configuration changes (such as a change in library name or update of normalization rules or enrichment options), records will not be republished with the new data. A new republish full index option will be available to force the records to be republished with the new data.
- OAI publishing profiles will always work in incremental mode and will also include deleted records. If the target to which you are publishing cannot process record deletions, you can use FTP publishing with the option to include all records described above. Another option is to use the new republish full index action to republish the whole set as new (this option will have the same result as the current full publishing mode).

Next Release Sneak Preview

[View a list of features](#) that are planned for the Alma April 2019 release.

Note

The Content Operations release notes are now located [here](#).

Next Release Sneak Preview (for April 2019)

Note

The features below are currently planned for the next release. However, some of these features may, for various reasons, not be included in this month's release, but rather in a future Alma release.

Acquisitions

- Create PO Line from "Check Availability and Pricing" – When using the Check Availability and Pricing tool to create a PO line in Alma, the price information will be automatically copied into the new PO line.
- Changing Funds in Invoice Lines – There will be enhancements related to the options for changing funds in invoice lines.
- "Wait" Mechanism for SUSHI Harvesting – Alma will support "Wait" for SUSHI harvesting. When receiving a response that indicates that the report will be available at a later time, Alma will set a trigger to automatically retry later.
- Usage Data Loader – The Usage Data Loader page will include a column that indicates the global success rate of the report type for that month.

Resource Management

- Support for Multicampus Portfolio Loader and Export – The portfolio loader and extended export will now support a multicampus environment. The portfolio loader Excel sheet will include AVAILABLE_FOR columns to represent the groups for which the portfolio is available.



- **Idea Exchange:** Edit Local Authority Record in the MD Editor – It will be possible to edit a local authority record while editing a bibliographic record.
- Authority Search and Display Improvements – The April release will see the first part of enhancements related to authority search and display.

Fulfillment



- **Idea Exchange:** Additional ID for Hold Request Management – An additional ID will be added to hold requests.



- **Idea Exchange:** Upload Excel for Library Opening Hours – It will be possible to update calendars by uploading an Excel spreadsheet.

Digital Repository

- Utility to Transfer Complex Files Using Script Templates – It will be possible to use document template scripts for migrating complex objects from remote repositories to Alma.

Analytics

- New Fields in the Fund Expenditure Subject Area – The **Fund Ledger Owner** will be added to the **Fund Ledger** folder. The **Invoice Owner** will be added to the **Invoice Line** folder in the Funds Expenditure subject area.

APIs

- Delete API – There will be a new Delete API for electronic collections/services/portfolios.

Main Features

DARA – Data Analysis Recommendation Assistant

DARA



is a new service for Alma that provides you with recommendations to improve your workflows and better optimize your usage of Alma. Currently, DARA is available to optimize your SUSHI vendors. DARA can determine when it is beneficial for you to create a SUSHI account and have usage information harvested automatically from the vendor. DARA guides you through the steps to implement the recommendation. For more information, see [DARA](#).

OASIS Availability, Pricing, and Ordering

March 2019 Acquisitions

The Check Availability and Pricing tool that was introduced in January 2019 is now available without intervention required from Ex Libris Support. The page enables Purchase Request Operators/Managers and Purchasing Operators/Managers to search ProQuest OASIS (Online Acquisitions and Selection Information System) for resources, view pricing information for the retrieved records, and—for purchasing operator/managers—place orders. The orders can now be placed simultaneously in Alma and OASIS in two new ways.

- From the Check Availability and Pricing page, selecting the **View in External Vendor** button takes you directly to OASIS where you can create an order. If the API is configured, the order in OASIS creates an accompanying PO line in Alma.
- From the Check Availability and Pricing page, selecting the **Create Order** button creates an Alma PO line. Once the PO line details are updated, the order can be sent directly to OASIS by selecting the **Integrate with OASIS** button on the Purchase Order Line Details page.

Watch the [Check Availability and Pricing at Select External Vendors \(OASIS and More to Come\)](#) video (3:32 min).

See [Check Availability and Pricing](#).

Include an Item Description in the Subject of the PO Line Claim Letter

March 2019 Acquisitions

The subject of the PO Line Claim letter (letter code: POLineClaimLetter) can now be configured. For all PO line types, the PO line number and title can be included in the email subject. If the PO line type is physical continuous, the item description can also be included. For non-predicted continuous orders, the expected received date can be included.

Managing Vendor Accounts at the Library Level

March 2019 Acquisitions

It is now possible to assign users a Vendor Account Manager role, allowing them to manage only the vendor accounts and not the entire vendor record. Vendor account management can be limited to the library level.

A vendor account manager in the scope of a library can view only vendor accounts whose vendor type is **Material Supplier** and are available for this scope. All vendor accounts in this scope can be edited. If a vendor account is available for two libraries and the user has the Vendor Account Manager role in either library, the user can see the vendor account. In order to edit or delete the vendor account, though, the user must have the Vendor Account Manager role in the scope of both libraries.

A Vendor Account Manager in the scope of the institution can view all vendors and edit all vendor accounts in any vendor. See [Managing Vendors](#).

Restore Record Version Privilege

March 2019 Resource Management

A new privilege, **Restore Record Version**, was created for the Cataloger, Catalog Manager, Catalog Administrator, and Cataloger Extended roles to restrict the ability to restore a previous version of a record in the MD Editor. By default, the Restore Record Version privilege is enabled for these roles—that is, no change to the existing functionality. See [View Versions](#) for more information. Contact Ex Libris Support if you want to implement this privilege/restriction for one or more of these roles.

SBN Authority Options

March 2019 Resource Management

Additional authority search options are available for SBN. See [Searching for SBN Authority Records](#) for more information. The Manage Location Information feature was added for authority records. See [Sending Location Information and Updating the UNIMARC 899 Field in Alma](#) for more information.

Related Record Physical Inventory for UNIMARC

March 2019 Resource Management SF: 00496741

Similar to the MARC 21 implementation, Alma supports the use of specific item information for UNIMARC. With this capability, you can control the display of specific holdings/items as indicated in the related record. This physical inventory information appears in the Primo Get It tab and in Alma repository search results when configured. See [display_specific_related_items](#) for the Alma configuration information.

Alternative Call Number Label

March 2019 Resource Management

The alternative call number label was changed to item call number throughout Alma.

006 Field in the MD Editor

March 2019 Resource Management SF: 00456037 00478243 00512659 00571206 00603487 00631463 00142357 00142859 00212475 00414812 00048900 00100246 00116044 00125472 00136308

The MD Editor form for the 006 field now correctly displays the options that correspond to the form of material that you select from the **Add form of material for 006** pop-up that appears when you create the 006 field. See the example below.

006 Form of material(0) m - Computer file/Electronic resource ▼	Undefined (1-4)	Target audience(5)
Form of item(5)	Undefined (7-8)	Type of computer file(3)
Undefined(10)	Government publication(11)	Undefined (12-17)

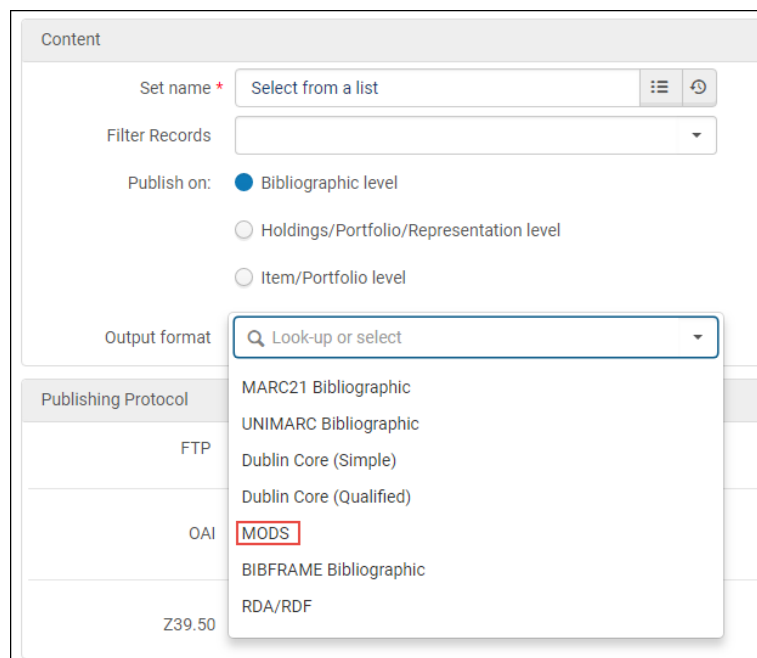
As part of this change, there is a new validation task for the MARC 21 and KORMARC metadata configurations called **Validation Form of Material MARC21 (Validation Form of Material KORMARC)** that was added to the **Marc21 Bib validation on save (Kormarc Bib validation on save)** process. This task was automatically added to the validation process except for institutions that have configured this process. For institutions that have configured the validation process, you need to manually add the **Validation Form of Material MARC21 (Validation Form of Material KORMARC)** task to the validation process. See [Editing Validation Processes](#) for more information.

Watch the [Metadata Editor: Edit the 006 Field in Context-Sensitive Form Editor](#) video (1:23 min).

Publishing Bibliographic Records in MODS Format

March 2019 Digital Resource Management

You can now publish bibliographic records in MODS format. To support this feature, the option to select **MODS** is now available from the **Output format** drop-down list when configuring publishing profiles ([Resources > Publishing > Publishing Profiles](#)).



The screenshot shows a web interface for configuring publishing profiles. The 'Content' section is active, showing a 'Set name' field with a dropdown menu, a 'Filter Records' dropdown, and 'Publish on' radio buttons for 'Bibliographic level', 'Holdings/Portfolio/Representation level', and 'Item/Portfolio level'. The 'Output format' dropdown is open, showing a search bar and a list of options: 'MARC21 Bibliographic', 'UNIMARC Bibliographic', 'Dublin Core (Simple)', 'Dublin Core (Qualified)', 'MODS' (highlighted with a red box), 'BIBFRAME Bibliographic', and 'RDA/RDF'. The 'Publishing Protocol' section shows 'FTP', 'OAI', and 'Z39.50' options.

MODS Output Format

Configure Images for Collection Discovery Lobby

March 2019 Digital Resource Management SF: 00601502

You can now manually select a group of images to appear in the Collection Discovery Lobby of your discovery interface. This feature is currently enabled for Primo VE users, including the option to **View in Discovery** from the Alma configuration page. The feature will be expanded to standard Primo users in the future. To support this feature, a new **Discovery** tab was added to the Collection Resource Editor ([Resources > Manage Collections > Edit Collection](#)):

Collection Resource Editor

Col05091245769

Col05091245769

PID 8114779260000301 Library Main Library Title Col05091245769

Description Collection for publishing 05091245769

General Sub-collections (0) Title List **Discovery** History

Manage Discovery Thumbnails

Delete Selected Delete All Select Upload

Creation Date
2018-10-03 09:56:24

Discover Tab

For more information, see [Working with Collections](#).

Improve Display of Multiple Values with the Same Label in Digital Viewers

March 2019 Digital Resource Management

The display of multiple values with the same label in the metadata of digital viewers was enhanced.

- For the Alma Viewer only – you can configure the Alma Viewer to hide repeated uses of the same label for each value under the label. Now the label appears once with the all of the values listed under it. To support this feature, the new **Hide Repeated Labels** check box was added to the configuration page for the Alma Viewer ([Configuration > Fulfillment > Discovery Interface Display Logic > Viewer Services > Alma Viewer](#)).

Service Details

Alma Viewer

Service Code AlmaViewer

Service Description Digital Version(s)

Service Details Service Availability Rules

Active Active

Service Code * AlmaViewer

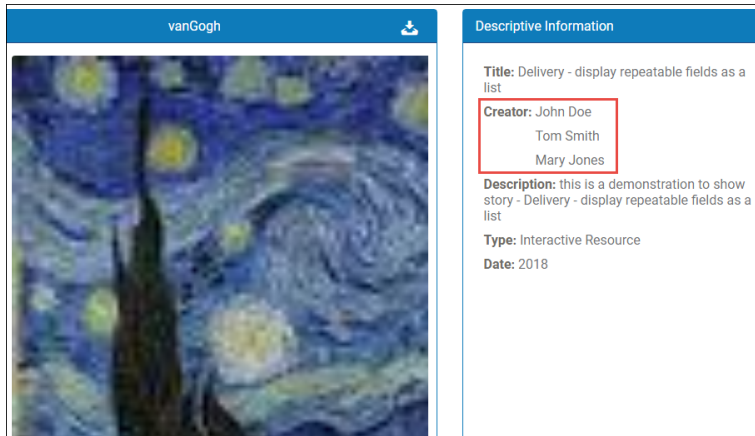
Service Name * Alma Viewer

Service Description Digital Version(s)

Hide Repeated Labels ☐

Hide Repeated Labels Checkbox

Select the check box to hide repeated labels and display the label once with the all of the values listed under it.

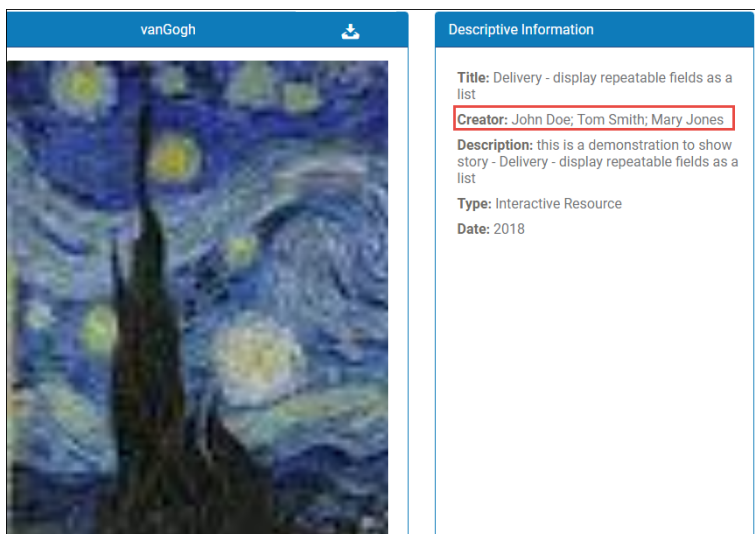


Hide Repeated Labels

- For all digital viewers – add a delimiter to a list of metadata with repeated labels. To support this feature, the new **Delimiter for Grouping Repeated Delivery Metadata** field was added to **Configuration > Fulfillment > Discovery Interface Display Logic > Other Settings**.

Delimiter for Grouping Delivery Metadata with Repeated Labels

Enter a delimiter in this field to display metadata with the same label separated by the delimiter.



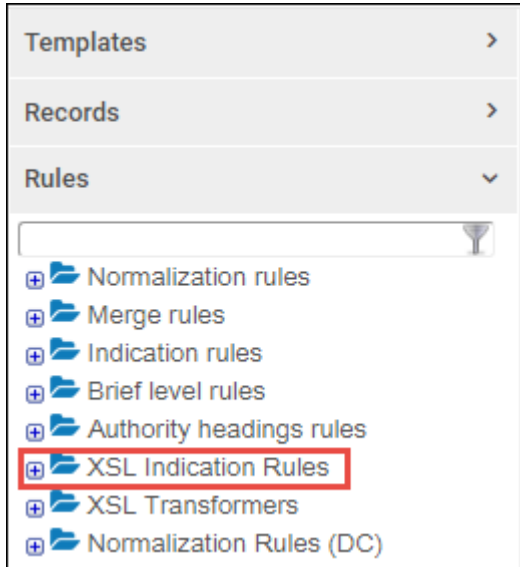
Separate a List of Metadata with a Delimiter

XSL Indication Rules Added to Support Dublin Core

March 2019 Digital Resource Management

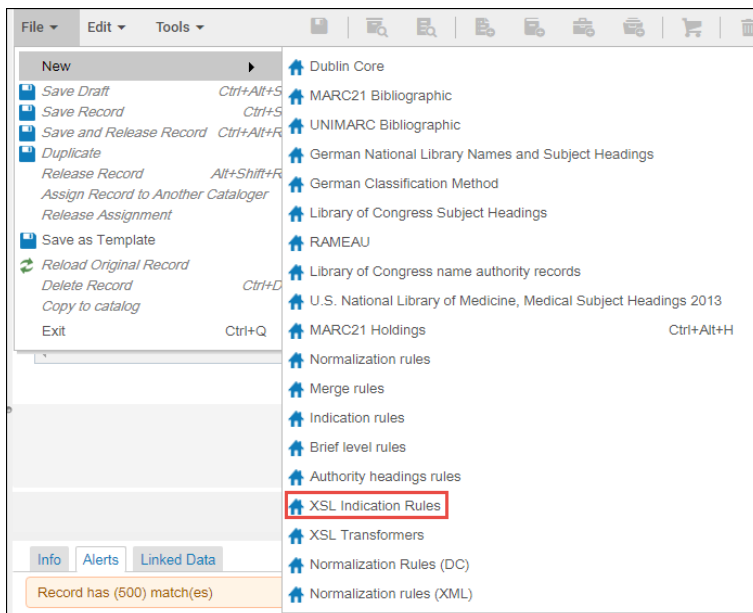
XSL indication rules were added to support bibliographic records in Dublin Core format. To support this feature, XSL indication rules are available for Dublin Core records in the following locations:

- In the MD Editor, under rules:



MD Editor Indication Rules

- In the MD Editor under the **File > New** menu:



MD Editor New Indication Rule

- In the **Filter out the data using** drop-down list of the Normalization and Validation tab, when configuring digital import profiles:

< Import Profile Details

General Import Profile

Profile Type Digital

Filter

Filter out the data using **XSL/General Indication Rule**

Normalization

Correct the data using **Add BIB to Collection**

Validation Exception Profile

Handle invalid data using **Dublin Core Metadata Editing On Save**

Digital Import Profile Indication Rules

- In the **Indication Rule** drop-down list, when filtering sets of digital titles:

< Set Details Cancel Submit

General Information

Set name * Digital Titles Set - filtered - 28/01/2019 10:26:13 AM IST

Description

Note

Set content type **Digital titles** Set type **Itemized**

Private ☒ Yes ☐ No Status ☒ Active ☐ Inactive

Creation date 28/01/2019 10:25:50 AM IST Created by exl_impl

Updated by exl_impl Content Origin Institution only

Set ID -

Filter set

Indication Rule * **XSL/General Indication Rule**

Filter Set Indication Rules

- In the **Filter Records** drop-down list, when configuring publishing profiles:

Content

Set name * Select from a list ⋮ ↺

Filter Records **XSL/General Indication Rule**

Publish on: ☒ Bibliographic level

☐ Holdings/Portfolio/Representation level

☐ Item/Portfolio level

Output format **MARC21 Bibliographic**

Publishing Profile Indication Rules

For more information, see [Working with Indication Rules](#).

General Electronic Service Availability Rules

March 2019 Fulfillment



Idea Exchange SF: 00486594 00162113 00054535 00092091 00096968 00113978

Library and location parameters are now available to be added to the availability rules for item and title level general electronic services. Additionally, the following parameters are available for item-level general electronic services so that the item metadata can be used to determine if the service is displayed:

- material_type
- item_policy - values are populated from the institution's Item Policy table. See [Configuring Item Policies](#).
- process_type
- base_status - values are **Item not in place** and **Item in place**

See [Configuring General Electronic Services](#).

Locate Physical Items with Metadata

March 2019 Fulfillment - Resource Sharing / Collaborative Networks SF: 00583746 00587365 00590747 00594319 00608628

The locate process for resource sharing requests is optimized for resource sharing partners that share a Network Zone when the request was placed following a search in the Network Zone discovery system. The new **Allow locate by metadata** field, configurable on the Partner page, enables the locate process to be successful even if the request between partners that share a Network Zone was not placed from the shared Network Zone discovery system. In this case, the locate process will use the request's metadata to find a match in the partner's catalog.

This option allows borrowers that share a Network Zone with the lenders to create resource sharing requests for records that are not shared in the Network Zone. It also allows hold requests to be converted to resource sharing requests even if the borrower and lender share a Network Zone.

Tipasa NCIP Integration

March 2019 Fulfillment - Resource Sharing

It is now possible to integrate Alma with Tipasa as a broker. The Tipasa integration is similar to the other broker integrations in Alma. The following messages are supported by this integration:

Borrower Side:

- Accept Item – When physical item is received
- Check In Item – When physical item is sent back to the lender
- Create User Fiscal Transaction – For creating a request fee

Lender Side:

- Check Out Item – When item is shipped to the borrower
- Check In Item – When item is received back from the borrower

Perform Locate Based on Electronic Coverage

March 2019 Fulfillment - Resource Sharing

The **Manage Fulfillment Options** row action on the Lending Resource Sharing task list displays the local resources that the lender can use to fulfill the lending request. If you set the **rs_uresolver_locate parameter** to **true**, Alma suggests electronic services only if the coverage-related information (volume, issue and publication date) on the resource sharing request matches the coverage of the local electronic resource. See [Configuring Other Settings \(Fulfillment\)](#).

Asynchronous BLDSS Requests

March 2019 Fulfillment - Resource Sharing



Idea Exchange

You may now send an asynchronous resource sharing request to the British Library using the BLDSS API without a successful locate result. If a match is unsuccessful because the locate process fails or if the locate process was not run, the request can now be sent. To allow this, you must select the **Allow Asynchronous Request** check box on the **BLDSS Parameters** tab of the **Partner** page. The check box is selected by default for new customers going live in March 2019 or later.

The automatic runs of the Update BLDSS Requests job will now be increased to eight times a day.

See [BLDSS Parameters](#).

Delete Completed Resource Sharing Requests

March 2019 Fulfillment - Resource Sharing SF: 00156022 00159972 00210796 00053012 00106001 00136614

A new weekly job, **Resource Sharing Completed Request Cleanup**, allows you to remove requests from the resource sharing task list based on the request status and the number of days since the request reached a final status.

Final statuses for borrowing requests are:

- Canceled by partner
- Canceled by patron
- Canceled by staff
- Digitally received by library
- Expired
- Request completed - This is the final status before removal, and may be manually set.

Final statuses for lending requests are:

- Shipped digitally
- Request completed - This is the final status before removal, and may be manually set.

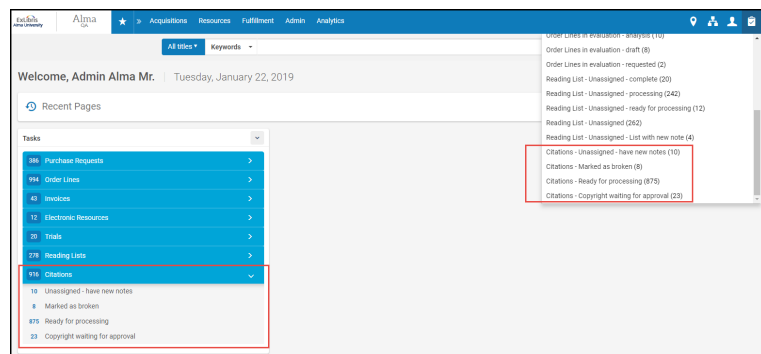
Any request that is in one of the statuses above and is in the range of the request age (base on the request modification date) will have its status changed to **Deleted**. Deleted requests will not appear in the active and completed task lists.

See [Configuring Fulfillment Jobs](#).

Citation Tasks

March 2019 Fulfillment - Course Reserves

Citations is a new top-level category for citation-related tasks. Some reading list tasks were moved to this new category. Some tasks are relevant only to Leganto customers; these tasks do not appear for non-Leganto customers. When you select any citation task, the Edit Citation page appears with the relevant tab and/or filter pre-selected (see [Managing Citations](#)).



Citation Tasks

The new tasks are as follows:

- Citations - Copyright waiting for approval.
- Citations - Marked as broken

Leganto only. Formerly known as **Reading List - Citation with broken links**.

- Citations - Ready for processing
- Citations - Assigned to Me - have new notes

Leganto only. Formerly known as **Reading List - Assigned to Me - Citation with new note**.

- Citations - Unassigned - have new notes

Leganto only. Formerly known as **Reading List - Unassigned - Citation with new note**.

Additional Features

- **March 2019 Acquisitions SF: 00579997**
The **Negotiation Details** tab in a negotiation license now has a **View** row action. See [Centrally Managed Licenses for Electronic Resources in a Network Zone](#).
- **March 2019 Acquisitions**
The **Order Line** and **Order Line Type** labels are now **PO Line** and **PO Line Type** throughout the Acquisitions area.
- **March 2019 Acquisitions SF: 00466693 00225755 00378333**
For an integration profile of type **Finance**, when an action is set to **Active**, the file path is now mandatory. See [Financial Systems](#).
- **March 2019 Resource Management**
When bibliographic record linking (to authority records) is done by ID, preferred term correction now works for cases where there is no language indication in the bibliographic record and multiple preferred term options exist due to multilingual differences. As part of the preferred term correction process, the language indication in addition to the preferred term is copied to the bibliographic record. For MARC 21, the language indication is copied to \$9; and for UNIMARC, it is copied to \$7 positions 0-1. See [Working with Multilingual Authority Records](#) for more information.
- **March 2019 Resource Management SF: 00536407 00553953**
Specific to the 3rd edition (2012) of the UNIMARC Authority format, the following UNIMARC authority fields were added to Alma: 231, 431, 531, 731, 232, 432, 532, and 732. These can now be accessed and customized in the UNIMARC Authority metadata configuration profile (**Configuration Menu > Resources > Cataloging > Metadata Configuration**). The filter in the UNIMARC Authority metadata configuration was updated to include these fields in the filtering groups.
- **March 2019 Resource Management SF: 00427448**
When displaying related record information in the MD Editor, the PO line title is used when it is available. When no PO line title is available, the display of related record information remains the same.
- **March 2019 Resource Management SF: 00484176**
The HAN resolver proxy type was added as an integration proxy option. See [Resolver Proxies](#) for more information.
- **March 2019 Resource Management SF: 00574999 00602976 00625884 00636754**
There is a new report type available for the Authority Control Task List called **Preferred term correction – Multiple matching AUT headings with same Originating System ID (ambiguous)**. See [Using the Authority Control Task List](#) for more information.
- **March 2019 Resource Management SF: 00537868**
Government Document was added as an Electronic Material Type. See [Electronic Material types](#) for more information.
- **March 2019 Resource Management**
The UNIMARC authority metadata configuration profile was updated to include the following 340 subfields: b, c, d, f, and p.
- **March 2019 Digital Resource Management**
The Terms of Use configuration page was renamed **Terms and Conditions** (**Configuration > Resources > Deposit > Terms and Conditions**).
- **March 2019 Fulfillment**
When uploading a file for a link digitization request, the file size limit is now 25 MB instead of 10 MB. The previous limitation of 10 MB is still effective when sending attachments. See [Attaching Digitized Items to Be Sent to a Patron](#).

- **March 2019 Fulfillment SF: 00464191**

When uploading a file for an attachment digitization request, if the attachment is greater than 10 MB, a message is displayed—**Total attachments size exceeds max allowed size**—and the processing of the request stops. See [Attaching Digitized Items to Be Sent to a Patron](#).

- **March 2019 Fulfillment**



Idea Exchange:

When returning an item on the Return Items page, if the next step is a locally managed work order, the next step now displays both the next step and the work order type—for example, **Manage Locally - Preservation**. See [Scanning Items](#).

- **March 2019 Fulfillment / Collaborative Networks SF: 00583648**

When a loan is made at another institution in a fulfillment network, the **Loaned at library** and **Loaned at desk** fields now contain the details of the borrowing institution.

- **March 2019 Fulfillment SF: 00549460**

The loan status labels and renewal messages that appear on the Primo My Account page can now be configured on the **Labels** page, **Fulfillment > Discovery Interface Display Logic > Labels**.

- **March 2019 Fulfillment**

When you are at a location which has multiple printers, you can now check which printer you are currently connected to by hovering with the mouse above the **Currently At** icon.

- **March 2019 Fulfillment - Resource Sharing SF: 00552602 00609995**

Resource sharing request fields are now available in the XML for the General Message Email Letter (letter code: GeneralMessageEmailLetter). You can configure the XSL of the letter to add the details. The path is: notification_data - > request_display.

- **March 2019 Fulfillment - Resource Sharing**



Idea Exchange: SF: 00379525

The due date for recalling borrowing requests will now be updated to the last closing hour of the request library, before the original recall due date.

- **March 2019 Fulfillment - Course Reserves**

Multiple Courses for Reading Lists: 1) When course instructors are automatically added as reading list owners, all course's owners are now added, instead of just the first course's. 2) The Instructors pane in Leganto now shows instructors from all courses, not just the first one. 3) The Bulk Citation Enrichment job now finds all reading lists associated with a course (not just the reading lists for which the course was the first course associated with the list). 4) In the Find Lists tab of Leganto, searching by academic department now searches for all academic departments of all courses associated with the list, not just the first. 5) When scanning in an item and associating the item with a reading list, the due date for the item is now taken from the reading list instead of the first course associated with the list.

- **March 2019 Fulfillment - Course Reserves**

The resource locate process and the check CLA permissions action now use both ISBN and ISBN-13 for matching. In addition, when relevant, these processes remove invalid characters from these fields.

- **March 2019 Fulfillment - Course Reserves**

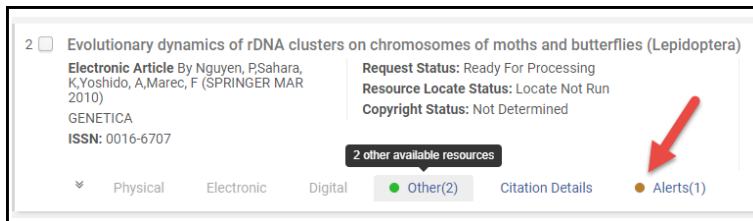
Facets now appear on the Edit Citations and Edit Reading List pages for non-Leganto customers as well.

Note

All logical reading list sets that made use of the **Course Start Date** and **Course End Date** fields in their set definitions are affected by this change. Although you can continue to use your existing sets, it is recommended that you now recreate your logical sets (as announced in the February 2019 release notes).

- **March 2019 Fulfillment - Course Reserves SF: 00525246**

An orange dot in the **Alerts** tab on the Edit Citations and Edit Reading List pages indicates that there are alerts for the citation.



Edit Reading List

- **March 2019 Analytics**

In Fulfillment > Loan, the **Loan** field was replaced by the following fields to allow you to create more detailed reports:

- Num of Loans (In house + Not In House)
- Num of Loans (In House)
- Num of Loans (Not In House)

- **March 2019 Analytics**

The **Collection Name** and **Collection ID** fields were added to the shared Bibliographic Details dimension in all subject areas in which it appears. These fields allow you to display in a report all of the collections to which a title belongs.

- **March 2019 Analytics SF: 00625631**

The **Citation Alerts** field was added to Course Reserves > Reading List Citation. It lists the alerts for the citation.

- **March 2019 Analytics**

The following fields were added to the shared PO Line dimension in every subject area in which it appears:

- PO Line Owner Library Code
- PO Line Owner Library Name
- PO Line Identifier
- PO Line Vendor Title Number
- PO Line Manual Packaging
- PO Line Routing During Receiving
- PO Line Binding During Receiving
- PO Line Title

For a video describing this enhancement, see [Analytics: New Fields in the PO Line Folder](#).

- **March 2019 Analytics**

The **Service Details** dimension with the **Service ID** field was added to the E-Inventory subject area.

- **March 2019 Analytics SF: 00607284 00607365**

Analytics objects can now be scheduled for 8 AM.

- **March 2019 Analytics SF: 00627392 00629050**
The **IED** field was added to Digital Inventory > Representation Details.
- **March 2019 Analytics SF: 00616442**
The **Related Record** field was added to Funds Expenditure > Fund Transaction Details. It indicates the related resource sharing record.
- **March 2019 Administration and Infrastructure SF: 00542509**
The Export Users by Condition job now includes a new daily scheduling option.
- **March 2019 APIs**
An option was added to the Request Options API to calculate display logic rules. Note that this is optional (opt-in) and applies only to print resources.
- **March 2019 APIs**
You can now set the Update or Create BIB API to fail if warnings are issued.

Resolved Issues

- **March 2019 Analytics SF: 00406196 00407060 00628068 00389662**
When **Anonymize item loans** was selected, Alma Analytics reports did not correctly indicate the number of users. This was corrected.
- **March 2019 Analytics SF: 00632251**
The ARL titles count was incorrect. This was fixed. A new report for electronic titles, **Electronic Titles Count by Library**, was created. The current report was renamed **Physical Titles Count by Library**.
- **March 2019 Analytics SF: 00620126 00622079 00622268 00626477 00646510 00634238 00616394 00613713 00617391 00627647**
Creating a report from an Analytics set did not work properly. This was fixed.
- **March 2019 Analytics / Fulfillment - Course Reserves SF: 00555633**
For Leganto customers, when adding a new analytics object, the Leganto folder could not be selected. This was fixed.
- **March 2019 Acquisitions SF: 00557743 00587803 00623224 00611482 00574188 00578508 00603711**
If the library of the job was the same as the library of the PO line's item or holdings record, the job did not change the PO line owner. This was fixed.
- **March 2019 Acquisitions SF: 00604988 00570019 00581363 00598380 00622536 00544297 00607099 00515876 00571443 00544149 00609419**
Acquisition Administrators could not delete PO line templates that they did not create. This was fixed and now Acquisition Administrators can delete such PO line templates.
- **March 2019 Acquisitions / Administration and Infrastructure SF: 00574149 00449659 00519100 00591822**
The PO line **Library Cancellation Reason** did not appear in German. This was fixed, and it now appears in all supported languages.
- **March 2019 Acquisitions SF: 00571882 00551515 00642553 00499417**
The **Back** and **Save** buttons were not working in the **Invoice Lines** tab of the Purchase Order Line Details page. This was fixed.
- **March 2019 Acquisitions SF: 00592156 00566002 00591771**
Purchasing review rules did not work if they contained more than one value in any parameter. This was fixed. The purchasing review rule now works even if there is more than one value in a parameter.
- **March 2019 Acquisitions SF: 00449574**
The **Relink** button didn't change the **Identifier** field in the **Summary** tab and the data in the **Description** tab. This was fixed.
- **March 2019 Acquisitions SF: 00602345**
The owner of an invoice created from an Excel file was at the institution level, even though all PO lines associated with invoice were at the library level. Now, when an invoice is created from an Excel file, the owner of the invoice is taken from the PO line and not from the Excel file.
- **March 2019 Acquisitions SF: 00544299 00212350 00389253 00225320 00497817 00177163 00372594**
Fully invoiced PO lines with closed invoices had a **Waiting for Invoice** status. A data correction will change the fully invoiced PO lines with closed invoices to **Closed**.
- **March 2019 Acquisitions / Administration and Infrastructure SF: 00528526 00507380 00412945 00635253**
The column type on the **Transactions** tab of a fund was not translated. This was fixed and now the column type is translated to all supported languages.
- **March 2019 Acquisitions SF: 00607817**
Users with the Acquisition Administrator (read only) and Purchase Operator roles could deactivate vendors. Now when the vendor list is opened in View mode, the activate/deactivate slider is grayed out.
- **March 2019 Acquisitions SF: 00611287 00598204 00630803 00585443 00580012 00564911 00619593 00576003**
Deleting a file from the files list did not delete all related data and the file could therefore not be loaded again by the harvesting job. This was fixed.

- **March 2019 Acquisitions SF: 00619137 00640173 00616688 00607371 00615770 00616277**
Unsupported report types were displayed when loading a valid JR5 COUNTER report. This was fixed.
- **March 2019 APIs SF: 00619920 00648232 00617405**
The GET Item API retrieved the **inventory_date** field incorrectly, setting the date to one day earlier than the date set in Alma. This was fixed and the **inventory_date** field is now correctly retrieved.
- **March 2019 APIs SF: 00584311**
The GET Request Options API did not return the MMS ID in the **request_url** field. This was fixed.
- **March 2019 APIs / Administration and Infrastructure SF: 00627600**
The GET Fee API did not show the barcode related to a fee in some cases. This was fixed.
- **March 2019 APIs / Administration and Infrastructure SF: 00522419**
In the GET Fee API, the user fee status date was different than the date shown in the Alma UI. This was fixed.
- **March 2019 Administration and Infrastructure SF: 00588853**
The **Force password change on next login** check box in the user record was still selected even though the user changed the password in Primo. This was fixed.
- **March 2019 Administration and Infrastructure SF: 00626385**
The message that appeared when creating a role profile with the name of a deleted profile was incorrect. This was fixed.
- **March 2019 Administration and Infrastructure SF: 00537167**
Read-only Administrator roles combined with the Purchasing Manager role could update physical item sort routines. This was fixed and now only the following roles have this ability: General System Administrator, Repository Manager, Purchasing Manager, Purchasing Operator, Physical Inventory Operator
- **March 2019 Administration and Infrastructure SF: 00537158**
Users with read-only Administrator roles were able to update controlled vocabulary settings in Metadata Configuration. This was fixed and now these users can only view the controlled vocabulary settings and not change them.
- **March 2019 Administration and Infrastructure SF: 00406649 00483234 00210499 00378972 00579596 00592026**
Values with dots used in mapping tables (for example, statistical category types) were not displayed correctly. This was fixed.
- **March 2019 Administration and Infrastructure SF: 00502442 00538811**
Viewing files in the **Attachment** tab sometime displayed an error message. This was fixed.
- **March 2019 Administration and Infrastructure SF: 00595623**
The user title drop-down was sorted incorrectly. Note that for the sort order to be corrected, you must re-sort and customize the User Titles code table.
- **March 2019 Resource Management SF: 00564392**
On the Item Edit page, when selecting the PO line pickup field, the **Back** button did not go back to the Purchase Order Line Details page. This was fixed.
- **March 2019 Resource Management SF: 00617241**
An invalid response was created when the RSS feed returned 0 results. This was fixed.
- **March 2019 Resource Management SF: 00563992**
The **Max days** option in the RSS publishing profile was ignored by the RSS job. This was fixed.
- **March 2019 Resource Management SF: 00601759**
For publishing to Primo, heading enrichment information was published incorrectly in some cases. This was fixed.
- **March 2019 Resource Management SF: 00609292**
Heading enrichment was sometimes performed erroneously in the 830 field with \$LY instead of \$9Y when the user added a duplicate authority. This was fixed.
- **March 2019 Resource Management SF: 00618269**
For physical item sets, the Change Holdings Information job erroneously used the set criteria of the physical title level. This was fixed.
- **March 2019 Resource Management SF: 00572032**
An itemized set created from a shelf report job analysis disappeared when creating the next set. This was fixed.
- **March 2019 Resource Management SF: 00634478**
The Synchronize Changes from CZ and User Audit Purge with Retention jobs could not be run simultaneously. This was fixed.

- **March 2019 Resource Management SF: 00619885**
The UNIMARC authority field 240 (preferred Name + Title) did not appear in the repository search results. This was fixed.
- **March 2019 Resource Management / Collaborative Networks SF: 00576850 00531571 00576900 00577285 00451838**
When non-preferred terms of authority records held special characters (this mostly happened in GND authorities), searching for local bibliographic records by the authority non-preferred terms did not retrieve records linked to the Network Zone. This was fixed.
- **March 2019 Resource Management SF: 00584873**
The **Subject** and **Series** fields were not displayed in the search results for physical, electronic, and digital titles. This was fixed.
- **March 2019 Resource Management /Administration and Infrastructure SF: 00573232 00607020 00601792 00591816**
Labels for local fields did not appear in the selected language in the repository search. This was fixed.
- **March 2019 Resource Management SF: 00576246**
The **Is Empty** option was removed from the **Fund Name** list of options in an order lines advanced search since this capability is not supported by the infrastructure.
- **March 2019 Resource Management SF: 00570422 00540971**
The **Edit Collection** button did not appear for logical sets. This was fixed.
- **March 2019 Resource Management SF: 00579856**
During preferred term correction, when subfields were updated from the authority record, the subfields from the the bibliographic record heading were retained as well. This caused duplication of these subfields. This has been fixed, and now subfields from the bibliographic record heading are retained only if they are not corrected from the authority record.
- **March 2019 Resource Management SF: 00521032 00525192 00530594 00552218 00610378 00629308 00557591 00643870 00610510 00559313 00597257 00575481 00621583 00574800 00635159 00570398 00581054 00617006 00573527 00521788**
Invalid characters in an XML caused an error when creating a MARC record. This was fixed and now the invalid characters are removed.
- **March 2019 Resource Management SF: 00649672 00592236 00382670**
When the MD Editor released a record in split mode and the focus was on the left record, it froze. This was fixed.
- **March 2019 Resource Management SF: 00531438**
The KORMARC LDR position 6 values in the MD Editor form were fixed. The **y** option was removed. The **w** option, **Rare book**, was added. The **o** option label was changed to **Kit**.
- **March 2019 Resource Management SF: 00625715**
The drop-down list values were not sorted properly when the location was configured to display the name of the location and not the code. This was fixed.
- **March 2019 Resource Management SF: 00619349 00643529 00633241**
If field 830 containing subfield \$\$v was linked to an authority using F3 > Select, subfield \$\$v was duplicated. This was fixed.
- **March 2019 Resource Management SF: 00634781**
Some drop-down lists in the MD Editor were not translated. This was fixed.
- **March 2019 Resource Management / Collaborative Networks SF: 00614734 00576546 00631886**
When editing a Network Zone record from a member institution, in some cases, local fields were not displayed, or local fields from another member institution were displayed. This was fixed and now only the local fields of the member institution of the user that is editing the record are displayed.
- **March 2019 Resource Management SF: 00420703**
In the MD Editor when editing field 260 \$\$a, the pop-up displayed incorrect information. This was fixed.
- **March 2019 Resource Management SF: 00142001 00514866 00634644 00607424 00595162 00564992 00543200**
The months for prediction patterns were only in English although they should be according to the holdings language. This was fixed.

- **March 2019 Resource Management SF: 00628382 00624857**
When subfield 6 in the authority field was in linkage information format (for example 100-01 or 880-02), it was copied to the bibliographic record field in the correction job. This was fixed.
- **March 2019 Resource Management SF: 00628094 00578799**
The authority control task list operated slowly. This was fixed.
- **March 2019 Resource Management SF: 00553953**
The new MARC country codes for Guernsey (gg), Isle of Man (im), and Jersey (je) were not available in the drop-down list for 008 field positions 15-17. This was fixed.
- **March 2019 Resource Management SF: 00597463**
GND authority record subfields were incorrectly sorted. This was fixed and they are now sorted according to the MMS record order.
- **March 2019 Resource Management / Collaborative Networks SF: 00520109**
When a new record was imported using an import profile with the **Use NZ Record** option selected, an incorrect control number appeared in the Institution Zone. This issue was fixed.
- **March 2019 Resource Management / Collaborative Networks SF: 00557115 00567331 00599982 00615878 00625683 00638108 00640980**
The message **RollbackException: Transaction marked as rollbackOnly** will no longer appear in the report for the Network Publishing job. The root cause error was handled.
- **March 2019 Fulfillment SF: 00605006 00619804**
The **License Terms** label and value were displayed as one HTML tag with a colon as the delimiter. This was fixed. The label and value were separated to two terms, and the delimiter was removed.
- **March 2019 Fulfillment SF: 00458610**
If an item on loan had a pending personal delivery request, when the item was returned, the print slip sometimes did not print. This was fixed.
- **March 2019 Fulfillment SF: 00548590**
Sometimes marking an item on the hold shelf as missing caused the item to get stuck on the expired hold shelf. This was fixed.
- **March 2019 Fulfillment SF: 00521245 00555333 00115065 00477836 00222482 00358747 00468606**
If there was a default value in the User Group configuration table, the user group could not be removed from the **User Group** field on the Overdue and Lost Loan Profile page. This was fixed.
- **March 2019 Fulfillment SF: 00454580 00468698**
Missing Title sometimes appeared when viewing the Full Calendar view for library opening hours. This was fixed.
- **March 2019 Fulfillment SF: 00575332**
The borrower name on the Loan Audit Trail page did not appear in the Contact Information pop-up window. This was fixed.
- **March 2019 Fulfillment SF: 00604836**
When placing a title-level request for an item in a temporary location, the request slip did not contain the permanent call number. This was fixed.
- **March 2019 Fulfillment SF: 00564170**
In some cases, when editing or deleting a requested item, an incorrect warning message was displayed or no warning was displayed at all. This was fixed.
- **March 2019 Fulfillment SF: 00527268 00456559 00524849 00602107 00352482 00128053 00421938**
When a hold request was canceled for an item in **On Hold Shelf** status, and an item was returned from the Manage Patron Services page instead of the Scan In Items page, the item disappeared from the hold shelf, but the process remained **On Hold**. This was fixed. The item is now moved to the next step.
- **March 2019 Fulfillment SF: 00548932**
When canceling a borrowing resource sharing request, the cancellation note was not saved properly. This was fixed.
- **March 2019 Fulfillment SF: 00608503 00629540**
The fields in the **Bookings** tab were not displayed properly. This was fixed.
- **March 2019 Fulfillment - Resource Sharing SF: 00570666**
When creating a book type borrowing request via the ZFL server, the chapter author and chapter title for SLNP messages were not added to the borrowing request. This was fixed.

- **March 2019 Fulfillment - Resource Sharing SF: 00623051**
A borrowing request was not sent to a partner in the rota. This was fixed.
- **March 2019 Fulfillment - Resource Sharing SF: 00617489**
The item-level **Description** drop-down did not always display all available descriptions. This was fixed.
- **March 2019 Fulfillment - Resource Sharing**
The notification letter for document delivery borrowing requests that contains a link to the file was always sent to the patron, even when this feature was not configured. Now, if the library did not indicate to send the letter directly to the patron, the letter is sent to the borrower's resource sharing library.
- **March 2019 Fulfillment - Resource Sharing SF: 00571299**
When creating a **Ship physically** request to fulfill a lending request, the **Library destination** drop-down list displayed all resource sharing libraries even if there was no **Supply To** relationship. This was fixed, and the **To** drop-down list now displays only resource sharing libraries that have a **Supply To** relationship.
- **March 2019 Fulfillment - Course Reserves, Acquisitions SF: 00431571**
When creating a purchase request from a citation, the request was not prefilled with the bibliographic metadata. This was fixed.
- **March 2019 Fulfillment - Course Reserves SF: 00637464**
In some cases, the reading list facets did not display the correct results after selecting the facet. This was fixed.
- **March 2019 Fulfillment - Course Reserves SF: 00629136 00634279**
An error message appeared on the Edit Reading List screen, in some cases, after a rollover. This was fixed.
- **March 2019 Administration and Infrastructure SF: 00536957**
The out-of-the-box delivery skin CSS file was outdated. This was fixed.
- **March 2019 Administration and Infrastructure SF: 00597986**
The header text in Alma turned gray when the session timed out. This was fixed.
- **March 2019 Administration and Infrastructure SF: 00514170**
The dates in the Community Zone Updates Task List were cut off. This was fixed.
- **March 2019 Administration and Infrastructure SF: 00483394**
Some drop-down lists were blocking data entry in Internet Explorer. This was fixed.
- **March 2019 Administration and Infrastructure / Acquisitions SF: 00595109**
The PO line type is now translated for all supported languages.
- **March 2019 Administration and Infrastructure / Acquisitions SF: 00505821 00528509 00483886 00505823 00505435**
The value of the PO line status is now translated for all supported languages.
- **March 2019 Administration and Infrastructure SF: 00367724**
In the e-activation task list, the **Status** and **Type** values are now translated to all supported languages.
- **March 2019 Administration and Infrastructure SF: 00636626 00635258**
When using the new Identity Service reset password flow, the message **An email with the reset password link has been sent to your registered email address** always appeared in English instead of the user's preferred language. This was fixed.
- **March 2019 Administration and Infrastructure / Fulfillment SF: 00579288**
The library names on the Fulfillment Units configuration page were not translated. This was fixed.
- **March 2019 Administration and Infrastructure SF: 0055301**
The Health Check job verified only that standard opening hours existed for the library, but not if they were still valid. This was fixed and now the job also checks whether the opening hours of a library are valid.
- **March 2019 Administration and Infrastructure SF: 00551224 00550566 00609412 00630732**
The maximum number of records that could be opened in the MD Editor with a catalog set was 100. This was increased to 200.