



Alma February 2020 Release

Alma Libraries Around the World  
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# Alma February 2020 Release Notes

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## 2020 RN 02 Main

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### Real Time Ordering - Purchase Type License Upgrade as an Additional PO Line

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#### February 2020 Acquisitions

PO lines with a **Purchase Type** of **License Upgrade** created via New Order API will be associated to the relevant portfolio as an additional PO line. Previously, PO lines with a **Purchase Type** of **License Upgrade** were associated to the relevant portfolio as a main PO line. Now, the main PO line reflects the original PO line that initiated the order, while the PO line with a purchase type of License Upgrade complements the main PO line.

See [Real Time Ordering](#).

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### Suppress Access to PO Line Summary Information

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#### February 2020 Acquisitions

You can now disable access to review a PO line and view in-depth acquisitions information for users with the roles of Repository Manager, Physical Inventory Operator, or Electronic Inventory Operator. To do so, contact Ex Libris customer support.

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### Improved Claiming Functionality for Continuous PO Lines

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#### February 2020 Acquisitions



**Idea Exchange** Previously, if an item's due date arrived and the item was not received, a claim letter was sent to the vendor. Now, if the next expected item also does not arrive, you can send an additional letter to the vendor which includes details for both items which did not arrive. This function is enabled when the **claim\_continuous\_item\_level** parameter is set to true.

See [Configuring Other Settings \(Acquisitions\)](#).

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### Entering PO Line Number in Item Editor

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#### February 2020 Resource Management

When entering the PO line number in the Item Editor page, the number is now validated, even when typing the number instead of selecting it from the pick list.

Watch the [Entering PO Line Number in Item Editor](#) video (0:48 minutes).

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### Search Indexes for Specific OCLC Numbers

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#### February 2020 Resource Management

For simple and advanced titles searches (All titles, Physical titles, Electronic titles, and Digital titles), the following search indexes were added: OCLC Control Number (019), OCLC Control Number (035a), OCLC Control Number (035a+z), and OCLC Control Number (035z).

The image shows a search interface with a dropdown menu. The top bar has 'All titles' and a search input field containing 'OCLC'. Below the input field, a list of search indexes is displayed:

- OCLC Control Number (019)
- OCLC Control Number (035a)
- OCLC Control Number (035a+z)
- OCLC Control Number (035z)

#### Search Indexes for Specific OCLC Numbers

With these new indexes, you can now locate specific OCLC numbers for improved search results and improved Excel exports.

See [OCLC Control Number](#) for more information.

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## Local Extensions for Community Zone Bibliographic Records

**February 2020 Resource Management SF:** 00475068 00660007 00666609 00686792 00740123 00173800 00223460 00108985 00134538

All institutions can now create and maintain local extensions to Community Zone bibliographic records in order to record their own proprietary information.

With this capability, institutions can enter and maintain local information in the MARC 21 77X/78X, 09X, 59X, 69X, and 9XX fields. This can be done with the MD Editor for one record at a time, or for multiple records by running a job with a normalization process that updates local extension fields. Local extension data can be searched, exported, published (general publishing and to Primo) and handled using APIs (see [Bibliographic Records and Inventory](#) in the Developer Network). When linked bibliographic records are synchronized during Community Zone updates, the local extension content is not overridden.

See [Working with Local Extension Fields](#) for more information.

Please note that the March release will include the ability to load local extensions to Community Zone records via the mport process.

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## Suppress Bibliographic Record from External Search

### February 2020 Resource Management

You can configure Alma to suppress bibliographic records from external searches. To perform this configuration, first configure the SRU or Z39.50 integration profiles to suppress searches of records with the Suppress from External Search tag:

< Integration Profile

Z39

Code

Z39

Integration Type

Z39.50 Server

General Information

Actions

Contact Info

EXPORT

User Name

Password

Allow Access

☒

Enrich with Holdings

☒

Enrich with Representations

☐

Enrich with Remote Representations

☐

Apply Normalization

☒

Suppress records based on "Suppress from external search" tag

☒

#### Suppress Records from External Searches - Integration Profile

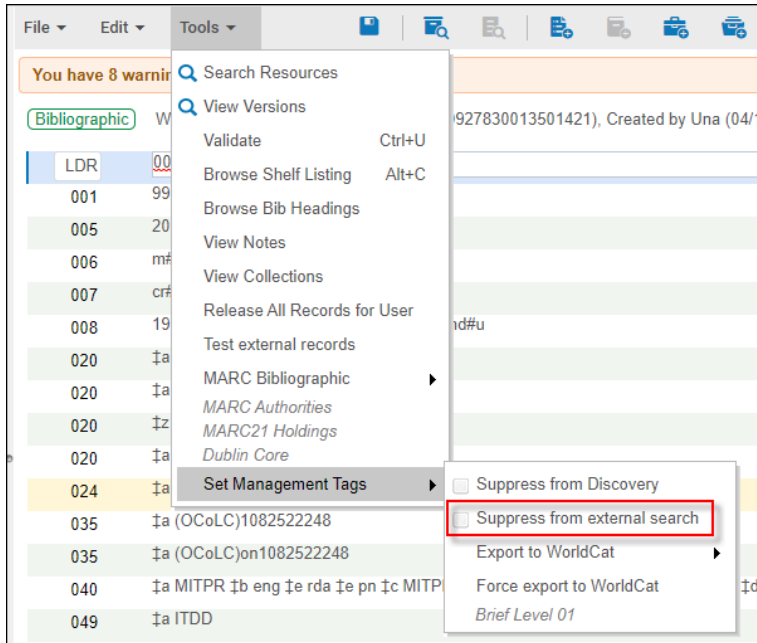
#### Note

The Z39.50 and SRU protocols have different behavior when the **Suppress records based on "Suppress from external search"** option is selected:

- Z39.50 – Records that are tagged as Suppress Records from Publish/Delivery are also suppressed from external searches even if they do not have the Suppress from External Search tag.
- SRU – Only records tagged as Suppress from External Search are suppressed from external searches.

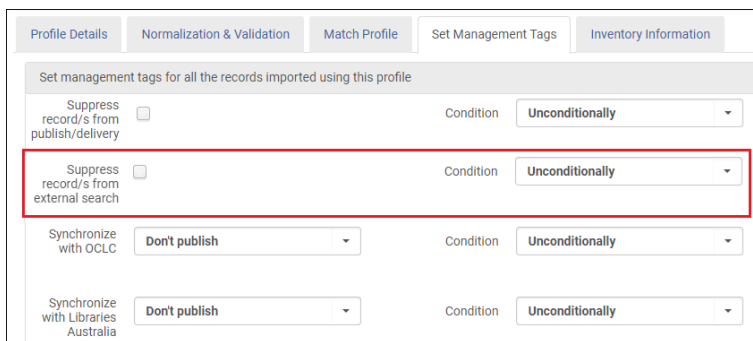
You can tag records to be suppressed from external searches in the following areas:

- From the Metadata Editor – select **Suppress from External Searches** ([Tools > Management Tags](#)) for a record.



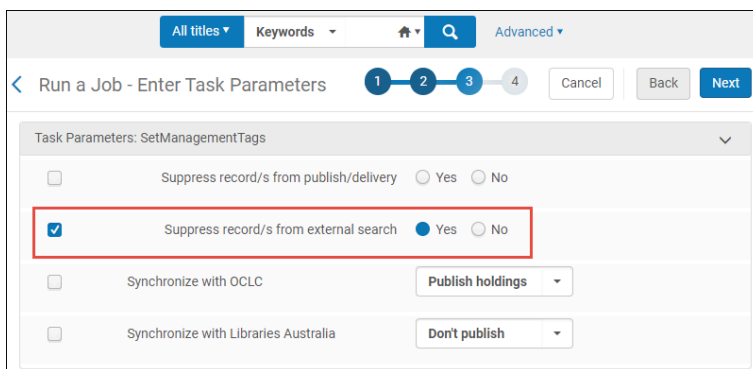
#### Suppress from External Searches - MD Editor

- In the Set Management Tags tab of import profiles (all types except Update Inventory, Authority, Initial Authority) for records imported using the profile:



#### Suppress Records from External Searches - Import Profile

- From the new Set Management Tags job:



#### Set Management Tags

In addition, it is possible to search for bibliographic records that are suppressed from external search:

All titles
Zone:
Institution
Community

Tag Suppressed From External Search
Equals
No
+

Clear form
Search

Searching for Records Suppressed from External Search

## Enhanced Configuration of Deposit Status Update Letter

**February 2020 Digital Resource Management SF: 00709117**

You can now customize the **Deposit Status Update Letter** using the same workflow as other Alma letters from **Configuration > General > Letters > Letters Configuration**. This allows you to configure additional elements of the letter, including a reason for the letter, a delivery URL, and a note.

Deposit Status Update Letter
Preview Letter
Cancel
Save

Labels
Template
Letter Examples

Customize All
Restore Default Translations

Filter: English

|    | Enabled                             | Code          | Description                   | Translation                   | Updated By | Last Updated |
|----|-------------------------------------|---------------|-------------------------------|-------------------------------|------------|--------------|
| 1  | <input checked="" type="checkbox"/> | subject       | <Your Deposit>: deposit_title | <Your Deposit>: deposit_title | -          | -            |
| 2  | <input checked="" type="checkbox"/> | department    | Alma deposit approval team    | Alma deposit approval team    | -          | -            |
| 3  | <input checked="" type="checkbox"/> | deposit_id    | Deposit ID is:                | Deposit ID is:                | -          | -            |
| 4  | <input checked="" type="checkbox"/> | letterName    | Deposit Status Update         | Deposit Status Update         | -          | -            |
| 5  | <input checked="" type="checkbox"/> | Bcc           | None                          | None                          | -          | -            |
| 6  | <input checked="" type="checkbox"/> | decline_text  | None                          | None                          | -          | -            |
| 7  | <input checked="" type="checkbox"/> | approve_text  | None                          | None                          | -          | -            |
| 8  | <input checked="" type="checkbox"/> | return_text   | None                          | None                          | -          | -            |
| 9  | <input checked="" type="checkbox"/> | submit_text   | None                          | None                          | -          | -            |
| 10 | <input checked="" type="checkbox"/> | withdraw_text | None                          | None                          | -          | -            |
| 11 | <input checked="" type="checkbox"/> | Cc            | None                          | None                          | -          | -            |
| 12 | <input checked="" type="checkbox"/> | note          | Note:                         | Note:                         | -          | -            |

**Deposit Status Update Letter**

For more information, see [Configuring Alma Letters](#).

## Improved Performance For Alma Analytics

**February 2020 Analytics**

Ex Libris is currently implementing performance upgrades to the Alma Analytics infrastructure. These upgrades will greatly improve performance when running analytics reports. The rollout will affect additional environments each month. For the February release, the upgrades will be made available to NA04.

## Last Patron Activity Date

**February 2020 Administration and Infrastructure**



**NERS Enhancement (ID #5631)**



**Idea Exchange**

You can now view the last activity date for specific activities in the **Last Patron Activity Date** field of the User Details Page. The field is display only and will be available for analytics in an upcoming release. Due to privacy concerns, data will only be collected from activation of this new feature onward. If the option is disabled, all data collected in this field will be deleted for all users. When enabled, this field is updated when any of the following activities are executed:

- Placing a request of any type - hold, booking, digitization, acquisition, resource sharing
- Borrowing an item (all workflows, including self-check / API)
- Returning an item (all workflows, including self-check / API)
- Loan renewal (except automatic renewal), or renewal request (for resource sharing loans)
- Update of user information from Primo

The following activities do NOT update the Last Patron Activity Date field:

- Using the **Pay** button on the Manage Patron Services page
- Canceling a request in Alma or Primo
- Patron Purchase Request sent from Primo - this will be added in a later release

To enable this option, select **yes** in the new **Record Last Patron Activity Date** page (**Configuration > User Management > General**).

Watch the [Last Patron Activity Date](#) video (1:36 minutes).

See [Managing Users](#) and [Configuring Last Patron Activity Date](#).

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## Absolute and Relative Paths in the S/FTP Definition

### February 2020 Administration and Infrastructure

Alma now supports the ability to indicate both an absolute and a relative path to the input directory in the S/FTP import protocol when creating import profiles to third-party systems. See [Managing Export Profiles](#).

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## Quick Printing Option for Multiple Records

### February 2020 Fulfillment

When printing call slips for multiple items, you can select several items and print slips for all of them in one action with the Quick Print functionality. The quick print functionality aggregates all the slips into a single PDF (within a popup window) and allows the operator to either send these to a designated printer or save the created PDF to a file. See [Pickup at Shelf](#).

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## DARA Recommends Local Standalone Portfolios to Link to the Community Zone

### February 2020 DARA

Based on ISSN / ISBN matching, DARA now recommends local standalone portfolios for linking to the Community Zone. Linking to the Community Zone enables you to receive updates automatically without the need to update the portfolio manually.

1 Local standalone portfolio "My title" can be linked to the community

**Type:** Link electronic inventory to the CZ

 "My title" is a local standalone portfolio. Based on ISSN/ISBN matching, I identified that this portfolio exists in the community.

Linking to the community zone will enable you to receive updates automatically, without the need to update the portfolio manually.

 I recommend linking this local electronic portfolio to the community.

### DARA Recommendation to Link Standalone Portfolio to the Community Zone

Show Me Why



 I generated this recommendation after reviewing your Electronic inventory. Based on ISSN/ISBN matching, I identified that the local portfolio "My title" exists in the community.

 You can view the local Eportfolio by pressing **Let's see**. In order to implement the recommendation and link to the community, select **Let's do it!**.

### Show Me Why for Linking a Standalone Portfolio to the Community Zone

Lets do it!



 I generated this recommendation after reviewing your electronic inventory. Based on ISSN/ISBN matching I identified that "My title" portfolio exists in the community.

 Press "I'm ready" to implement the recommendation and link the local portfolios to the CZ. I will display a list of matching portfolios from the community, and you will be able to select the portfolio from the relevant electronic collection.

### Let's Do It for Linking a Standalone Portfolio to the Community Zone

For more information, see [DARA – Data Analysis Recommendation Assistant](#).

For more information about linking, see [Link to Community](#).

## DARA Recommends Linking Local Electronic Collections to the Community Zone

### February 2020 DARA

Based on the electronic collection name, DARA now recommends local electronic collections for linking to the Community Zone. Linking to the Community Zone enables you to receive updates automatically without the need to update manually.

Link local Electronic Collection "GeoScienceWorld", Service: "Full Text" to CZ

**Type:** Link Electronic inventory to the CZ

 GeoScienceWorld Electronic collection is defined locally in your institution. I identified that this Electronic collection **exists in the Community Zone**.

Linking the local Electronic Collection to the CZ Electronic Collection will enable you to receive updates automatically, without the need to update the collection and its portfolios manually.

 I recommend linking this local Electronic Collection to the CZ. Note that this is done using a background job.

### DARA Recommendation to Link Electronic Collection to the Community Zone

Show Me Why



**i** I generated this recommendation after reviewing your Electronic inventory. Based on Electronic Collection name, I identified that the local Electronic Collection "GeoScienceWorld", Service: "Full Text" can be linked to the CZ. Note that I used exact match.

**cc** You can view the local Electronic Collection/Service by pressing **Let's see**. In order to implement the recommendation and link local Collection/Service to the CZ, select **Let's do it!**

### Show Me Why for Linking an Electronic Collection to the Community Zone

Lets do it!



**i** "HeinOnline U.S. Congressional Documents Library" electronic collection, service "Full Text" can be linked to the community. Such linking will enable your institution to benefit from the updates sent to the community by the providers, and receive updates of the electronic collection and its Portfolios automatically.

**cc** Press **I'm ready** to link the local electronic collection / service to the community. In the next screen you will be able to confirm the linking information and choose whether to use the community bibliographic records as well and trigger the background job which will perform the linking.

### Let's Do It for Linking an Electronic Collection to the Community Zone

For more information, see [DARA – Data Analysis Recommendation Assistant](#).

For more information about linking, see [Linking a Local Electronic Collection to the Community Zone](#).

## Library Filter Added to Recommendations List

### February 2020 DARA

A new **Library** filter was added to the List of Recommendations that you can use to filter the list by library. This feature is relevant for recommendations such as Unavailable Portfolios, Missing Items, and Local Electronic Collections.



Manage Recommendations

1 - 12 of 12
0 rows selected

☐ Select All
Category : All
Status : Active
Library : All

1
☐
Unavailable portfolios in the "Chadwyck PAO Collection 9" electronic collection, service: "Full Text"

**Category:** Unavailable Portfolios

**There are 75 unavailable portfolios out of the total 75 portfolios in "Chadwyck PAO Collection 9" electronic collection, service: "Full Text".**

These portfolios are not getting published to discovery and are not visible to your patrons.

**i** I recommend reviewing the portfolios and activating or deleting as needed.

**Created on:** 07/03/2019

**Updated on:** 07/03/2019

**Updated by:** System

**Notes:** 0

**Attachments:** 0

### Library Filter

## New Columns Added to DARA Export File

### February 2020 DARA

The following columns were added to the Excel file that is produced when you export recommendations using the Export icon:

- Entity Type – for example: Electronic Service, Physical Item, Electronic portfolio
- Entity ID – for example: the Electronic Service ID, the Item PID, or the Electronic portfolio PID
- Additional Info – for example: the columns of the analytics report or the Access type, Authentication note, and Public note of the electronic collection

## 2020 RN 02 Additional

- **February 2020 APIs**

(URM-120274) The GET-Representations API now includes a new parameter, `originating_record_id`, which enables filtering remote representations by the unique ID of the object in the remote repository.

- **February 2020 APIs**



**NERS Enhancement (ID #6430)**

(URM-111751) In order to better view the details of a low traffic API, the Traffic History report on the Developer Network API dashboard now includes options to select a date range and select a specific API key when API key is selected in the Group By drop-down list. See the [Developer Network](#).

- **February 2020 APIs**

(URM-119485) Two new Printouts APIs allow you to communicate with the Online Print Queue. You can check for new printouts using the GET API. The POST API marks the files printed. For more information, see the [Developer Network](#).

- **February 2020 APIs**

(URM-1225) You can now manage purchase order requests via APIs. This includes options to get, update, approve or reject purchase requests, or fetch a purchase request list. For more information, see the [Developer Network](#).

- **February 2020 Digital Resource Management**

(120707) The **Run Generate thumbnail for jp2 files** SP scheduled job was added that generates thumbnails from jpeg 2000 files.

- **February 2020 Digital Resource Management**

The **Originating System ID** field for remote digital repositories was renamed to **Originating Record ID** when adding digital representations. The field was already indexed and searchable.

Remote Representation Details

Remote Digital Repository \*

Delivery Link -

Thumbnail Link -

Originating Record ID \*

Linking Parameter 3

Clear Form

Originating Record ID

- **February 2020 Analytics**

(URM-119228) The new **Funds Overview for Fiscal Period** report was added to the Acquisitions folder and dashboard. It includes the new Fund Transaction fields that were added for the January release.

- **February 2020 Analytics**

(URM-118444) The following fields were added to Titles > Title Measures:

- Number of Titles with Physical Items (Active)
- Number of Titles with Physical Items or Holdings Records (Active)
- Number of Titles with Holdings Records and No Items (Active)
- Number of Titles with Electronic Portfolios (Active)
- Number of Titles with Electronic Collections (Active)
- Number of Titles with Digital Representations (Active)

- **February 2020 Analytics**

(URM-117084) The **Electronic Resource Collection Overlap** folder under `Shared/Alma` was removed, because the information in this folder is now available in the **Titles with Multiple Portfolios** report located under `/shared/Alma/Cost per use via COUNTER reports e-inventory and acquisitions data/Reports`.

- **February 2020 Analytics**

(URM-114165) The **Return After Lost** field was added to to Fulfillment > Loan. It indicates the number of items returned with the Lost process status.

- **February 2020 Analytics**

(URM-100652) The new **Fund Rules** dimension was added to the Fund Expenditure subject area. It includes the following fields:

- Expenditures prior to fiscal period (days)
- Fiscal period end encumbrance grace period (days)
- Encumbrances prior to fiscal period (days)
- Fiscal period end expenditure grace period (days)
- Overencumbrance allowed
- Overencumbrance limit percent
- Overencumbrance warning percent
- Overexpenditure allowed
- Overexpenditure limit sum
- Overexpenditure warning sum
- Override Rules Information (Yes/No)
- Transfers prior to fiscal period (days)

## 2020 RN 02 Issues

- **February 2020 Fulfillment - Course Reserves SF: 00665112**  
Analytics data does not include owners added using the **set\_instructors\_as\_owners** flag. This was fixed.
- **February 2020 Resource Management**  
(URM-100322) Since there is no physical inventory maintained in the Community Zone or the Network Zone, the Community Zone and Network Zone search options (icons / tabs / radio buttons) were removed from the Alma repository search for the **Physical titles** and **Physical items** search options.
- **February 2020 Acquisitions SF: 00708476**  
In the In Process Items page, the Modified By column displayed the first operator that modified the record instead of the last operator. This was fixed.
- **February 2020 Acquisitions SF: 00674166 00733466**  
In some cases when a PO Line was closed and reopened the PO Line's title was changed to the title of the previous PO Line handled. This was fixed.
- **February 2020 Acquisitions SF: 00790022**  
In some cases, the PO Lines that were created from EOD ignored the purchasing review rules and continued the workflow. This was fixed.
- **February 2020 Acquisitions SF: 00680283**  
The additional information was missing from invoice export XML when created from Physical - Standing Order order line. This was fixed.
- **February 2020 Acquisitions SF: 00702085**  
Total invoice lines amount did not display sum under invoice line detail. This was fixed.
- **February 2020 Acquisitions SF: 00685088 00769493**  
When changing the price in the invoice line page the Redistribute line did not happen automatically and required the user to click it. This was fixed and now redistribute lines will happen automatically when changing the price.
- **February 2020 Acquisitions SF:**  
In case of combined search result, the inventory context was wrong. This was fixed.
- **February 2020 Acquisitions SF: 00626738**  
E activation link from advanced search did not work. This was fixed and works as expected now from both searches (simple & advanced)
- **February 2020 Acquisitions SF: 00671578 00532041**  
Selecting the trials link to a survey form led to an error. This was fixed.
- **February 2020 Acquisitions SF: 00747060 00793722 00731551 00787767**  
Executing the data corrector caused the available for field to be empty. This was fixed and now the available for field gets the value depending on the owner.
- **February 2020 Acquisitions SF: 00759302 00746552**  
Typo was corrected in the message displayed to user when adding a fund to a PO Line or Invoice line and there was an encumbered warning.
- **February 2020 Acquisitions SF: 00710513 00699403**  
In Rollover Ledgers Job > Add job, When the Create Allocation From is changed from the default 'None' to anything else and then selecting 'Copy' in Action, the value in the field Create Allocation From returned to None. This was fixed.
- **February 2020 Acquisitions SF: 00533293**  
When an Order was sent via EDI for Standing order type of PO Line the location was not added to the Order in EDI file. This was fixed.
- **February 2020 Acquisitions SF: 00702666**  
The PO was stuck because of duplicate POs that were created in the EOD. This was fixed. For documentation: The input EOD file was invalid: There is no option to sent po number with two different libraries. If such situation is needed, they should send vendor invoice number but not PO number.

- **February 2020 Acquisitions SF: 00540508**  
When selecting **Acquisitions > Import > Load Usage data** it took more than seven seconds for the page to load. This was fixed.
- **February 2020 Administration and Infrastructure SF: 00792366**  
In the bulk fine waiving screen, typing anything other than numbers will be prevented.
- **February 2020 Administration and Infrastructure SF: 00526195 00683661 00594501 00593504**  
Updating password from Primo without entering the old password would display a success message, but without actually updating the user password. The was fixed, an error message is now displayed.
- **February 2020 Administration and Infrastructure SF: 00659374 00758194 00717340 00750708 00799429**  
In some cases, when searching for a user with a hyphen the user was not found. This was fixed.
- **February 2020 Administration and Infrastructure SF: 00715406**  
Changed name display so that when configuration specifies both name and preferred name, both are displayed even if they are identical.
- **February 2020 Administration and Infrastructure SF: 00103990**  
Checking the SMS Preferred in Primo my account was not validating the SMS number. This was fixed, whenever a blank SMS number is submitted an error message is displayed.
- **February 2020 Administration and Infrastructure SF: 00661018**  
The Auto Complete search for users in Japanese environments did not return results when the last name contained spaces. This was fixed.
- **February 2020 Administration and Infrastructure SF: 00695423**  
The external resources screen has special implementation and therefor the options to choose the number of results to display cannot be used. Issue was fixed by removing the option to set a different number of results than 20.
- **February 2020 Administration and Infrastructure SF: 00705746 00657295 00792211**  
In Manage Items Returns, the pop-up message when returning an item to be reshelfed to a temporary location was not translated. This was fixed.
- **February 2020 Administration and Infrastructure SF: 00735668 00643584**  
The IdP Reset Password pages, when used with a language-code parameter, did not follow with the requested language to error-message pages. This was fixed.
- **February 2020 Administration and Infrastructure SF: 00702404**  
The One-Time Logic using email pages, when used with a CSS skin, did not follow with the requested skin to a error-message pages and the success screen. This was fixed.
- **February 2020 Analytics SF: 00717661**  
When creating a report in the E-Inventory subject area with fields from the Bibliographic Details dimension, if the the Originating System field is added, some of the results where Originating System is expected to be "Unknown" did not appear in the report. This was fixed.
- **February 2020 Analytics SF: 00642793**  
The Transaction Type Pie chart on the Acquisitions dashboard could not be edited to display the remaining allocation regardless of status. This was fixed.
- **February 2020 Analytics SF: 00637768**  
Subfolders were not displayed properly in the Analytics Object List, which prevented dashboards from being added to the list. This was fixed.
- **February 2020 API SF: 00648237**  
The IdP Reset Password pages, when used with a CSS skin, didn't follow with the requested skin to the page where new password is requested. This was fixed.
- **February 2020 API SF: 00646813 00725471 00678614**  
"The Update-User API failed when the user had 'Receiving Operator' role with the scope of the institution, but with a service-unit parameter in a scope of a library. This was fixed.
- **February 2020 API SF: 00714379**  
The Create Set API didn't work when creating a logical set by library/locations. This was fixed.
- **February 2020 API SF: 00720665**  
When updating a portfolio using an API the history tab showed that a 'change' was made to library even though this field was not touched. This was fixed.

- **February 2020 Fulfillment SF: 00705635**  
Export Users job sometimes failed to upload XML file due to invalid characters. This was fixed, the invalid characters are removed before retrying to upload the file.
- **February 2020 Fulfillment SF: 00729923 00704493 00703731 00608577**  
If an item's barcode was changed while the item was in a work order, the item was sometimes not found when searching for it by the new barcode on the Manage in Process Items page. This was fixed.
- **February 2020 Fulfillment SF:**  
When SMS was activated, if the Loans - Overdue and Lost Item job failed to send an SMS message because there is no preferred SMS number on the User Detail page, the job completion status was set to Completed with Errors. Now the SMS message is not sent, without causing the job status to be Complete with Errors. The SMS messages which were not sent will continue to be reported inside the job report as before.
- **February 2020 Fulfillment SF: 00744296 00735221**  
Placing a request on a title with multiple items that belong to remote storage failed under a specific configuration. This was fixed.
- **February 2020 Fulfillment SF: 00733124 00769441**  
Previously, if a library was removed from a lost loan profile, the locations list still remained saved on the profile, even though it was not displayed in the UI. Additionally, if a library and locations were selected, removing the location(s) from the profile did not work. Both issues are fixed.
- **February 2020 Fulfillment SF: 00756362 00614301**  
When requesting an ASRS remote storage item, sometimes the request appeared in Alma with a status of Request Communicated to Remote Storage, even though the communication with the ASRS server failed. Now, if the communication fails, Alma cancels the request with cancellation reason: Failed to communicate with remote storage.
- **February 2020 Fulfillment SF: 00639641**  
Previously, in some circumstances, when a user requested a title from primo with two holdings or more, a pickup location appeared in the drop-down list that was not applicable. This was fixed.
- **February 2020 Fulfillment - Resource Sharing SF: 00688547 00684300**  
In some cases, the locate process did not run for a partner and therefor left it in the rota, despite not having any items for the request. This was fixed. The Manual Locate Job now runs on all relevant partners.
- **February 2020 Fulfillment - Resource Sharing SF: 00659455**  
Chapter author and chapter title are now determined by the content of SLNP message
- **February 2020 Resource Management SF: 00674416**  
When running the 'Change Holding Information' job and the holdings did not match the normalization rule, the holdings, incorrectly, were changed anyway. This issue was fixed.
- **February 2020 Resource Management SF: 00705243**  
The Locations filter on the List of Items page does not present the correct list of locations, per the user interface language being used (German). This issue was fixed.
- **February 2020 Resource Management SF:**  
In the Physical Item Editor, the locations and libraries were not translated. This was fixed.
- **February 2020 Resource Management SF: 00696284 00709644 00719581 00714169 00730541**  
In the items list, the filters did not include all the values across pages, that was fixed.
- **February 2020 Resource Management SF: 00703769**  
When a title had a deleted portfolio available for the institution and also an active portfolio available for a group, the title would sometimes appear in the main institutional export (instead of just the export for the group institutions). This has been corrected.
- **February 2020 Resource Management SF: 00716894**  
Two portfolios connected to two different bibliographic records with the same ISBN / ISSN did not link properly to the Community Zone. This was fixed. The recommended workflow is to avoid creating bibliographic records with the same ISBN / ISSN.
- **February 2020 Resource Management SF: 00720954 00735159 00719431 00759325 00788382**  
When the Springer 'Upload electronic holdings' job was run, the job was not able to download the file due to special characters in the name. This issue was fixed.
- **February 2020 Resource Management SF: 00721075 00718384**  
The 'Publish your Local Holdings Records (LHRs) to OCLC' publishing job mistakenly took a bibliographic record 035

field value and added it to the holdings record 004 field when there was already a 004 field, thus creating a second 004 field. The standard dictates only one 004 field, and OCLC requires that the 004 value be the OCLC number. Set the 'fix\_multiple\_004\_in\_oclc\_publishing' customer parameter to 'true' to address this issue.

- **February 2020 Resource Management SF: 00759564 00719909**

Previously, when running the 'Add Members to Set' job (Admin > Manage Jobs and Sets > Manage Sets > select Add Set > Itemized) and 1) the 'From File' option was selected from 'Add Contents from File to Set' section and 2) the file selected contained one or more invalid IDs that could not be found in Alma, the job report did not count the invalid IDs and showed the job as completed successfully. This was fixed. When invalid IDs are encountered in the selected file, they are now counted and reflected in the job report that is created. For more information, see 'Creating Itemized Sets' at <a

href="">[https://knowledge.exlibrisgroup.com/...\\_Itemized\\_Sets](https://knowledge.exlibrisgroup.com/..._Itemized_Sets)</a>.

- **February 2020 Resource Management SF:**

When creating a logical set (Admin > Manage Jobs and Sets > Manage Sets > select Add Set > Logical) after completing a filtered repository search, the repository search filter appeared on the Repository Search page (wizard step 2) of creating a logical set. This issue was fixed. A refresh is now completed to avoid this issue.

- **February 2020 Resource Management SF: 00393209**

When an institution's authority linking strategy is based on ID and an authority search for 'bibliographical records matching this value' was performed, the authority ID prefix was ignored and returned irrelevant records. This issue was fixed.

- **February 2020 Resource Management SF: 00793673**

The Primo VE facets filter appeared as code, labels were missing. The Primo VE user interface was fixed.

- **February 2020 Resource Management SF:**

In the scenario where 1) there are two network bibliographic records A (primary) and B (secondary), 2) a member institution had a local bibliographic record linked to the network record B, and 3) the local record B was related to a PO line AND the member institution performs 'Merge Records & Combine Inventory' for the two network bibliographic records A and B, record B was merged into A; and B was deleted. However, when B was deleted the PO lines previously associated with record B were not associated with record A. This was fixed.

- **February 2020 Resource Management SF: 00681621**

After selecting an item to edit through the 'Browse Shelf Listing' feature and then returning back to the MD Editor by selecting Cancel, Save or the Back arrow, the user is not directed back to the Browse Shelf Listing with the previous parameters settings. This was fixed.

- **February 2020 Resource Management SF: 00686125 00668558 00668457**

In some cases, when a member institution performed 'Merge & Combine' from the MD Editor on two network records, the 'primary' network record was 'locked by System' for one hour. This has been corrected.

- **February 2020 Resource Management SF: 00738891**

The following values that were not up-to-date were corrected/added to the UNIMARC bibliographic metadata profile, field 105, positions 4-7: m = dissertation or thesis (original) 7 = academic thesis below the doctoral level, including the masters v = dissertation or thesis (revised) w = religious text

- **February 2020 Resource Management SF: 00714086**

In some cases, when a member institution performed 'Merge & Combine' from the MD Editor on two network records, the 'primary' network record was 'locked by System' for one hour. This has been corrected.

- **February 2020 Resource Management SF: 00591893**

Brackets were missing in the SBN to UNIMARC converted record when a title was preceded by one-letter articles. This was fixed.

- **February 2020 Resource Management SF: 00742361**

Access to the Authority reference file using F3 was not working with Polish characters for certain fields such as the 373 field. This was fixed.

- **February 2020 Resource Management SF: 00529800**

For UNIMARC Browse Bibliographic Headings, some titles did not display properly. This was fixed. Subfield e is now added to the headings (for display and browse) created out of the bibliographic fields 200 (Title and Statement of Responsibility), 225 (Series), and 410 (Series - LINKING ENTRY). A full inventory re-indexing (including 'recreate bib headings') needs to be run for this fix to be fully functional.

- **February 2020 Resource Management SF: 00553890**

For UNIMARC Browse Bibliographic Headings, there were issues with the display and indexing of fields 225 and 410 > \$\$e. This was fixed. Subfield e is now added to the headings (for display and browse) created out of the bibliographic

fields 200 (Title and Statement of Responsibility), 225 (Series), and 410 (Series - LINKING ENTRY). A full inventory re-indexing (including 'recreate bib headings') needs to be run for this fix to be fully functional.

- **February 2020 Resource Management SF: 00746271**

Two new scheduling options were added for the central catalog integration job.

## 2020 RN 02 MtM

Download a PDF of the [Release Notes and Resolved Issues](#).

## Make the Most of February's Release

| Action Items                                                                                                                                                                                                                                                                                                                                                                          |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> <a href="#">Local Extensions for Community Zone-Linked Bibliographic Records</a> - Are you using the Community Zone? Did you always want to add your own proprietary information to Community Zone Bibliographic records? You can now achieve this by using local extensions. For more information see <a href="#">Working with Local Extension Fields</a> . |
| <input type="checkbox"/> <a href="#">Support ability to change to an absolute path in the S/FTP Definition</a> - The S/FTP definitions have been enhanced to support absolute paths in addition to the relative paths already supported. This is needed to support file transfer with specific systems provided by OCLC, which recently changed how they transfer files.              |
| <input type="checkbox"/> <a href="#">"Quick Printing" Option for Multiple Records</a> - Multi Select Quick printing support was added to the 'Pick From Shelf' task list.                                                                                                                                                                                                             |

## OBI Upgrade and Data Visualization (DV)

Ex Libris is upgrading the Analytics platform from version 11 to 12 of OBIEE. As part of this upgrade, the Data Visualization tool is also being added, which adds great value to the analytics platform. To learn more about both OBI 12 and Data Visualization and how DV interacts with Alma, see [Data Visualization \(DV\) and OBI 12](#). Please note that Data Visualization (DV) will be deployed in 'Preview Mode', meaning it is available for testing and evaluation but is not yet intended for full production use. We will continue to update you on plans for the general release of Data Visualization (DV) later in 2020.

As of December 2019, OBI 12 for Alma Analytics and DV is being used by 14 institutions as early adopters. In March 2020, both OBI 12 and DV will be available to all NA institutions, and during May 2020 to all other institutions. As part of the OBI upgrade from v11 to v12, institutional reports will be migrated. During the migration (a week as per the following schedule) it will not be possible to create new reports that will be migrated to OBI12. This is referred to as the 'freeze period'.

| Data Center                                     | Step                                                | Date                    |
|-------------------------------------------------|-----------------------------------------------------|-------------------------|
| Chicago Data Center<br>(NA01, NA02, NA03, NA91) | Migration of OBI11 reports to OBI12 (freeze period) | February 22-28          |
|                                                 | OBI12 Go Live                                       | March 1                 |
| All other Data Centers                          | Migration of OBI11 reports to OBI12 (freeze period) | May 2 -8                |
|                                                 | OBI12 Go Live                                       | May 10 (Release Update) |

## Next Release Sneak Preview

Select [February 2020 Sneak Preview](#) to view the next release sneak preview.

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## March 2020 Sneak Preview

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### 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.

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## Acquisitions

- **NERS Enhancement - New Addition to the Purchase Request Form in Alma** - There will be a new addition to the purchase request form in Alma. As part of the purchase request form, users will be able to determine the material type of the requested resource; the ability to define whether the requested resource will be Physical or Electronic as well as determining the actual material type (Book, CD-ROM, DVD).



- **Idea Exchange - Refinements to "Load usage data" Summary** - More information will be provided regarding SUSHI COUNTER load usage files to help users troubleshoot connection errors.
- **Update to 'Create Order' API** - When orders are sent from OASIS via the "Create Order" API, it will be possible to create orders in Alma with a zero-amount using a designated "no charge" parameter in the API. This can be useful especially in cases where orders are set as "License Upgrade" and have no charge to them.

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## Resource Management

- **NERS Enhancement - Link Resolver GetIt Services – Prevent Services for Wrong Titles** - In order to prevent GetIt services for the wrong titles, customers will have the option to limit the link resolver to display GetIt services for titles that were matched based on identifiers.
- **Community Zone Local Extensions – Import** - With the March release it will be possible to also add local extensions via the import process. This is in continuation of the functionality that was released in February which enables the addition of local extensions to Community Zone records.

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## Digital Resource Management

- **New Alma Viewer** - A new and attractive digital viewer, aligned with Primo UX and with full customization will be available through Primo Studio.
- **Full-text display in Alma Viewer** - The new Alma viewer will include the option of displaying a full-text pane, providing a side-by-side experience of files and their transcriptions.
- **Embed New Alma Viewer in Primo** - It will be possible to embed the new Alma Viewer into Primo's full display page, providing immediate access to the digital content.
- **File-level delivery** - The new Alma viewer will include an option of sharing a deep-link to a specific file in the representation.

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## Fulfillment

- **NERS Enhancement – Configurable Pop Up Notices** - Users will have the ability to determine the presentation of notifications when scanning in an item in the "Scan-In" page. Using a designated configuration table, an institution will be able to decide how notifications and confirmation messages will be presented to their users, as a "Pop-Up" messages, Confirmation badges or not at all. This will enable the institution to determine the importance of certain notifications and potentially improve their staff efficiency.

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## Resource Sharing

- **Option to keep Rapid ILL requests open** - The current workflow of exporting requests to RapidILL will be further fine-tuned, allowing libraries to keep the requests active in Alma after their export to RapidILL. This will enable manually verifying each request's satisfactory fulfillment before completing in Alma.
- **Claim request based on Average Supply Time** - Borrowing libraries will be able to automatically send claim messages to the potential lenders, based on a defined claim interval. It will also be possible to automatically cancel a request that the lender has not fulfilled within a defined period of time.

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## DARA

- **Recommendations List Refinements** - Based on user study, there will be refinements to Dara's Recommendations List - Let's Do It, Show Me Why, as well as briefer recommendation descriptions. In addition, there will be clear indications that recommendations were already implemented. 'Dismiss' and 'Mark as Implemented' will be a single action.