



Alma January 2020 Release

Alma Libraries Around the World
Mount Royal University Library,
Calgary, Canada

Alma January 2020 Release Notes

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2020 RN 01 MtM

Make the Most of January's Release

Action Items

- ☐ [More Possibilities for the Alma Color Theme](#) - We have added an additional 6 new colors themes for an institution to select. This provides more options to fit your institution brand and separation between environments. The colors comply with accessibility standards for contrast.

For information on Primo VE new release features, see the [Primo VE January 2020 Release Notes](#).

Cost Usage Subject Area in Alma Analytics Deprecated

Please note that in Alma Analytics, the Cost Usage subject area and its related features are deprecated for this release. This includes:

- The fields of the Cost Usage subject area that are available when selecting New > Analysis > Cost Usage
- The out-of-the-box reports and dashboards for Cost Usage under /shared/Alma/Cost per Use/Reports and under /shared/Alma/Cost per use via COUNTER reports and acquisitions data
- The folder Cost per use via COUNTER reports and acquisitions data

All reports that use the Cost Usage subject area no longer work.

Institutions that use reports from the Cost Usage subject area can do the following:

- Take advantage of the over 30 new out-of-the-box reports in the /shared/Alma/Cost per use via COUNTER reports e-inventory and acquisitions data/Reports folder. These reports use the new Cost Usage of the E-Inventory subject area.
- Use the out-of-the-box Electronic Cost Usage Dashboard (which uses the above reports) located in the /shared/Alma/Cost per use via COUNTER reports e-inventory and acquisitions data/Dashboards folder.
- Make their own customized reports using the Cost Usage dimension of the E-Inventory subject area.

GuideMe Step-by-Step Walkthroughs

Take advantage of our new GuideMe walkthroughs! GuideMe is a help tool layered over Alma, providing step-by-step guidance enabling you to get just-in-time help on selected workflows. These flows are segmented by role displaying flows relevant to your role in your institution. Additional GuideMe flows will be added on an ongoing basis. See [GuideMe FAQ](#) for more information.

Next Release Sneak Preview

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

February 2020 Sneak Preview

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.

DARA

- **New DARA Recommendations** - There will be two new DARA recommendations for identifying standalone portfolios or collections that can be linked to the Community Zone. This will help institutions in better managing their locally defined e-resources.
- **Library Level Recommendations** - This new enhancement will provide a better ability to view recommendations relevant for specific libraries, including a filter to choose which library's recommendations to view and take action on.

Acquisitions

- **Prevent Access to POL Summary Information for P/E inventory roles** - Institutions will be able to control access to acquisitions information (for example, when editing a physical item or electronic portfolio). A "View PO_PO Line" privilege was added to the roles Repository manager, Physical inventory operator and Electronic inventory operator.
- **Additional Functionality for PO line type "License Upgrade"** - In the January release Alma added support for a PO line type "License upgrade". Assuming that PO lines from type "license upgrade" will normally be associated with a resource that already has an existing order, "License Upgrade" orders will become 'additional' by default.
- **Send claim letter to a continuous POL based on the Item level** - For continuous PO lines which are in claim, Institutions will be able to send additional claim letters to the vendor every time a new item is claimed.

Resource Management

- **Ability to Control Copy Cataloging of Records** - An institution will be able to define, on an individual record level, if it can be externalized via z39.50/SRU, thereby better supporting the ability to enforce metadata record policies. This new record setting can be defined in batch on a one by one basis, or during the import of records.
- **Add Local Extensions to Community Zone Bibliographic Records** - Institutions will be able to add local extensions to Community Zone bibliographic records in order to record and expose institution specific proprietary information.

Digital Resource Management

- **Move Deposit Letters to Letter Customization Infrastructure** - This new option will allow institutions to fully customize the patron deposit letter, utilizing the recently upgraded Alma letters customization infrastructure.

Fulfillment



- **Idea Exchange - Last activity date on user record** - Institutions will be able to activate a function which will store the patron's "last activity date" when performing a number of actions – e.g. loan, request, and return.
- **Update to "Pick from shelf"** - In order to improve the efficiency of the operator working with the "Pick from shelf" functionality, an option to multi-select records and print slips for all of them in a single click will be added using the "Quick-Print" functionality.

2020 RN 01 Main

DARA Now Recommends Configuring Description Templates

January 2020 DARA

DARA now identifies that you have not configured description templates, which are used to generate descriptions for physical items based on ENUM/CHRON information, and directs you to configure them.

1 Use Alma feature: Description Templates
Category: Use physical inventory features
Type: Description Templates
 Your institution did not configure description templates. Description templates can help generating an item description based on the ENUM/CHRON information. For more information about this feature click [here](#).
 Click [here](#) in order to configure and start using this feature.

DARA – Description Templates

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

For more information on configuring Description Templates, see [Configuring Description Templates](#).

Role Configuration for DARA Recommendations

January 2020 DARA

You can now configure DARA Recommendations on the new Configuring DARA Recommendations page (**Configuration > General > General Configuration > DARA Recommendations**):

DARA Recommendations			
1 - 9 of 9			
Active	Type	Category	Roles
☒	Description Templates	Use physical inventory features	Physical Inventory Operator, General System Administrator
☒	Unavailable Portfolios	Unavailable Portfolios	Electronic Inventory Operator, Repository Manager, Purchasing Operator, Purchasing Manager
☒	Upload Electronic Holding	Use Electronic Inventory Features	General System Administrator
☒	Local Portfolios in Community-Linked Collection	Link Electronic Resources to the Community	Electronic Inventory Operator, Repository Manager, Purchasing Operator, Purchasing Manager
☒	Automatic Usage Data	Automatic Usage Data	Vendor Manager
☒	High Request Load	High Request Load	General System Administrator, Fulfillment Services Operator, Selector, Fulfillment Administrator, Purchasing Operator, Purchasing Manager, Acquisitions Administrator
☒	Media Conversion	Use digital inventory features	Digital Inventory Operator, Editor Full, Repository Manager
☒	Validate Order Information	Use Acquisitions Features	General System Administrator
☒	Load Usage Data	Load Usage Data	Vendor Manager

DARA Recommendations Configurations

Move the slider to activate/deactivate a recommendation for your institution. When deactivating a recommendation, an option to dismiss all existing recommendations of that type is displayed. This functionality was moved to this page from the Data Sharing profile page.

Select the **Actions** button to display the list of roles that are configured for the recommendation. You can remove or add one of the configured roles.

Recommendation Type Roles

Cancel Save

RECOMMENDATIONS

Content

Repository Manager X Purchasing Operator X

Electronic Inventory Operator

✓ Repository Manager

✓ Purchasing Operator

Purchasing Manager

Recommendations Roles

Bulk Dismissal of DARA Recommendations

January 2020 DARA

You can now dismiss several recommendations at one time by selecting the recommendations and clicking **Dismiss selected**.

Manage Recommendations

Back

1 - 12 of 12

12 rows selected Dismiss 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 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

2 Unavailable portfolios in the "Institute of Physics Journals. Package B" electronic collection

Category: Unavailable Portfolios

There are 23 unavailable portfolios out of the total 23 portfolios in "Institute of Physics Journals. Package B" electronic collection. These portfolios are not getting published to discovery and are not visible to your patrons. 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

3 Unavailable portfolios in the "Miscellaneous Ejournals 2808161851" electronic collection

Category: Unavailable Portfolios

There are 32 unavailable portfolios out of the total 314 portfolios in "Miscellaneous Ejournals 2808161851" electronic collection. These portfolios are not getting published to discovery and are not visible to your patrons. 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

DARA Bulk Dismiss

Create Order API - Improved Matching and Creation of Portfolios to work with Community Zone

January 2020 Resource Management

When the **New Order API** runs, Alma now uses the vendor proprietary identifier number or the ISBN/ISSN to search and match the incoming order to an existing portfolio in an electronic collection. If no match is found Alma will attempt to activate the relevant portfolios from the collection in the Community Zone.

The newly created PO line will be associated to the existing portfolio as the main PO line, and if a PO line already existed on the portfolio it will be set as an additional PO line. The access model description, as defined in the [Access Model](#) table, is added to the PO line **Notes** tab and to the portfolio's **Public Notes** field for display in Primo.

The access model description is only added to the portfolio's Public Notes field if the **Include access model in portfolio public note** check box is selected on the New Order API integration profile.

This functionality is currently supported for orders originating from OASIS for ProQuest EBook Central content. A future

release will include additional providers.

See [Real Time Ordering](#).

New Purchase Type **License Upgrade** Available for Purchase Order Lines

January 2020 Acquisitions

A New purchase type **License Upgrade** is available for Purchase Order lines, this will enable institutions to record purchases which reflect license upgrades purchase model. Additionally, a PO line can now be created without a fund and price for scenarios such as described above where a **License upgrade** has no charge and needs to be recorded in the system. The option to set a PO line as no charge is compatible with the following acquisition methods: **Purchase**, **Approval Plan**, and **Purchase at Vendor System**. When selecting any of these values in the **Acquisition Method** of the PO line, the **No Charge** check box appears. When this check box is selected, the **Funding** and **Pricing** sections are hidden.

See [Manually Creating a PO Line](#).

COUNTER Release 5

January 2020 Acquisitions

With the January 2020 release Alma is now fully compliant [with COUNTER release 5](#). COUNTER Release 4 will continue to be supported along with COUNTER release 5. This is the case for both Alma as well Alma Analytics. For more information, see video [COUNTER Release 5 in Alma and Alma Analytics](#) as well as Knowledge Center entry [Managing COUNTER-Compliant Usage Data](#).

Phrase Search in the Simple Search Box

January 2020 Resource Management



Idea Exchange SF: 00668493

Alma now supports phrase search in the simple search box. All entities and index types that have the option to use phrase search in Alma's advanced search also have this capability with simple search when using double quotation marks to identify the phrase. See [Performing a Simple Search](#) for more information.

BIBFRAME Added to the Export Bibliographic Records Job

January 2020 Resource Management

Alma now supports exporting bibliographic records in the BIBFRAME and RDA/RDF output formats. See [Export Bibliographic Records](#) for more information.

Community Zone Set Management

January 2020 Resource Management

In addition to the Community Zone set management announcements made in the December release (see [Community Zone Set Management](#)), the January release adds the following Community Zone sets features:

- Cataloging an authority record set of Community Zone records
- Exporting a set of Community Zone records (with Export Authority Records or Export Bibliographic Records)
- Creating or updating a set of Community Zone records via API (see [Rest APIs – Configuration and Administration](#) in the Developer Network)

See [Managing Search Queries and Sets](#) for more information.

Alma-Based Authority Management

January 2020 Resource Management

Alma now supports contribution of authorities that are managed in an Alma institution. For an institution that manages local authority records and publishes them to the Community Zone, there is now the option to have the Alma community contribute to these authority records (like the National Library of Israel (NLI) implementation). If you are an institution that 1) currently manages an authority file locally, 2) publishes it to the Community Zone, and 3) wants to have other authorized members of the Alma community contribute changes to this authority file, contact Ex Libris to analyze the feasibility of your request. If your authority requirements match the criteria for this functionality, Ex Libris will work with you to implement this capability. See [Working with NLI Integrated Authority Records](#) for an example of how this feature is used, and see [Alma-Based Authority Management](#) for more information.

Download Original File in Universal Viewer

January 2020 Digital Resource Management SF: 00700969

You can now download a file from the Universal Viewer in the original format in which it was uploaded to Alma. To download the original file, select the download icon.

You configure the icon to appear from **Configuration > Fulfillment > Discovery Interface Display Logic > Viewer Service > Universal Viewer**. Select the **Display Original Image Download Link** checkbox:

The screenshot shows the 'Service Details' configuration page for the 'Universal Viewer' service. The page has a header with a back arrow, 'Service Details', and 'Cancel' and 'Save' buttons. Below the header, the service name 'Universal Viewer' is displayed with a dropdown arrow. Underneath, the 'Service Code' is 'UniversalViewer' and the 'Service Description' is 'Digital Version(s) - IIIF'. There are two tabs: 'Service Details' (active) and 'Service Availability Rules'. In the 'Service Details' tab, there is an 'Active' dropdown set to 'Active'. Below that, the 'Service Code' is 'UniversalViewer', the 'Service Name' is 'Universal Viewer', and the 'Service Description' is 'Digital Version(s) - IIIF'. At the bottom, there is a checkbox labeled 'Display Original Image Download Link' which is currently unchecked. This checkbox is highlighted with a red rectangular box.

Display Original Image Download Link

Deposit Interface Customization

January 2020 Digital Resource Management SF: 00593963 00709116

You can now customize the Deposit user interface. To support this feature, a new configuration page was created at **Configuration > General > User Interface Settings > Alma Viewer and Deposit Customization**:

The screenshot shows a web interface titled 'View Configuration'. At the top right are 'Back' and 'Save' buttons. Below the title is a dropdown menu showing 'EXLDEV1_INST:AlmaGeneralView'. Underneath is a section labeled 'View Name' with the value 'AlmaGeneralView'. This is followed by two main sections: 'Upload Package' and 'Upload Logo'. The 'Upload Package' section contains a text input for 'Customization Package', a file upload icon, and an 'Upload' button. The 'Upload Logo' section contains a text input for 'Upload Logo File', a file upload icon, an 'Upload' button, and a text input for 'Logo Clickable URL' with an information icon to its right.

Alma Viewer and Deposit Customization

You can perform the following customizations from this page:

- Upload a customization package created in Primo Studio
- Upload a logo image file
- Enter a URL that is opened when you select the logo

Note

In a future release, you will be able to customize the Alma Viewer from this page as well.

Network Zone Import with Local Extensions

January 2020 Collaborative Networks SF: 00474265 00490469 00510530 00537427 00549465 00694413 00200674 00210745 00018526 00105104 00106863 00119947

For Network Zone member institutions, import can now be used for adding / managing local extensions in the Network Zone. See [Adding Local Extensions Using Import](#) for more information.

Fulfillment Network Pickup Locations

January 2020 Fulfillment / Collaborative Networks

The calculations of a pickup location for a Primo patron request will now be modified for institutions that are part of more than one fulfillment network. As an example, institutions A and B are a fulfillment network, while institutions A and C are a separate fulfillment network:

Previously, when a patron from institution B finds a title in institution A, the pickup locations presented are from all three institutions because A is the owner of the item and A is in networks with both B and C.

Now, rather than displaying all possible pickup locations based on the item owner, Alma will also utilize the Primo login institution, institution B, and only display the pickup locations that can serve both item owner (A) and login institution (B), in

this scenario, A and B.

Leganto Configuration Menu

January 2020 Fulfillment

All Leganto configuration links that previously appeared in the Leganto sub-section of the Fulfillment tab in the Alma configuration menu are now moved to a single Leganto tab on the configuration menu (for those institutions that are configured for Leganto). The Settings mapping table now appears in each of the Leganto tab's sub-sections. Only those customer parameters that are pertinent for that section are displayed in each link.

More Possibilities for the Alma Color Theme

January 2020 Administration and Infrastructure



Idea Exchange

Adding to the existing 11 color schemes on the Branding Management Page ([Configuration Menu > General > User Interface Settings > Alma Logo and Color Scheme](#)), you can now select from the following new colors: Denim Blue, Pine Green, Teal Green, Cerise, Violet, and Brown.



Alma Color Palette

Cloud Passwords

January 2020 Administration and Infrastructure

In the next step of the move to Ex Libris Identity Service, which launched in January 2019, we are removing all passwords from the Alma database. See the [Ex Libris Identity Service](#) in the Developer Network.

This change only affects users that have not logged in since the beginning of 2019. However, if you have Primo/PDS which hasn't been upgraded for some time, there could be active users which still have passwords in the Alma database. This will only be users whose passwords are not strong enough to be written into the Identity Service automatically.

To handle users without passwords, you can do any of the following:

1. Add a "forgot password" link to Primo which will be useful also for users without password. See the Knowledge Article, [How to add a 'Forgot My Password' link to the login page in the new UI when using Alma for authentication](#).
2. Create a list of the relevant users using an Analytics report and send them an email using the Update/Notify Users job (with a link to page where they can create a new password). See [Editing/Messaging Users in Bulk](#).
3. Do nothing. The patrons who cannot login will approach a librarian who will set a new password for them.

Translating Notifications

August 2019 Fulfillment - Course Reserves SF: 00624647 00636708

You can now translate the recent changes (in Leganto, these are notifications) in the System Event Types code table. See [Translating Notifications](#).

Mapping Bibliographic Record Fields to Citation Fields

July 2019 Fulfillment - Course Reserves SF: 00589678 00623171

You can now configure and normalize the information that is taken from a bibliographic record and copied to a citation when a) a repository citation is created or b) a resource locate succeeds for the citation. For more information, see [Mapping Bibliographic Record Fields to Citation Fields](#).

Changes to the Course Loading Integration Profile

July 2019 Fulfillment - Course Reserves SF: 00629468

The following changes were made to the course loading integration profile:

- You can select the status **Rolled Over** for rolled over reading lists.
- New setting: **On rollover list creation mode - Multiple** (create a new list for each course) or **Single** (if the list already exists, attach it to the new course).

Course Loading Integration Profile Rollover: Increased Performance and Reading List Name Suffixes

June 2019 Release Update Fulfillment - Course Reserves SF: 00690351 00690649 00690885

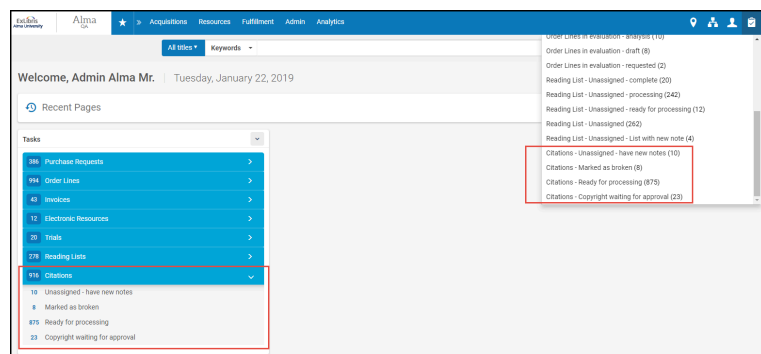
The course loading integration profile was taking a long time to run for when performing a rollover. Part of the issue was found to be the way that suffixes were added to the names of the rolled over reading lists.

This was fixed by adding a new field (**On rollover reading list name suffix**) to enable you to enter the suffix that you would like to add to new reading lists. For example, if you enter -201906 as the suffix, then a reading list with the name *History* will be rolled over to a reading list with the name *History-201906*. If you leave this field empty, the name of the new reading list is the same as the name as the old reading list. See [Configuring Course Loading](#).

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 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.**

Enhancements to Handling Multiple Matches During Resource Locate

January 2019 Fulfillment - Course Reserves

Until now, when Alma found multiple matches during a resource locate (for citations added using the Process and Enrich Citations in Bulk job or when saving a citation added by an instructor in Leganto), Alma did not attach any of the matches that it found to the citation. The job report indicated that multiple matches were found. A librarian could then manually match the citation to a repository entity.

You can now use **resource_locate_multiple_matches** and **resource_locate_multiple_matches_priority** (see [Configuring Other Settings](#)) to configure how Alma handles multiple matches:

- **resource_locate_multiple_matches** is set to **manual** by default, which is the current behavior. Set to **first_by_inventory_type** and also set the next parameter to have Alma attach the citation to the first entity found according to priority type (see next field).
- When you select **first_by_inventory_type** for **resource_locate_multiple_matches**, set the priorities for matching in **resource_locate_multiple_matching_priority** using the values **E** (electronic), **P** (physical), and/or **D** (digital). in priority order, separated by commas. For example, **E, P** indicates first priority electronic, second priority physical, and not to consider digital matches.

The Process and Enrich Citations in Bulk page was enhanced to support these options and in a few other ways. The old course date fields were combined to use a single date range picker, and the other previous fields were slightly moved and renamed (but otherwise remain the same).

Job ID	Status	Creator	Time Started	Time Ended	Entities Fulfilled	Entities Failed
1 2939726200000121	Completed Successfully	exec	08/09/2018 11:55	08/09/2018 11:56	16	0
2 3889412300000121	Completed Successfully	jrasm	07/12/2018 20:32	07/12/2018 20:32	8	0
3 3638421250000121	Completed Successfully	gal	03/08/2018 16:44	03/08/2018 16:45	151	0

Process and Enrich Citations in Bulk Page

To support the new multiple match handling feature, the field **When multiple matches are found** was added. Select either **Handle manually** or **Use first matching resource**. If you select **Use first matching sequence**, select the priorities from the drop-down lists for the three resource types.

When multiple matches are found

☐ Handle manually

☒ Use first matching resource of a specific inventory type, if it exists (otherwise, handle manually)

Physical

2nd Priority

Electronic

1st Priority

Digital

Don't Use

Process and Enrich Citations in Bulk Page, Select Priorities for Multiple Matches

2020 RN 01 Additional

- **January 2020 Acquisitions SF: 00730306**

You can now update a vendor with the PUT API with an existing EDI code.

- **January 2020 Digital Resource Management**

Alma now supports the auto-generation of thumbnail files for the jpeg2000 format.

- **January 2020 Fulfillment SF: 00753133 00449565 00724914 00380383 00595649 00696222 00718324 00364224 00722572 00714969 00740348 00756284 00363006 00733243 00547021**

The performance of the Send Courtesy Notices and Handle Loan Renewals job is improved. Additionally, loans for a single user are now aggregated into one letter. If there are more than 100 loans, they will be split into an additional letter.

- **January 2020 Fulfillment SF: 00710105 00732714**

Merge users now includes options to migrate purchase requests, and data from Primo VE and Leganto from the source to the target user.

- **January 2020 Fulfillment SF: 00506433 00508143**

The Export Users job now allows you to rerun failed jobs. Jobs that failed due to a server restart will rerun automatically. All other failed jobs can be rerun from the Jobs History list.

- **January 2020 Fulfillment / Collaborative Networks**

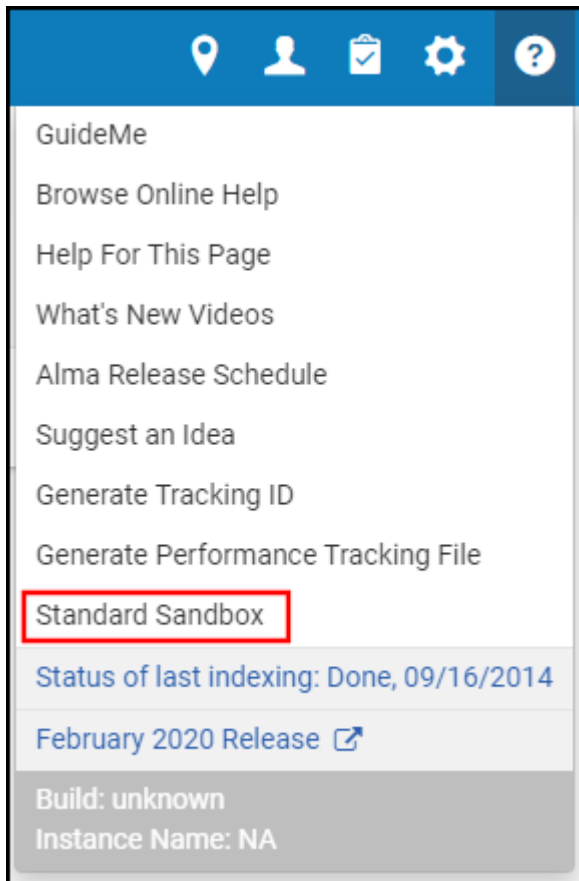
The Pick From Shelf Task List and the Request Monitor now include the Fulfillment Network Institution Code and the Fulfillment Network Borrowing ID in order to facilitate troubleshooting between network fulfillment institutions. These fields can also now be searched using persistent search bar.

- **January 2020 Fulfillment Resource Sharing SF: 00685289 00753932**

The Distribute Central Resource Sharing Configuration job now correctly updates rota template members. Additionally, partners with inactive status will also be added to the rota template. Known issue: Inactive partners appear as active in the Rota Template, but will not be considered when running the Sending Rules.

- **January 2020 Administration and Infrastructure**

For customers who do not have an Alma premium sandbox, the **Standard Sandbox** link has been added to the Help Menu to allow them to access their sandboxes from Alma.



Standard Sandbox Link on Help Menu

Note

If your sandbox cannot be located after selecting the link, please open a Support case and provide the URL for your sandbox.

- **January 2020 Administration and Infrastructure**

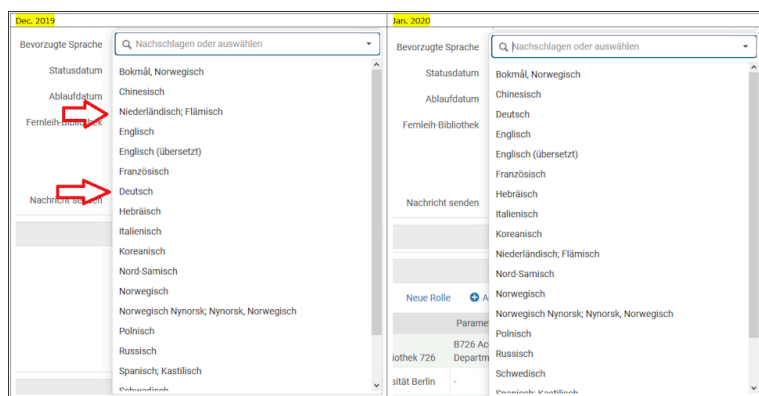
Previously, the DARA icon, which provides a shortcut to the Manage Recommendations page ([Admin > Recommendations > Manage Recommendations](#)), displayed when any recommendations were available. With this enhancement, the icon will also display the number of recommendations that are available.



DARA Icon with Count Indicator

- **January 2020 Administration and Infrastructure**

The list of preferred languages in the user record are now sorted by the language the user is in and not by the English text or English code. See an example of this change below.



Language Sort

• January 2020 Analytics

The following shared reports were added:

- Acquisitions:
 - POLs which have a renewal date in the next three months (next quarter) with bibliographic and POL information
 - Expenditure trends for physical and electronic resources for last 8 full quarters
 - Serial Issues Claims Report (Items with material type issue and expected receiving date greater than seven days that have not been received)
 - Non-Serial Issues Claims Report (Items without material type issue and expected receiving date greater than seven days that have not been received)
- Usage via Alma Link Resolver:
 - Alma Link Resolver Usage Requests for the last complete 24 months
 - Alma Link Resolver Usage Requests from Primo and not Primo for the last complete 24 months
- Usage via COUNTER reports:
 - COUNTER report loading analysis for the last complete 24 months
- Titles:
 - Deleted Records Report
- Events:
 - Events of type Physical Item went into transit and transited in less than 24 hours for the last year
- E-Inventory:
 - Portfolios with portfolio library unit different than electronic collection library unit

• January 2020 Analytics

In the **Usage by title** report (shared/Alma/Usage/Reports) the month labels at the bottom of the graph were moved to be vertical instead of horizontal to be more readable.

• January 2020 Analytics

The name of the **Library Name** field in reports and prompts located under shared/Alma/Inventory/Reports was changed to **Library (Active)**.

• January 2020 Analytics

The **Cost Usage** subject area and its related features are deprecated. This includes:

- The fields of the Cost Usage subject area that are available when selecting New > Analysis > Cost Usage
- The out-of-the-box reports and dashboards for Cost Usage under /shared/Alma/Cost per Use/Reports and under

/shared/Alma/Cost per use via COUNTER reports and acquisitions data

- The folder Cost per use via COUNTER reports and acquisitions data

All reports that use this subject area no longer work.

Institutions that use reports from the Cost Usage subject area can do the following:

- Take advantage of the over 30 new out-of-the-box reports in the /shared/Alma/Cost per use via COUNTER reports e-inventory and acquisitions data/Reports folder. These reports use the new Cost Usage of the E-Inventory subject area.
- Use the out-of-the-box Electronic Cost Usage Dashboard (which uses the above reports) located in the /shared/Alma/Cost per use via COUNTER reports e-inventory and acquisitions data/Dashboards folder.
- Make their own customized reports using the Cost Usage dimension of the E-Inventory subject area.

- **January 2020 Analytics**

The **Week Number** and **Start of Week** fields were added to all Date dimensions in Alma Analytics. In addition, all Date dimensions were aligned to include the same fields.

- **January 2020 Analytics SF: 00689762 00714049**

The **Author (Contributor)** field was added to the Bibliographic Details folder for all subject areas in which it appears. For MARC21 the data for this field comes from MARC fields 700, 710, and 711, and for CNMARC it comes from the 702, 711, and 712 fields.

- **January 2020 Analytics**

The **Uniform Resource Identifier** field was added to the Bibliographic Details folder for all subject areas in which it appears. The data for this field comes from MARC field 856, subfield u.

- **January 2020 Analytics**



Idea Exchange



NERS Enhancement (ID #5619)

The following fields containing the OCLC control number were added to the Bibliographic Details folder for all subject areas in which it appears. The data for these fields comes from MARC fields 019 and 035.

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

- **January 2020 Analytics**

The following fields were added to Fund Expenditure > Fund Transaction:

- Transaction Cash Balance: Allocated Balance – Expenditure Balance
- Transaction Available Balance: Allocated Balance – Expenditure Balance - Encumbered Balance
- % remaining (Considering expended and encumbered): (Available Balance / Allocated Balance) * 100
- % remaining (Considering only expended): (Cash Balance / Allocated Balance) * 100

- **January 2020 Analytics SF: 00524082**

The user detail fields in the Requester subject area are now anonymized. For more information about the

anonymization of Analytics reports, see [Anonymizing Analytics Report Details](#).

- **January 2020 Analytics**

The **Call Number Prefix** field was added to Physical Items > Holding Details. The data for this field comes from MARC field 852, subfield k.

- **January 2020 Analytics**

The shared **Electronic Resource Collection Overlap** folder under Shared/Alma will be deleted for the February release. The information in this folder is included in the **Titles with multiple portfolios report** located under /shared/Alma/Cost per use via COUNTER reports e-inventory and acquisitions data/Reports.

- **January 2020 Fulfillment - Course Reserves / Analytics**

The **Number of Student Suggestions** field was added to Reading Lists dimension of the Leganto Student Usage, Leganto Instructor Usage Events, and Course Reserves subject areas.

2020 RN 01 Issues

- **January 2020 Acquisitions SF: 00752082 00727349 00730262 00729330 00744537 00729810**
When receiving multiple journals on the Received Items List page, an error occurred. This was fixed.
- **January 2020 Acquisitions SF: 00747168 00507810 00527371 00620630 00664064 00638787 00622470 00579221 00648063 00684313 00650554 00657599 00678414 00599063 00653943 00662030**
When an electronic collection is linked with a PO Line, the E-Resource activation status was not correctly specified. This was fixed. Now, in electronic collections, if the resource has at least one active service and one active portfolio OR it links to unsuppressed bib that has a URL, it will be considered as active in the PO Lines List and in the Resource List (drawer).
- **January 2020 Acquisitions SF: 00612971 00701400 00706193 00587292 00701536**
In some cases, the PO status was stuck in Sent even though all PO Lines were closed or cancelled. This was fixed.
- **January 2020 Acquisitions SF: 00703816 00713459 00678527 00678592 00715117**
Performance enhancements were made for invoice processing.
- **January 2020 Acquisitions SF: 00651755**
When a credit invoice had a VAT amount, the VAT percent was set to a negative value. This was fixed.
- **January 2020 Acquisitions SF: 00709722**
If a fund had a negative value, when selecting the fund in the invoice line, the encumbered amount was ignored and the fund was not returned. This was fixed.
- **January 2020 Acquisitions SF: 00547688**
Alma failed to load the ONIX-PL file downloaded from the EDItEUR standard site. This was fixed.
- **January 2020 Acquisitions SF: 00663075 00664985 00661891**
When releasing a record from In Process Items, the notification listed the title of the first record on the list, not the records that were released. This was fixed.
- **January 2020 Acquisitions SF: 00662798**
Funds with diacritics could not be searched without the diacritic in a PO Line. This was fixed.
- **January 2020 Administration and Infrastructure SF: 00510675**
When editing a user record where the address was mandatory, but not entered, the validation stated that the preferred email was not selected. This was fixed.
- **January 2020 Administration and Infrastructure SF: 00674580 00583762**
When accessing the User Details page without edit permission, the action buttons appeared but when selected, caused the page to freeze. The buttons were removed for users without edit permissions.
- **January 2020 Administration and Infrastructure SF: 00481959**
The Circulation Desk Operator - Limited role could not update or delete blocks, even though the Create Remove Blocks privilege was enabled. This was fixed.
- **January 2020 Administration and Infrastructure SF: 00600227**
When creating a new user through Manage Patron Services, the header of the User Information section wasn't translated to the active UI language. This was fixed.
- **January 2020 Administration and Infrastructure SF: 00736416**
The last name was not appearing correctly in most letter emails. This was fixed.
- **January 2020 Administration and Infrastructure SF: 00671738**
Under macOS Mojave 10.14.4, for users with the Circulation Desk Operator - Limited role, Alma displayed a blank page when adding a circulation desk parameter. This was fixed.
- **January 2020 Administration and Infrastructure SF: 00727579 00721405 00634501 00690185**
In the Physical Item Editor, in the upper Summary section, Process type and Status were not translated. This was fixed. Additionally, when a physical item has a Process Type that is "not-in-place" (such as Patron digitization request, Acquisition technical services, and Transit For Reshelving), it is not translated in non-English interfaces. This was fixed for the search results list of Physical Items, the upper Summary section of the Physical Item Editor, and the List of Items page.

- **January 2020 Administration and Infrastructure SF: 00706221**
Email-based login to Alma and Primo included a confirmation that the email was sent, but it was only displayed in English. It is now translated according to the user's preferred language.
- **January 2020 Administration and Infrastructure SF: 00435157**
Slow upload times were noted in production. This was fixed.
- **January 2020 Analytics SF: 00753341 00788057 00756900**
The missing field 'Preferred Phone Number' was added back to the subject area.
- **January 2020 Analytics SF: 00206593 00659631**
In Analytics, data was not returned for roles in the Events subject area. This was fixed.
- **January 2020 Analytics SF: 00612626**
Adding the 'Event end date' field to Analytics reports in the Physical Item Historical Events subject area for transit events that do not have an end date caused the report to not display any data. This was fixed.
- **January 2020 Analytics SF: 00694317**
The Publication Date is now populated according to the following prioritization: MARC field 264 subfield c, if empty then MARC field 260 subfield c, if empty then MARC field 008 pos. 7-10.
- **January 2020 Analytics SF: 00706573**
A link on the Loan per Library tab of the Fulfillment Dashboard to the Items Loaned per Patron Group tab was broken. This was fixed.
- **January 2020 Analytics SF: 00717478 00705114**
When the value of the Return Date field in Analytics (Fines and Fees > Loan Details) was null because the loan is not returned, reports erroneously displayed '01/01/1'. This was fixed and now the field is empty.
- **January 2020 API SF: 00739973**
In the user-request REST API and Webhook XSD, the manual_description field was missing. The field was added and will be retrieved in GET requests.
- **January 2020 API SF:**
When running the GET Bib API with expand=e_avail against a network and portfolios that exist in the network, the sub-fields \$\$0 and \$\$a were not retrieved. This was fixed.
- **January 2020 API SF: 00717237**
In some cases, updating portfolios via the API was changing the Activation Date by one day. This was fixed.
- **January 2020 API SF: 00692798 00741188 00727951**
The Create Portfolio API was not working for a bibliographic record if the bibliographic record had no existing portfolios linked to it. This was fixed.
- **January 2020 API SF: 00731954**
When a patron fine was paid using an API, the Created By and Accepted By fields did not have an indication in the fine/fee transaction list that the payment action was done via an API. This was fixed. Now, when the patron fine is paid using an API, the Accepted By field will contain exl_api.
- **January 2020 Fulfillment SF: 00671263 00668563**
Previously, multiple overdue blocks could be created for the same returned loan. This was fixed. Now, a single block should be created for each loan. The block should be created according to the updated return date, if it is different than the return date.
- **January 2020 Fulfillment SF: 00537240**
In some cases, when sending multiple checkout messages for the same user on a self-check machine, the loan limit could be exceeded. A performance improvement was implemented to address this issue.
- **January 2020 Fulfillment SF:**
On the Held By Patron and On Shelf tabs of the Active Hold Shelf, clicking loan links caused an error. The loans are no longer clickable.
- **January 2020 Fulfillment SF: 00137820 00073829 00684133 00133442 00218631 00361884 00684052 00137916 00326538**
In some cases, the booking calendar had available slots appearing as not available and vice versa. This was fixed.
- **January 2020 Fulfillment SF: 00491212 00570186**
The Resource Sharing distribution job did not correctly handle partners that were deleted in the Network Zone and created again with the same code. The job also blocked deletion of partners that are connected to completed resource sharing requests regardless of the BorrowingRequestsInactiveFilters code table. This was fixed. The job now updates

these partners as required and consults the BorrowingRequestsInactiveFilters tables for deletion.

- **January 2020 Fulfillment - Resource Sharing SF: 00629860**
A renewal request sent to an itemless library was not processed correctly. This was fixed.
- **January 2020 Fulfillment - Resource Sharing SF: 00693541**
Previously any recall operation initiated by fulfillment processes on an item in resource sharing would process the recall. This was fixed. The recall will not be allowed if the item is in resource sharing and the status is Returned by Partner.
- **January 2020 Fulfillment SF: 00530054 00661611 00712276 00715321**
The Test Access functionality in the portfolio editor was not working for URLs with non-latin alphabet characters. This has been fixed.
- **January 2020 Resource Management SF: 00700517**
Ex Libris fixed the customer data and deleted the additional portfolios.
- **January 2020 Resource Management SF: 00509995**
The wrong permission flag was removed from tar compression code.
- **January 2020 Resource Management SF: 00720896**
This was fixed by support with 18.10.
- **January 2020 Resource Management SF:**
In Publishing to Primo, authority enrichment information was not published for UNIMARC records that used the working with ID strategy and had links to multiple authority headings per field. That was fixed.
- **January 2020 Resource Management SF: 00673395 00658396**
If an item came back from a resource sharing request to its remote storage by an NCIP check-in message, it would have automatically started the next resource sharing request instead of being put in place. This was fixed.
- **January 2020 Resource Management SF: 00679188**
Previously, when a remote storage item was checked in via an NCIP check-in message, Alma did not check if the item did indeed belong to remote storage, but, instead, automatically put it in place. This was fixed. Alma is now checking if the item belongs to the current remote storage.
- **January 2020 Resource Management SF: 00663701 00630971 00637626 00565091**
When viewing an in-transit item from search results where the To Circulation Desk is empty, then viewing a second item where the To Circulation Desk is not empty, and subsequently, returning to the first item, the first item shows the To Circulation Desk of the second item instead of remaining empty. This was fixed.
- **January 2020 Resource Management SF: 00653455**
When a network member did a repository search and the held by holdings had the fields 866/867/868 with subfield \$\$a and \$\$z, the \$\$z information did not appear under 'Summary Holdings' in the search results. This was fixed.
- **January 2020 Resource Management SF:**
In Repository Search, a tooltip was added to the orders and requests links.
- **January 2020 Resource Management SF:**
Browsing bibliographic headings for the local call number 09X did not bring the user to the correct place in the browse bibliographic headings list. This was due to a delimiter between subfields that was responsible for wrong sorting. This was fixed. Reindexing is required for this to be fully functional.
- **January 2020 Resource Management SF: 00576280 00638264**
When the MD Editor is open in split mode while editing a bibliographic record in one and a holdings record in the other, creating a new holdings record results in two holdings where one is related to the wrong bibliographic record. This issue was fixed with the exception of creating a new holdings record using the shortcut key ctrl+alt+h. The full fix will be handled in a later release.
- **January 2020 Resource Management SF: 00628384**
For a member institution, clicking on the record's link in the list of matches in the MD Editor displays the Community Zone icon instead of the Network Zone icon. This was fixed. In addition, when a Network Zone record already exists in the draft list, the record's link is now hidden for this record in the list of matches.
- **January 2020 Resource Management SF: 00721252**
The contribution of serial records to CALIS did not work. This was fixed.
- **January 2020 Resource Management SF: 00720432**
The Preferred Term Correction job removed subfields from the 651 field because of wrong matching. This was fixed.

- **January 2020 Resource Management SF: 00634901**
Subdivisions were duplicated in records with trailing punctuation (period). This was fixed.
- **January 2020 Resource Management SF: 00719942 00700533**
A new setting has been enabled that handles subfield u in the following manner: * Subfield u is ignored while browsing headings suggestions (F3) * Subfield u is kept after selecting the suggested heading * Subfield u is not part of the linking process * Subfield u is not part of the Preferred Term Correction process Reindexing needs to be run for this to be fully functional.
- **January 2020 Resource Management SF: 00702435 00639130**
The output file of the 'Duplicate Title Analysis' job included deleted bib records. This has been corrected.
- **January 2020 Resource Management SF: 00647258 00694008 00531194 00604766 00493144 00644802**
If the import finds at least one match, and the upon match method is 'DO NOT ADD,' then the import report did not display the matched records. This was fixed.
- **January 2020 Resource Management SF: 00691126 00618086**
After the import job completed successfully, no email report was sent for the import job. This issue was fixed.
- **January 2020 Resource Management SF: 00727936 00654643 00714134**
View Import on the Resolve Import Issues page led to an Oops error. This issue was fixed.
- **January 2020 Resource Management SF: 00630562**
When importing UNIMARC/CNMARC bibliographic records using the ISSN match method (exact subfield match), records that had position 6 of the LDR as 'I - Electronic Resources' and position 7 as 's - Serial' were not matched correctly by the ISSN. This was fixed.
- **January 2020 Resource Management SF: 00685475**
The crosswalk of OAI DC Format to MARC21 on the Repository profile was not supported. This issue was fixed.
- **January 2020 Resource Management SF: 00731980 00676139**
the indication rule was not applied for import profiles defined in a network member institution when the 'Use Network Zone' parameter was checked in the import profile. This has been fixed.
- **January 2020 Resource Management SF: 00693333**
Import with an Excel file that contains lines with one of their cells containing a space character was not processed correctly. This was fixed.
- **January 2020 Resource Management SF: 00706413 00734597**
When contributing a record to CALIS, subfields a and z of the 920 field were saved in the wrong order. This was fixed
- **January 2020 Resource Management**
The manner in which Alma processes identifying records that need to be reviewed for change based on new or updated authority records has been modified for institutions that have implemented ID-based authority record linking. Now for institutions using the ID-based authority linking method when there are new or updated authority records, Alma uses an ID-based method for identifying bibliographic records that need to be checked for potential linking by the linking process. This ensures that the Authority Control Task List entries reflect more accurate and meaningful changes.
- **January 2020 Fulfillment - Course Reserves SF: 00725347 00729516**
The resource locate was being triggered when no changes were made in the citation. This was fixed.
- **January 2020 Fulfillment - Course Reserves SF:**
Previously, when the **resource_locate_multiple_matches** parameter was set to `manually`, and multiple results were matched, selecting **Save and Run** returned the user to the **Edit Reading List**. This was fixed. Now, the repository search page will appear, and the operator will be able to select the title.
- **January 2020 Fulfillment - Course Reserves SF: 00728534 00713135**
When selecting the **All** tab of a Reading List, an error was displayed. This was fixed.
- **January 2020 Fulfillment - Course Reserves SF: 00731299 00583061**
After September, the **Number of Citations** field counted only citations with usage. It was fixed and now it includes all citations. The **Number of Citations** now includes the number of citations in the reading list without any relation to the usage. The Activity Score field is impacted similarly as its calculation is based on the **Number of Citations** field.
- **January 2020 Fulfillment - Course Reserves SF: 00717468**
The **Course Code** field, which appears in the Course Reserves and Usage, has been increased to 255 characters.
- **January 2020 Fulfillment - Course Reserves SF: 00712048 00742202 00745287 00754472**
Rolling over a course with single list creation mode was not working properly. This was fixed. Additionally, a new flag

was added to course loader, **On Rollover copy only newest list.**