



Alma July 2020 Release

Alma Libraries Around the World
University of Cape Town, S. Africa

Alma July 2020 Release Notes

CONFIDENTIAL INFORMATION

The information herein is the property of Ex Libris Ltd. or its affiliates and any misuse or abuse will result in economic loss. DO NOT COPY UNLESS YOU HAVE BEEN GIVEN SPECIFIC WRITTEN AUTHORIZATION FROM EX LIBRIS LTD.

This document is provided for limited and restricted purposes in accordance with a binding contract with Ex Libris Ltd. or an affiliate. The information herein includes trade secrets and is confidential.

DISCLAIMER

The information in this document will be subject to periodic change and updating. Please confirm that you have the most current documentation. There are no warranties of any kind, express or implied, provided in this documentation, other than those expressly agreed upon in the applicable Ex Libris contract. This information is provided AS IS. Unless otherwise agreed, Ex Libris shall not be liable for any damages for use of this document, including, without limitation, consequential, punitive, indirect or direct damages.

Any references in this document to third-party material (including third-party Web sites) are provided for convenience only and do not in any manner serve as an endorsement of that third-party material or those Web sites. The third-party materials are not part of the materials for this Ex Libris product and Ex Libris has no liability for such materials.

TRADEMARKS

Ex Libris, the Ex Libris logo, Alma, campusM, Esploro, Leganto, Primo, Rosetta, Summon, ALEPH 500, SFX, SFXIT, MetaLib, MetaSearch, MetaIndex and other Ex Libris products and services referenced herein are trademarks of Ex Libris, and may be registered in certain jurisdictions.

The absence of a name or logo in this list does not constitute a waiver of any and all intellectual property rights that Ex Libris Ltd. or its affiliates have established in any of its products, features, or service names or logos.

Trademarks of various third-party products, which may include the following, are referenced in this documentation. Ex Libris does not claim any rights in these trademarks. Use of these marks does not imply endorsement by Ex Libris of these third-party products, or endorsement by these third parties of Ex Libris products.

Oracle is a registered trademark of Oracle Corporation.

UNIX is a registered trademark in the United States and other countries, licensed exclusively through X/Open Company Ltd.

Microsoft, the Microsoft logo, MS, MS-DOS, Microsoft PowerPoint, Visual Basic, Visual C++, Win32,

Microsoft Windows, the Windows logo, Microsoft Notepad, Microsoft Windows Explorer, Microsoft Internet Explorer, and Windows NT are registered trademarks and ActiveX is a trademark of the Microsoft Corporation in the United States and/or other countries.

Unicode and the Unicode logo are registered trademarks of Unicode, Inc.

Google is a registered trademark of Google Inc.

iPhone is a registered trademark of Apple Inc.

Alma July 2020 Release Notes

Make the Most of July's Release

Action Items
☐ User Sets and Advanced Search for Users - The new options to search users in advanced mode allows creating sets based on multiple search attributes. This way, you can use complex conditions to save a list of users as a set for various purposes, such as for sending a notice, running an update etc.
☐ Push user records from NZ not via SIS - Networks that share user records in the Network Zone can now manage the Network Zone users not only via SIS updates but also by manual or API updates, as well as by running batch user updates in the network using the Update/Notify Users job.
☐ Scan In Interface - Allow check in of shipped items - You can now set the system to issue a warning if an item that is scanned in is expected to be shipped for resource sharing and not expected to be scanned in.
☐ Enhancements to Forms - Institutions now have advanced control over the configuration of deposit forms, both staff and patron, including repeatable fields and additional filed types such as check-boxes and many more.
☐ Enhanced Sorting Support for Collections - Patrons are provided with a rich set of new sort routines for titles under a collection, and Alma staff can configure the default sort routine both for sub-collections and for titles under each collection level.
☐ Provide the ability to share and contribute GES templates in the CZ - Part II - Do you have a useful general electronic service you created? You can now share it with the community by contributing it to the Community Zone.
☐ CZ Contribution - Update contributed collections - Part II - Do you have a local electronic collection that will be useful to wider Alma community? You can now contribute additional information associated with your local electronic collection.

Upcoming Issues to Note

Security update - Removing HTTP allowed exceptions for Alma

To align with industry standards and avoid security vulnerabilities, Ex Libris is removing its remaining HTTP allowed exception. Alma will require working with HTTPS for all incoming traffic and as result, will redirect all HTTP traffic to HTTPS traffic. This means that all browser activity will continue working as usual. For more information, see [Technical Requirements for Alma and Discovery Implementation](#).

Support for HTTP will be phased out as follows:

Release	Environment
June	EU00, EU01, EU02
July	NA01, NA02, NA03
August	AP01

All other instances already support HTTPS only. We are also working to identify non browser calls coming from specific IPs and are contacting several customers directly asking to change their calls to HTTPS.

For further assistance, open a Salesforce case and reply with the case number.

OAS (Oracle Analytics Server) and DV (Data Visualization)

The OBI that is used with Alma Analytics is being upgraded to OAS (Oracle Analytics Server) which includes DV (Data Visualization). As many in the Ex Libris community are aware, the original plan was to upgrade to OBI 12. However, on January 31, 2020, Oracle released OAS (Oracle Analytics Server) to replace the OBI 12.

The following table details the rollout plan for the OAS:

Environment	Freeze Start Date	OAS Go-Live Date
DC06 - EU03	17.6	21.6
DC04 - NA02	13.7	19.7
DC04 – NA03	13.7	22.7
DC04 – NA01	13.7	26.7
DC82 (CA)	Q3	Q3
DC05 (APAC)	Q3	Q3
DC03 (EU00-2)	Q4	Q4
DC81 (CN)	Q4	Q4
DC01 (NA04-6)	Q4	Q4

For information regarding steps to take prior to migration, see [Ensuring Reports are Migrated](#).

Analytics Infrastructure Performance Upgrades

Ex Libris is currently implementing performance upgrades to the Alma Analytics infrastructure which will include the Oracle In-Memory Database. These upgrades will greatly improve performance when running analytics reports and are being rolled out gradually. The table below describes the rollout plan. For more information, see the [Analytics - Infrastructure Improvements in 2020](#) document.

Instance	Will be implemented during
NA01	Completed
NA02	Completed
NA03	Completed
NA04	Completed
NA05	July 2020
NA06	Completed
NA07	July 2020
NA91	July 2020
EU00	Completed
EU01	Completed
EU02	Completed
EU03	July 2020
EU04	July 2020
AP01	July 2020
CA01	September 2020
CN01	January 2021

Next Release Sneak Preview

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

July 2020 Main Stories

Audio Visual Media type Added to the Physical Material Type Description Table

July 2020 Resource Management

The Physical Material Type Description table now includes an **Audio visual media** option.

See [Configuring Physical Item Material Type Descriptions](#).

Purchase Request Form Alert

July 2020 Acquisitions



NERS Enhancement (ID #5685)

When a patron in Primo enters an ISBN or EISBN number in a blank Purchase Request form, an alert now displays indicating whether a holdings for the resource exists in the library. Primo displays a message that a holdings does not exist for the identifier placed by the patron, which may be because the resource does not exist, because there is a location, bibliographic record, or holdings that is suppressed from discovery, or because, for electronic resources, the electronic portfolio is not active. This is also relevant for network and multi-campus.

This functionality is controlled by the customer parameter **PR_indicate_for_primo_if_ISBN_exists**, and is enabled by default. See [Configuring Other Settings \(Acquisitions\)](#).

This enhancement is available for Primo classic only and will be made available for PrimoVE users in a future release

See [Creating a Purchase Request](#).

Activating GOBI Real Time Orders Sent from the Relevant Portfolio in the Community Zone

July 2020 Acquisitions



Idea Exchange SF: 00596978 00713525 00426146

For orders originating from GOBI, Alma will attempt to locate the relevant portfolio located within a Community Zone collection using the vendor proprietary identifier number or the ISBN/ISSN and activate it within the relevant collection in the institution, for this functionality to work it is important that the relevant collection will be activated from the Community Zone in the institution. In cases where Alma does not find a matching portfolio in the relevant Community Zone collection **or** if the relevant collection was not activated in the institution, a stand-alone portfolio will be created in Alma will not be linked to a Community Zone portfolio. See [GOBI vendors list](#) for list of Community Zone collections which supports this functionality.

Additionally, three new collections are now available in the [OASIS vendors list](#).

Move Invoice Owner from an Institution to a Library

July 2020 Acquisitions



Idea Exchange SF: 00810848

You can now change the owner for an invoice after it is edited. The values for the **Owner** list depend on the owner of the linked PO line/s, user role scope, library availability for vendor, and vendor account and funds. When saving the invoice, if the invoice owner is the institution but all the PO lines associated with the invoice lines are owned by a single library, a confirmation message displays that allows you to confirm or cancel your changes.

Watch the [Move Invoice from the Institution to a Library](#) video (1:20 minutes).

Platform Field Added to the SUSHI Account Details

July 2020 Acquisitions



Idea Exchange SF: 00799252 00800227 00801116 00802185 00802271 00807054 00810911 00814981 00818471 00831882

The SUSHI Account Details page now includes a **Platform** field. This field should be populated for vendors that require a platform code for successful harvesting of usage data. Note that the platform code is case sensitive. Only one platform code can be used per SUSHI account.

See [Managing SUSHI Accounts](#).

Advanced Search for Users

July 2020 Administration and Infrastructure



Idea Exchange SF: 00180020 00214711 00220450 00226302 00024637 00024650 00074581 00084395 00102382 00125857 00126248 00129769

You can now search for users by combining search criteria, using Alma advanced search. This is available only to users with the roles and privileges to search for users.

In addition, there are new search options for user records. The new search options in advanced search are:

- User group - Equals, Is Empty, Not Equals, Is Not Empty - equals and not equals options display a multiple choice drop-down list.
- Create date - Equals, Before, After
- Birth date - Equals, Before, After, Is Empty
- Expiration date - Equals, Before, After, Is Empty
- Purge date - Equals, Before, After, Is Empty
- Last activity date - Equals, Before, After, Is Empty
- Statistical category - Equals, Is Empty, Not Equals, Is Not Empty - equals and not equals options display a multiple choice drop-down list.
- Note - Contains Keywords, Contains Phrase - this option is also available on the simple search

- Has note type - Equals, Not equals - displays a multiple choice drop-down list.
- Has block type - Equals, Not Equals - displays a multiple choice drop-down list with block types.
- Has Identifier type - Equals, Not equals - displays a multiple choice drop-down list.
- Fine/fee total sum - <, <=, >, >=
- Campus - Equals, Is Empty, Not Equals, Is Not Empty - equals and not equals options display a multiple choice drop-down list.

New options for existing search criteria in advanced search options are:

- Email - Equals, Is Empty
- First Name - Contains Keywords, Contains Phrase, Is Empty
- Identifiers - Equals
- Job Category - Equals, Is Empty, Not Equals, Is Not Empty - equals and not equals options display a multiple choice drop-down list.
- Last Name - Contains Keywords, Contains Phrase, Is Empty
- Middle Name - Contains Keywords, Contains Phrase, Is Empty
- Primary Identifier - Equals

See [Searching in Alma](#).

XSL Transformation as Part of an Integration Profile

July 2020 Administration and Infrastructure

Now when exporting users from Alma to SIS systems that use other data formats than Alma, you can convert Alma's data format to the specific format required by the target system. Previously, the conversion had to be done outside of Alma, and demanded specific technical knowledge and resources from institutions.

To facilitate the conversion process, you can now do the following:

- Define an XSLT converter to be used by Alma
- Apply the XSLT converter to an Integration Profile that defines the way data is exported/imported from/to Alma
- Manage XSLT converters in Alma:
 - Share converters between institutions
 - Preview results on a demo file
 - Validate converters

Currently, this is possible for the following integration (see [Student Information Systems](#)):

- SIS import
- SIS synchronization

The ability to define XSLT converters disabled by default. If your institution would like to activate this behavior, please contact Ex Libris customer support.

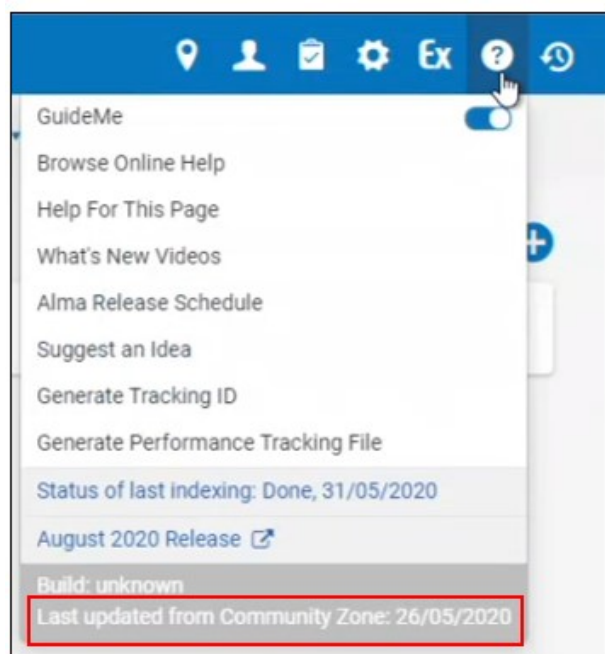
To manage XSLT converters, a new page **Integration XSL Converters** was introduced (available from [Configuration > General](#)). This page allows creating and editing EXSL converters, as well as allows institutions to share converters in the Community Zone.

See [Integration XSL Converters](#).

Notification on Last Community Zone Update

July 2020 Administration and Infrastructure

A notification about the date of the most recent Community Zone update was added to the Help menu located in the **Main Menu Icons**.



Institutions that work with the Community Zone expect that Community Zone resources will be up-to-date to the most recent Community Zone update. To this effect, the [Synchronize Changes from CZ](#) job runs daily in each institution updating authorities and resources from the Community Zone to the local institution.

However, if the number of updates in the Community Zone is very large, the job cannot complete on the same day. Every day the job attempts to close the gap. Thus, in cases of very large Community Zone updates, a delay of a few days might occur in the synchronization of CZ and the local institution. However, when customers do not see the relevant resources updated in their institutions on the day of the Community Zone update, or on the next day, the discrepancy might cause alarm.

The new notification in the Help menu lets you know the date of the last Community Zone update that was implemented in your system. If the date indicated is not today's date, the reason you do not see some Community Zone updates in your system is due to this delay. You need to wait for the following runs of the job to update your resources.

Note

In July-deployed environments where the Community Zone Harvesting job has not run yet this notification is not displayed. It will be displayed once the Synchronize Changes from Community Zone job has run.

See [Synchronize Changes from CZ](#) and [The Alma User Interface](#).

Creation of Several Itemized Sets From File in Parallel

July 2020 Administration and Infrastructure

When creating itemized sets, one of the options to add records to a set is uploading a file that contains the identifiers (MMS ID, ISSN, ISBN, and so forth). The **Add Members to Set** job runs and creates a set from the file. Previously, only one

instance of the job could be run simultaneously. Now any number of instances of this job can run in parallel.

See [Creating Itemized Sets](#).

Skipped Job Status

July 2020 Administration and Infrastructure

The status of jobs that need to be skipped was changed to 'Skipped'. Previously, the status of these jobs was indicated as 'Failed', which was misleading.

Alma skips jobs in the below cases:

- Another instance of the job is currently running, and the job does not allow multiple instances.
- The job is dependent on the completion of another job, and that job is still running.

See [Viewing Running Jobs](#).

Dependent Job Waiting

July 2020 Administration and Infrastructure

The below dependent jobs now wait till the completion of the job they are depended on with the status 'Pending', and start running after that job completion:

- Authorities - Link BIB Headings
- Authorities - Preferred Term Correction
- Authorities - Handle Local Authority Record Updates
- MMS - Build Record Relations

Previously these jobs were skipped with the status 'Failed', which was misleading.

See [Overview of Jobs](#).

External Users with Internal Authentication

July 2020 Administration and Infrastructure

For institutions whose Student Information System (SIS) does not offer authentication services, it is now possible to create users as external in Alma, but assign passwords for them directly in Alma. In this case, all the user information, such as name, ID, etc, is managed from the SIS, but the passwords are stored in Alma and managed by the Ex Libris Identity Service.

When this behavior is active, changing a user from external to internal (and vice versa) does not reset the user password; the existing password the user used as an external user is retained.

This new behavior is activated by a customer parameter, upon request. If your institution's SIS does not offer authentication services and would like to activate this behavior, please contact Ex Libris customer support.

See [Registering Patrons](#) and [Mapping User Accounts to Other Systems](#).

Request Anonymization and Anonymization Rules

July 2020 Fulfillment



Idea Exchange

You can now define rules for all anonymization types, not just loans. The anonymization job, which runs once daily, is **Fulfillment - Handle Historical Archiving**. The rules are found in the Fulfillment Jobs Configuration page (**Configuration Menu > Fulfillment > General > Fulfillment Jobs Configuration**) next to each anonymization type. This is now the only place the anonymization rules are accessed. The link to Loan Anonymization Rules is no longer available on the Fulfillment Configuration menu.

The customer parameter, **should_anonymize_requests**, which previously anonymized a resource sharing request as soon as it was completed, has been renamed to **should_anonymize_requests_immediately_when_complete**. Now, when set to **true**, Alma still anonymizes the request as soon as it is completed and also ignores the anonymization rules.

When creating a rule for request anonymization, if choosing **Library** or **Location** as input parameters, the library and location are calculated as follows:

When a request is completed, if there are multiple items available, if the request was attached to a specific item, for instance, item level request or item already fulfilled the request, the library and location of the item is used. If the request can still be fulfilled by multiple items, the library and location are taken from the holding selected automatically as preferred for fulfilling the request.

As previously, checking resource sharing requests will anonymize both borrowing and lending requests. However, rules can be applied only to resource sharing borrowing requests.

See [Configuring Anonymization](#).

Watch the [Request Anonymization and Anonymization Rules](#) video (4:28 minutes).

Option to Exclude the Grace Period When Calculating Fee

July 2020 Fulfillment



Idea Exchange

Previously, when calculating fees, when the grace period ended, fines were immediately implemented and set for the entire period including the grace period. Now, the grace period can be set to not be included in the fine period at all. In the policy, currently, you can now configure new periods. Each of the prior periods now has a second period with excluded from day. When that period is selected, the fee calculations are the same, but they are based on the end time of the grace period instead of the due date.

See [Physical Fulfillment](#).

Watch the [Exclude the Grace Period when Calculating a Fine](#) video (1:23 minutes).

Digitization Request File Upload Limit

July 2020 Fulfillment

For attachment digitization requests, the file size limit was increased from 10 MB to 25 MB.

See [Digitization Processing](#).

ISO 18626 - Return Information

July 2020 Fulfillment - Resource Sharing

When using the **ISO 18626** resource sharing partner type, return information is now supported. The lending partner can

select **Send ReturnInfo** on the Resource Sharing Partner page to include the information for the originating lending library instead of the resource sharing library. The ISIL code of the lending library is then included in the resource sharing request, if it is populated. The ISIL code is presented on the Resource Sharing Borrowing Task List as **Return Information**. It is also available in the XML for the ResourceSharingReturnSlipLetter. The field appears in the letter when populated. If the letter is customized, you must manually add the field to the XML in order for it to be populated.

When scanning an item through the Scan In Interface, the destination information is added to each line. When returning through Returns, it is added to the pop-up display.

Check-In for Shipped Items in the Scan In Interface

July 2020 Fulfillment - Resource Sharing



Idea Exchange

You can now set a message to warn the users if they are going to complete a lending process when scanning items. On the Scan In Messages Configuration page, the **Complete lending request** message, which defaults to none (no message), can be set to Popup message. When this is set, if an item is scanned in and is part of a Resource Sharing Request that is linked to a lending request in status **Shipped Physically**, the warning message will require a Confirm or Cancel action. This way the user cannot accidentally complete the lending request. If the message is set to Feedback message, rather than Popup, the feedback will tell them that the request will be completed, but the scan in action cannot be canceled.

See [Scanning Items](#).

Export Renew Allowed Indication in API to ILLiad

July 2020 Fulfillment - Resource Sharing

The ILLiad API now supports sending the **Renewals Allowed** field in a resource sharing request. The 'RenewalsAllowed' indication will be set according to the lending workflow profile that is attached to the ILLiad partner. If one of the following is enabled then Alma will send "RenewalsAllowed": true

- Patron renewal
- Staff renewal

If both patron and staff renewal are disabled then Alma will send "RenewalsAllowed": false.

Distribute Users from the Network Zone

July 2020 Collaborative Networks

Networks that share their user list in the Network Zone can create and update the network zone users manually using the Alma Manage Users menu, the API or the Update/Notify Users job. This is in addition to the previously only option to manage the Network Zone users using SIS feeds.

Users can now be updated in the Network Zone in the following ways, and the changes will be reflected in the Institutions that have a copy of the user record:

- The update/notify users job
- Using an API

- Manually updating the user in the User Edit form

See [Centrally Managing Users in a Network Zone](#).

Order Indication for Electronic Resources Ordered from NZ

July 2020 Collaborative Networks

In a Collaborative Network where electronic resources are managed centrally in the Network Zone and the orders are managed in the individual Institution Zones, institutions can order electronic collections or portfolios managed in the NZ.

In such cases, when using the staff search for electronic portfolio and electronic collection for Network Zone resources (both combined and NZ searches), Alma will now display the order icon by the records ordered from the Network Zone. Clicking on the link of the number of orders displays the list of the PO Lines of these orders.

The screenshot shows the Alma search results page. At the top, there's a search bar with 'Keywords' and 'a'. Below it, the results are filtered by 'Electronic Portfolios (1 - 20 of 45,229)'. The search scope is set to 'Institution'. The first result is 'A Priori Justification' by Wiley Online Ebooks (Orbis Cascade Alliance). The record details include 'Creation Date: 06/02/2020 10:39:10 PM' and 'Modification Date: 06/02/2020 10:39:10 PM'. A red box highlights the 'Orders: 2' link. To the right, the Portfolio ID, Service ID, Collection ID, and MMS ID are listed.

In Network search

The screenshot shows the Alma search results page for a Network search. The search bar contains 'Keywords' and '53326476910001451'. The results are filtered by 'Electronic Portfolios (1 - 1 of 1)'. The search scope is set to 'Network'. The first result is 'A Priori Justification' by Wiley Online Ebooks (Orbis Cascade Alliance). The record details include 'Access Type: Current', 'Creation Date: 06/02/2020 10:39:10 PM', and 'Modification Date: 06/02/2020 10:39:10 PM'. A red box highlights the 'Orders: 2' link. To the right, the Portfolio ID, Service ID, Collection ID, and MMS ID are listed.

In combined search

Saving Local Sets in Network Zone

July 2020 Collaborative Networks



Idea Exchange

Now the Institution Zone staff can create a local set of bibliographic records in the Institution Zone and then save the set in the Network Zone.

This is useful in use cases where a set can only be built in the Institution Zone because the query uses search criteria from either localized fields in the bibliographic record or from the inventory (holdings, items, portfolio, etc.) However,

you cannot run normalization rules on Network Zone bibliographic records from within the Institution Zone, since non-localized fields in the Network Zone bib records cannot be changed from within an Institution Zone.

The current development allows the Institution Zone staff to save a local set of bibliographic records to the Network Zone, where they can then perform any actions with the set, such as running normalization on the bib records.

To support this functionality, the Save in Network action was added to the Manage Sets page (Admin > Manage Jobs and Sets > Manage Sets). Choosing this action saves a local set of bibliographic records to the Network Zone. See [Saving Sets in Network Zone](#).

The new action runs a job that creates a set in the NZ containing only the records linked to the Network out of all records. See [Save Set in Network Report](#).

Sharing and Contributing General Electronic Services in the Community Zone

July 2020 Collaborative Networks

Users now can contribute their General Electronic Services to the Community Zone, where other institutions can copy and use these services.

Note

The current functionality of distributing general electronic services from Network Zone to Institution Zone using the Distribute Fulfillment Network Configuration job remains as is (see [Configuring Fulfillment Information in the Network Zone](#)).

See [Sharing General Electronic Services in the Community Zone](#) and [Community Zone Contribution Guidelines](#).

Note

The ability to share general electronic services in the Community Zone will become available a few days after the July installation.

Improvements to Electronic Collections Contributions

Networks

July 2020 Collaborative Networks

Electronic collection contribution was enhanced as follows:

- Now you can contribute to additional fields, including static and dynamic URLs.
- Now you can update additional fields of your contributed electronic collections and share your updates with the community.

Additional Electronic Collection Fields that You Can Contribute

The following additional fields can now be contributed:

Collection	Service	Portfolio
- Type - Interface name - Level URL - Is Free? - Description - Language - Category	- URL type: Dynamic URL - Linking level - Service is free? - Crossref supported	URL type: - Static URL - Dynamic URL

See [Managing Electronic Collections](#).

Updating Your Contributed Electronic Collections

If you are the contributor to the electronic collection, now you can update additional fields and share these updates with the Community Zone. Your changes are submitted to a job that runs overnight to update the electronic collection, its portfolios, services, and bibliographic records in the Community Zone. This job copies the information from the override fields to the main fields and then removes the override values. This synchronizes your electronic collection with the Community Zone.

To update an electronic collection in the Community Zone:

1. In the Institution tab of the electronic collection, enter the new values in the override fields, and select **Update in Community**.
This updates the Community Zone with the new values.
2. In the confirmation message that appears, click **Yes**.

Confirmation Message

You are about to update the following electronic collection in the community: 08-06-2020 Contribution

Override

PORTFOLIOS:

New 0

Deleted 0

Updated 1

BIBLIOGRAPHIC RECORDS:

New 0

Deleted 0

IMPORTANT

Any populated override field will replace the corresponding main field value in the Community Zone, thus, it will affect all the customers that activated this electronic collection from the Community Zone. This action cannot be reversed.

Notice that this is true for any override field of Electronic Collection / Electronic Service / Electronic Portfolio.

Any value will be cleared from the override fields once the contribution process is finished.

Please make sure to contribute Portfolios with Static URLs that are free of institution specific information only!

Are you sure you would like to update this electronic collection in the Community Zone?

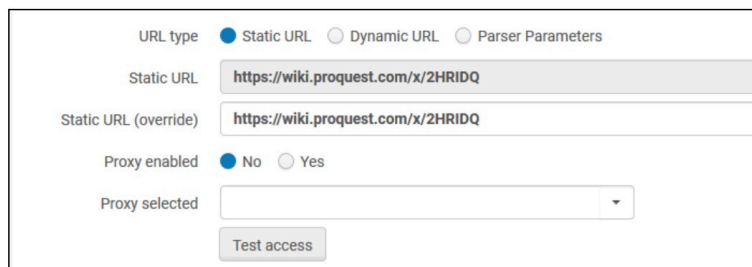
Cancel

Confirm

See [Updating Community Zone Contributed Electronic Collections](#).

Contributing Static and Dynamic URLs

Now Alma supports the contribution of portfolio Static/Dynamic URL and service Dynamic URL, in addition to the existing contribution of parser parameter URL. This way, you see in the Community Zone the exact URL that you contributed.



Override Fields of Community Zone Electronic Collections

All activated Electronic Community Zone Electronic collections are edited with your own information. Your edits are only local, no changes are made to the Community Zone record.

When editing the collection, you make your edits in the override fields. Any later updates to this electronic collection will update only the main values so that you know what the updates were. Your local override values remain unchanged.

The following additional fields can now be edited:

Collection	Service	Portfolio
- Type (override) - Interface name (override) - Level URL (override) - Is Free? (override) - Description (override) - Language (override) - Category (override)	- URL type: Dynamic URL - Linking level (override) - Service is free? (override) - Crossref supported (override)	URL type: - Static URL (override) - Dynamic URL (override)

See [Managing Electronic Collections](#).

Additional Elements in Related Record for Physical Inventory

July 2020 Resource Management

For a child record, Alma now supports displaying a specific item when cataloging a specific issue, part or pages. Previously, Alma supported displaying specific items of the parent record only when cataloging a specific year, volume or barcode.

The following item specifications are now supported:

Item Specifications	Value in \$g (MARC21 / KORMARC) \$v (Unimarc / CNMARC)	Item Field
Issue	iss:	Enum B

Item Specifications	Value in \$g (MARC21 / KORMARC) \$v (Unimarc / CNMARC)	Item Field
Part	pt:	Enum C
Pages	p:	pages

See [Configuring Related Records for Physical Inventory](#).

MARC 21 Updates

July 2020 Resource Management

The following MARC 21 updates (for bibliographic, authority, holdings, classification, and community information formats) have been added to Alma in the July 2020 release:

- MARC21 BIB
 - Update No. 27 (November 2018)
 - Update No. 28 (May 2019)
- MARC21 Holdings
 - Update No. 28 (May 2019)
- MARC21 Authority
 - Update No. 26, April 2018
 - Update No. 28, May 2019

Refer to <http://www.loc.gov/marc/status.html> for additional details regarding these MARC 21 changes.

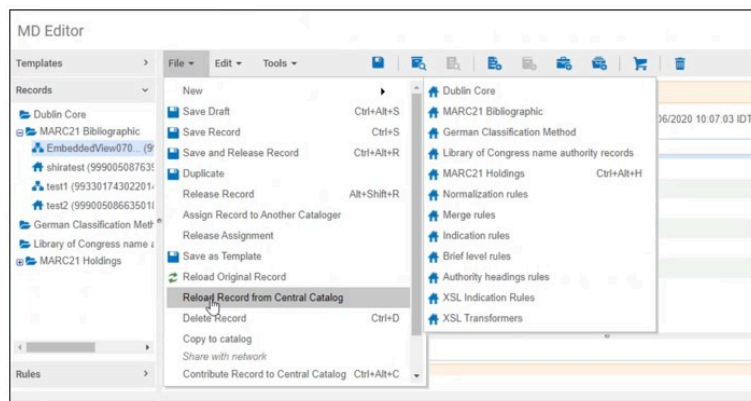
Reload Bibliographic Records from Central Catalog On Demand

July 2020 Resource Management

Users working on Bibliographic records in Central Cataloging (Aleph, SBN, CALIS, etc.) need to ensure that they view and update the most recent version of a Bibliographic record.

A new option **Reload Record from Central Catalog** was added to the Metadata Editor under the File menu. This option enables reloading the most recent version of the Bib record that was loaded previously from the Central Catalog. This restores the Bib entire record from the Central Catalog, removing any changes made by you.

This action is available for Bibliographic records that are managed centrally with the required prefix in 035, and the ones that are managed locally. However, only records managed centrally are reloaded.



Note

The Reload Record from Central Catalog option is available only when both below criteria are met:

- if you have configured a Central Catalog integration profile,
 - when working on Bibliographic records.
-

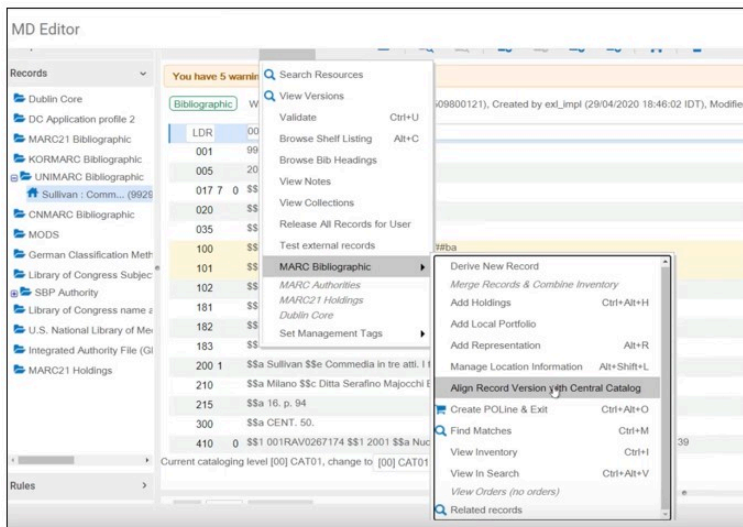
See [MD Editor Menu and Toolbar Options](#).

Align Record Version with SBN

July 2020 Resource Management

Now users working in SBN can align the local record version with the SBN record version, without making any additional changes to the local version. Since now the date is the same, SBN accepts the record contribution.

A new entry **Align Record Version with Central Catalog** was added to the Metadata Editor (**Tools > MARC Bibliographic**). Selecting this option updates the local version of the record with the SBN record version.



Note

The option is visible only if a central catalog integration profile for SBN is defined.

See [Integrating the SBN Italian Union Catalogue](#) and [MD Editor Menu and Toolbar Options](#).

Public Access Model on the Portfolio Editor

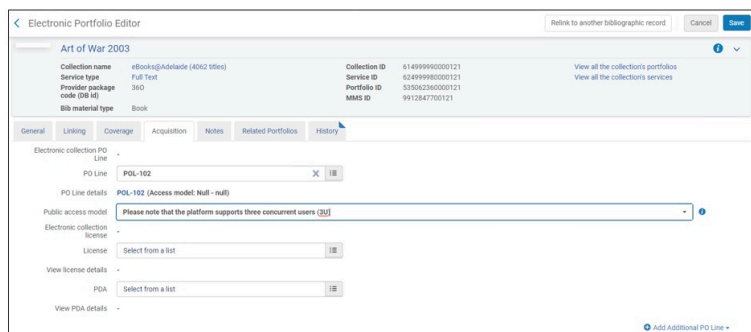
July 2020 Resource Management

Access Model defines how end-users can access the electronic resources. The access model has always been indicated in the PO line, but now it is also displayed in a new field **Public access model** that was added to the Acquisition tab of the portfolio editor. This field presets the active access model associated with the portfolio, as inherited from the PO line that created the portfolio. Any updates to the access model on the PO line are reflected in the **Public access model** field of the portfolio editor. See [Editing a Portfolio Using the Electronic Portfolio Editor](#).

You can also change the value of the **Public access model** field directly on the portfolio editor, and this determines the active access model of the portfolio. However, changing the access model value on the portfolio does not update the access model on the PO line.

Note

In case a PO line of type 'License Upgrade' was added to the portfolio as an additional PO line, the **Public Access Model** field on the portfolio displays the access model associated with the license-upgrade order.



"Public access model" field on the portfolio editor

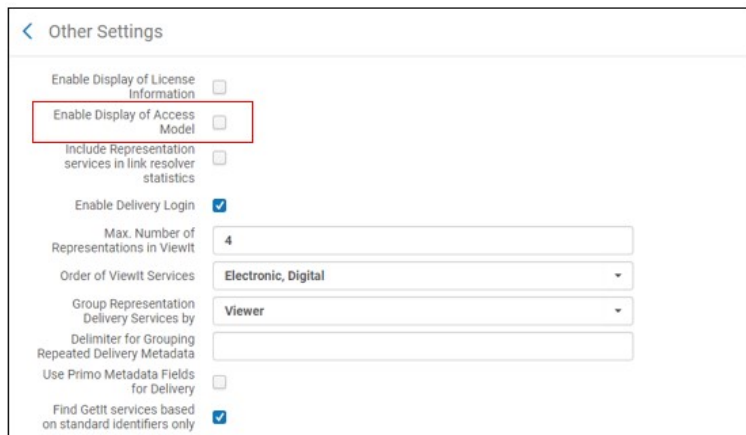
The **Include access model in portfolio public note** checkbox, which previously controlled the presentation of the access model on the portfolio's **Public Note** field in the Alma Link Resolver, was now removed from the New Order API integration profile. See [Real-Time Ordering](#).

To control the presentation of the access model to patrons via Alma Link Resolver, institutions now can use a designated configuration located under **Fulfillment > Discovery Interface Display Logic > Other settings**. Select the checkbox **Enable Display of Access Model** to display in Primo the access model information located on the portfolio.

Note

Primo VE will support this configuration in a future release.

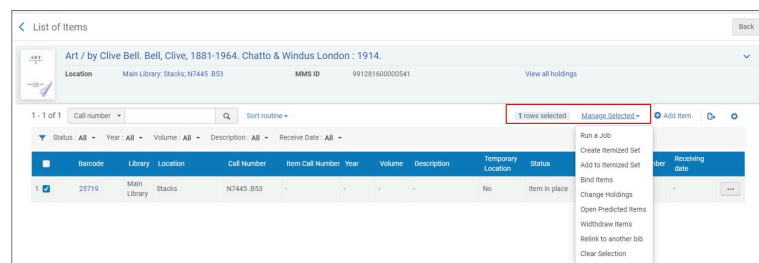
For institutions that previously had the **Include access model in portfolio public note** checkbox enabled in their integration profile, the **Enable Display of Access Model** option is enabled automatically. For other institutions, this checkbox is disabled, but you can enable it. See [Configuring Other Settings](#).



Manage Selected Physical Items

June 2020 Resource Management

Following the changes made in [June 2020](#) release, the actions that previously were displayed as links of the page actions, were now added to the Physical Items list, to enable you to perform actions on multiple physical items in bulk. In addition, when you select items from the list, the item counter above the list now provides an indication of the number of items selected.



Some of the actions that can be performed, such as running a job and creating/adding to the itemized set, can only be performed if you possess the required permissions.

See [Working with the List of Items](#).

Watch the [Manage Selected Physical Items](#) video (0:51 minutes).

Improvements to Electronic Collection and Portfolio Deletion

July 2020 Resource Management

The process of electronic collection and portfolio deletion was made more user-friendly. Now the options to edit records (add, edit or delete) are disabled on electronic collections, portfolios and services once these resources are marked for deletion. In addition, now you are blocked from attaching a stand-alone portfolio to a collection that is marked for deletion (unless the portfolio has some available services).

Enhancements to Forms

July 2020 Digital Resource Management

Several enhancements have been added to the Alma Forms feature (**Configuration > Resources > Metadata Configuration > MARC21 Bibliographic or Qualified Dublin Core > Forms tab**) when selecting **Add fields**:

- The **Checkbox** field type was added.
- The **Repeatable** field was added to the field types (when configured) to allow the user to add multiple instances of the field. This is available only for Patron Deposit forms.
- For date fields, if configured to be mandatory, the **Default Value** field is set to the current date.

Enhanced Sorting Support for Collections

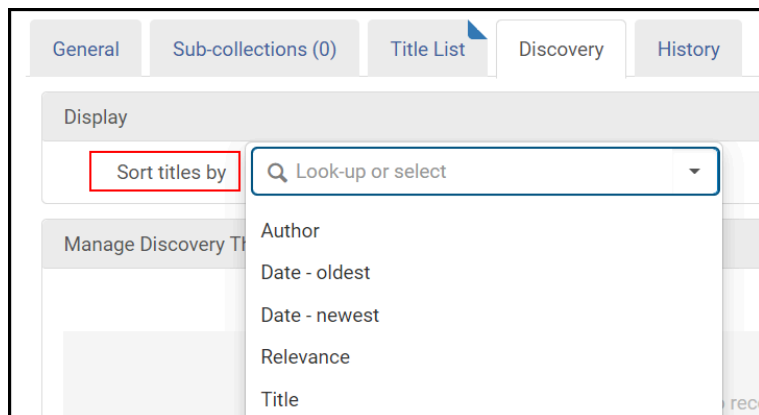
July 2020 Digital Resource Management



Idea Exchange

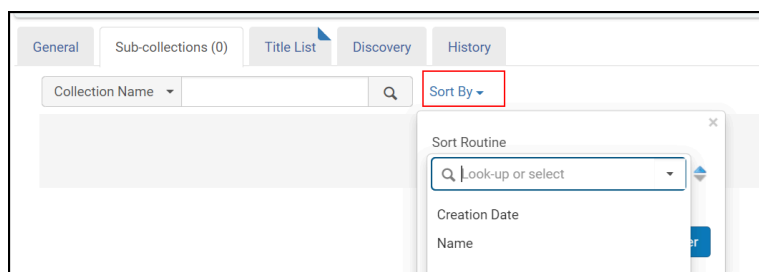
You can now configure the default sorting for titles and sub-collections in Primo VE, using a richer set of title-level sort routines.

- To configure the default sorting of titles in a collection, select an option from the **Sort titles by** drop-down list (**Resources > Manage Collections > Edit Collection > Discovery Tab**):



Sort Titles By

- To configure the default sorting of sub-collections in a collection, select an option from the **Sort by** drop-down list (**Resources > Manage Collections > Edit Collection > Sub-collections tab**):



Sort By

DARA Recommendation to Identify Missing Items

July 2020 DARA

DARA now identifies items that have been missing for a significant amount of time and recommends that you handle them.

An item of title "The Eerdmans dictionary of early Judaism / edited by John J. Collins and Daniel C. Harlow." has been missing for a long time

Item with 39031029782984 barcode has been in missing status for a long time.

Missing since: 2017-10-04 10:38:51, **Barcode:** 39031029782984, **Location Name:** Stacks, **Permanent Call Number:** BM176 .E34 2010, **Title:** The Eerdmans dictionary of early Judaism /, **Library:** Theology and Ministry Library

I recommend reviewing the item in order to decide how it should be handled.

Category: Missing Items

Created on: 08/06/2020

Updated on: 08/06/2020

Updated by: System

Notes: 0

Attachments: 0

Entity Type: Physical item

Entity ID: 23387491910001021

Missing since: 2017-10-04 10:38:51, **Barcode:** 39031029782984, **Location Name:** Stacks, **Permanent Call Number:** BM176 .E34 2010, **Title:** The Eerdmans dictionary of early Judaism /, **Library:** Theology and Ministry Library

Missing Items

By default, DARA identifies items missing for more than 12 months. You can customize DARA to produce recommendations that better suit the needs of your institution. For more information, see [DARA – Data Analysis Recommendation Assistant](#).

July 2020 Additional Stories

- **July 2020 Acquisitions SF: 00564392 00636479**

A new filter, **Equals**, is available for the PO line pickup form. This means that the vendor code/name must be a 100% match for the name in the search box, including case sensitivity.

- **July 2020 Acquisitions**

A new field, **redistribute_funds**, was added to the Update PO Line API. When the field is **true**, Alma now splits the new price per fund according to its percentage in the order (similar to the redistribute lines in the PO Line details). When the field is **false**, which is the default, the previous functionality is maintained. The field is sent as a parameter on the URL (`redistribute_funds=true`) and relevant only for Update PO Line (PUT).

- **July 2020 Acquisitions**

Performance has been improved for the Received Items List. As a result, the PO line list on the page is now sorted by **creation date**, from newest to oldest.

- **July 2020 Acquisitions SF: 00532439**

You can now define the address From value for conversation emails as either the current user's email or the library's email. Set the **conversation_send_from_logged_in_user_address** parameter to **true** to use the current user's email, or **false** for the library's email.

- **July 2020 Administration and Infrastructure**

The footer bearing the Ex Libris logo was introduced on Alma pages.

- **July 2020 Fulfillment SF: 00818602**

Users with the Circulation Desk Operator role can now access the **Advanced Tools** section of the main Fulfillment menu. See [User Roles - Descriptions and Accessible Components](#).

- **July 2020 Fulfillment SF: 00811064 00833669 00835370 00840241**

The **Requests - Recalculate After Inventory Update** job now processes inventory changes only for the last seven days. See [Viewing Scheduled Jobs](#).

- **July 2020 Fulfillment**

You can now add the **External ID** of the resource sharing request to the fulfillment request slip.

- **July 2020 Fulfillment SF: 00643324 00646605**

Previously, for resource sharing borrowing requests, locating a resource at partner configured with Locate Profile of type 'Z39.50' failed if the title or author of the borrowing request contained the '&' sign. Now, the '&' sign can be removed before the locate process is executed. The **rs_z39_locate_replace_amp** parameter defines what will be substituted in place of the '&' sign. When set to **NONE**, which is the default, the '&' sign remains in place and is not removed. When set to **AND**, it is replaced with " AND ". When set to **BLANK**, it is replaced with a space. See [Configuring Other Settings \(Fulfillment\)](#).

- **July 2020 Fulfillment SF: 00638391 00640030 00790183 00795599**

In resource sharing requests, **Ship Physically** and **Ship Digitally** are now available in the configurable request statuses on the Request Pickup Configuration page.

- **July 2020 Analytics**

The **Monthly Usage Data** out-of-the-box report was added to the Usage Via COUNTER Reports - Release 5 folder. It is based on the information displayed in the **Monthly Usage Data** tab of Alma (**Acquisitions > Import > Load Usage Data**) and displays for each platform what data was and was not loaded for each month.

- **July 2020 Analytics**

The following fields for linked records were added to the Bibliographic Details dimension in every subject area in which it appears:

- Link ID – the link ID
- Linked to CZ – indicates if the record is linked to the Community Zone
- Linked to NZ – indicates if the record is linked to the Network Zone
- **July 2020 Analytics**
The **Chinese Classifications (Taiwan)** folder was added under the Other Classifications folder in the subject areas in which it appears. You can use the fields of this folder to create reports relating to the classification system used for Chinese in Taiwan.
- **July 2020 Analytics**
The following fields were added to the Fulfillment subject area regarding requests:
 - Loan Details > Is Hold Request Loan – indicates if the loan was initiated by a hold request
 - Loans > Loans (Not In House) from Hold Request – the number of not in house loans that came from a hold request
 - Loans > Loans (Not In House) from Booking Request – the number of not in house loans that came from a booking request
- **July 2020 Analytics SF: 00816223**
The **Creation Date and Time** and the **Modification Date and Time** fields were added to Purchase Requests > Purchase Request Details. These fields expand on the existing Creation Date and Modification Date fields by displaying the time together with the date.
- **July 2020 Analytics**
The **Portfolio Details for Consortia** dimension in the E-Inventory subject area was renamed to **Portfolio Details for Consortia Members** to clarify that it is to be used by the network members.
- **July 2020 Analytics SF: 00824333 00824805 00833645**
The following fields were added to E-Inventory > Electronic Collections to support the new Central Discovery Index (CDI):
 - No. of Electronic Collections (In Repository + In CDI)
 - No. of Electronic Collections (In Repository + Not In CDI)
 - In CDI
 - Active for Fulltext In CDI
 - Active for Search In CDI
 - CDI Full Text Linking
 - CDI Full Text Rights
 - CDI Newspapers
 - CDI Number of Records
 - CDI Resource Types
 - CDI Search Rights
 - CDI Update Frequency
 - CDI Provider Package Code
 - CDI - Subscribe to only some titles in this collection
 - CDI - Do not show as full text available even if active in Alma
 - CDI Local Note
- **July 2020 Analytics SF: 00626259 00686799 00708175**



Idea Exchange Database usage is now included in usage statistics in the E-Inventory subject area.

- **July 2020 Analytics**

For UNIMARC records, Bibliographic Details > Publication Date is now taken as follows:

- the bibliographic details publication date comes from 210 subfield d (no change from current behavior)
- If there is no 210 subfield d, the publication date comes from field 214 subfield d.
- if both fields do not exist, the publication date comes from field 100 subfield a pos. 9-12

Note

This feature will be available in August after the re-indexing job runs.

- **July 2020 APIs**

When creating a patron digitization request using API, it is now possible to define also the following fields (relevant for partial digitization request): Volume, Issue, Part, Publication Date. See https://developers.exlibrisgroup.com/alma/apis/xsd/rest_user_request.xsd/.

- **July 2020 APIs**

The [Update user API](#) now supports the option to recalculated user roles based on role assignment rules.

- **July 2020 APIs**

The [create purchase request API](#) now supports defining of the requested material type. When purchase request is approved (in UI or using the API), the corresponding PO line will be created accordingly.

- **July 2020 APIs**

The User Request API now includes managed by code and description.

- **July 2020 APIs**

The Invoice export XML now includes the number of attachments.

July 2020 Resolved Issues

- **July 2020 Acquisitions SF: 00757142 00830347 00719198 00757646 00796170 00815392 00725019 00727030 00724503 00729501 00727818 00754788 00715117 00807475**
Improvements were made for the slow response time on the Receive New Material page.
- **July 2020 Acquisitions SF: 00791901 00734706**
Performance improvements were made for the Receiving Department Items loaded page.
- **July 2020 Acquisitions SF: 00793139**
In some cases, adding an email address to a work order caused it to fail. This was fixed.
- **July 2020 Acquisitions SF: 00641376**
When entering a material type of JOURNAL in the PO line, it was saved as Journal Package. This was fixed.
- **July 2020 Acquisitions SF: 00736046 00752661**
When creating a new purchase request that creates the bibliographic record, the record is suppressed from publishing but it is not indexed as such. Because of this, it could not be found as a record with Tag Suppressed (Title) = 'Yes'. This was fixed.
- **July 2020 Acquisitions SF: 00593516 00817537**
When receiving a new item for a continuous PO line, an incorrect calculation caused the item status to be 'in place' instead of 'not in place'. This was fixed.
- **July 2020 Acquisitions SF: 00788285**
In some cases, using a prediction pattern to receive an unreceived journal caused the process fail. This was fixed.
- **July 2020 Acquisitions SF: 00715242**
Previously, when the MMS ID equaled zero in the Electronic Resource Activation Task List, the URL did not display or export. This was fixed.
- **July 2020 Acquisitions SF: 00791724 00648063 00650554 00599063 00834322**
E-books unexpectedly appeared in the Claim list. This was fixed.
- **July 2020 Acquisitions SF: 00794334**
A tooltip in the Vendor EDI Add Organization Unit was not correct. This was fixed.
- **July 2020 Acquisitions SF: 00813037**
In the Harvest Now process, when one report failed, all other reports failed as well. This was fixed.
- **July 2020 Acquisitions SF: 00821922 00799361 00820939 00846528 00800843 00813098 00810358 00837632**
In the SUSHI harvesting process, when a vendor returned an error about date arguments, the harvest process failed. This was fixed.
- **July 2020 Acquisitions SF: 00791077**
When sorting by SUSHI account in the SUSHI vendor list, some SUSHI accounts were missing. This was fixed.
- **July 2020 Administration and Infrastructure SF: 00819599**
In the Fines/Fees Notification Profile Record, the maximum amount was not saved. This was fixed.
- **July 2020 Administration and Infrastructure SF: 00792037**
Previously, every fine/fee which was created manually was written with a creator and modifier by the first and last names of the operator. This was fixed. Now it is written with the operator's user name so it will be aligned with fines fees created automatically.
- **July 2020 Administration and Infrastructure SF: 00829990**
On the Payment Receipt Letter, the barcode now appears for fines that were attached to barcodes but are not attached to loans.
- **July 2020 Administration and Infrastructure SF: 00646323**
When attempting to add a service unit to the Receiving Operator Role after it was created, an error was generated. This was fixed.
- **July 2020 Administration and Infrastructure SF: 00711273 00683998 00813793 00718441 00713315 00715329 00835417 00821778 00709386 00735257 00722852 00843064**

In some cases, the History tab of the User Details page appeared with the blue indicator on the tab, but there were no changes. This was fixed.

- **July 2020 Administration and Infrastructure SF: 00769496**

In some cases, on the User Management Information page, when selecting the Force password change on next login checkbox, the selection was retained between users. This was fixed.

- **July 2020 Administration and Infrastructure**

On the User Record page, the Contact Information tab was accessible even though it should have been restricted. This was fixed.

- **July 2020 Administration and Infrastructure SF: 00821765 00813150**

In some cases, logging into Alma failed due to certain Service Units used in 'Currently at'. This was fixed.

- **July 2020 Administration and Infrastructure SF: 00823694**

When creating a Quick Registration in a member institution, some user fields were not updated by the Network SIS loader. This was fixed.

- **July 2020 Administration and Infrastructure SF: 00842264 00831324 00843538**

In some cases blank address information displayed as 'Null' in user contact information tab. This was fixed.

- **July 2020 Administration and Infrastructure SF: 00825934**

In the resetting the password with the Forgot Password option, some of the error messages appeared in English regardless of the user's selected language. This was fixed.

- **July 2020 Administration and Infrastructure SF: 00656217 00668227 00734071 00590725 00648393 00697253 00720620 00655322**

The Ex Libris footer sometimes appeared in the middle of the page. This was fixed in new Alma layout.

- **July 2020 Administration and Infrastructure SF: 00793460**

The Alma course search criteria appeared cut. This was fixed.

- **July 2020 Administration and Infrastructure SF: 00579885**

Inconsistent naming between navigation links and page titles. This was fixed in Alma new layout

- **July 2020 Administration and Infrastructure SF: 00571440 00601352 00815480 00625940 00599103**

Heading shifts side to side made it difficult to select configuration menu. This was fixed.

- **July 2020 Administration and Infrastructure SF: 00804213 00752066 00805055**

Quick User information automatically populated PIN and sent emails (Chrome, German interface). This was fixed.

- **July 2020 Administration and Infrastructure**

When using the new menu, running 'Move set of portfolios' job reverted the interface back to the regular interface. This was fixed.

- **July 2020 Administration and Infrastructure SF: 00634501**

In the Approval Requests List, The contents of the Digitization Type and Warning columns were not translated. This was fixed.

- **July 2020 Administration and Infrastructure SF: 00553228 00794082**

Request button in Get It not fully clickable in Firefox. This is fixed

- **July 2020 Administration and Infrastructure SF: 00833857**

QuickAccess display (embedded in the new Alma viewer) for Network Zone, Institution Zone, and related records is not working. This was fixed.

- **July 2020 Analytics SF: 00816692**

Analytics "Interface status" has numeric value instead of Active/Inactive

- **July 2020 Analytics SF: 00832429**

The Newly Created Portfolios out-of-the-box report referred to private folders or unconfigured prompts. This was fixed.

- **July 2020 Analytics SF: 00622887 00791102**

In Analytics, in the Fulfillment subject area under the Loan Details folder, the Loan Note field contained no data even when the loan had a note. This was fixed.

- **July 2020 Analytics SF: 00625633 00795793 00847844 00650924 00733831 00795408 00792709 00840418 00817982**

The Daily Book Request report sent an error message instead of the report. This was fixed.

- **July 2020 Analytics SF: 00752860 00739058 00794706**

The **Physical Items > Holding Details > Holdings Record Creation Date** analytics field displayed the same value as

the Holding Details > Holdings Record Modification Date analytics field and not the holding record's creation date as it appears in Alma. This was fixed.

- **July 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.

- **July 2020 Analytics SF: 00832277 00756030 00823270**

There was no difference between the data in the Fulfillment subject area between the Patron Details folder and the Borrower Details folder. This was fixed, and now the Patron Detail folder displays information from the time of the loan and the Borrower Details folder displays the current information.

- **July 2020 Analytics SF: 00753773 00842063 00845646**

Results did not appear for reports with the **Bibliographic Details > Language of Cataloging** field in Analytics reports if the record does not include an 040 \$b field. This was fixed.

- **July 2020 Analytics SF: 00827498**

The Portfolio Access Type field (**Inventory >Portfolio Details**) returned two values for 'None'. This caused portfolio duplication in the report. This was fixed and now only one record is displayed in the report.

- **July 2020 Analytics SF: 00819855**

LC Classification range 195.001 to AC199.999 showed incorrect groups. This was fixed.

- **July 2020 API SF: 00720750 00720048 00551789**

The New Order API was not recording the version when holdings were updated. This was fixed.

- **July 2020 API SF: 00798293**

The GET Purchase-Requests API failed when the relevant user was missing a first or last name. This was fixed.

- **July 2020 API SF: 00821361**

The Update-Portfolio API was updating the portfolio incorrectly when the payload included more than one local_date_coverage_parameters. This was fixed.

- **July 2020 API SF: 00820598**

The Retrieve Electronic Collections API was slow when called without any search parameters. This was improved.

- **July 2020 API SF: 00813079**

Hold Requests created by API didn't include item barcode. This was fixed.

- **July 2020 API SF: 00819485**

The GET-Users API, when used with wrong search syntax for the 'q' parameter, wasn't returning the expected error message. This was fixed.

- **July 2020 API SF: 00836954**

The Get-Requests-By-Bib-mms-id was skipping digitization requests in some cases. This was fixed.

- **July 2020 API SF: 00695928**

The Create Portfolio API (POST /bibs/{mms_id}/portfolios/) was creating multiple IEE records. This was fixed.

- **July 2020 API**

The GET-Bibs API was not returning the total_record_count field. This was fixed.

- **July 2020 API SF: 00840598**

The GET-Bibs API returned an error when, according to the search parameters, no record was found. It now returns an empty list of records.

- **July 2020 CDI**

Display issues on the the CDI Collection Tab were fixed.

- **July 2020 CDI**

Publishing to CDI failed when there was an empty publishing profile. This was fixed.

- **July 2020 CDI**

DB type collections showed the selective indication option in multi-campus. This was fixed.

- **July 2020 Fulfillment**

Previously, you could not place a manual description request if the item was in a temporary location. This was fixed.

- **July 2020 Fulfillment SF: 00492161**

A performance improvement has been made for selecting a new processing location in Alma.

- **July 2020 Fulfillment SF: 00635597 00793126**

Request recalculation ignored the On Shelf request policy. As a result, recalculation of a request sometimes caused the request to switch to an available item even if the On Shelf request policy did not allow it. This was fixed.

- **July 2020 Fulfillment SF: 00648548**
The Primo Get-It pane loading time was slow for serial titles that had many related records. The loading time was improved. Additional improvements are in progress.
- **July 2020 Fulfillment SF: 00824480**
Under certain circumstances, the last renew status of a loan was incorrect. This was fixed.
- **July 2020 Fulfillment SF: 00809021**
A content indicator was added to the Instructors tab in the course details page.
- **July 2020 Fulfillment SF: 00842579 00823488**
The Quick Print Preview of Ful Resource Request Slip Letter was not Supporting Japanese Characters. This was fixed.
- **July 2020 Fulfillment**
If the Notifications - Send Courtesy Notices and Handle Loan Renewals job failed to send emails because of users with no preferred email address, the job completion status was set to either Completed with Errors or Completed with Warnings according to the percentage of failures. Now the the job completion status is always set to Completed with Warnings in this case, regardless of the number of failures.
- **July 2020 Fulfillment**
A performance improvement has been added in the fulfillment area.
- **July 2020 Fulfillment SF: 00809197**
When cancelling a request from the Patron Services page, the cancellation reasons did not appear in the order of the code table, as they do when cancelling form the Monitor Requests page. This was fixed.
- **July 2020 Fulfillment**
If the Loans - Overdue and Lost Item job failed to send emails because of users with no preferred email address, the job completion status was set to either Completed with Errors or Completed with Warnings according to the percentage of failures. Now the the job completion status is always set to Completed with Warnings in this case, regardless of the number of failures.
- **July 2020 Fulfillment**
Translations were added for labels and buttons within the user summary section of the Patron Services page.
- **July 2020 Fulfillment SF: 00726894 00759677 00698458**
Alma does not support sending emails to invalid addresses. This is now reflected on the job report.
- **July 2020 Fulfillment SF: 00743690**
When importing a calendar from an excel file, events with 'Yearly' recurrence were incorrectly imported as 'Weekly' events. This was fixed.
- **July 2020 Fulfillment SF: 00756146**
Some performance improvements were done for handling NCIP messages. Additional improvements are planned for future releases.
- **July 2020 Fulfillment SF: 00432307**
The Pick from Shelf print slip report is now sorted in the same order as the UI list.
- **July 2020 Fulfillment SF: 00414707 00474012 00801139 00549665 00451924 00459766 00612811 00526298 00392229 00736894 00460182 00558398**
The content indicator of requests and returns tabs on the Patron Services page are now populated when coming from user details Manage Fulfillment Activities.
- **July 2020 Fulfillment SF: 00740059 00574434**
When trying to place a request from Patron Services, and the record had only items in a temporary location, the Booking button that not appear within the Submit Request popup. This was fixed.
- **July 2020 Fulfillment SF: 00789385 00790545 00812022 00798431**
When a physical item request was in the pick from shelf stage, and then the item information was changed, the resource request slip was immediately printed a second time. Now, a new resource request slip is printed in this case only if one of the following fields is changed: Location, Description, Material type, Item policy, Process type. Note: If the request will not be handled (i.e. it is still in the pick from shelf stage) until the next execution of the Requests - Recalculate after Inventory Update job, the job will process the request and will trigger a printing of a new slip regardless of which fields were changed.
- **July 2020 Fulfillment SF: 00792171 00826975 00799440 00794008**

The reshelving of an item was wrongly considered an inventory update and therefore incorrectly triggered request recalculation by the Requests - Recalculate after Inventory Update job. Since the job also reprints resource request slips during the recalculation, this caused the slips for these items to be printed a second time for no reason. This was fixed. Now reshelving will no longer trigger request recalculation and therefore the slips will not be reprinted.

- **July 2020 Fulfillment**

Patron information will now be exported within the exported document (XML) for any request type with such information.

- **July 2020 Fulfillment**

When an AFN request was created for an item that was temporarily in remote storage, the request was sometimes placed in Pick from Shelf status instead of Waiting for Remote Storage status. This was fixed.

- **July 2020 Fulfillment SF: 00701755**

The XML of the Resource Sharing Shipping Slip Letter was missing the issue_level_description information. This was fixed.

- **July 2020 Fulfillment SF: 00690928**

The series title number was not added to FulOutgoingEmailLetter and QueryToPatronLetter. This was fixed.

- **July 2020 Fulfillment SF: 00746820 00805568**

When trying to renew a lending request either manually or automatically, and the Resource Sharing library has no opening hours, the renew response was sent without a due date and an internal error displayed to the page in the manual action. This was fixed. Now, in this circumstance, the renew action is not performed, no message is sent to borrower and an informative error displays on the page.

- **July 2020 Fulfillment**

When converting an article resource sharing request to a digitization/hold request, the note did not include the Article Title and Author information. This was fixed.

- **July 2020 Fulfillment SF: 00812077 00821850**

In some cases, shipping a lending request digitally resulted in an error. This was fixed.

- **July 2020 Fulfillment SF: 00694833**

The parameter rs_override_local_partner_shared_barcode to override the shared barcodes in the distribution of partners was enabled for all BIBSYS institutions.

- **July 2020 Fulfillment SF: 00800370**

When sending an NCIP AcceptItem message for a borrowing request that was initially created by Alma, Alma ignored the DateForReturn field and did not update the request due date accordingly. This was fixed. Alma now updates the borrowing request with the new due date if sent. No change is done in the loan due date in case the item is loaned already.

- **July 2020 Fulfillment SF: 00740309 00453083 00731900 00736130 00728401 00741175 00626932 00623005**

Notes containing a carriage return in ISO messages sometimes caused the message to fail. This was fixed, Carriage returns are now removed from the notes of all ISO messages.

- **July 2020 Fulfillment SF: 00648258 00684788**

The dynamic URL was not encoded properly. This was fixed.

- **July 2020 Fulfillment SF: 00460098 00715241 00450769 00580891**

Previously, if the ful_network_default_pickup_inst parameter was set to the patron, the initial value of the pickup institution field in a fulfillment network request form was left blank. This was fixed. Now, when the parameter is set to patron, the initial value is set to the patron's institution, meaning that linked account users show the patron's source institution. Note that this depends on the configuration of the item's owning institution and not on the logged in primo user.

- **July 2020 Fulfillment**

The pickup institutions list in Alma and Getit request forms is now alphabetically sorted.

- **July 2020 Fulfillment SF: 00751777 00729366 00727865**

A performance improvement was made to the Loan - Overdue and Lost Item job.

- **July 2020 Fulfillment SF: 00831954**

Previously, the Request Send Report job always appeared as active on the Fulfillment Jobs Configuration page, although the job was actually inactive. This was fixed.

- **July 2020 Fulfillment**

In some cases, the External_System_RS_Export job failed to export the request due to a change in the request or item

during the job execution. This was fixed.

- **July 2020 Resource Management SF: 00756530**

In Repository Search, when searching in advanced search using Additional Publication year > Contains keywords = Â, the results page was not loaded properly. This was fixed.

- **July 2020 Resource Management SF: 00792655**

When merging secondary bib record 'A' (attached to an Electronic Collection) into a primary bib record 'B', the Electronic Collection was correctly attached to record 'B'. However, a redundant representation of the primary record 'B' remained active, which caused this record to be published twice. This was corrected. The redundant representation of the primary record 'B' is deleted as part of the merge and combine process.

- **July 2020 Resource Management SF: 00826000**

'Physical Inventory Operator' role does not work as expected, causing users without Repository Manager role unable to see the holdings/items links when opening a public itemized set. This was fixed.

- **July 2020 Resource Management SF: 00788933 00816952 00759342**

The 500 Internal error was issued when attempting to save predicted items. This was fixed.

- **July 2020 Resource Management**

The relinking option of a holding or an item (functionality available for the Physical Inventory Operator/Extended/Manager/Repository Manager/Purchasing Operator/Purchasing Manager roles) was allowed for any holding or item even when they are not in the same library scope.

- **July 2020 Resource Management SF: 00789803 00789816**

When holdings had more than one item and one of the items changed his location to a new holdings, the Modify column contained wrong data. That was fixed. Old data wasn't fixed, to fix it, re-save the item.

- **July 2020 Resource Management SF: 00812367**

In the Physical Item 'view' mode, the 'Relink to another bibliographic record' button is now visible only to the following roles, which include the 'PHYSICAL_INVENTORY_MANAGE' privilege: Repository Manager, Physical Inventory Operator (+ extended), Purchase Operator, Purchase Manager.

- **July 2020 Resource Management SF: 00239222**

After contributing an electronic collection to the Community Zone, updating the URL of a portfolio in the collection changed the local portfolio but not the Community Zone. This was fixed.

- **July 2020 Resource Management SF: 00688677**

When a portfolio already had a license attached and the import profile did not contain a license, portfolio license was not deleted. This was fixed.

- **July 2020 Resource Management SF: 00754725**

Portfolio with a big amount of coverages caused overlap analysis to fail. This was fixed.

- **July 2020 Resource Management**

Deleting e-collection by a job while restarting the batch, caused the e-collection to remain in 'In deletion' status.

- **July 2020 Resource Management SF: 00799486**

Upload Electronic Holdings job for Ovid was not activating or updating monographs when multiple profiles were set up in a multi-campus environment. This was fixed.

- **July 2020 Resource Management SF: 00828538 00804299 00824720**

When an identifier from an Upload Electronic Holdings job input file already existed in at least two different bibliographic records within an institution, the portfolio was not activated or updated by the job. This was fixed.

- **July 2020 Resource Management**

'Type' label appeared twice in the 'Manage Column Display' when searching for electronic collections. This was fixed to appear only once.

- **July 2020 Resource Management**

The 'Service' label that appeared in the 'manage column display' when searching for electronic collections was removed because the 'Services' label already exists and therefore, the 'Service' label is unnecessary.

- **July 2020 Resource Management SF: 00826322**

The Upload Electronic Holdings job used to update and reindex every active portfolio in the input file, even if no changes were made. The job now checks for changes before updating portfolios.

- **July 2020 Resource Management SF: 00827823 00828566**

The upload electronic holdings job used to update and reindex every active portfolio in the input file, even if no changes were made. The job now checks for changes before updating portfolios.

- **July 2020 Resource Management SF: 00838823 00827077 00841414 00827875 00826257**
A new data corrector, DataCorrectorDeleteCollection, was created in order to manually delete collections where the deletion job failed. This can be run from the Data Corrector page.
- **July 2020 Resource Management SF: 00839043**
The "Selected Full Text" service could not be deleted from electronic collection. This was fixed.
- **July 2020 Resource Management SF: 00809493**
In some cases, removing a link to a bibliographic record in an electronic collection did not trigger the publishing of the bib record as deleted. This was fixed: now when a bib record is separated from a collection, it is properly published as deleted.
- **July 2020 Resource Management SF: 00731853**
With the October release, the Publish Electronic Records to CDI job was made available for all customers, even when the parameter publish_to_central_index was set to 'PC only'. This was fixed.
- **July 2020 Resource Management SF: 00794242**
In enrichment publishing, the Create Date/ Modification Date was wrong in some cases. This was fixed.
- **July 2020 Resource Management SF: 00796215**
Error messages displayed when trying to delete collections relating to a workflow, such as import, profile/deposit, and profile/digitization profile did not provide enough information. This was fixed.
- **July 2020 Resource Management SF: 00814009 00802283**
A new data corrector, DataCorrectorDeleteCollection, was created to manually delete collections where the deletion job failed.
- **July 2020 Resource Management SF: 00827068 00798456**
Running Update Electronic Holdings Integration Profile for SPRINGER produced the error 'An error occurred while downloading vendor's file'. This was fixed. The jobs that did not complete successfully, now provide the right indication.
- **July 2020 Resource Management SF: 00829504**
In some cases, 'Combine set' showed as failed, but succeeded to create the new set. This was fixed.
- **July 2020 Resource Management SF: 00791647**
Portfolios that were linked to more than one service (wrong service ID in TPS) caused a different number for collection and service. A data corrector was added to fix the issue.
- **July 2020 Resource Management**
'Held By' page – Summary Holdings: previously only field 866 subfields \$a and \$z were displayed. This was fixed. If the holdings record contains fields 866, 867, or 868 (all three are repeatable) with subfields \$a (non-repeatable) and \$z (repeatable), all of them will be displayed. Fields are separated with " ; " (space semicolon space), and subfields with " – " (space dash dash space).
- **July 2020 Resource Management SF: 00701001**
Browse Shelf Listing of Dewey call numbers: the sorting of the browsed results has been corrected for Dewey call number that contain an underscore ("_"). This fix is relevant only when the "Dewey_normalization_numeric_sort_after_underscore" customer parameter is set to "true". In addition, full inventory indexing is required, with the "recalculate Holdings Operational" option enabled.
- **July 2020 Resource Management SF: 00602927 00479956 00826458 00627399 00666413 00602926**
Advanced search with the "Contains Phrase" operator (and also "Starts With", which is available for some indexes) did not work for search phrases that included an apostrophe. This was fixed.
- **July 2020 Resource Management SF: 00808612**
When an itemized set with deleted bib records was used for the "Delete Bibliographic records" job, the counter [X] in the message "The selected set contains [X] members" included the deleted records. In addition, the "Number of bibliographic records deleted" in the job's report included previously deleted records. Both issues were fixed.
- **July 2020 Resource Management SF: 00818932**
Linking fields to related inventory – 773\$\$g (MARC21) or 461\$\$v and 463\$\$v (UNIMARC): when there were multiple subfields to filter both by year (Chronology I) and volume (Enumeration A or barcode), e.g. 461 \$\$v yr:1998 \$\$v no:19, related holdings records were filtered only according to volume (no:19) and not by year (yr:1998). This was fixed.
- **July 2020 Resource Management SF: 00661567**
A UResolver request with rft.doi containing a DOI's base URL caused an incorrect target URL. The base URL was removed from the rft.doi and fixed the target URL.
- **July 2020 Resource Management SF: 00517671 00742671**

DOI title parsed with many spaces that causes incorrect target URL. This was fixed.

- **July 2020 Resource Management SF: 00818824**

Previously, when creating a local authority in the MDE, it created a local authority record with the originating system id = '001' field, even if this originating system and originating system id already exist. This was fixed. Now, it validating if an authority record with the same originating system and originating system id already exist, and issues an error if so.

- **July 2020 Resource Management SF: 00453801**

When cataloguing in Hebrew, and adding a Hebrew letter directly after \$\$, the key Backspace does not work. When the 'show directional characters' option is on, the 'backspace' key does not work at all on '\$\$u' (for example). If the 'show directional characters' option is off, only clicking twice on the backspace key works. Both issues were fixed.

- **July 2020 Resource Management SF: 00658944 00670815 00752783**

Previously, when saving a record and the record was not changed, the 'Modified By' did not change, but the 'Modification Date' did change. This was fixed. Now the 'Modified By' does change when the record is saved and no change was made.

- **July 2020 Resource Management**

In some cases, when a network institution member tried to delete a network bib record (which cannot be deleted) from the Metadata Editor, a warning message was displayed, followed by a system error message; as a result, the record was deleted although it should not have. This was corrected.

- **July 2020 Resource Management SF: 00759171**

CNMARC profile - content code values for field 100 position 17 had the same value for 2 codes. The value of code k at position 17 of field 100 was updated.

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

After browsing for an item with a specific source of classification or shelving scheme (call number type = source specified in subfield \$2) through the 'Browse Shelf Listing' feature, editing it and then returning back to the MD Editor by selecting 'Cancel,' 'Save' or the 'Back' arrow, the user was not directed back to the Browse Shelf Listing with the previous parameters settings. This was fixed.

- **July 2020 Resource Management SF: 00814758**

Relinking holdings did not remove the merged empty holding. This was fixed.

- **July 2020 Resource Management SF: 00830152**

MD Editor New UI - problematic display of info message 'Alma has attempted to link the bib heading...'. This was fixed.

- **July 2020 Resource Management SF: 00702239**

The headings of field 490 were wrongly linked to authorities. The data was fixed (link removed), and added code that prevents future link of unauthorized fields.

- **July 2020 Resource Management SF: 00754256 00790005 00707903**

AUTH heading - punctuation was removed when linking an authority record via F3, even though parameter add_punctuation_for_heading was set to "N". This was fixed.

- **July 2020 Resource Management SF: 00795572**

When Editing CZ NLI Authorities, no drop-down list for Expand from Template appeared. This was fixed.

- **July 2020 Resource Management SF: 00798137**

CZ authority records for NLI - F3 was not working in 37X-fields for some institutions. This was fixed.

- **July 2020 Resource Management SF: 00744438**

Field 075 (Type of entity) was missing in the MARC21 Authority profile. This was fixed.

- **July 2020 Resource Management SF: 00813630**

After updating a BARE authority record, the 035 was missing. This was fixed.

- **July 2020 Resource Management SF: 00820894 00629897 00667186 00504073 00500239 00602332**

An error was reported for a specific case when running the Update Inventory import profile. It was fixed.

- **July 2020 Resource Management SF: 00743313**

In some cases, a New Order import job that imported greater than 50 records that all used the same PO created the PO twice. This was fixed.

- **July 2020 Resource Management SF: 00821832**

Alma was slow when opening 'Monitor and View Imports'. This was fixed.

- **July 2020 Resource Management SF: 00819352**

While updating an existing import profile, the confirmation message indicated that a new profile was added. The

feedback message was fixed.

- **July 2020 Resource Management SF: 00811504**
312, 314, 320 and 330 UNIMARC fields were not converted to MARC21 fields during import. This was fixed.
- **July 2020 Resource Management SF: 00822760**
Contribution of SBN Authority record of type Authore failed after modification. A specific error message was added.
- **July 2020 Resource Management SF: 00822752**
Contribution of Titolo Uniformi authority records generated a different response from SBN than other authority types. Alma functionality was modified to handle this.
- **July 2020 Resource Management SF: 00553890**
For UNIMARC Browse Bibliographic Headings, some titles did not display properly. This was fixed. A full inventory re-indexing (including 'recreate bib headings') needs to be run for this fix to be fully functional.
- **July 2020 Resource Management SF: 00813711 00742324**
SBN integration - Search for fingerprint (T012) was missing for materials other than Music. Impronta search fields were added.