



Alma March 2020 Release Notes

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Document released: March 2020

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Make the Most of the March Release

Action Items

- ☐ [Option to keep Rapid ILL requests open](#) - If you use Alma to export borrowing requests to Rapid ILL, you can now keep the request active in Alma in order to further track the request in Alma until it is completed in Rapid ILL.
- ☐ [Claim request based on Average Supply Time](#) - Borrowing libraries that use Alma for peer to peer requests can now automatically send claim messages to lenders that have not fulfilled a request within a defined period of time. In addition, the borrowing libraries can automatically cancel request that they expect to have been fulfilled already.

Upcoming Issues to Note

Sandbox Refresh

As a reminder, premium sandboxes will be updated in February according to [Alma's premium sandbox refresh policy](#).

Security update - Removing HTTP allowed exceptions for Alma and Primo

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
July	NA01, NA02, NA03, AP01
April	EU00, EU01, EU02

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.

OBI Upgrade and Data Visualization (DV)

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

As of December 2019, OBI 12 for Alma Analytics and DV is being used by 14 institutions as early adopters. In March 2020, both OBI 12 and DV will be available to NA01, NA02 and NA03 institutions, and during May 2020 to all other institutions. As part of the OBI upgrade from v11 to v12, institutional reports will be migrated. During the migration (a week as per the following schedule) it will not be possible to create new reports that will be migrated to OBI12. This is referred to as the 'freeze period'.

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

For more information, visit the [FAQ](#) page.

Next Release Sneak Preview

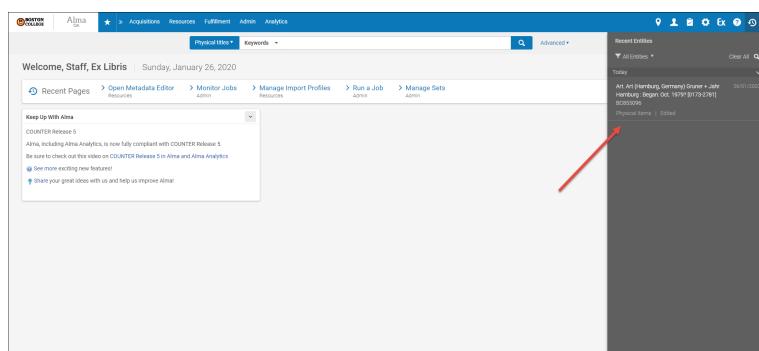
April 2020 is a maintenance release that will not contain any new features.

Main Stories

Viewing Your Recent Documents

March 2020 Administration and Infrastructure

The **Recent Entities**, part of My Activity Center, is a system-level interface that lists all the entities you have added, updated, and deleted within the last 7 days. You can scroll through the list and select an entity to resume your work, or you can view the entity in view-only mode. The **Recent Entities** list is a helpful way to find the records you have recently accessed, even if you do not remember their names. It also allows you to easily view your recent changes to your records. At any moment you can open and close the **Recent Entities** list, and then resume your ongoing work without interrupting its context.



The Recent Entities pane

From the Recent Entities pane you can:

- Open the entity in a view-only mode or in edit mode.
- Search for a certain entity in the list.
- Narrow down the list to a specific type of repository entity, such as physical items, or to entities accessed on a specific day.
- Dismiss entities from the list.

Watch the [Viewing Your Recent Documents](#) video (1:06 minutes).

See [Recent Entities List](#).

Preferred Material Type in Purchase Requests

March 2020 Acquisitions



NERS Enhancement (ID #5685)



Idea Exchange

You can now select a material type for purchase requests in Alma. The field previously called **Requested Format** has been renamed to **Material Type** and moved to the **Resource Information** section. In addition to the **Physical** and **Electronic**

options that appeared previously, a new option is available, **Default**. When selected, the **Default** option determines the **Material Type** value for the PO line based on the customer parameter, **purchase_request_preferred_material_type_default**. When the parameter is **P** (for physical), the material type is determined by the default value in the Physical Material Type Descriptions table. When the parameter is **E** (for electronic), the material type is taken from an internal table of electronic types, and is **Book**. The table of electronic material types is internal and cannot be modified. If you choose an option other than **Default**, a new field, **Choose Type**, allows you to specify the exact material type needed. This selection options for the **Choose Type** field are dependent on the selection in the **Material Type** field, so that the list will include only Electronic or Physical material types, accordingly.

The accompanying modifications for the Primo Purchase Request Form will be added in an upcoming release.

See [Creating a Purchasing Request](#).

SUSHI Performance Improvements

March 2020 Acquisitions



Idea Exchange

The SUSHI harvest process now contains new performance enhancements. Additionally, the **Missing Data** tab has been renamed to the **Monthly Usage Data** tab. The errors on this tab are now further refined to help you troubleshoot connection issues. The yellow icon (



) indicates that the connection to the vendor was successful, but the vendor did not send any data. While the red icon (



) indicates that the the vendor connection attempt was unsuccessful. The green icon (



) indicates, as previously, that the usage report file was successfully uploaded.

See [Viewing Usage Data](#).

Link Resolver Get It Services – Prevent Services for Wrong Titles

March 2020 Resource Management



NERS Enhancement (ID #6201)

When an OpenURL does not contain any identifiers, the link resolver matches a bibliographic record based on the OpenURL title. At times the match is inaccurate and can result in Get It services for the wrong title. You can now configure Alma to limit the link resolver to display Get It services for titles that were matched only based on identifiers. See [Using Standard Identifiers](#) for more information.

Import Local Extensions to Community Zone Records

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

It is now possible to add local extensions via the import process. This is a continuation of functionality that was released in

February that enables the addition of local extensions to Community Zone records. This capability is enabled through new configuration options in the Repository, Update Inventory, and New Order import profiles under Match Actions. See [Community Zone linked records handling](#) and [Support for local extensions for bibliographic records linked to the Alma CZ](#) for more information.

UNIMARC 463 Related Records

March 2020 Resource Management SF: 00694838

Similar to UNIMARC 461, Alma now supports UNIMARC 463 for related records. See [display_specific_related_items](#) and [Using the UNIMARC Linking Fields for Related Records](#) for more information.

Bibliographic MMS ID Appears in Additional Search Results and Various Resource Editors/Lists

March 2020 Resource Management

The bibliographic MMS ID now appears in search results for physical items, electronic collections, and portfolios. In addition, the MMS ID appears in the header information for the following resource editors/lists: Physical Item Editor, List of Holdings, List of Items, Electronic Collection Editor, Electronic Portfolio Editor, and the Electronic Service Editor. See below for examples.

Physical Items (1 - 20 of 231) | [lincoln](#) [Save Query](#)

[Institution](#)

Sort by: Rank Secondary Sort by: Rank

1 **Mr. Lincoln / Edited by Richard N. Current.** [Edit Item](#) [Request](#) [...](#)

Book By Randall, J. G. (New York : Dodd Mead 1957.)
Barcode: 74881
Library: Main Library
Creation Date: 17/12/2011 23:43:04 PM IST
Modification Date: 11/06/2018 10:43:42 AM IDT
Expected Arrival Time: -
On Hold Expiration Date: -
Due Date: -
Needed By: -
Until: -
Permanent Location: Main
[Other details](#)

Call Number: E457 .R215
Call Number Type: Library of Congress classification
Status: Item in place
Due back: -
Material Type: Book

Item ID: 235447790000541
Holdings ID: 2254478000000541
MMS ID: 991362330000541

Physical Items Search Results

Electronic Collections (1 - 20 of 33) | [ovid complete](#) [Save Query](#)

[Institution](#) [Community](#)

Sort by: Rank

1 **Journals@Ovid Complete** [Portfolio List \(3164\)](#) [Edit Collection](#) [...](#)

Type: Selective package
Services: Full Text (Available)
Interface name: Ovid
Linking Level: Article
Creation Date: 06/03/2018 11:59:59 AM IST
Modification Date: 28/01/2020 13:58:50 PM IST
[Other details](#)

Collection ID: 6112451070000301
MMS ID: 9951441500301

Electronic Collections Search Results

Electronic Portfolios (1 - 20 of 11,860) | [ovid complete](#) [Save Query](#)

[Institution](#) [Community](#)

Sort by: Rank

1 **Emotion.** [Edit Portfolio](#) [Order](#) [...](#)

Journals@Ovid Complete: getFullTxt
ISSN: 1528-3542
Available from 2001 volume: 1 issue: 1.

Access Type: Current
Electronic Material Type: Journal
Creation Date: 06/03/2018 12:05:01 PM IST
Modification Date: 06/03/2018 12:05:28 PM IST

Peer Reviewed
Portfolio ID: 5312536470000301
Service ID: 6212451060000301
Collection ID: 6112451070000301
MMS ID: 9951155200301

Electronic Portfolio Search Results

< List of Holdings Back

Art / by Clive Bell. Bell, Clive, 1881-1964. Chatto & Windus London : 1914. ▼

MMS ID 99128160000541

1 - 2 of 2 Call number Q

List of Holdings

< List of Items Back

Mr. Lincoln / Edited by Richard N. Current. Randall, J. G. 1881-1953. (James Garfield), Dodd Mead New York : 1957. ▼

Location Main Library: Main; E457 .R215 MMS ID 991362330000541 View all holdings

1 - 1 of 1 Call number Q Sort routine

List of Items

< Physical Item Editor Relink to another bibliographic record Cancel Save

Mr. Lincoln / Edited by Richard N. Current. Randall, J. G. 1881-1953. (James Garfield), Dodd Mead New York : 1957. i ▼

Holdings Main Library: Main; E457 .R215 View all holdings
 Holdings ID 225447800000541
 Barcode 74881 View all items
 Process type - Item ID 235447800000541
 Status Item in place MMS ID 991362330000541 Browse shelf listing

Physical Item Editor

< Electronic Collection Editor Cancel Save

 Agriculture Collection i ▼

Collection name Agriculture Collection Collection ID 6113279740000301 Provider package code IAG (DB id)
 MMS ID 9955741300301

Electronic Collection Editor

< Electronic Portfolio Editor Relink to another bibliographic record Cancel Save

 Emotion. Emotion (Washington, D.C. : Online) American Psychological Association [Washington, D.C.] : Vol. 1(1) (Mar. 2000) [1931-1516] ▼

Collection name Journals@Ovid Complete Collection ID 6112451070000301 View all the collection's p...
 Service type Full Text Service ID 6212451060000301 View all the collection's s...
 Provider package code (DB id) Portfolio ID 5312536470000301
 Bib material type Journal MMS ID 9951155200301

Electronic Portfolio Editor

< Electronic Service Editor Cancel Save

Collection name Journals@Ovid Complete Collection ID 6112451070000301 View all services
 Service type Full Text Service ID 6212451060000301
 Provider package code (DB id) MMS ID 9951441500301

Electronic Service Editor

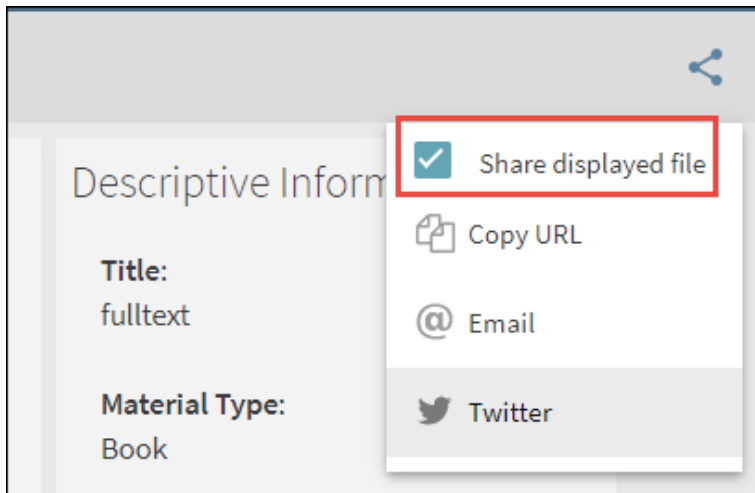
New Alma Viewer

March 2020 Digital Resource Management



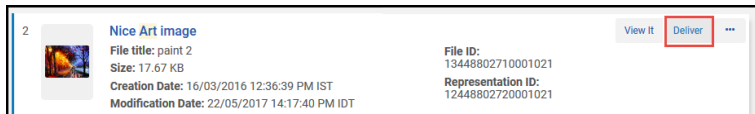
Idea Exchange

The newly designed Alma Viewer is now available to view digital resources. To enable the new viewer, select the **Use New Viewer** checkbox in the Alma Viewer configuration (**Configuration > Fulfillment > Discovery Interface Display Logic > Viewer Services > Alma Viewer**):



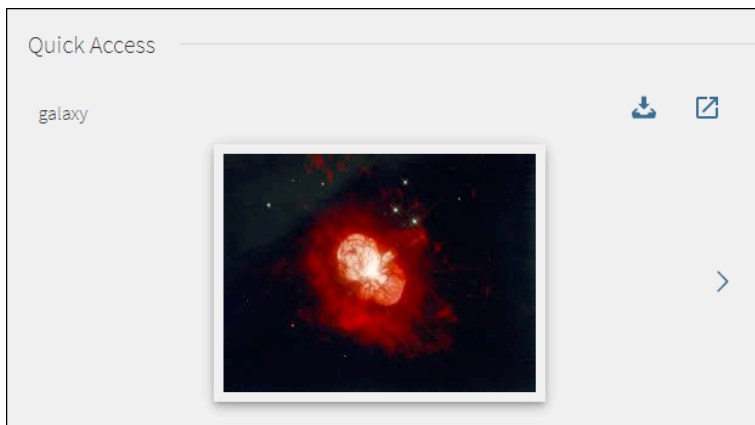
Share Displayed File

In addition, you can now deliver a file from the search results when searching for a digital file:



Deliver Digital File

- (URM-120744) Embedded Image in Primo VE – you can configure the new Alma Viewer to appear in Primo VE in a new Quick Access section. You are able to view the files of the representation, download the files, and open them in the full viewer.



Embedded Image in Primo VE

You can configure display logic rules with the new Representation Quick Access service to control the Quick Access display.

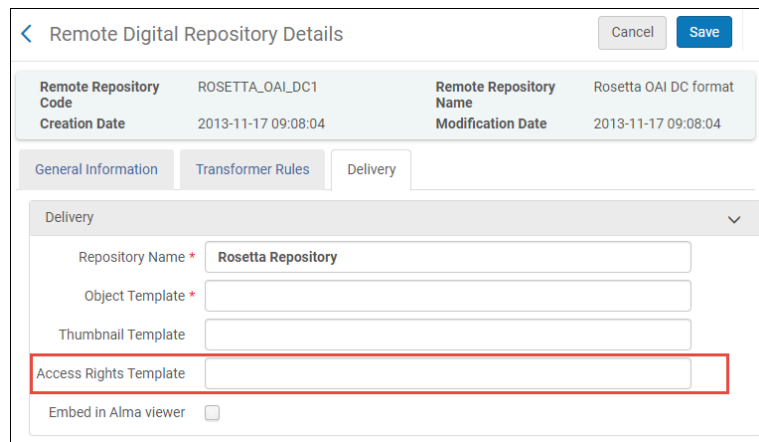
- (URM-120706) Hide Representations with Obtrusive Copyrights from Quick Access – You can create a display logic rule ([Configuration > Fulfillment > Discovery Interface Display Logic > Display Logic Rules](#)) that hides representations with obtrusive copyrights from the Quick Access section of Primo VE.

An upcoming Alma release will support full customization of the new Alma viewer through Primo Studio.

Access Rights Template URL for Remote Repositories

March 2020 Digital Resource Management 00740460

You can now configure a unique URL, separate from the delivery URL, to check access rights for remote repositories. To support this enhancement, the Access Rights Template field was added to the Delivery tab of the Remote Digital Repository Details page ([Configuration > Resources > Record Import > Remote Digital Repositories](#)). It replaces the Check Access Rights checkbox.



The screenshot shows the 'Remote Digital Repository Details' page with the 'Delivery' tab selected. The 'Access Rights Template' field is highlighted with a red box. The page includes a header with 'Cancel' and 'Save' buttons, and a table with repository details.

Remote Repository Code	Remote Repository Name
ROSETTA_OAI_DC1	Rosetta OAI DC format

Creation Date	Modification Date
2013-11-17 09:08:04	2013-11-17 09:08:04

General Information | Transformer Rules | **Delivery**

Delivery

Repository Name * Rosetta Repository

Object Template *

Thumbnail Template

Access Rights Template

Embed in Alma viewer ☐

Access Rights Template

Enhancements to In Parallel Digitization Workflow

March 2020 Digital Resource Management

The following workflow was added for digitization requests that are configured to be processed in parallel to the digitization workflow ([Configuration Menu > Fulfillment > Copyright Management > Digitization and Copyright Rules](#)):

- While the request is being processed, the representation is marked as inactive.
- If the request is approved, the representation is marked as active.
- If the request is rejected, the representation is deleted.

Pop-up Messages in the Scan In Interface

March 2020 Fulfillment



NERS Enhancement (ID #5299)



Idea Exchange

You can now configure how pop-up messages will display in the **Scan In** Interface. All messages can be configured to appear as a pop-up message, a feedback message, or to not appear at all. This is defined in the Scan In Messages Configuration table. Additionally, a yellow icon is added to the list of scanned items for patron request of types **Booking Requests**, **Physical Requests**, and **Patron Digitization Requests** to draw the scanning operator's attention that some items have a patron request associated with them.

An additional informational message was added to the **Scan Items** page for lost items which were returned (**Lost** status removed). This message appears as a feedback message and can be configured similar to all other messages in the **Scan In** interface to appear as a pop-up message, a feedback message, or to not appear at all.

Watch the [Pop-up Messages in the Scan In Interface](#) video (2:04 minutes).

See [Configuring Scan In Messages](#).

Keep Rapid ILL Requests Open

March 2020 Fulfillment Resource Sharing

You can now define whether the Rapid ILL API will close a request that it operates on. When the **Close request when exported** check box is selected on the Resource Sharing Partner page, the request is closed when exported, as it has done previously, and the request status is updated to **Exported to 3rd party**. This is the default. When the check box is not selected, the request remains active after it is exported to Rapid, and the request status is updated to **Sent to partner**. This allows the request to remain viewable in Primo even though it has been exported. Requests that are left open must be manually closed.

See [RapidILL Parameters](#).

Claim Resource Sharing Request

March 2020 Fulfillment Resource Sharing



NERS Enhancement (ID #5632)



Idea Exchange

For peer-to-peer resource sharing partners, you can now trigger an automatic claim letter when a configured period of time is reached. For example, when the **Automatic Claim** check box is selected and the **Time to Claim (days)** field is set to 7, if a request was sent 7 days ago and the request's status is still **Sent**, a claim letter is automatically triggered and the request status is set to **Claimed**.

You can also configure an option to send a cancel message and continue through the rota.

In case of an Email/SLNP partner, the letter is sent by email.

For ISO requests, the notice is sent in a General Message. The text in the message can be configured.

See [Resource Sharing Partners](#).

Publishing Profile Templates for Rapid ILL

March 2020 Fulfillment Resource Sharing

Setting up a new integration with Rapid ILL requires defining sets of lendable and non-lendable resources, as well as publishing profiles that expose that information to Rapid ILL via OAI.

Defining the publishing profiles can now be made using Community Zone contributed profiles. When defining a new integration with Rapid ILL, you can now localize the Community Zone publishing profiles with the description **EXL profile for Rapid ILL**, and attach your defined sets to the relevant profiles. Using these templates speeds up the Rapid ILL integration process. For more information, see [Alma Holdings Harvest for RapidILL](#).

SAML User Updates

March 2020 Administration and Infrastructure

You can now map SAML assertions to a user's fields according to an uploaded XSL file. The file is uploaded in the **XSL configuration file** field in the **Self Registration** section of the SAML integration profile.

The screenshot shows the 'SELF REGISTRATION' section of a SAML integration profile. It includes a status toggle for 'Active' (radio button) and 'Inactive' (radio button, selected). Below this are three dropdown menus: 'User Group' set to 'Consortium Member', 'Resource sharing library' set to 'Resource Sharing Library', and 'Statistical Category'. There are two checkboxes: 'Update user upon login' and 'Recreate user roles upon login', both currently unchecked. A blue link 'Mapping of assertion fields to Alma fields' is present. At the bottom, there is an 'XSL configuration file' field with a file upload icon and a 'Save' button.

Self Registration Section of the SAML Integration Profile

In addition, the new **Recreate user roles upon login** check box in the **Self Registration** section allows you to force a role recalculation every time a user logs into Alma, based on the Roles Assignment Rules.

See [SAML Authentication](#) on the Ex Libris Developer Network.

DARA Interface Enhancements

March 2020 DARA

The DARA interface was enhanced with the following changes:

- Recommendations are now marked as implemented even when they are handled outside of the DARA workflow.
- The **Mark as Done** and **Dismiss** actions were replaced by the new **Remove** action
- The **Let's Do It** button was replaced by a button with an action specific to the recommendation, such as **Create SUSHI account** and **View Title in Search**.
- The **Show Me Why** button was renamed to **More Info**. The recommendation description was shortened to make it more focused and the some of the information was moved to the More Info page.

The screenshot shows the 'Manage Recommendations' interface. It displays a list of recommendations. The first recommendation is 'High Request Load for "How to win friends and influence people / Dale Carnegie" title'. It includes details like 'Category: High Request Load', 'Created on: 02/02/2020', and 'Updated by: System'. A dropdown menu is open for the first recommendation, showing options: 'View Title in Search', 'More Info', 'Remove', 'Edit Notes', and 'Edit Attachments'. The 'Remove' option is highlighted.

DARA Interface Enhancements

Cancel All on Printing Queue

March 2020 Administration and Infrastructure

The **Printout Queue** page now has an option to cancel multiple printouts by selecting all the printouts you want to cancel and selecting **Cancel Selected**.

See [Printouts Queue](#).

Export to Excel Enhancements on Job Reports

March 2020 Administration and Infrastructure

When exporting the events list of a job report, Alma now limits the number of rows to 10 thousands rows. Rows above this number are not exported. To export specific rows of the job report, use the controls on the report page.

Sorting Tables Alphabetically in All Languages

March 2020 Administration and Infrastructure

Now you can sort tables alphabetically in Alma, regardless of the language of the data in the table. The data is sorted according to the alphabet of the selected language.

New Letter Type on Letter Configuration

March 2020 Administration and Infrastructure

A new letter "Change Rapido Request Terms Letter" was added to the list of configurable letters available in Alma. This letter is part of new resource-sharing abilities that are currently being developed. Ignore it for now.

See [Letter List](#).

Absolute and Relative Paths in the S/FTP Definition

March 2020 Administration and Infrastructure SF: 00736685

Alma now supports the ability to indicate both an absolute and a relative path to the input directory in the S/FTP import protocol when creating import profiles to third-party systems.

See [Managing Export Profiles](#).

Managing Purchase Requests Created From Citations

March 2020 Fulfillment - Course Reserves SF:

The **Course Information** table has been added to the **Purchase Request** form, displaying basic information about the course.

Course Information							
Code	Section	Name	Processing Department	Academic Department	Number Of Participants	Instructor	Term
1. ORG651	-	Leadership in public organizations	Business Administration		105	Multiple	-
Number of total copies 5							
Citation Tag Essential							
Created automatically by rule Citations with Essential Tag - Auto Purchase Req							

Course Information Table

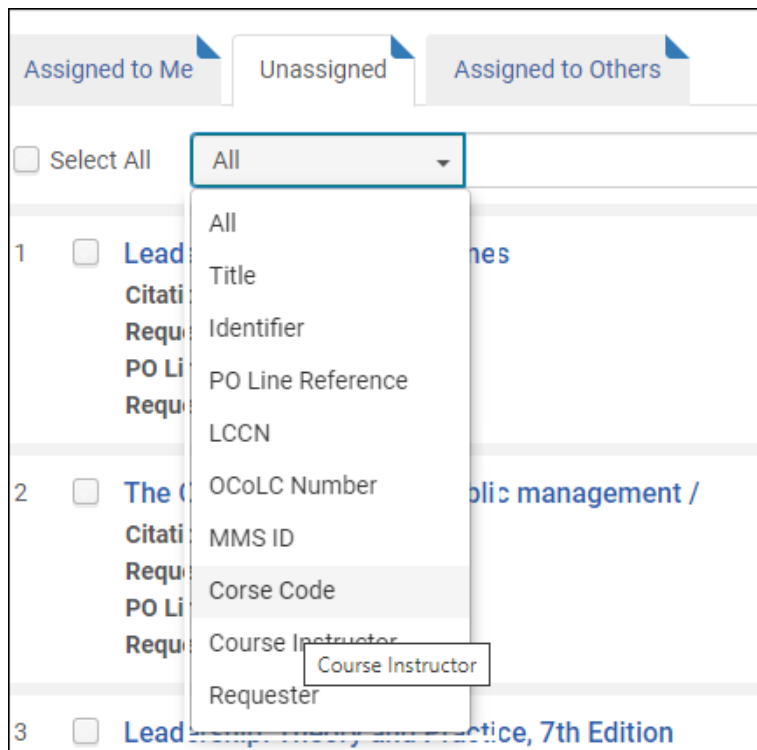
The following facets have been added to the **Manage Purchase Requests** screen (**Acquisitions > Manage Purchase Requests**):

- Processing department
- Academic department
- Campus
- Course year
- Course term
- Citation tag

Citation type Book (12) Journal (9) Request format Default (1) Physical (20) Vendor A&E HOME VIDEO (1) HARRASSOWITZ (1) Automation Vendor (2) Owning library O'Neill (14) Bapst (1) Requester Implementer, Ex ... (11) Manager, Acquisiti... (9) 1427869790_upd... (1) Created from reading list No (17) Yes (4) Processing department Test Unit (1) Academic department Romance Lang... (1) Course year 2010 (1) Course term Winter (1)	3 ☐ L2/ Aphrodite: Greek Goddess of Love and Beauty Tammy gagne Citation type: Book Request status: In Review PO Line Reference: - Requester: Implementer, Ex Libris Created c Updated Requeste
	4 ☐ stam title Citation type: Book Request status: In Review PO Line Reference: - Requester: Implementer, Ex Libris Created c Updated Requeste
	5 ☐ stam title Citation type: Book Request status: Approved PO Line Reference: 15-311945 Requester: Implementer, Ex Libris Created c Updated Requeste
	6 ☐ New Zealand / Citation type: Book Request status: Approved PO Line Reference: 15-311906 Requester: Implementer, Ex Libris Created c Updated Cost: 24,4 Requeste
	7 ☐ Journal of advertising research. Citation type: Journal Request status: Approved PO Line Reference: 15-311946 Requester: Implementer, Ex Libris Created c Updated Cost: 11,4 Requeste
	8 ☐ The sixties and beyond : Citation type: Book Request status: Rejected Created c Updated

Facets Added to the Manage Purchase Requests Screen

The following figure shows the search criteria that has been added.



Added Search Criteria

For more information on managing purchase requests, see [Managing Purchase Requests](#).

For more information on the Leganto purchasing and acquisition workflow, watch the [Leganto Purchasing and Acquisition Workflow](#) training video.

Automate Reading List Status While Active or Inactive

March 2020 Fulfillment - Course Reserves SF:

From the **Activate/Deactivate Courses** section, staff can now automate the reading list status for courses while it is either **Active** or **Inactive**. For example, staff can set a reading list status to be **Being Prepared** while a course is active, and to change to **Archived** when a course has been deactivated (when it has ended) ([Fulfillment > General > Fulfillment Jobs Configuration](#)).

Automating Reading List Status While Active or Inactive

The Reading list status and Reading publication status can be set to the following ([Fulfillment > General > Fulfillment Jobs Configuration](#)):

- Reading list status - sets the status of the reading list to the following:
 - Being prepared
 - Being processed

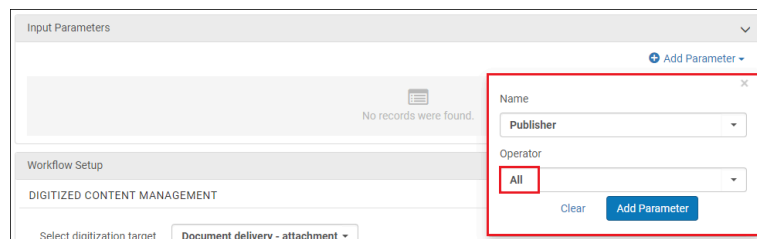
- Complete
- Declined
- Inactive
- Processing
- Ready For Processing
- Rolled Over
- Reading publication status - sets the reading list's visibility status to the following:
 - All Students Full
 - All Students Restricted
 - Anyone Full
 - Anyone Restricted
 - Anyone Restricted, All Students Full
 - Archived
 - Course Students
 - Deleted
 - Draft

For more information on activating/deactivating schedule jobs, see [Viewing Scheduled Jobs](#) and navigate to **Activate/Deactivate Courses** in the **Scheduled Jobs** table.

Publisher Parameter Checks All Publishers When Submitting Copyrights

March 2020 Fulfillment - Course Reserves SF:

Leganto now allows you to set the parameter publisher to check against all publishers when you submit a copyright request (**Fulfillment > Copyright Management > Digitization and Copyright Rules**).



The screenshot shows the 'Input Parameters' dialog box in the Leganto interface. The 'Name' dropdown menu is set to 'Publisher' and the 'Operator' dropdown menu is set to 'All'. A red rectangular box highlights these two dropdowns. The background of the dialog shows the 'Workflow Setup' section with 'DIGITIZED CONTENT MANAGEMENT' selected. There is also a 'Select digitization target' dropdown set to 'Document delivery - attachment'.

Publisher Parameter Checks Against All Publishers

All publishers are stored in the **Copyright Publishers** table (**Fulfillment > Copyright Management > Leganto Copyright Settings**).

For more information about adding a digitization and copyright rule, see [Configuring Leganto Copyright-Related Procedures](#).

For more information about adding all publishers at once, see [Adding a Digitization and Copyright Rule](#) and navigate **Publisher** to the **Digitization and Copyright Rule Clause Types** table.

Additional Stories

- **March 2020 Fulfillment - Resource Sharing / Collaborative Networks SF: 00694833**
(URM-115937) The user's selection for **Activity Status** on the Resource Sharing task lists is now always retained for the user. Previously, the value was only retained during a given session. Additionally, when attempting to show all completed tasks in the task lists, an error message now displays to indicate that you must enter a search term when selecting an activity status other than **Active**.
- **March 2020 Fulfillment - Resource Sharing / Collaborative Networks**
(URM-117678) You can no longer create broker partners in a Network Zone institution. NCIP, BLDSS, RapidILL, and INNReachAPI must be created only in a member institution.
- **March 2020 Fulfillment - Resource Sharing**
(URM-121879) You can now configure whether the Distribute Central Resource Sharing Configuration job will distribute the value in the **Shared Barcodes** field on the Resource Sharing Partner page. To maintain the value locally, which is the existing behavior, set the customer parameter, **rs_override_local_partner_shared_barcodes**, to **false**. This is the default. When the parameter is set to **true**, the **Shared Barcodes** field is disabled at the local institution level and can only be updated by the network.
- **March 2020 Analytics**



NERS Enhancement (ID #5631)

(URM-120275) The **Last Activity Date** field was added to every place that user details appear. It indicates the last date that a patron was active (for example, made a request or borrowed, renewed, or returned an item).

- **March 2020 Analytics SF: 00632314 00661797**
(URM-118502) The following fields were added to the Fulfillment subject area. They provide information concerning the institution at which an item was loaned when it is not the institution that owns the item:
 - Loan Details > Loaned at Another Institution
 - Loan Details > Loaned at Institution Name
 - Loan Circulation Desk > Loaned at Institution Circulation Desk
- **March 2020 Analytics**
(URM-100390) The following fields were added to the Physical Items subject area under Physical Item Details and Fund Information > Fund Measures. They allow you to create reports according to the type of request.
 - Num of Requests (Booking)
 - Num of Requests (Digitization)
 - Num of Requests (General Hold)
 - Num of Requests (Physical Item)
 - Num of Requests (Total)
- **March 2020 Analytics**
(URM-89274) The **Shipping Date** and **Shipping Date (Calendar)** fields were added to Borrowing Requests > Borrowing Request Details. They indicate the date the lender shipped the item to the borrower.
- **March 2020 APIs**
(URM-121580) A new Alma extension is available that listens for and prints letters from the Ex Libris Alma print queues. The application can be found at <https://github.com/ExLibrisGroup/alma-print-daemon> and in the [Ex Libris](#)

[Developer Network App Center](#).

- **March 2020 APIs**

(URM-113760) Additional fields have been added to the Create and Update Vendor and Create PO Lines APIs. For more information, see [Rest PO Line](#) and [Rest Vendor](#) in the Developer Network

Resolved Issues

- **March 2020 Analytics SF: 00718544**
When there is no Creative Commons License, its status is marked as NOTDETERMINED, which causes the data from the analytics report to not be displayed. This was fixed, and now when there is no Creative Commons License, it is marked as NONE and the data is retained.
- **March 2020 Analytics SF: 00733619**
On the Fulfillment dashboard, for the 'Recalled items', 'Loans by title', and 'Loan items ratio' tabs, selecting a library from the prompt does not filter the data according to the selected library. This was fixed.
- **March 2020 Analytics**
Reports with fields from the Fulfillment > Location dimension did not work because the reports were not updated to the new name of the dimension 'Item Location at time of loan'. This was fixed.
- **March 2020 Analytics SF: 00717850**
An item which received today didn't filter in the items list, that was fixed.
- **March 2020 Analytics**
Users with fund manager and purchasing operator could view and edit po lines from libraries out of the purchasing operator scope. This was fixed.
- **March 2020 Analytics SF: 00563366**
In the Invoices tab of a vendor, when the user clicks Export to Excel the Excel file had duplicate invoice records. This was fixed.
- **March 2020 Analytics SF: 00474875 00506687 00501341**
The PO Line index was enhanced to recognize TSVCC Chinese characters when searching PO Lines by title.
- **March 2020 Analytics SF: 00693673 00687775**
At last page of results in Receiving Department Items, clicking on the second or subsequent results navigates to the incorrect record. This was fixed.
- **March 2020 Analytics SF: 00710006 00720642 00738299 00789801 00804131 00724535 00785097 00789312 00686458 00751176 00666128 00732123 00755738 00793303 00785315 00699674 00742718**
The electronic activation job Ebook Central Academic Complete UKI Edition created many electronic collections due to a problem caused by restarts on the server or a one-time failure. This was fixed, and the activation job should activate only one electronic collection as expected.
- **March 2020 Analytics SF: 00668826 00654532 00658372 00661555**
In the PO Line Claim Letter, Subject and newSubject were not translated. This was fixed.
- **March 2020 Analytics SF: 00686401**
The Trial notification job sent the notification even for draft trials. This was fixed.
- **March 2020 Analytics SF: 00697123 00800887 00799574**
In the Missing Data page, duplication occurred due to case sensitivity. This issue was fixed in the new Monthly Usage Data tab which was developed as part of the SUSHI Performance handling story. See March release notes
- **March 2020 API SF: 00675602**
Retrieve Logical Set members API was repeating members in some cases. This was resolved.
- **March 2020 API SF: 00674879 00751850**
Update License API was not working with controlled vocabulary terms - this was fixed.
- **March 2020 API SF: 00751542**
Create hold-request API: when a user has 2 patron roles, one in the relevant library (expired) and the other in ANOTHER LIBRARY (without expiration date). When this patron will try to create a request for an item in the library where the expiration date for its role is in the past, although the TOU would enable this request, the request will be blocked in the UI, but worked by API. Now it will be blocked in the API as well.
- **March 2020 API SF: 00756689**
The GET-item-by-barcode API, when called with format=json was redirecting without including the format=json parameter. This was fixed.

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This issue was fixed.

- **March 2020 Resource Management SF: 00717752**

Previously, there was an issue with duplicates created as a result of the activation job. This issue was fixed.

- **March 2020 Resource Management SF: 00752585 00745865 00790351 00759343 00803550**

Previously, there was an issue with duplicates created as a result of the activation job. This issue was fixed. No duplication of any type is created as a result of the activation job. The activation job will activate at once (not partially and without duplication) the desired collection from the Community Zone.

- **March 2020 Resource Management SF: 00759090**

The publishing platform was not accurate with the number of rows/records per file. This issue was fixed.

- **March 2020 Resource Management SF: 00696353**

Previously, an Institution Zone record was linked to a Network Zone record with the 461 using the MMS ID of the Network Zone record; and the PLK field was built using the parent record in the Institution Zone which is not correct for Primo's retrieval of the child record in the Institution Zone. This issue was fixed.

- **March 2020 Resource Management SF: 00673395 00658396**

Previously, some items automatically fulfilled requests without going through remote storage when returned through the NCIP check-in from AWS. This issue was fixed. The scenarios have been expanded in which the correct behavior should take effect.

- **March 2020 Resource Management SF: 00708955**

Previously, the Aleph Bridge import job resulted with many skipped holdings and items that failed with a general error. This issue was fixed.

- **March 2020 Resource Management SF: 00600825**

Linking an Institution Zone bibliographic record to a Network Zone record (that is linked to the Community Zone) creates an Institution Zone bibliographic record that is linked to the Community Zone, and the Network Zone bibliographic record is linked to the Community Zone.

- **March 2020 Resource Management SF: 00744652**

Previously, using the Borrowing request > Add from external search function in the the Alma Korean interface did not return any results. However, the same query using the Alma English interface did provide results. This was fixed.

- **March 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.

- **March 2020 Resource Management SF: 00654188 00510181**

Previously, text in angular brackets was not correctly displayed in Get It. This was fixed.

- **March 2020 Resource Management SF: 00699001 00603065 00523838 00584547 00627509 00793741 00575243 00562853 00583035 00728906 00650084 00583399 00610138 00585549**

Previously, when saving a holdings record sometimes the 852 field disappeared. This issue was fixed.

- **March 2020 Resource Management SF: 00576280 00638264**

In the Metadata Editor, after creating a new holdings for a bibliographic record on the left, replacing it with another bibliographic record on the right, and then creating another holdings using the hotkey Ctrl+Alt+H, two new duplicated holdings were created instead of one. This was fixed.

- **March 2020 Resource Management SF: 00724927**

Previously, the HanzitoPinyin normalization task performed the wrong linking when the configuration option was set to not show the script code. This was fixed.

- **March 2020 Resource Management**

The character mapping was updated for the new Chinese author number characters and corresponding codes.

- **March 2020 Resource Management SF: 00754495**

Previously, the pop-up assistance in Hebrew for the 260 and 264 fields did not appear in certain cases. This issue was fixed.

- **March 2020 Resource Management SF: 00745730 00659624**

- **March 2020 Resource Management SF: 00668788**

In MARC21, subfield \$\$e is no longer part of the matching between bibliographic and authority records for fields 800, 810 in bibliographic records and for fields 100, 110, 400, and 410 in local authorities.

- **March 2020 Resource Management SF: 00741789**

Previously, when editing a record and using F3, deleted authority headings appeared. This issue was fixed. The deleted authority headings were removed.

- **March 2020 Resource Management SF: 00791189 00753671 00433424 00799709 00723729 00735697 00800317 00743323 00726722 00751756 00724396 00724235 00723804 00809557 SF:URM-116960**
- **March 2020 Resource Management SF: 00700596**
- **March 2020 Resource Management SF: 00706100**
As a result of corrupted data, bibliographic headings were not updated. The issue was fixed by removing the corrupted authority headings.
- **March 2020 Resource Management SF: 00666607**
The BIBFRAME view of bibliographic records was missing links for local authority records. This was fixed.
- **March 2020 Resource Management SF: 00757187 00653367 00657820 00611415**
The data keeping policy was improved, and the display of manual issues was restricted to one year back. This solution should reduce the number of oops errors on the 'Manual Handling' page.
- **March 2020 Resource Management SF: 00741219**
In some cases, the EOD import job with the import profile fails and shows 'Failed in Commit after calling NZ.' This was fixed.
- **March 2020 Resource Management SF: 00809119**
Previously, the Publishing MODS to Primo failed if the Related records information enrichment option was selected in the publishing profile. This was fixed.
- **March 2020 Fulfillment SF: 00641086 00680411 00686405 00652613 00796319**
In some cases, when saving a rule on the Request Pickup Configuration page, an error was generated. This was fixed.
- **March 2020 Fulfillment SF: 00693233 00695620 00809863**
When scanning in a requested item from a different institution, the Print Slip action did not work when the fulfillment_network_unique_barcode customer parameter was set to FULL. This was fixed.
- **March 2020 Fulfillment SF: 00721687**
Previously, when Alma responded to a patron information request (SIP 63) at a self-check machine, if the patron's city was blank, the response (SIP 64) included a null string in the patron's address. This was fixed.
- **March 2020 Fulfillment SF: 00647458**
In some cases, when a requested item was checked out to a patron other than the requester, the loan was not blocked. This was fixed.
- **March 2020 Fulfillment SF: 00728860**
On the Manage Patron Services page, the counter for the number of items renewed using the Renew All action was sometimes incorrect. This was fixed.
- **March 2020 Fulfillment SF: 00756362 00614301**
When requesting an ASRS remote storage item, sometimes the request appeared in Alma with a status of Request Communicated to Remote Storage, even though the communication with the ASRS server failed. Now, if the communication fails, Alma cancels the request with cancellation reason: Failed to communicate with remote storage.
- **March 2020 Fulfillment SF: 00806219 00754850 00634538**
Previously, if the Send Requests to Remote Storage Job failed after it processed the requests but before it exported the XML file to the FTP (e.g. as a result of server restart or FTP connection error), the requests were not exported but in Alma they appeared as if they were. This was fixed. Now, if the job fails, the requests will remain in Waiting for remote storage status, so that they will be handled again on the job's next run.
- **March 2020 Fulfillment SF: 00678803 00724446**
Previously, on the Pick From Shelf task list, marking an entry as missing did not work if the item was in a temporary location and the holding had more than one item. This was fixed.
- **March 2020 Fulfillment SF: 00711645**
In some cases, an item that was loaned remained on the Pick From Shelf list. This was fixed.
- **March 2020 Fulfillment SF: 00727734**
Previously, when scanning a barcode and request ID in the Scan In Interface, if multiple requests existed, the item was always attached to the first request in the queue. This was fixed.
- **March 2020 Fulfillment SF: 00804714 00804727**
Performance improvements were added to Get It for the fulfillment network configuration.

- **March 2020 Fulfillment - Resource Sharing SF: 00719048**
cancellation reason and note to partner limited to 4000 char only
- **March 2020 Fulfillment - Resource Sharing SF: 00709245 00731881**
In some case the Reactivate row action did not display in the Resource Sharing Borrowing task list. This was fixed.
- **March 2020 Fulfillment - Resource Sharing SF: 00731363**
In some cases the itemShipped message contained incorrect bibliographic data. This was fixed
- **March 2020 Fulfillment - Resource Sharing**
In some cases the Volume, Chapter, Pages fields were not sent to RapidILL. This was fixed.
- **March 2020 Fulfillment - Resource Sharing SF:**
In the **Receive Items** screen, entering a due date caused, in some cases, the item creation rule to unexpectedly run and change the location value that was manually chosen by the user. This was fixed. The location is now recalculated only in case both the item policy & location are the default values and were not changed manually.
- **March 2020 Fulfillment - Resource Sharing SF: 00648258 00684788 00789471**
Dynamic URL was not encoded properly. This was fixed.
- **March 2020 Fulfillment - Course Reserves SF: 00558998**
The Course Loader job report did not show a deleted lists event (using the **Delete** operation). This was fixed.
- **March 2020 Fulfillment - Course Reserves SF:**
The course loader job initially combined course loading and indexing. Now the course loader job has been divided into two jobs. When the course loader job is completed, the MMS indexing job begins (for Primo VE customers), reducing the amount of time it takes for both jobs to complete.
- **March 2020 Fulfillment - Course Reserves SF: 00557726**
In the Alma Citations brief display, Add Pages was hidden by default. This was fixed.
- **March 2020 Fulfillment - Course Reserves SF: 00573621 00699342 00706209**
The course loader file was processing duplicate jobs. This was fixed.
- **March 2020 Fulfillment - Course Reserves SF: 00711351**
Interface enhancements were made on the owner subscription letter.
- **March 2020 Fulfillment - Course Reserves SF: 00688241 00709144 00735529**
Copyright recalculation does not function after rollover. This was fixed.
- **March 2020 Fulfillment - Course Reserves SF: 00736258**
Submit button for digitization requests not functioning for a specific journal. This was fixed.
- **March 2020 Fulfillment - Course Reserves SF: 00797118**
Citation processing rules created purchase requests without fulfilling the rules. This was fixed.