Alma May 2020 Release Notes

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Make the Most of May's Release

Action Items
☐ New Metadata Editor - The new Metadata Editor is now available for your review in the sandbox. See the Metadata Editor and Rollout Plan sections on the Usability Improvements page for more information.
☐ Requesting Physical Items - It is now possible to set the system to ignore rota lenders that own only electronic copies of a resource, if the borrowing resource sharing request has been made to specifically request a physical resource. This can be set up by setting the new rs_ignore_electronic_for_physical_request parameter to 'true'.
☐ Recent Entities for Digital Resources - Collections and Digital representations are added to the list of "Recent Entities" for quick access.
☐ Keyboard Shortcuts Enhancements - Users can now turn off Alma generic shortcuts when it overlaps with a special keyboard on language shortcut. Each user can access a special screen via the user menu, UI preferences.

Upcoming Issues to Note

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
June	EU00, EU01, EU02
July	NA01, NA02, NA03, 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.

GuideMe Step-by-Step Walkthroughs

In the Alma May release, we are introducing these new GuideMe flows in the Resource Management functional area:

1. Export Catalog for Cleanup
2. Import Catalog after Cleanup

3. Create a Set for a Manual Job
4. Save a Query for a Manual Job
5. Create Normalization Rule for Local Extensions
6. Create Normalization Process for Local Extensions
7. Run Job to Add Local Extensions

We highly recommend you take a look at these step-by-step walkthroughs available within the Alma interface (All GuideMe flows on Production). These are easily accessible from the GuideMe menu or the Alma help menu.

If you have an idea for a new workflow to add to our growing library, please submit your suggestions at the Idea Exchange under Alma.

GND Name Authorities Changes

The German National Bibliographic Center DNB (Deutsche Nationalbibliothek) has announced that as of 16 June 2020 the GND (Gemeinsame Normdatei) Name Authorities marked as type N will no longer be supported and will be removed from the GND authority files.

For more information, see GND Name Authorities Changes.

Next Release Sneak Preview

Select June 2020 Sneak Preview to view the next release sneak preview.

June 2020 Sneak Preview

Note

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

Resource Management

- ****NERS Request** – Portfolio Resource Editor Display of Inherited Data Elements** - For ease of management of electronic resources, the Portfolio Resource Editor will present data elements that are inherited from the Collection/ Collection service in a read-only mode.
- **New Layout for Alma** - There will be a new layout for Alma which will include an increase in the size of the user working area, improved navigation, the ability to customize the menu and improved dynamic workflows. .

Digital Resource Management

- **Deposit forms improvements** - Institutions will have better control over the quality of digital content deposited by patrons, including controlled vocabularies for combo box selection, limitation on file formats and size, date picker, option to select between multiple access rights policies and more.
- **Simplified Access to Primo Studio** - There will be simplified access to Primo Studio for the new Alma viewer and deposit page. Institutions will be able to use Primo Studio's advanced and easy-to-use set of tools to fully customize the patron deposit page and the new Alma viewer.

Administration

- ****NERS Enhancement** - Update Protected User Accounts** - Libraries will be able to define that some user account types can be updated only by specially privileged staff. For example, the library may restrict updating user accounts of library staff so that only privileged user mangers can update these accounts. The protected user accounts will be identifiable by being assigned library defined user groups or by having been assigned library defined roles.

DARA

- **DARA SUSHI Recommendations** - An updated version of the DARA SUSHI recommendation will be released, with extended coverage of COUNTER Release 5 vendors.

APIs

- The Invoice API will be enhanced with details on Invoice Attachments, thereby better supporting Finance system integrations.
- The Request API will be enhanced with details that will better support the ability of courier services to integrate with Alma.

Analytics

- **Esploro entities in the titles subject area** - Institutions will be able to report on and gather data relating to entities from Esploro in the Alma Analytics titles subject area. This will allow for a complete and better integrated ability to perform evidence based decision making.

Acquisitions

- **My Activity Center - Recent Documents - Purchase Orders** - Recent Entities will list the purchase order lines that were added, updated, or deleted within the last 7 days by the user. The addition of the PO Line to the Recent Entities list will be a helpful way of finding the PO Lines recently accessed by the user, even if they do not remember their identifying number.

May 2020 Main Features

Ability to create/update the vendor details on a purchase order line using APIs

May 2020 Acquisitions

An option to create and/or update the fields within the **Vendor Details** section have been added to the Update PO Line and Create PO Line APIs.

See Rest PO Line in the Developer Network.

Monthly Run Option for SUSHI Harvesting Job

May 2020 Acquisitions

The SUSHI Harvesting job can now be run on a monthly schedule, in addition to the weekly scheduling option. The monthly schedule offers four predefined optional dates across the month. This will save institutions from trying to harvest usage data each week, which can result in redundant failures in case reports are not ready yet.

See Managing SUSHI Harvesting.

Ability to Activate Portfolio from CZ using Create Order API

May 2020 Acquisitions

The functionality, which was originally introduced in the January release, is designed for orders originating from OASIS. It is now available for 11 providers (see complete list).

This functionality eliminates the need to load full MARC records via an Import process, due to the fact that the ordered resources are activated from the Community Zone (which includes full bibliographic records for the ordered electronic resource).

Pre-requirement: The relevant Community Zone collection must be active in your Institution Zone. If the collection is not available in the Institution Zone, a standalone electronic resource (portfolio) is created and the order is associated to it, requiring the use of a full MARC update via an Update Inventory import profile for complete descriptive information and access information.

Example:

An order is sent from OASIS for an electronic resource "1,000 Comic Books You Must Read" from ProQuest EBook Central. Alma associates the OASIS order with the relevant portfolio by activating the relevant portfolio from the collection "Ebook Central Perpetual, DDA and Subscription Titles", including complete descriptive information and access information.

See Real-Time Ordering.

New Metadata Editor

May 2020 Resource Management

The new Metadata Editor is now available for your review in the sandbox. See the Metadata Editor and Rollout Plan sections on the Usability Improvements page for more information.

Watch the New Alma Metadata Editor video (4:40 minutes). To view the video on an alternate video host, click here.

Control the presentation of related holdings in Primo

May 2020 Resource Management

NERS Enhancement (ID #5340)
New configuration options are available for the Get It display, these options provide institutions the control of whether or not to present related holdings for patrons using Primo/PrimoVE. A more granular option provides the institutions with the option to present related records only for serials or only for monograph titles.

See Enabling the Display of Related Records in Primo for more information.

View Community Zone Portfolio Linking Information

May 2020 Resource Management

NERS Enhancement (ID #5790)

Idea Exchange
In order to assist with the decision of activating Community Zone portfolios, you can now view portfolio linking information from search results in the Community Zone tab. Previously in order to view the linking information of a Community Zone portfolio, you had to activate the portfolio. See Linking Information on the Searching in Alma page for more information.

UTF-8 Special Character Handling

May 2020 Resource Management

Alma offers a new method of handling UTF-8 special characters (with diacritics). UTF-8 special characters may be saved (via import, manually in the Metadata Editor, preferred-term correction and so forth) in both the composed or decomposed version of the character in bibliographic or authority records. Now, you have the option to configure your system with normalize on save to always save the composed version of special characters. This may be especially useful to implement to avoid the use case where multiple records are marked for preferred-term correction and the only difference is the composed / decomposed nature of a special character. If you are interested in this new method of handling UTF-8 special characters, contact Support to configure this for your system. Note that when this is implemented, it applies to all new and modified records.

Statistical Notes

May 2020 Resource Management

In advanced search for **Physical titles** and **Physical items**, you can now search for statistical notes. See Searching for Statistical Notes for more information.

Note

Full inventory indexing needs to be run to enable this functionality.

MARC 21 and UNIMARC Updates

May 2020 Resource Management

The following MARC 21 holdings and authority configuration profile updates have been completed:

- MARC 21 Holdings – Update No. 28 (May 2019)
- MARC 21 Authority – Update No. 26 (April 2018) and Update No. 28 (May 2019)

The following UNIMARC bibliographic configuration profile updates have been completed:

- 135 $a/1 Special Material Designation
  - New codes: d – computer disc, type unspecified, e – computer disc cartridge, type unspecified, k – computer card, s – standalone device
  - Renamed: j – magnetic disk, r – online
- New field 214
- New subfield 2 for the following fields: 200, 225, 510, 532, 541
- The following new subfields for the 602 field: c, d, o
- The following new subfield for the 604 field: 2
- The following new subfield for the 623 field: 3

The following UNIMARC authority configuration profile updates have been completed:

- 101
  - Repeatable
  - New indicator 2 – Source of code
    - # – ISO 639–2 language code
    - 7 – Source specified in subfield 2
  - New subfield 2 – System Code (NR)
- The following new subfields for the 123 field: q, r, s, t, 2
- The 106 field renamed to 106 CODED DATA FIELD: ENTITY NAME AS SUBJECT ACCESS POINT
- The following new fields: 180, 370, 822
- The following new X23 fields: 223, 423, 523, 723

CDI Provider Coverage Field

May 2020 Resource Management

The **Provider coverage** field is now available on the Electronic collection editor. When this read-only field is set to **yes**, the collection is indexed with data received directly from the provider. When set to **no**, a feed from the provider is not available,

but at least 80% of the content of the collection is covered in CDI by data received from other providers. The field also displays in the Electronic collection result list, in **Institution**, **Network** and **Community** tabs, below the **In CDI** field, for any electronic collection where **In_cdi** = 1.

Note

This is relevant only for CDI enabled customers.

See Electronic Collections.

API Usage Subject Area

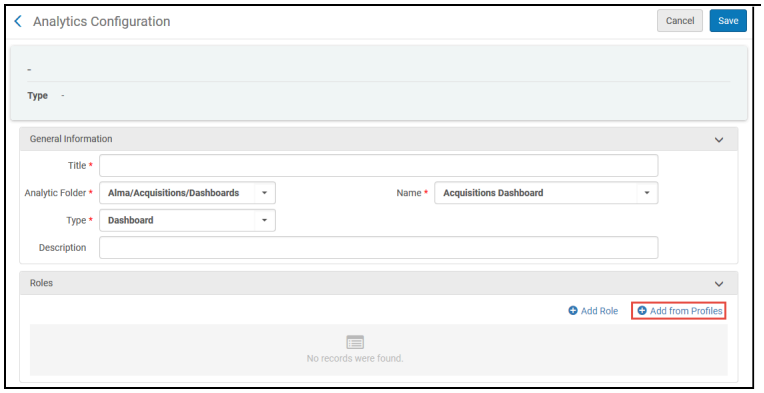
May 2020 Analytics

The new API Usage subject area is now available. You can use the fields of this subject area to create reports that display usage of Alma Analytics by API. For more information, see API Usage.

Add Roles from Profiles For Widgets and Dashboards

May 2020 Analytics

When creating Analytics Widgets and dashboards (**Configuration Menu > Analytics > Analytics Objects List or Analytics > Analytics Objects > Analytics Objects List**) you can now select a profile of roles to assign to the widget or dashboard.



Add from Profiles

For more information, see Scheduling and Subscribing to Alma Analytics Reports.

For more information on role profiles, see Configuring Role Profiles.

Normalization of Generic XML to Alma XML

May 2020 Digital Resource Management

Alma now supports XSL transformer rules to convert generic XML files in a DCMI schema to an XML format recognized by Alma. This enables a RESTful API to load the file into Alma. For example, you can load an ETD Admin file with a SWORD API into Alma in ETD-DCAP format.

Recent Entities for Digital Resources

May 2020 Digital Resource Management

Actions performed for the following digital resources are now indicated on the Recent Entities pane:

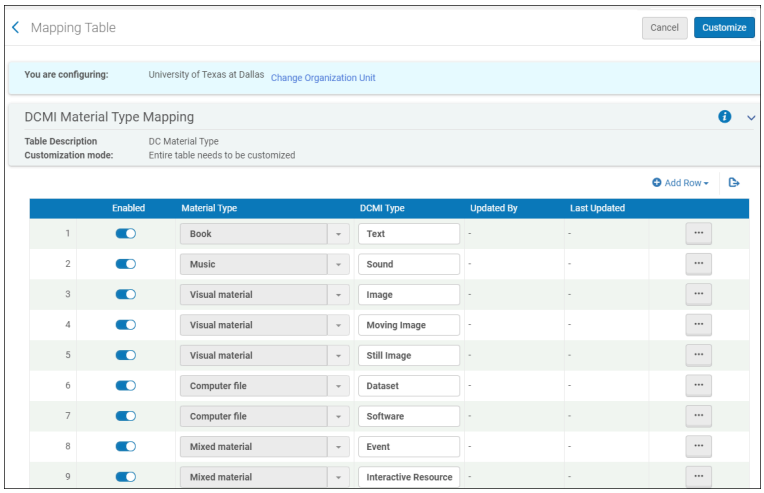
- Digital Collections
- Digital Representations
- Digital Files
- Digital Deposits

For more information, see Recent Entities List.

Material Type Mapping

May 2020 Digital Resource Management

You can now map Alma material types to DCMI types that you configure. The DCMI types that you configure are available in the Material Type drop-down lists wherever they exist in Alma. Additionally, when the DCMI types that you configure are the value in the `dc:type` or `dcterms:type` fields in a DC bibliographic record, Alma will display the record with the mapped Alma material type. To support this feature, a new mapping table is available at **Configuration > Resources > Cataloging > DCMI Material Type Mapping**:

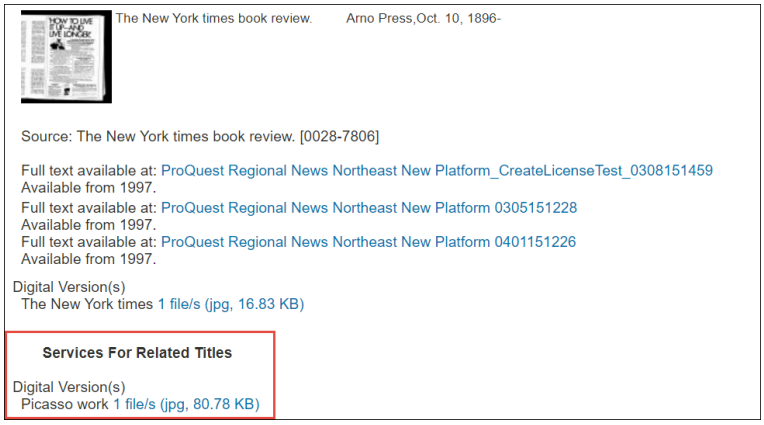


Material Type Mapping

Related Digital Records

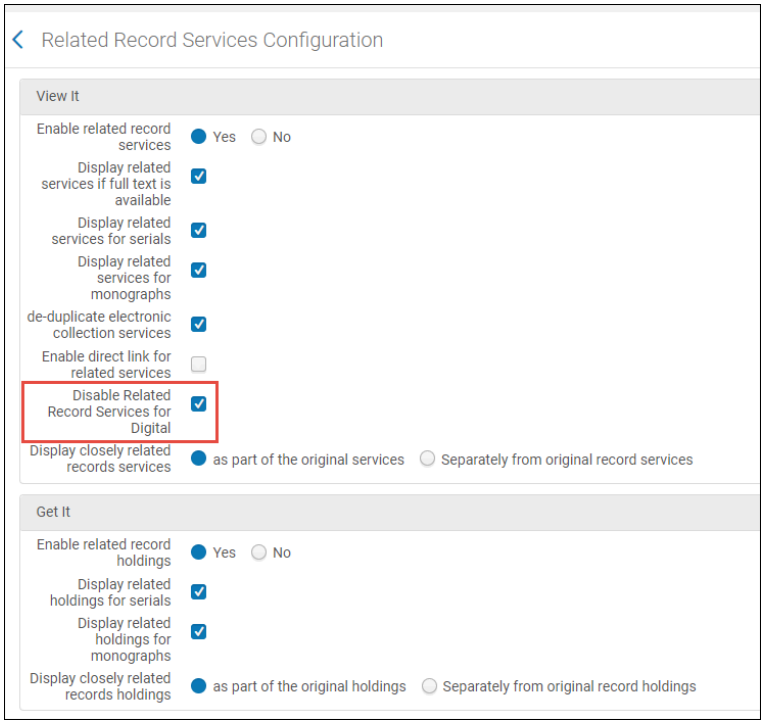
May 2020 Digital Resource Management

Related digital records are now indicated when clicking View It.



Related Records

To support this feature, the new **Disable Related Record Services for Digital** configuration option is now available (**Configuration > Fulfillment > Discovery Interface Display Logic > Related Records**).



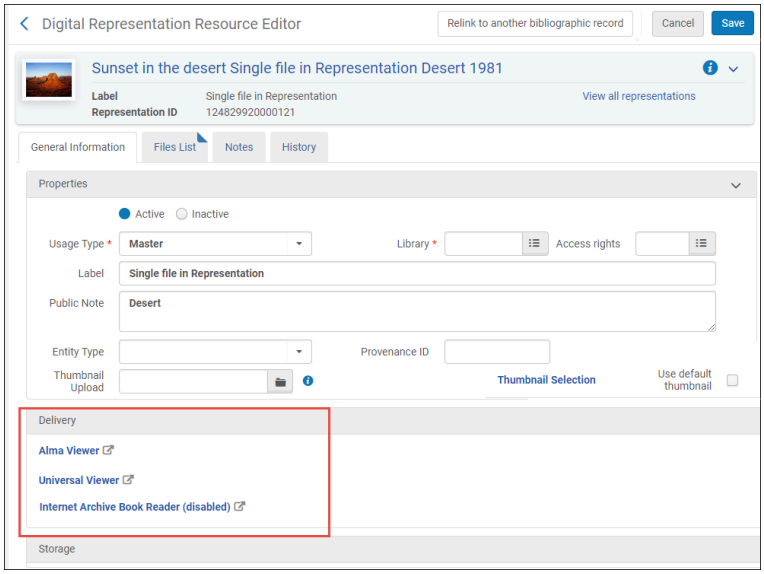
Disable Related Record Services for Digital

Clear this option to allow the related records indication for digital records to be displayed

Multiple Viewers Available for Staff Delivery

May 2020 Digital Resource Management

Library staff can now select which viewer is used to display a digital file. To support this feature, a new Delivery section was added to the Digital Representation Resource Editor that displays the available viewers. Unavailable viewers are marked as `Disabled`.



Delivery Section

Note

The Delivery URL is no longer displayed.

'Printouts Queue' Link Visibility

May 2020 Administration and Infrastructure

Now you can grant access to the Printouts Queue link (Admin > Printing) only to specific users. To support this, two new user roles were added:

- The Printout Queue Operator - can access the Printouts Queue, but can see only the letters they have printed (which means they do not have access to the Printed By filter).
- The Printout Queue Manager - can access the Printouts Queue, and can see all the letters there. Have access to the Printed By filter.

The change in Alma will be implemented gradually, over the May and June releases, as follows:

- In May release: No change in behavior. All users can still access the Printouts Queue link.
- In June release:
  - The Printout Queue link becomes hidden for all users without one of the above roles.
  - The Printout Queue Operator role is automatically added to all the users who have printed to the Printout Queue within the previous 30 days.

To manage this change, Ex Libris recommends that you do the following within the duration of the May release:

- If grant access to the Printouts Queue link to specific users, make sure to add one of the above roles to all users that need to receive access to the link.
- To grand access to the link to all your users, add the new Printout Queue Operator role to a Role Profile. This will make the link available for all users without the need to add it to each user manually. For details about Role Profiles, see Configuring Role Profiles.

In addition, in the May release the retention period for items in the Printout Queue will be increased from 7 days to 30 days, after which the Alma cleaning job will clean the items. There is currently no way for customers to control the retention

period.

See Managing User Roles.

Keyboard Shortcuts Enhancements

May 2020 Administration and Infrastructure

Now you can view the full list on the **Shortcut Customization** page (User menu > Shortcut Customization).

You can also disable global Alma keyboard shortcuts. You may want to do that in cases when your language requires usage of the same keyboard keys for typing accents or diacritics. Note that you can disable the Alma shortcuts, but cannot define other Alma shortcuts for the same action.

See Global Alma Hot Keys.

Sorting Tables Alphabetically in All Languages

May 2020 Administration and Infrastructure

Continuing the enhancements introduced in March 2020, now you can sort additional 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.

This was implemented in the following tables within Alma:

- Bulk Change Due Dates table – Material Type column
- Add Non-Repository Citation table - Material Type column
- Edit Reading List Citation - Material Type column
- Resource Sharing Borrowing Request table - Languages column
- Manage Course Information table - Academic Department column

Option for Locate of Electronic Resources

May 2020 Fulfillment Resource Sharing

You can now set a policy to not send a borrowing request to a lender that has only an electronic version of the requested resource, if the request has been requested for a physical format. When the new parameter, **rs_ignore_electronic_for_physical_request**, is set to **true**, the borrowing locate process for physical requests ignores lenders' electronic inventory, as shown in the table below. Lenders which have the requested resource only in electronic form are then removed from the rota by the locate process.

If the **Allow other formats** check box is selected, when creating a new borrowing request, electronic resources are allowed, regardless of the value in the parameter.

The below table describes how the locate process runs with regard to the possible combinations of the **Ignore Electronic and Digital Resources** option in the locate profile and the new **rs_ignore_electronic_for_physical_request** parameter

		Allow other formats is not selected	**Allow other formats** is selected
rs_ignore_electronic_for_physical_request = false	**Ignore Electronic and Digital Resources** is not selected in Locate Profile Details	Allow electronic regardless of format	Allow electronic regardless of format

	locate profile ignore electronic is selected in LocateProfile Details	ignore electronic regardless of format	ignore electronic regardless of format
rs_ignore_electronic_for_ physical_request = true	**locate profile ignore electronic** is not selected in Locate Profile Details	ignore electronic if physical / physical non-returnable	Allow electronic regardless of format
	locate profile ignore electronic is selected in Locate Profile Details	ignore electronic regardless of format	ignore electronic regardless of format

See Borrowing Locate Process.

New SAML Certificate

May 2020 Administration and Infrastructure

The current DigiCert SAML Certificate will expire in January 2021. If your institution uses this certificate, Ex Libris recommends that you consult with the IT dept. in your institution, and if required, replace the certificate for Alma and/or Primo VE. If replacing the certificate, this must be done in coordination with your IDP. For more information, see Replacing a Signed Certificate.

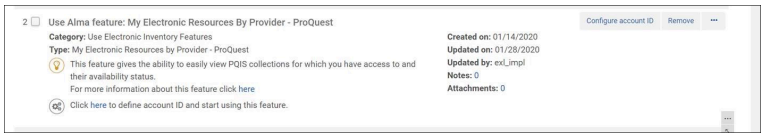
If your institution uses ADFS, Ex Libris highly recommends that you replace the certificate to avoid any complications.

Note: No immediate action is needed. Replacing the certificate can be done at any time till its expiry on January 1, 2021.

DARA Recommendations for My Electronic Resources by Provider

May 2020 DARA

The My Electronic Resources by Provider feature in Alma allows you to view your subscriptions with providers and their availability status in Alma and activate any resources that you access but have not activated. DARA can now determine if the feature is relevant for your institution, but is not in use, and recommend that you use it.



My Electronic Resources by Provider

For more information, see DARA – Data Analysis Recommendation Assistant.

For more information on the My Electronic Resources by Provider feature in Alma, see My Electronic Resources by Provider.

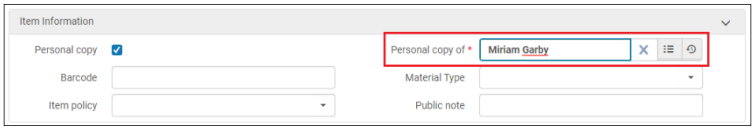
Instructor Personal Copy Management

May 2020 Fulfillment - Course Reserves

Alma now includes enhanced workflows to enable instructors to lend their personal copies of items to the library for circulation. This allows the library to catalog instructor-owned copies, track which instructor owns the item, and easily re-use previous items in subsequent terms.

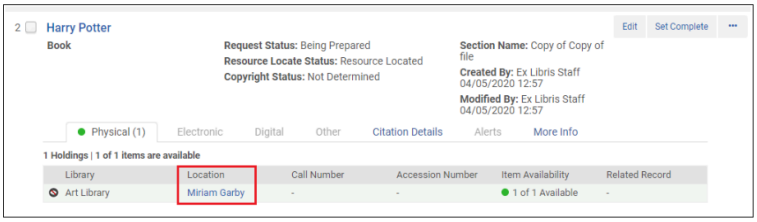
When enabled, library staff can indicate that an item is a personal copy when creating a Brief Citation **(Add Citation > Add Brief)** and enter the instructor's name. Alma will store information about all instructor-owned copies using dedicated personal copy locations. Locations in the library are automatically created when the instructors' copies are cataloged, with

one location per instructor. All items deposited by the instructor will be created in that same location.



Instructor's Name for Personal Copy

Personal copy locations indicate that the items are owned by the instructor, and also allow the library to track items that are not physically in the library at that time, but rather, in the instructor's possession. All personal copy locations and the items in them will be suppressed. When the instructor lends the item to the library, the item can be moved to a temporary location representing a non-personal copy location in the library, where it will circulate according to standard fulfillment rules. For example, library staff may move the item to the temporary location of "Course Reserves" with a due back date of the end of the term. The item will temporarily circulate as part of the library collection, but with the instructor's name stored as the permanent location, indicating the person to which the item should be returned at the end of the term.



Copy Moved to Desired Location

When the item is moved back to its permanent location, which is the personal copy location, it will automatically be suppressed. The item can then be returned to the instructor, but the record does not need to be deleted and can be easily re-used in subsequent terms by following the workflow above.

To enable this feature, configure the following parameters:

Personal copy library: To enable the **personal_copy_library** flag **(Fulfillment > General > Other Settings)** you must enter a library code as the parameter value, such as **MAIN**. This code corresponds to the library where the personal copy locations will be created.

Personal copy fulfillment unit: To enable the **personal_copy_fu** flag, you must enter a fulfillment unit code as the parameter value. Fulfillment terms for items in the instructor-owned locations are determined by the rules set in this Fulfillment Unit. Keep in mind that the intended workflow is that items in an instructor location are not currently part of the library collection and are physically stored with the instructor.

For more information on adding citations to a reading list, see Contributing Instructor Resources to a Reading List.

May 2020 Additional Enhancements

- **May 2020 Resource Management**
  The controlled vocabulary of subfield 4 for the following fields in the GND Authority metadata configuration was updated: 500, 510, 511, 550, and 551.
- **May 2020 Resource Management**
  The Bibliographic Alignment Configuration and the Authority Alignment Configuration section in the SBN integration configuration profile is no longer under construction. In addition, the job reports are now ready for bibliographic and authority alignment (see SBN Job Report for Bibliographic and Authority Alignment).
- **May 2020 Resource Management**
  The Alma import profile crosswalk conversion for DANMARC to MARC 21 was enhanced. See Source format for more information.
- **May 2020 Fulfillment SF: 00477529 00514344 00524344 00554469 00597712 00614459 00705363 00721465 00754884 00811039 00435898**
  On the In Process Items page, the order of the filters has changed for acquisition departments.
- **May 2020 Fulfillment**
  On the request form in Get It, once a patron clicks on the Submit button, the button is disabled so that it cannot be clicked twice.
- **May 2020 Fulfillment - Resource Sharing**
  When creating a digitization request because of an AFN request for a digital copy, the following fields should be added in the note:
  - Article\Chapter Title
  - Volume
  - Issue
  - Chapter
  - Pages
  - Year

  Note: If any of these values exist, the digitization request is created as a general digitization request with the **Partial Digitization** attribute enabled.
- **May 2020 Fulfillment - Resource Sharing**

  Idea Exchange
  On the Primo Resource Sharing Request form, the text of the Home Address and Work Address options in the pickup locations list now pulls the values from the Labels. They are listed separately from the other pickup locations, as they are for hold requests.
- **May 2020 Fulfillment - Resource Sharing**
  A new field is now available on the PUSH API transaction for ILLiad, The CitedIn field differentiates between a request imported from Alma and a request submitted directly to ILLiad. When coming from Alma, the CitedIn field contains Sent from Alma.
- **May 2020 Fulfillment - Resource Sharing**
  For the resource sharing real time item level requesting process, the barcode is now populated in the lending request

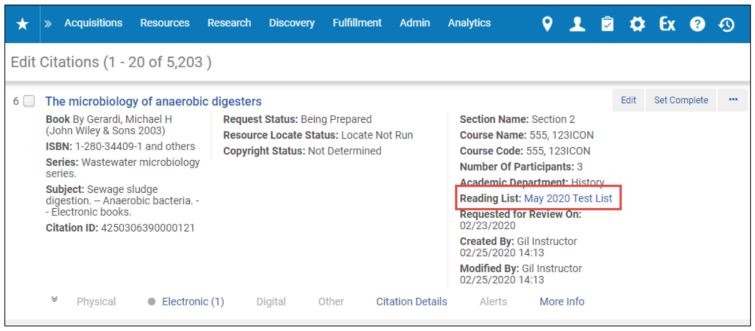
regardless of the request format and whether the lender has activated the Locate By Barcode option.

- **May 2020 Fulfillment - Resource Sharing / Collaborative Networks SF: 00694833**
  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**.
- **May 2020 Analytics**
  The **No. of Available Portfolios** and **No. of Unavailable Portfolios** fields were added to E-Inventory > Portfolio.
- **May 2020 Analytics SF: 00626259 00686799 00708175**
  You can now create reports for electronic collections without portfolios from the E-Inventory subject area in Alma Analytics. To support this enhancement the **No. of Electronic Collections Without Portfolios (In Repository)** field was added to E-Inventory > Electronic Collection.
- **May 2020 Analytics**
  The following new out-of-the-box reports were added to `shared/Alma/Titles/Reports`:
  - Titles with physical inventory received in the last month
  - Titles with electronic inventory activated in the last month
- **May 2020 Analytics**
  The following fields relating to place of publication were added to the Bibliographic details shared dimension for every subject area in which it appears.
  - Place of Publication - Country
  - Place of Publication - State
  - Place of Publication - City
- **May 2020 Administration and Infrastructure SF: 00754378 00756448 00793632 00824171**
  The following letters are now listed in the letter list. The first four can only be activated or deactivated:
  - AssignToLetter
  - UserRegistrationLetter
  - ProcessCreationLetter
  - InvoicePaymentLetter
  - ExportUserLetter - this letter will not have an option to generate a preview.
- **May 2020 Administration and Infrastructure**

  Idea Exchange
  The City and Postal Code from a user's physical address are now visible in the Contact Information page.
- **May 2020 APIs SF: 00178286**
  The GET ITEMS API (GET /almaws/v1/bibs/{mms_id}/holdings/{holding_id}/items) has the following new options. New query parameters. Dates have the format YYYY-MM-DD.
  - create_date_from, create_date_to - filter based on item creation date
  - modify_date_from, modify_date_to - filter based on item modification date
  - view - the currently supported value: label. When this parameter is retrieved, label information for each item will be returned - in the same way view=label works for a single item.
- **May 2020 APIs**
  You can now download log files in the Developer Network, with one line per API request, including date/time, IP

address, the API called, the request method and response code. To enable the log file, in the Developer Network, go to **Build my APIs > Reports > History**, enter the configuration for a specific API-key, and select **Save detailed log files**.

- **May 2020 APIs SF: 00745740**
  The GET Fees API now includes external_transaction_id.
- **May 2020 APIs**
  The Get-Printouts API now supports filtering by specific printer IDs. For more information, see the Developer Network.
- **May 2020 Fulfillment**
  Excel exports from the Edit Citations screen now include the **Course Code**, **Course Term**, **No. of Participants**, and **Academic Department** columns.
- **May 2020 Fulfillment**
  Previously, when a librarian issued a digitization request for an item on a reading list, the email notification the librarian received with the digitized file lacked some of the information needed to associate the file with the correct citation. The following information is now included in the email notification so that librarians will know which citation to associate this file with:
  - Name of the reading list
  - Citation ID
  - Creator of the request (the person who submitted the request).
- **May 2020 Fulfillment**
  When working with the DCS, instructors can now make digitization requests for citations on reading lists that are not associated with a course or courses. For more information, see Integrating with the UK's Digtal Content Store (DCS).
- **May 2020 Fulfillment**
  In the **Edit Citations** screen, Alma now provides a link to reading lists in each citation in Alma.



- **May 2020 Fulfillment - Course Reserves / Analytics**
  In the the Course Reserves subject area, the **Leganto Citation Library Discussions** field was added to Reading List Citation dimension and the **Leganto List Library Discussions** field was added to Reading List dimension. They display the library discussions.

May 2020 Resolved Issues

- **May 2020 Acquisitions SF: 703086**
  The PO line advanced search did not take the scope into account. This was fixed.
- **May 2020 Acquisitions SF: 632395**
  When executing import EOD for Electronic Resource and the Do not create Eactivation task field was selected, the creation of activation tasks was not skipped. This was fixed.
- **May 2020 Acquisitions**
  The MR1 SUSHI harvest failed because the title was not sent. This was fixed.
- **May 2020 Administration and Infrastructure SF: 793075**
  There is a new configuration option that can be set by Support to address this issue. See the UTF-8 Special Character Handling section in the May 2020 release notes for details.
- **May 2020 Administration and Infrastructure SF: 00675534 00694010**
  Using '@' for email addresses in Swiss & German keyboards, in Edge and IE browsers did not work. This was fixed.
- **May 2020 Administration and Infrastructure SF: 733011**
  Using the AltGr+S hotkey to type the Polish letter ‘?’ opened the Scan In Items page instead. This was fixed.
- **May 2020 Administration and Infrastructure SF: 00755480 00802287 00806050 00799674 00757561 00751297 00791907 00751472 00798026 00751896 00808876 00749748**
  After the removal of the XML to Letter Admin page, XML notices continued to be sent with no way to remove them. This was fixed.
- **May 2020 Administration and Infrastructure SF: 00798967 00800321 00812794**
  When trying to log in to Alma via SAML, and then, on the same browser, going to the local authentication, the second link displayed the IdP login page again. This was fixed.
- **May 2020 Administration and Infrastructure SF: 816651**
  In the new Alma layout, clicking 'Save' after creating a physical item via the Metadata Editor saved the item successfully but did not leave the Metadata Editor page. This is fixed.
- **May 2020 Administration and Infrastructure SF: 713313**
  We refresh the search labels cache after distributing code tables
- **May 2020 Administration and Infrastructure**
  The ALTO search could not find punctuation marks. This was fixed.
- **May 2020 Administration and Infrastructure SF: 435157**
  Slow upload times were noted in production. This was fixed.
- **May 2020 Analytics SF: 00206593 00659631 00788435**
  In Analytics, data was not returned for roles in the Events subject area. This was fixed.
- **May 2020 Analytics SF: 560641**
  The 'Updated by' field now shows the logged in user that made the change and not the default Ex Libris user.
- **May 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.
- **May 2020 Analytics SF: 796152**
  The Storage Location ID field was missing from the Physical Item Details folder in the Physical Item Historical Event SA. The field was added.
- **May 2020 API SF: 745259**
  The Update Electronic Collection API did not work with JSON. This was fixed.
- **May 2020 API SF: 755430**
  The GET Bibs API was returning an incorrect error message when searching for a non-existent Holding record by API. This was fixed.
- **May 2020 API SF: 720739**

The Create invoice API was slow in some cases. The performance of the API was improved.

- **May 2020 API SF: 742722**
  In the PUT/POST Partners APIs, address, emails and phones did not support 'ALL' as an option. This was fixed.
- **May 2020 Digital Resource Management SF:**
  When uploading a folder with multiple files using the digital uploader, a timeout occurred before all of the files were uploaded. This was fixed.
- **May 2020 Digital Resource Management SF: 00746220**
  When deleting digital representation and title, and restoring it back - process didn't re-index the mms, thus title didn't appear in the collection editor as assigned. This has been fixed. Tested successfully in release env.
- **May 2020 Digital Resource Management**
  Labels generated by file name during upload were truncated after the first period to remove the file extension. This was changed to the last period in case the file name contains a period.
- **May 2020 Digital Resource Management**
  Changes to a label in the digital representation editor were not saved after sorting the files of the representation. This was fixed.
- **May 2020 Fulfillment SF: 00560122 00704105 00795363**
  Previously, refreshing a linked user duplicated the local Fines and Fees without identification. This was fixed.
- **May 2020 Fulfillment SF: 00671156 00740455**
  Previously, if a user could not be deleted during the Purge Users job, the job failed. Now, the job will continue processing the other users.
- **May 2020 Fulfillment SF: 698572**
  Previously, you could update the user Primary ID with value of one of its identifiers. This was fixed and will now cause a validation error.
- **May 2020 Fulfillment SF: 706151**
  The block period of overdue blocks was sometimes one day longer than the expected period. This was fixed.
- **May 2020 Fulfillment SF: 755073**
  Previously, when creating a new item in a department on the Scan-In Interface - Quick Cataloging, the item status appeared as In Place. This was fixed. Now, the item will automatically appear as in process.
- **May 2020 Fulfillment**
  The Interested Users filter on the In Process Items page is now visible only to an acquisitions department.
- **May 2020 Fulfillment SF: 789946**
  A performance improvement was made for laptop loans on the Physical Item Editor page.
- **May 2020 Fulfillment SF: 792211**
  Previously, when a requested item was scanned and went into hold shelf processing, the label was not translated. This was fixed.
- **May 2020 Fulfillment SF: 752360**
  After logging in successfully to an Alma account on a self-check machine, if the user attempted to toggle to the renew function, the application crashed with error “SelfCheck station is not available. Please contact library staff.” This was fixed.
- **May 2020 Fulfillment - Course Reserves SF: 813666**
  In Alma, a reading list that has an large number of Instructors on the course has an issue in that the “view in Leganto” click through is not displaying has been fixed.
- **May 2020 Fulfillment - Resource Sharing SF: 00453083 00736130 00626932 00736136 00623005 00396861**
  In some cases, an ISO message for lending resource sharing requests did not reach the partner but a 'failed to send' note was not added to the request. This was fixed.
- **May 2020 Fulfillment - Resource Sharing SF: 00715708 00789988 00797208**
  Updating the Calendar via the Opening Hours caused the Locate By Fields to be removed from the library's configuration. This was fixed.
- **May 2020 Fulfillment - Resource Sharing SF: 00757888 00713861**
  When a patron canceled a resource sharing request after the lender has already shipped an item to fulfill it, no return slip was sent to the circulation desk printer when receiving the item. This was fixed.
- **May 2020 Fulfillment - Resource Sharing SF:**

A borrowing request that was mistakenly handled as Expired could not have been processed as Lost. This is not a valid scenario, but the Lost operation should not fail. This was fixed.

- **May 2020 Fulfillment - Resource Sharing SF: 00797850 00704709**
  Multiple workflow profiles existed with the same name after a Resource Sharing distribution from the Network. This resulted in actions that are allowed in the profile not working as expected. This was fixed, the local duplicate entries were removed.
- **May 2020 Resource Management SF: 00436593 00086774 00156886 00389885 00606963 00023575 00393482**
  The number of items in the MD Editor > View Inventory > Holdings tab did not reflect the total number of items but, instead, just the items which were not in a temporary location. This was fixed; a new counter of items in a temporary location was added.
- **May 2020 Resource Management SF: 00619843 00566391 00758554 00576447 00528941 00569039**
  Previously, not all operations were updating the Modified By column for Item History. This was fixed.
- **May 2020 Resource Management SF: 637543**
  In the Item Sequences Configuration page, when using the Recent Searches functionality in the 'Library' field, the 'Library' field was populated with corrupt data. This is fixed
- **May 2020 Resource Management**
  The 'Delete Holdings' link in the 'List of Holdings' page, which was visible to users with the 'Physical Inventory Operator' role, is now visible only to users who have the 'Physical Inventory Operator Extended' role.
- **May 2020 Resource Management SF: 653695**
  Alma Analytics displayed collections in a library when none actually existed. This was fixed.
- **May 2020 Resource Management SF: 710203**
  Previously, the short title appeared in the Community Zone Updates Task List. Now, instead, the full title appears in the Community Zone Updates Task List.
- **May 2020 Resource Management SF: 00721519 00785187 00713860 00725762 00735823 00715415 00721481 00740421 00724700 00738299 00727882 00725700 00746946 00730607 00687731 00758191 00818363 00726866 00728080 00822794 00733854 00742798 00715115 00686458 00799591 00725372**
  The issues with deleting electronic collections have been fixed.
- **May 2020 Resource Management SF: 00715159 00716908**
  This was a data issue. With a new data correction tool, Support is now able to address this data issue.
- **May 2020 Resource Management SF: 703769**
  Group settings without date information were not handled correctly for all cases when publishing to Primo Central. This was fixed.
- **May 2020 Resource Management SF: 719349**
  The holdings file included two entries for the same MMS ID (one with coverage lines and one without), and this caused the wrong availability to appear in Primo. This was fixed.
- **May 2020 Resource Management**
  A portfolio with more than one Available For group with no date information caused the coverage line to disappear from the institution file. This was fixed.
- **May 2020 Resource Management SF: 00800627 00613840**
  The output message to the System aborted job was changed.
- **May 2020 Resource Management SF: 00660320 00690610**
  Portfolios with embargoes were not handled as expected in the 'Overlap and Collection Analysis.' New logic was added to apply the embargo on the coverage(s).
- **May 2020 Resource Management SF: 00704675 00803581 00713184**
  Alma did not show thumbnails while Primo did show thumbnails. This is fixed.
- **May 2020 Resource Management**
  The label of the item-level advanced search index 'Item Creation Date' was incorrect; it was 'Creation Date (Title).' It was changed to 'Creation Date (Physical Item).'
- **May 2020 Resource Management SF: 640658**
  The “Starts With” operator in Advanced Search did not retrieve any results when the searched value contained an apostrophe (e.g. America’s). This has been corrected. This fix is relevant for all indexes and all search types (e.g. “Authorities”, “All Titles” etc.).

- **May 2020 Resource Management SF: 751131**
  Support is able to use DB/Solr diff to resolve the specific problem, and additional development was completed to prevent future occurrences of the issue.
- **May 2020 Resource Management SF: 00715383 00715065**
  In some cases, there were missing entries in the browse shelf listing. This was fixed. In addition, a data issue was fixed.
- **May 2020 Resource Management SF: 689944**
  A link from the SFX API did not display properly in ViewIt. This was fixed.
- **May 2020 Resource Management SF: 703383**
  Hanzi to Pinyin transliteration did not display certain words. This was fixed.
- **May 2020 Resource Management SF: 00457470 00669321 00380400 00812026 00797958 00634818 00559471 00800600 00629754 00528741 00797802**
  Text in angle brackets <> was not displayed in the Metadata Editor F3/ View and in Browse Bib headings. This was fixed.
- **May 2020 Resource Management SF: 582715**
  Accented characters in Alma were encoded in two different ways, depending on whether they were loaded through the migration process or through manual input via the Alma user interface. This was fixed.
- **May 2020 Resource Management SF: 00684642 00719956 00704993 00689036**
  Validation Form of Material MARC21 adds alerts to records where there is no issue. This was fixed.
- **May 2020 Resource Management SF: 590998**
  In the Metadata Editor, the controlled vocabulary did not work correctly for field 317. This was fixed for subfield $$5.
- **May 2020 Resource Management SF: 00710285 00600825 00686205 00753177**
  In some cases, records from the Community Zone linked to the Network Zone linked to the Institution Zone appeared in the repository and could not be saved. This was fixed.
- **May 2020 Resource Management SF: 00713297 00698811 00683610**
  When updating authorities by import from a different originating system, 'ghost' authority headings remained in the system. This was fixed.
- **May 2020 Resource Management SF: 751589**
  In the Metadata Editor when using F3 on bibliographic headings and viewing more than one authority record and after clicking Edit on the authority record on the right side, all the viewed authorities were opened. This was fixed.
- **May 2020 Resource Management SF: 734584**
  The 'Single match same inventory' parameter in the Repository PDA profile was disabled. This was fixed.
- **May 2020 Resource Management SF: 00802735 00803944**
  The ISBN (exact sub-field match)/ 024 / 035 Match Method did not appear as a non-serial match method in the import profile. This was fixed.
- **May 2020 Fulfillment - Course Reserves SF: 00828403**
  When editing a book chapter citation, duplicate Publication Date and Place of Publication fields appeared and displayed identical information in the Main section and More Item Details section. This was fixed.