



Alma November 2020 Release Notes

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Make the Most of November's Release

Action Items

☐ [Enrich Digital Publishing with File Delivery URL](#) - Enrich Digital Publishing with file delivery URL: Institutions are now able to enrich the published digital records with URLs to the actual files, beyond existing URL to the delivery service, allowing external systems to run services requiring direct access to the file, eg copying the file, extracting full-text and more.

Upcoming Issues to Note

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

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

To read the OAS Upgrade Q&A, click [here](#).

The following table details the rollout plan for the OAS:

Environment	Freeze Start Date	OAS Go-Live Date
EU03	June 17	June 21
NA02	July 13	July 19
NA03	July 13	July 26 (updated from 22.7)
NA01	July 13	July 26
CA01, AP01	August 23	August 30
NA91	August 30	September 6

Environment	Freeze Start Date	OAS Go-Live Date
EU00, EU01, EU02	October 11	October 18
NA04, NA05, NA06, NA07, CN01	November 1	November 8

You may need to take certain steps prior to migration. See [Ensuring Reports are Migrated](#).

Analytics Infrastructure Performance Upgrades

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

Instance	Will be implemented during
NA01	Completed
NA02	Completed
NA03	Completed
NA04	Completed
NA05	Completed
NA06	Completed
NA07	Completed
NA91	Completed
EU00	Completed
EU01	Completed

Instance	Will be implemented during
EU02	Completed
EU03	Completed
EU04	Completed
AP01	Completed
CA01	Completed
CN01	January 2021

December 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.

Acquisitions

- **Enhanced Audit Events for Invoices and Invoice Line** - When creating, editing and deleting an invoice and/or invoice lines, an event will be triggered. This will allow institutions to track – with Alma analytics any changes made in invoicing.
- **Enhancements to the "Change Vendor in Order"** - The existing "Change vendor in order" functionality will be enhanced to allow orders to be sent immediately to the newly selected vendor, or to have the orders with the new vendor be stopped first for review. The existing functionality of simply changing the name of the vendor on an existing order will be maintained.
- **New Advanced Search Index** - A new Advanced Search option "Owner" will be made available when searching for a PO line. The new search index will hold a list of the institution's libraries and allow Alma users to search for PO line by the owning library.

Digital Resource Management

- **Concurrent Usage control** - The existing concurrent usage access rights policy will be enhanced to support the expiration of delivery sessions at the end of a configurable period, allowing strict control over the number of concurrent users of digital content at any given time.

Fulfillment

- **New Letter "On hold shelf reminder"** - It will be possible to set a new "hold shelf reminder" letter which will allow institutions to define a time interval for a reminder that will be sent to the patron regarding an item waiting to be picked up. Institutions will be able to define whether the reminder will be sent once or repeatedly.
- **Option to Block Users from Accessing the Patron's Active Balance** - A new privilege will be added to circulation desk roles that block staff from seeing a patron's fines and fees on the patron record and in the Manage Patron Services screens.
- **New Circulation Desk Configuration** - A new circulation desk configuration will allow institutions to determine if a desk allows the registration of new users. Even if a staff user has this privilege, if the specific desk does not allow this, the staff user will not be able to register new users.
- **New Document Delivery Screen** - A new document delivery screen will allow users to scan a request ID, attach a document and send it to the recipient without the need to go through "Scan In" and "Manage In Process Items". This will enhance the productivity of handling immediate document delivery requests.

Resource Sharing

- **Resource Sharing Integration with KERIS ILL** - Alma will support resource sharing integration with KERIS ILL by importing KERIS ILL resource sharing borrowing requests and updating KERIS ILL upon receipt.
- **Add 'Shipped Digitally' Tasks Widget** - A new link will be added to the Borrowing Requests list of tasks. The new link will link to a filtered list of borrowing resource sharing requests that have the status of 'Shipped Digitally'. A request may be in this status if it has been supplied by a Rapid ILL lender but the Rapid ILL integration has been set to a manual mode.
- **Automatic Fulfillment Network for serials** - It will be possible to set up the resource sharing Primo request form to view a list of item level descriptions in an Automatic Fulfillment Network. This way the requesting patron will be able to view a list of the volumes/issues that are available in the network and request a specific volume/issue, even when the network is an Automatic Fulfillment Network.
- **Improve Shipping Interfaces** - The lender side Ship Item Digitally screen will be replaced with a simpler screen that allows for dragging and dropping files that need to be shipped as part of the document delivery service.
- **Locate – Electronic Licenses** - Lenders will be able to manage the electronic inventory that may be used to fulfill lending resource sharing requests by using the resources' attached license records. Alma will automatically reject new lending requests for resources that are attached to a license record that does not allow resource sharing.

November 2020 Main Features

Disable PO Line and Invoice Alerts

November 2020 Acquisitions



Idea Exchange

Some PO line and invoice alerts, as seen on their respective **Alerts** tabs, can now be disabled. The disabling of the alerts also effects the confirmation message associated with these alerts. The eligible alerts are found on the Manage Acquisitions Alerts page (**Configuration Menu > Acquisitions > General > Manage Acquisitions Alerts**) in two sections, one for invoice alerts, and one for PO line alerts. It is important to note that if an alert is disabled and purchasing review rules or invoice review rules are set for the alert that is disabled, the rule will not work for any PO lines/invoices that are recalculated or created. If an alert is disabled, alerts on existing PO lines/invoices are maintained until the PO line or invoice is recalculated.

On the Invoice Alerts list, there is one message that is not tied to a PO line alert. Disabling the message, "The invoice owner is the institution. All associated PO lines are owned by a single library. You can change the invoice owner to match the PO line owner." disables the pop up message only.

See [Managing Acquisitions Alerts](#).

Manually Mark PO Line for Review When Creating from EOD/API

November 2020 Acquisitions

You now have the option to stop PO line for review when the PO line is created via API or EOD. To do so, you must:

1. Add a new rule to the Purchasing review rules to stop review of PO lines with the assertion, **Manually mark for review**. (see [Configuring Purchasing Review Rules](#)). Valid values are **Y**, **y**, **TRUE**, **True**, and **affirmative**.
2. Indicate on the order coming from API/EOD that it should stop for review:
 - For API, add the following text to the URL of the create order API: `requires_manual_review=true`.
 - For EOD, Set the **Require manual review** field to **True** in the New Order import profile (**PO line information** tab).

When activated, the rule creates a new alert in the PO line, **This PO line is marked for review**. The alert can also be added to the PO line without a review rule.

See [Managing Import Profiles](#).

Selector Roles for Rialto Users Only

November 2020 Acquisitions

The Selector role in Alma is now associated to the Rialto roles section. If you are using the Selector role and do not have Rialto enabled, you should replace the Selector role with the Purchase request operator role which has the same

functionalities as the Selector role had previously.

The Selector extended role is now deprecated. Any Alma user that had this role is now automatically given the Purchase request operator - extended role, which allows the user same functionalities as the Selector extended role.

See [User Roles - Descriptions and Accessible Components](#).

Prevent Closed/Approved Invoices from Being Set to Review

November 2020 Acquisitions

Two new privileges are now available on the Invoice Operator and Invoice Manager roles. The **Send back to review** privilege defaults to enabled and the **Delete invoice line** privilege is disabled by default to maintain existing functionality for all customers. To modify, contact Ex Libris customer support. If the **Send back to review** privilege is disabled, users cannot send closed and approved invoices back to review. Invoices which are waiting for approval still have the option to be sent back to review if they were not yet approved

These additions allow institutions to set users with Invoice operator/manager roles and enable/disable these roles (pending the institution's policy) the privilege which will allow users to send invoices back to review and delete invoice lines.

See [Role Privileges](#).

Display the Waive Reason in the List of Fines and Fees

November 2020 Administration and Infrastructure

A new column, **Waive Reasons**, is now available in the Fee/Fine List on the User Details page. By default, the column is disabled. It can be added from the Column Display Option, and reflects the waive reason(s) of the fine or fee, separated by commas when more than one reason is available.

See [Managing User Fines and Fees](#).

New Alma Layout Turned On for All Users

November 2020 Administration and Infrastructure

Continuing the rollout of the [new Alma layout](#), starting from the November release, the new layout is turned on automatically for Alma users. In the **New Alma Layout And Menu Options** page ([Configuration Menu > General](#)), the last option is automatically selected.

< New Alma Layout And Menu Settings Back Save

ALMA NEW LAYOUT AND MENU MODES

☐ New Alma layout and menu is disabled

By default the New Alma layout and menu is disabled for your institution.

☐ New Alma layout and menu is enabled

By activating this mode you are enabling the new Alma layout and menu for your institution. By default all users will continue to access the old layout and menu, and an option in the user menu becomes available to allows users to opt in.

☒ New Alma layout and menu enabled and turned on for all users

By activating this mode you are turning on the new Alma layout and menu for all users in your institution, and an option in the user menu becomes available to allows users to opt out.

The new layout increases your working area, improves navigation, gives you more options to customize your menus, and facilitates improved user workflows. For a full list of changes, see [Layout Improvements](#).

See [video](#) for a short training session.

Alma Administrators can turn the new functionality off for a specific user (Opt-out). In addition, each user can switch between the new and the old layouts, at will. For instructions for the Alma Administrator and users, see [Turning On the New Layout for Users](#).

New Alma Layout Enhancements

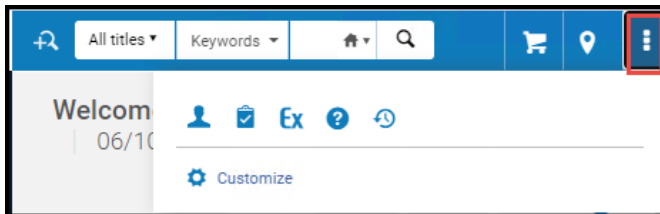
November 2020 Administration and Infrastructure

As part of the [new Alma layout](#) rollout, the following usability improvements were performed:

- The search area and history box on the main toolbar cannot be minimized above a certain length, to make sure that you can enter information even on small window size.



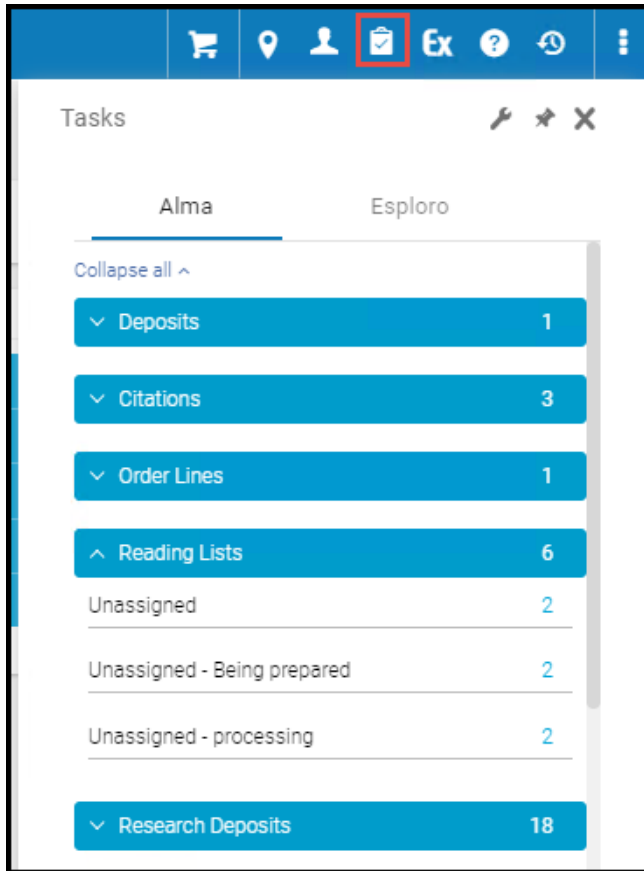
- If the window is not wide enough to accommodate all the menu icons, the top-right toolbar menu items now move to the ellipsis menu.



- Now users can expand/collapse and customize the task list to include in it only specific types of tasks. To customize the list, select



at the right-top.



- The support for the Hebrew language was significantly improved, allowing for a much better user experience. This includes better support for Right-to-Left orientation, correct icon alignment and button placement.

Create A Set API - Saving Sets in Network Zone as a Member

November 2020 Administration and Infrastructure

An option to enable institutions that are members of the Network Zone to save sets to the Network Zone while logged into the Institution Zone was added to the Create a Set API. This is possible if all the records included in the set are linked to the NZ.

See [Create A Set](#) in the Developer Network.

XSL Transformation as Part of an Integration Profile

November 2020 Administration and Infrastructure

In [July 2020 release](#), XSLT converters were introduced to Alma that enable converting data from source system formats to the format required by Alma, when importing users to Alma from SIS systems that use other data formats. Up till now, the ability to define XSLT converters was disabled by default, and activated only with the help of Ex Libris customer support. Now this ability has been enabled to all customers.

See [Integration XSL Converters](#).

November 2020 Administration and Infrastructure

The screenshot shows the 'Import' dialog box in the 'DCMI Material Type Mapping' application. The dialog is titled 'Import' and contains a 'File' input field with a file icon, an 'Upload File' button, and a 'Cancel' button at the bottom right. The background shows the 'DCMI Material Type Mapping' interface with a table of material types and a 'Mapping Table' header.

Excel files can be imported in either *.xlsx or *.xls formats. Note that the Excel sheet must be in a specific structure. It is recommended that you first export the existing mapping table to get the structure and the existing values, make your changes, and then import the changes back to Alma.

The structure of the Excel file includes the actual codes that are imported back into Alma, in addition to columns of descriptions that help you make sense of the data, but are not imported. The description values can be duplicated. In addition, the Excel file includes additional sheets, which are also not imported back into Alma, that provide you with full lists of codes and values that can be inserted into the Alma dropdowns - you can use these sheets when adding new rows to the Excel file, instead of referring to Alma for these code/value combinations.

There should be no duplicate lines in the codes that are imported back into Alma.

	A	B	C	D	E	F
	Included	Target Combo Code	Target Code Combo [Type]	Source4 Combo Code	Source4 Combo [UniquenessType]	Source2 Combo Code
2	Yes	00	System number	AcrossInstitution	Across Institution	TRUE
3	Yes	01	Eagle ID	AcrossInstitution	Across Institution	TRUE
4	Yes	02	BC UserID	AcrossInstitution	Across Institution	TRUE
5	Yes	03		AcrossInstitution	Across Institution	TRUE
6	Yes	04		AcrossInstitution	Across Institution	TRUE
7	Yes	05	ID Card Mag Stripe	AcrossInstitution	Across Institution	TRUE
8	Yes	FACEBOOK	Facebook ID for social login	AcrossInstitution	Across Institution	FALSE
9	Yes	GOOGLE	Google ID for social login	AcrossInstitution	Across Institution	FALSE
10	Yes	TWITTER	Twitter ID for social login	AcrossInstitution	Across Institution	FALSE
11	Yes	LT1 SELF REGISTERED	LT1 SELF REGISTERED	Across Type	Across Type	FALSE
12	No			Across Type	Across Type	FALSE
13	No			Across Type	Across Type	FALSE
14	No			Across Type	Across Type	FALSE
15	No			Across Type	Across Type	FALSE
16	No			Across Type	Across Type	FALSE
17	No			Across Type	Across Type	FALSE
18	No			Across Type	Across Type	FALSE
19	No			Across Type	Across Type	FALSE
20	No			Across Type	Across Type	FALSE
21	No			Across Type	Across Type	FALSE
22	No			Across Type	Across Type	FALSE
23	No			Across Type	Across Type	FALSE
24	Yes			Across Type	Across Type	FALSE
25	Yes			Across Type	Across Type	FALSE
26	Yes			Across Type	Across Type	FALSE
27	Yes			Across Type	Across Type	FALSE
28				Across Type	Across Type	FALSE

Code that is imported into Alma

Description that is not imported into Alma

Code that is imported into Alma

Description that is not imported into Alma

Full lists of values of each dropdown - for your convenience when adding rows with previously unused codes.

See [Importing Code and Mapping Table Information](#).

November 2020 Administration and Infrastructure

Now you can easily decide how many jobs to display on the Monitor Jobs page. You can alternate between 20, 50, or 100 jobs. This allows you to review and sort through all your jobs at a glance. Previously the number of jobs that could be displayed was limited to 50 in the History tab and 20 in the other tabs.

	Active	SP	Name	Start Date	
16	☐	☐	February 2015	Update in-house loans with item info	15/04/2015 18:21:50 IDT
17	☐	☒	March 2015	{JOB_NAME}	-
18	☐	☒	March 2015	Flattening UResolver tables	-
19	☐	☒	March 2016	Deleted inventory Objects Population	-
20	☐	☒	March 2016	Remove duplicate IEEs	-

1 2 3 ... 7 >
1 of 7 Go
Results per page: 20 50 100
Faster Slower

Configuration of Alma Standard Sandbox Instance URL

November 2020 Administration and Infrastructure

The parameter `standard_sandbox_override_link` was made available to customers. This parameter allows you to configure the URL of your Standard Alma Sandbox instance. To configure, enter the full path (including Protocol) of the override link for the standard Sandbox of your institution.

See [Configuring Other Settings](#).

General Hold Request Form Enhancements

November 2020 Fulfillment



Idea Exchange

The following fields are now available in the Hold Request and Digitization Request forms configuration tables, and can be added to the General Hold/ Request Another Issue and the General Digitization / Digitize Another Issue requests in Primo (for holdings with no items or serial holdings):

- Volume
- Issue
- Part
- Chapter
- Publication date
- Chapter/Article Title
- Chapter/Article Author
- Start Page
- End Page

If metadata exists, the fields are automatically populated, as is done in the Resource Sharing form.

To use these fields, they must be activated on the Hold Request / Digitization Request Form Customization pages.

The request APIs functionality remain unchanged. All description fields are sent as part of the manual description parameter.

Note: The new description fields will be added to the manual description in Alma to allow them to appear in pick from shelf, requests slips, etc. in order to maintain all current workflows.

See [Customizing Primo Request Forms](#).

Policy to Prevent Booking Requests Over Closed Days

November 2020 Fulfillment



Idea Exchange

New assertions are now available for the Closed Library Booking Management policy to allow institutions to prevent seats being booked for time periods when the library is closed.

The booking policy now has the following assertions:

- **Expand to previous and next open times** - Existing assertion that adjusts the start/end time according to the library's opening hours and allows booking over closed library periods. If the start/end date/time needs to be automatically adjusted, Alma ignores the item's maximum booking policy. This is suitable for items that you allow patrons to keep over the library's closed periods.
- **Attempt expanding if within maximum allowed booking length** - This new assertion will adjust the start/end time according to the library's opening hours and allows booking over closed library periods. If the start/end date/time needs to be automatically adjusted, Alma takes the item's maximum booking policy into account and may shorten the booking window. This is suitable for items that you allow patrons to keep overnight but not for longer periods.
- **Only allow booking during open times** - This new assertion will adjust the start/end time according to the library's opening hours and does not allow booking over closed library periods. If the booking window includes any closed times, the start or end dates/times will be automatically adjusted to be the first open period within the requested booking window, also taking into account the item's maximum booking policy. This is suitable for booking items such as library rooms or desks.

In Primo VE, a new error message is displayed for booking requests when the library is closed and a booking cannot be created, additionally, in cases where a user populates identical start/end booking times the system will block the request and notify the user.

See [Adding Fulfillment Policies](#).

Remove Current Rota when Recalculating Rota

November 2020 Fulfillment - Resource Sharing

You can now remove all partners, recalculate, and create a new rota for a borrowing request, all in one action. You do so by selecting the new **Remove and Recalculate Rota Assignment** row action on the Resource Sharing Borrowing Requests task list. If request was already sent to a partner and you use this action, the active partner is not removed from the rota and it remains the active partner. Only the rest of the rota is removed.

See [Managing Resource Sharing Borrowing Requests](#).

Integration with NACSIS - Upload Holdings

November 2020 Fulfillment - Resource Sharing

You can now upload holdings to the NACSIS central catalog.

To use this function, you must configure the Central Catalog Integration profile to include NACSIS on the **System** list in the profile. Eligible records will be those bibliographic records that have the NACSIS ID in the MARC field 016 subfield \$a and the NACSIS code in subfield \$2. The NACSIS Holdings cloud app can then be installed from the Cloud App Center, an eligible title selected, and **Retrieve NACSIS Holdings** selected. Once the holdings is retrieved, you can filter them based on the Owner from the drop-down list. New holdings can be created by using the **+ Add NACSIS Holding** button. The institution's Holdings can be modified or deleted.

This feature is available only in the Next Gen interface.

See [Integrating Alma with NACSIS](#).

Activate Collection for Full Text in CDI Only

November 2020 Resource Management

It is now possible to **Activate collection for full text in CDI only** for electronic collections of type **Link in Record** (not for **Link Resolver**), the **Activate collection for full text in CDI only** row action is available in the **Community** and **Institution** tab search results if **Available for CDI search activation** equals **Yes**.

CDI Information in the Community Zone Update Task List

November 2020 Resource Management

The Community Zone task list now includes a report on Community Zone electronic collection changes related to CDI. The changes include:

- CDI search activation
- CDI full text linking
- CDI search rights
- CDI full text rights
- CDI type

The Community Zone Update task list will not include reports for collections (and the portfolios connected to those collections), that are active for search in CDI but not active for full text in Alma. This excludes CDI related actions, which will be reported for all collections.

See [Actions on a Collection Following a Community Zone Update](#).

Add Related Record Enrichment as part of General Publishing

November 2020 Resource Management

Related records can now be republished to external systems, so that the external catalog has a full representation of the catalog and inventory of your library. You can include the related record information (BIB and physical inventory). If the institution is part of a consortium, then when publishing bibliographic records from the Network Zone to an external system, the related records information can also be published to the external system.

The section Related Records Enrichment was added to the Publishing Profile Details Page > Step 2. On this page you can define the information that will be added to the published bibliographic record from its related records. This new section is relevant for all types of publishing levels and all output formats, except Dublin Core simple / qualified.

Note

To deploy this feature for existing profiles, running **Republish Entire Index** is required.

See [Publishing and Inventory Enrichment \(General Publishing\)](#).

Improved Partial Linking Indication in the Metadata Editor

November 2020 Resource Management

The presentation of a link between a bibliographic heading with subdivision to an authority record without subdivision (partial linking) in the Metadata Editor was improved to better display the type of different types of linking. Now it more clearly displays partial and full linking.

In the November release, a system job runs that checks if every existing bib heading is fully or partially linked, and updates the the Metadata Editor to provide the correct indication.

See [Viewing Linked Names/Subject Headings from a Bibliographic Record](#).

Synchronize Record with Aleph Central Catalog on Save

November 2020 Resource Management

Now, when working with Aleph Central Catalog in a Network Zone, you can ensure that any update made by one of the members on a centrally-managed record is synchronized with the Central Catalog record. If the new "Automatically contribute to central catalog" checkbox is selected in the integration profile for Aleph Central Cataloging ([Alma configuration > Integration profiles > Aleph system > Action tab](#)), then when saving a NZ record in the Metadata Editor, the record is updated in the Aleph Central Catalog, as well as in the Network Zone.

If this checkbox is not selected, then saving NZ record is not automatically saved in Aleph Central Catalog. To save the record in Central Catalog, the cataloger will activate the "Contribute record to Central Catalog" action (existing functionality).

Only centrally-managed records are updated in the Aleph Central Catalog. For records that are not centrally managed (newly-created records and existing records without the 035 identifier), the cataloger will activate the "Contribute record to Central Catalog" action (existing functionality).

The screenshot shows the 'Integration Profile' configuration page. Under the 'CONTRIBUTION CONFIGURATION' section, the following fields are visible:

- Host: hk-aleph03
- Port: (empty)
- Library: main
- System Number Prefix: (ALP)
- Fix routine in central catalog: (empty)
- Username: (empty)
- Password: (empty)
- Allow Delete: ☐
- Automatic contribute to central catalog: ☒
- Correct the data using normalization rules: (empty)

The "Automatic contribute to central catalog" checkbox is only available when all of the below is true:

- The integration profile is defined for the type 'Central Cataloging',
- The Aleph system is selected,
- The institution is a member of a Network Zone.

To delete a centrally-managed record via the Metadata Editor in both the Network Zone and Aleph, the library should set the "Allow Delete" option in the Aleph Central Catalog integration profile to True. If set to True, then when the user attempts to delete a centrally-managed record, then record is deleted in both the Aleph Central Catalog and Alma Network Zone (in both systems, the deletion only takes place if neither of the two systems prevents this deletion).

See [Integrating Alma with the Aleph Central Catalog](#) and [Navigating the MD Editor Page](#).

ProQuest Ebook Central Upload Electronic Holdings Improved

November 2020 Resource Management

The ProQuest Ebook Central Automatic Upload of Electronic Holdings was improved:

- **Frequency** - Ex Libris moved from full synchronization on a weekly basis to daily incremental processing, which is faster and keeps your collection as up-to-date as possible.
- **Subscription Titles** - In addition to the activation of ProQuest Ebook Central Owned and DDA titles, the integration now supports the activation of Subscription titles.
- **Purchase Model Indication** - Each Portfolio will include an indication of ProQuest Ebook Central Purchase Model: Owned, DDA, or Subscription (including the subscription collection names), therefore Ex Libris will no longer:
 - Create a Technical-PO Line for Owned titles,
 - Associate a PDA profile to DDA titles.
- Title that are missing from the Community Zone at the point of the daily integration will automatically be activated once added to the Community Zone.

Customers that are currently not using the PQ EBC Upload Electronic Holdings integration will by default use the new improved integration, which is documented [here](#).

Customers who are already using the PQ EBC Upload Electronic Holdings integration will be moved to the new integration by Ex Libris. For details, please contact Support.

See [Upload Electronic Holdings from ProQuest Ebook Central for Subscriptions/Owned/DDA](#).

Enhancements to Name and Subject Bib Heading Browsing

November 2020 Resource Management



Idea Exchange

Alma enables you to browse bibliographic headings to support various cataloging workflows. You can browse by author name, subject, series, and title.

Now for cases when a person appears both as a creator and as a subject (i.e., 'Agatha Christie' might be both the subject and an author), you can select between the following methods of mapping the MARC 21 fields 600, 610, 611:

- **Names** - (existing options) When browsing bibliographic headings using this option, the 6XX fields appear under Names.
- **Subjects** - (existing options) When browsing bibliographic headings using this option, the 6XX fields are not found.
- **Names (without MARC21 600/610/611)** - (new option) When browsing using this option, the 6XX fields are not found.
- **Subjects (with MARC21 600/610/611)** - (new option). When browsing using this option, the 6XX fields appear under Subjects.

Note

- The new options **Names (without MARC21 600/610/611)** and **Subjects (with MARC21 600/610/611)** are available only in the new Metadata Editor. For details, see [Usability Improvements](#).
- This feature will be deployed gradually, depending on the semi-annual indexing job planned for November.

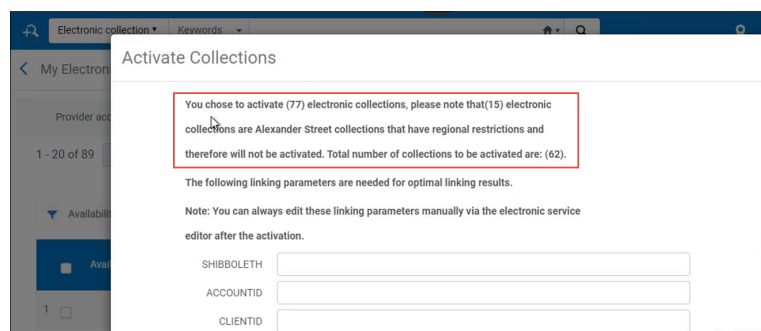
See [Browsing Bibliographic Headings](#).

Exclude Alexander Street Collections on Automatic Activation

November 2020 Resource Management

When automatically activating collections on the My Electronic Resources by Provider page (by selecting "Activate All"), now the Alexander Street collections are excluded from activation, due to their regional restrictions. Alexander Street collections can only be activated manually (by selecting the collection and selecting "Activate Selected").

To notify users about this, when users click "Activate All" on the My Electronic Resources by Provider page, the existing Activate Collections popup notification now provides the total number of collections, the number of Alexander Street collections that will not be activated, and the final number of collections to be activated as the result of this action.



See [My Electronic Resources by Provider](#).

Semi-Annual Re-indexing

November 2020 Resource Management

During November, the semi-annual re-indexing (described in greater detail in [Updates](#)) will be run. Features or resolved issues that require re-indexing to be fully functional will be addressed by the November semi-annual re-indexing. See the list below.

- Additional Authority and Bibliographic indexes were added, see [Additional Indexes](#).

Additional Indexes

November 2020 Resource Management

The following Authority indexes were added:

- Names for content in 700 subfields a-d,g,q
- Personal Name for content in 700 subfields a-d,g,q
- Names for content in 710 subfields a-v,x-z,0,5
- Corporate Name for content in 710 subfields a-v,x-z,0,5
- Names for content in 711 subfields a,c,d,g,n,q
- Meeting Name for content in 711 subfields a,c,d,g,n,q
- Uniform Title for content in 730 subfields a,d,f,g,k-t
- Subject for content in 750 subfields a,g,x,4
- Related Topical Term for content in 750 subfields a,g,x,4
- Subject for content in 751 subfields a,g,x,z,4

- Names for content in 100 subfield g
- Personal Name for content in 100 subfield g
- Names for content in 110 subfield g
- Corporate Name for content in 110 subfield g
- Names for content in 111 subfield g
- Meeting Name for content in 111 subfield g
- Uniform Title for content in 130 subfield g
- Names for content in 400 subfield g
- Personal Name for content in 400 subfield g
- Names for content in 410 subfield g
- Corporate Name for content in 410 subfield g
- Names for content in 411 subfield g
- Meeting Name for content in 411 subfield g
- Uniform Title for content in 430 subfield g
- Names for content in 500 subfield g
- Personal Name for content in 500 subfield g
- Names for content in 510 subfield g
- Corporate Name for content in 510 subfield g
- Names for content in 511 subfield g
- Meeting Name for content in 511 subfield g
- Related Meeting Name for content in 511 subfield g
- Uniform Title for content in 530 subfield g
- Related Uniform Title for content in 530 subfield g
- Notes for content in 672 subfields a,b,f
- Notes for content in 677 subfield a
- Notes for content in 678 subfields a,b
- Notes for content in 680 subfields a,i
- Notes for content in 681 subfields a,i
- Notes for content in 682 subfields a,i
- Notes for content in 688 subfield a

The following Bibliographic indexes were added:

- Creator for content in 110 subfield g
- Creator for content in 111 subfield g
- Creator for content in 700 subfield g
- Creator for content in 710 subfield g
- Creator for content in 711 subfield g
- Creator for content in 880 subfield g where the 880 field is linked to a 110 or 111 or 700 or 710 or 711 field
- Names for content in 700 subfield g
- Names for content in 710 subfield g
- Names for content in 711 subfield g
- Names for content in 751 subfield g
- Names for content in 880 subfield g where the 880 field is linked to a 700 or 710 or 711 or 751 field

- Subjects for content in 690 subfield 2
- Subjects for content in 691 subfield 2
- Subjects for content in 880 subfield 2 where the 880 field is linked to a 690 or 691 field
- Other System Number for content in 800 subfield w
- Other System Number for content in 810 subfield w
- Other System Number for content in 811 subfield w
- Format of Notated Music for content in 348 subfield a
- Format of Notated Music for content in 880 subfield a where the 880 field is linked to a 348 field
- Medium of Performance for content in 382 subfields a,b,d,e,n,p,r,s,t,v
- Medium of Performance for content in 880 subfields a,b,d,e,n,p,r,s,t,v where the 880 field is linked to a 382 field

See [MARC 21 Search Indexes](#).

Enrich Digital Publishing with File Delivery URL

November 2020 Digital Resource Management

You can now enrich digital bibliographic records with a file-level delivery URL. To support this enhancement, a new **Add File Information** checkbox was added to the Digital Inventory Enrichment section when configuring a publishing profile. How you indicate the location of the URL depends on the schema of the record:

- For MARC21 – When the checkbox is selected, the **File URL subfield** field is displayed where you can indicate the location of the URL.

Add File Information - MARC21

- For Dublin Core – a **Repeatable field** drop-down list is displayed for you to select the location of the URL.

Add File Information - Dublin Core

- For MODS – the location of the URL is fixed and cannot be configured by the user.

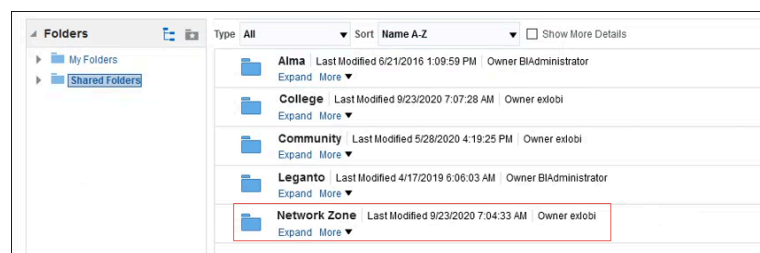
Network Zone Members Can Now Access Reports Created by the Network Zone

November 2020 Analytics

The members of a Network Zone can now access the analytics reports created by the Network Zone. To enable this functionality, you must set the following parameters to true:

- In the Network zone: `analytics_catalog_available_for_members` (**Configuration > Analytics > Analytics Network Settings**) – to enable Network Zone reports to be available to members.
- In the Network Zone member: `analytics_catalog_available_for_my_institution` (**Configuration > Analytics > Analytics Member Settings**) – to enable members to access the Network Zone reports.

When both parameters are set to `true`, the Network Zone report folder is visible to the member institution, which can access the reports as read-only.



Network Zone Folder Visible to Member

The member institution can edit the report and save it to its institution folder.

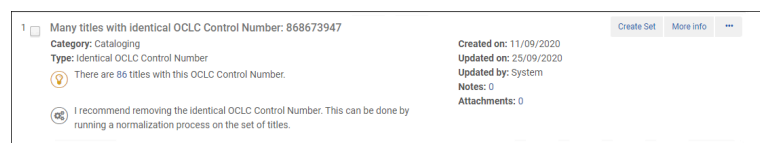
Note

When a member institution runs a report acquired from the Network Zone, only data of that member institution is displayed.

DARA Recommendation to Remove Multiple Bibliographic Records with the Same OCLC Number

November 2020 DARA

DARA now identifies if you have multiple bibliographic records with the same OCLC number in the 035\$a field.



Identical OCLC Control Number

DARA recommends that you create a set to review bibliographic records to see if there are records in which the system

control number should be corrected. Correcting BIB records can be done by running a normalization rule on the set of titles.

Control the Locate Citation Process with New Configuration

November 2020 Fulfillment Course Reserves

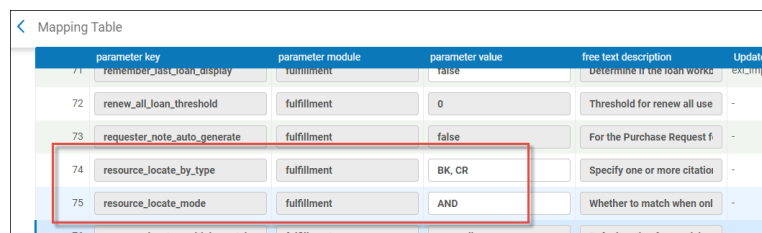
You can now configure Leganto to locate citations based on any or all the fields indicated in the Locate Citations By Fields mapping table ([Fulfillment Configuration > Courses > Locate Citation By Fields](#)), using the new **resource_locate_mode** field in the Other Settings table ([Fulfillment Configuration > General > Other Settings](#)).

- If you set the value of the **resource_locate_mode** field to "OR", then Leganto will locate citations based on any of the fields in the Locate Citations By Fields mapping table.
- If you set the value of the **resource_locate_mode** field to "AND", then Leganto will locate citations based on all of the fields in the Locate Citations By Fields mapping table.

Note

The default value of the **resource_locate_mode** field is "AND".

You can now also configure Leganto to locate only citations of specific material types (e.g. book, journal article, presentation, etc.), by entering in the codes for the material types into the new **resource_locate_by_type** field in the Other Settings table ([Fulfillment Configuration > General > Other Settings](#)), separated by commas.



parameter key	parameter module	parameter value	free text description	Update
71 reminder_loan_display	fulfillment	exists	Determines if the loan works	exists
72 renew_all_loan_threshold	fulfillment	0	Threshold for renew all use	-
73 requester_note_auto_generate	fulfillment	false	For the Purchase Request f	-
74 resource_locate_by_type	fulfillment	BK, CR	Specify one or more citation	-
75 resource_locate_mode	fulfillment	AND	Whether to match when onl	-
76 resource_locate_multiple_matches	fulfillment	manually	Default action for resolution	-

Other Settings table--Resource_locate_by_type & resource_locate_mode parameters

The codes for the material types are defined in the Citation Material Type table ([Fulfillment Configuration > Courses > Citation Material Type](#)). For more information, see [General \(Configuring Other Settings\)](#) and [Managing a Citation's Attachment to an Inventory Item](#).

In addition, in the Process and Enrich Citations job (Fulfillment > Advanced Tools > Process and Enrich Citations), a new "Perform locate on type" field allows you to select which material types to perform the locate action on. The field is automatically populated with the material types corresponding to the code(s) entered in the **resource_locate_by_type** parameter in the Other Settings table (see figure above). In this case, the field will be automatically populated with the "Book" and "Article" material types.

Perform locate on type

For more information on the Process and Enrich Citations job, see [Process and Enrich Citations in Bulk](#).

Create Reading Lists by Importing a CSV or XLS File

November 2020 Fulfillment Course Reserves



NERS Enhancement (ID #6490)

You can now create reading lists by importing a .txt or .csv file, using a new integration profile job called Reading List Loader. You can view a sample file [here](#).

For more information on the file requirements, see [Reading List Loader](#).

To create reading lists by importing a .txt or .csv file:

1. Add a new integration profile by navigating to the Integration Profile List page (**Configuration Menu > General > External Systems > Integration Profiles**) and selecting **Add Integration Profile**.
2. In the Integration Profile screen, select "Reading List Loader" from the **Integration Type** dropdown.
3. In the **S/FTP Connection Type** dropdown, select a connection type.
4. Fill in the remaining required fields and click **Next**.

Add integration profile - Reading List Loader

5. In the Reading List Import screen, enter the **Input File Path**. This is the path to the .csv or .xls input file on the ftp server.

6. Select to run the job in **Report** Mode if you wish. If selected, the job will not create reading lists, but will rather simulate the creation and produce a job report as if reading lists were created.

Reading List Import - Select Input File Path

7. If there are data files you wish to associate to the citations in the upload, you must put them into a folder named **files**, and put the folder into the same location as the input file.

Name	Date modified	Type
files	05-Oct-20 12:24	File folder
my_list.csv	05-Oct-20 12:36	Microsoft

files folder and input file

For each citation in the .csv or .txt input file to which you wish to associate a data file from the **files** folder, the value of the **file_name** field in the .csv/.txt file must be identical to the name of the data file that you wish to associate to the citation.

BE	BF	BG	BH	BI	BJ	BK	BL	BM	BN
s_citation	s_citation	s_citation	s_citation	n_additional	file_name	citation_p	license_t	citation_i	citation
source8	source9	source10	w	w	notexist.jpg		blabla		
source8	source9	source10	w	w	book.jpg	w	SELFDECL	instructor	instru
source8	source9	source10	w	w		w	SELFDECL	instructor	instru
source8	source9	source10	w	w		w	SELFDECL	instructor	instru

File_name field

If there is a problem reading/uploading a file, the upload process will continue and only that file will fail to attach.

8. Click **Save** to save the integration profile.
9. In the Integration Profile List screen, select the integration profile you have created and select the **Actions** tab. Click **Run** to run the job.

Note

A Reading List Loader job can be aborted at any time via the Monitor Jobs screen in Alma. When a job has been aborted, any reading list that has already been loaded will remain in the system.

Prior to running the job, the system validates the data in the input file, to check for the following errors:

- Missing columns
 - Rows with a corrupted row length (tab count is less than the required amount)
 - Reading list code already exists
 - The list is not in one block.
 - The section is not in one block.
 - Any of the following mandatory fields are missing for any rows:
 - Reading list code
 - Reading list name
 - Section name
 - Citation secondary type
 - Citation status
 - Citation title. If type is a book chapter, then the chapter title is mandatory.
 - The same list code appears more than once in the file across random rows.
-

Note

Empty lists are considered valid. Therefore if there are reading list names and codes but no section or citations, this is considered valid. In addition, if there are reading list names and codes and section names, with no citations, this is considered valid.

When the job runs, a reading list set (type-itemized) is created with all list IDs created during the job. The set will be visible (type "Public"). The set name will be ReadingListLoader_<JOB_ID>.

Once the job has run, you can view the results of the job by finding the integration profile in the Integration Profile List screen and selecting **Job History** from the ellipsis menu. The Job History screen appears for this job.

Job History

Back

external system details

Name

Reading List Loader

Description

Integration Type

Reading List Loader

Job History List

1 - 3 of 3

All

Filter: All

Job ID	Status	User	Time Started	Time Ended	Files Processed	Files Failed	
1 2520134...	Completed with Warnings	ext_limpl	2020-09-16 14:31:10	2020-09-16 14:44:47	0	0	...
2 2520119...	Completed with Errors	ext_limpl	2020-09-15 17:45:55	2020-09-15 17:45:58	0	0	...
3 2520111...	Completed with Errors	ext_limpl	2020-09-15 16:05:31	2020-09-15 16:05:31	0	0	...

Job History - Reading List Loader

For each Job ID, you can select **View** from the ellipsis menu to view the results for each job.

The screenshot shows the 'Job Report' interface. At the top, there's a 'Job Parameters' section with a dropdown arrow. Below it, various parameters are listed: External system type (READING_LIST_LOADER), Integration profile name (Reading List Loader for Alma), External action name (READING_LIST_IMPORT), Export (-), External system id (255610790000121), External system code (RLL), Report Mode (true), Input File Path (readingList), Import File Name (reading lists loader.txt), and Reading List Set (-). Below the parameters is the 'Job Events' section, also with a dropdown arrow. It lists several event categories: Reading lists created(4), Reading lists created with warning(11), Files not found(1), Reading lists not created due to error(0), File validation errors(0), and Reading list import job general failures(0). An 'Export Events' link is visible to the right of the events list.

Job report - Reading List Loader

In the example above, a total of four reading lists were creating without warnings, 11 reading lists were created with warnings/errors, and one file was not found. You can click on each category of event to view details on the events.

The following is an example of the events report for the lists created without warnings/errors.

The screenshot shows the 'Events Report' interface. It displays a table with 4 rows and 4 columns: Reading List Code, Reading List Name, Course Code, and Section. The data is as follows:

	Reading List Code	Reading List Name	Course Code	Section
1	importList1	Nursing Theory	EXLIBRIS_DEFAULT_COURSE	EXLIBRIS_DEFAULT_COURSE_SECTI...
2	importList2	Imported list	EXLIBRIS_DEFAULT_COURSE	EXLIBRIS_DEFAULT_COURSE_SECTI...
3	importList3	empty list	EXLIBRIS_DEFAULT_COURSE	EXLIBRIS_DEFAULT_COURSE_SECTI...
4	importList4	empty section	EXLIBRIS_DEFAULT_COURSE	EXLIBRIS_DEFAULT_COURSE_SECTI...

Events report--lists created without warnings/errors

The following is an example of the events report for the lists created with warnings.

The screenshot shows the 'Events Report' interface. It displays a table with 7 rows and 4 columns: Reading List Code, Row number, Level, and Error message. The data is as follows:

	Reading List Code	Row number	Level	Error message
1	importList1	2	Citation	value blabla is not in allowed values[], AU_CC_BY, WW_CC_BY, SELFDECLARED, AU_CC...
2	importList1	2	Reading list	Failed to find course with code: 0211141022TC - 01 and find Course By Searchable...
3	importList1	3	Citation	Failed to find MMS ID 991281600000541
4	importList1	3	Citation	Tag tag2" does not exist, and not created for citation with id -
5	importList1	3	Citation	Tag "tag1 does not exist, and not created for citation with id -
6	importList2	4	Reading list	Failed to find course with code: 0211141022TC - 01 and find Course By Searchable...
7	importList2	4	Citation	Failed to find MMS ID

Events report--Lists created with warnings/errors

For each warning/error that the job produces, there will be a reference to the list and row number in the input file.

To perform updates on the created set:

Once the job has finished running, you can also perform updates on the created set, including deleting the set, using the Reading List Bulk Update job (see [Reading List Bulk Update](#)).

November 2020 Additional Issues

- **November 2020 Digital Resource Management**

The delivery URL parameter `mode=quickaccess` is now available to allow libraries to embed the new Alma viewer in their own webpages or discovery interface.

- **November 2020 Analytics**

The following fields were added to E-Inventory > Portfolio:

- CDI Available for Groups – The group codes available for the specific collection, service, or portfolio for CDI.
- CDI Available for Group Members – The members of the groups in the Available For Groups field for CDI.

- **November 2020 Analytics**

The following fields were added to E-Inventory > Cost Usage > Portfolio and Collection Measures:

- No. of Electronic Collections (In Repository + In CDI) – The number of collections in both the repository and CDI
- No. of Electronic Collections (In Repository + Not In CDI) – The number of collections in the repository, but not in CDI

- **November 2020 Analytics**

The following fields were added to indicate the Rapid ILL Lending and Borrowing Institutions and Libraries:

- In Borrowing Requests > Borrowing Request Details: Lending Institution and Lending Library
- In Lending Requests > Lending Request Details: Borrowing Institution and Borrowing Library

- **November 2020 Analytics**

The **PO Line Creation Date** dimension was added to the following subject areas that have the PO Line dimension. It contains fields relating to the PO line creation date.

- E-Inventory (Portfolio PO Line Creation Date, Electronic Collection PO Line Creation Date, and Cost Usage PO Line Creation Date)
- Funds Expenditure
- Physical Items
- Purchase Requests

- **November 2020 Analytics**

In the Events subject area, the **Event Date and Time** field (added in August 2020) was moved from the **Event Keys** dimension to the **Event Date** dimension.

Note that any report created with this field in the old location must be updated for the report to work.

- **November 2020 Analytics**

The following fields were added to the E-Inventory subject area:

- In the Portfolio URL Information dimension:
 - Portfolio Dynamic URL (override)
 - Portfolio Static URL (override)
 - Portfolio URL Type (override)
- In the Service URL Information dimension:
 - Service Dynamic URL (override)

- Service Is Free (override)
- Service Linking Level (override)
- In the Electronic Collection dimension:
 - Electronic Collection Aggregator (override)
 - Electronic Collection Interface Name (override)
- **November 2020 Fulfillment - Resource Sharing**
Previously, when a borrower canceled a request, the information was submitted to Rapid, but Rapid did not feed the information back to Alma. This now functions as expected.
- **November 2020 APIs**
BARE Authority URI enrichment is now supported.
- **November 2020 Resource Management**
The Not Equals operator is no longer available for CDI electronic collection searches.
- **November 2020 Fulfillment**
The temporary customer parameter, temp_asrs_report_temporary_change, was removed. Previously, this parameter controlled whether Alma updated the ASRS about temporary location changes. Now, a temporary item removal from, or addition to, remote storage does not update the Dematic database.
- **November 2020 Fulfillment**
A new configuration on the library will allow other libraries to handle personal delivery for that library's items. This will take into account the scan-in library's ability to handle personal delivery (having a primary circulation desk that supports personal delivery).
- **November 2020 Fulfillment - Resource Sharing**
Previously, when locate at lender side by metadata found more than one bibliographic record, it returned a failure without considering the Ignore Electronic option. So if there were two bibliographic records, one holds a physical resource and the other holds an electronic resource, the locate failed. This was fixed. When Ignore Electronic is set to true, Alma now searches only for records that have physical items and calculates the locate result accordingly. To enable this functionality, set the temp_rs_locate_use_ignore_on_bib_search parameter to true.
- **November 2020 Fulfillment - Resource Sharing**
The Send action on a resource sharing borrowing request is now hidden after the request is sent to the active partner, in order to prevent mistakes that might disconnect the current request or create a new one when sent to an integration system.
- **November 2020 Fulfillment Course Reserves**
When performing a simple search for courses in Alma, you can now search by the Course ID. For more information, see [Course Search Fields](#).



The screenshot shows a search bar with a dropdown menu set to 'Courses'. Below the dropdown, 'Course ID' is selected as the search criteria. A magnifying glass icon is visible on the right side of the search bar.

Search by Course ID

- **November 2020 Fulfillment Course Reserves**
In the Course Terms code table ([Fulfillment Configuration > Courses > Course Terms](#)), a new **FALL** course term code has been added.

8	☐	YEARLY	Yearly
9	☒	FALL	Fall

Fall course term code

- **November 2020 Fulfillment Course Reserves**

When you duplicate a list that is associated with a course in Leganto (via the Reading List menu) or in Alma (via the Reading List Task List), the new (duplicated) list will not be associated with that course. However, when duplicating a list via the Courses page in Alma, or via the API, the associated course will be duplicated as well.

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

The **Section Locked** field was added to the Reading List Section dimension in the Course Reserves, Leganto Student Usage, and Leganto Instructor Usage Events subject areas.

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

The **Course ID** field was added to Course Reserves > Course.

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

The **Citation File Size (KB)** and **Citation Thumbnail File Size (KB)** fields were added to Course Reserves > Reading List Citation and Leganto Student Usage > Citations.

In addition the **Total File Size Used** out-of-the-box report is now available to display the total file size used, which includes the citation file and citation thumbnail file sizes.

November 2020 Resolved Issues

- **November 2020 Acquisitions SF: 00820060 00798385 00813686**
Previously, it was possible to create a PO Line from a purchase request with a deleted bibliographic record. This was fixed. When trying to approve and order a purchase request, if the bibliographic record is deleted, an error message is now displayed.
- **November 2020 Acquisitions SF: 801430**
Previously, it was possible to create a purchase request with a null requester ID. This was fixed.
- **November 2020 Acquisitions SF: 804771**
Previously, adding a note to a canceled PO line caused an error. This was fixed.
- **November 2020 Acquisitions SF: 808733**
The Generate Export XML is now aligned with the Export Invoices for Payment and does not include additional charges lines when they are not relevant.
- **November 2020 Administration and Infrastructure SF: 736481**
The Edit User Info button on the Manage Patron Services page is now hidden if the operator does not have the User Manager Update privilege enabled.
- **November 2020 Administration and Infrastructure SF: 816460**
Previously, the SAML Just-In-Time user registration mapping only supported FriendlyName attributes. It now also works with SAML assertions that do not include FriendlyName.
- **November 2020 Administration and Infrastructure SF: 00871333 00886497 00879676 00876691 00877368**
The Last Login date is now displayed in the Staff Login Report in the new Alma UI.
- **November 2020 Administration and Infrastructure SF: 851978**
In some cases, users with roles which can be configured with the parameter 'Can't edit restricted users', could not edit restricted users, even though the parameter was disabled. This was fixed.
- **November 2020 Administration and Infrastructure SF: 875966**
In some cases the anonymization process failed to update the user constraint, causing certain Primary IDs to be unusable for new users. This was fixed.
- **November 2020 Administration and Infrastructure SF: 880607**
Letter's channel was changed in UI to SUBMISSION, and it is now possible to change its activation status (it was not possible before).
- **November 2020 Administration and Infrastructure SF: 871014**
Cloud changes for https affected SOAP Label Printing web services. This was fixed and the Label Printing web service is now working.
- **November 2020 Administration and Infrastructure SF: 00511400 00493662 00509367**
New Alma layout - The Change Organization Unit text was cut off when resizing the window. This was fixed, and now switching scopes will be done with the configuration drop-down.
- **November 2020 Administration and Infrastructure SF: 00881651 00867090 00881394 00876036 00875466 00857785**
New Alma layout - The list of 'Export to Excel' options was partially hidden behind the Summary panel. This was fixed.
- **November 2020 Administration and Infrastructure SF: 866756**
New Alma Layout - Saving changes to a Library Circulation Desk in Configuration was changing the library being configured. This was fixed.
- **November 2020 Administration and Infrastructure SF: 867262**
New Alma layout - Launching 'Design Analytics' from the Recent Pages Widget opened Analytics in the same tab and caused an authentication loop. This was fixed.
- **November 2020 Administration and Infrastructure SF: 00875656 00867933 00876631**
New Alma layout - Discovery Configuration menu disappeared for Summon over Alma customers. This was fixed.
- **November 2020 Administration and Infrastructure SF: 00866986 00877877 00866780**

New Alma layout - the Quick Links Menu did not retain the pinned favorites after logging out. This was fixed.

- **November 2020 Administration and Infrastructure SF: 00869326 00871292**
New Alma layout - Acquisitions Quick Links displayed 'Review' and 'Approve' several times, without indication to which function each pertained. This was fixed. Menu groups were added for duplicate sub-menus and the duplicate sub-menus that exist on the same menu were renamed.
- **November 2020 Administration and Infrastructure SF: 869051**
New Alma layout - Accessing the last re-indexing Job via the **Help** menu led to 10077 Error. This was fixed.
- **November 2020 Administration and Infrastructure SF: 874186**
New Alma layout - Using the keyboard's Up and Down arrows to navigate recent searches in Repository Search moved two or more positions per use, instead of one. This was fixed.
- **November 2020 Administration and Infrastructure SF: 854796**
When editing translated letter labels and pressing the button "Cancel", the changed labels were saved anyway. This was fixed.
- **November 2020 Analytics SF: 817802**
In the **Digital Inventory** subject area, when adding the Rep Creation date field to a report, the measure fields of the report did not display the correct information. This was fixed.
- **November 2020 Analytics SF: 00865739 00874568 00864966**
Pivotable and other formatted reports do not export to Excel correctly in OAS. This was fixed by making a change to the configuration file.
- **November 2020 Analytics SF: 00879412 00866564**
CDI Newspapers was spelled incorrectly. This was fixed.
- **November 2020 Analytics SF: 850435**
The value of the **Fund Transactions > Fund Transaction Details > Related Records** field did not display the correct value, so the related record did not appear. This was corrected.
- **November 2020 Analytics SF: 00879803 00885301 00876252 00887501 00871485**
Analytics widgets are now working properly in NG.
- **November 2020 Analytics SF: 00875522 00884167 00856911 00874339**
The Analytics Usage Tracking job does not update the usage value. This was fixed.
- **November 2020 APIs SF: 785597**
The Owner field was not exported in the export PO XML file. This was fixed. The po_owner field contains the owning library code.
- **November 2020 APIs SF: 858100**
When using the scan-in API on a requested item, and 'Has hold shelf processing' was not selected for the Circulation Desk, the status was incorrectly changed to Hold Shelf Processing. This was fixed. The status now changes On Hold Shelf.
- **November 2020 APIs SF: 846241**
In the Update PO-Line API, the field expected_receipt_date was not supported. This was fixed.
- **November 2020 APIs SF: 873316**
In some rare cases, the Get PO line API was failing. This was fixed.
- **November 2020 APIs SF: 858795**
The Create-User API was ignoring the force_password_change field. This was fixed.
- **November 2020 Fulfillment SF: 634501**
When an item was ongoing for a digitization process, its status was not translated in the Get It tab. This was fixed.
- **November 2020 Fulfillment SF: 00743025 00714220**
Scanning in a fulfillment network item did not automatically print a hold shelf slip. This was fixed.
- **November 2020 Fulfillment SF: 00790612 00807507 00822748**
Performance improvements were applied for scanning in items. Additional improvements are planned for future releases.
- **November 2020 Fulfillment SF: 825657**
The Ful Resource Request Slip Letter was used for fulfillment network requests as on hold shelf slip instead of the Ful Hold Shelf Request Slip Letter. This was fixed.
- **November 2020 Fulfillment SF: 872211**

Previously, after printing a hold slip, the operator could press the enter key to validate the pop up window. But in the new interface, a mouse click was required. This was fixed. You can now press enter to validate the pop up window.

- **November 2020 Fulfillment SF: 00791142 00806255**
To improve performance, optimizations were added for the reading rooms desks and active hold shelf pages.
- **November 2020 Fulfillment – Course Reserves SF: 00723632 00865812 00730655 00823338 00634201**
Previously, when a brief citation was created in a reading list, the 'Suppress from Discovery' checkbox did not really create a suppressed item. This was fixed.
- **November 2020 Fulfillment – Course Reserves SF: 868212**
When we created the digitization request, it did not use the total chapter for copyright calculation. This was fixed.
- **November 2020 Fulfillment – Course Reserves SF: 00853071 00885370 00873180**
Previously, when the 'Course Restricted' checkbox did not appear in the created physical item page, the 'Personal Copy' did not appear as well. This was fixed.
- **November 2020 Fulfillment – Course Reserves SF: 872292**
The system allowed a reading list to be associated with the same course multiple times. This was fixed.
- **November 2020 Fulfillment - Resource Sharing SF: 00744934 00710318 00787740**
Previously, the Borrowing Request Task List showed pickup locations but ignored preferred pickup locations of AFN requests. This was added.
- **November 2020 Fulfillment - Resource Sharing SF: 800533**
In some cases, the availability check indicator in Primo for Resource Sharing requests was incorrectly indicating an available item although it was held by the local institution only. This was fixed. The indicator is now aligned with the resource locate results.
- **November 2020 Fulfillment - Resource Sharing SF: 812078**
Both journal and monograph requests are now handled by Alma when an OpenReceipt is received from Netpunkt.
- **November 2020 Resource Management SF: 807383**
Sort routine option did not appear for the Circulation Desk Operation rule. This was fixed.
- **November 2020 Resource Management SF: 808566**
In some cases in the Metadata Editor, when saving holdings, the performance was slow. This was fixed by performance improvement.
- **November 2020 Resource Management SF: 839951**
Different holdings records were merged into one when item locations were edited using the item editor. This was fixed.
- **November 2020 Resource Management SF: 874638**
RFID integration with 3M system returned an error when using Library or Location ID which are not numeric. This was fixed. Now alphanumeric codes are supported as well.
- **November 2020 Resource Management SF: 801236**
Different number of portfolios was shown in collections portfolio list in result list and in edit collection> additional tab. This was fixed.
- **November 2020 Resource Management SF: 00823224 00838829 00885218 00856194 00850177 00882481 00852998**
In some cases, the COUNTER Platform field in the electronic collection editor and the portfolio editor did not return suggested values or accepted valid values. This was fixed.
- **November 2020 Resource Management SF: 00859874 00851041**
When CAS was the only user authentication configured to access digital viewers (from Fulfillment > Patron User Authentication), the login did not work properly. This was fixed.
- **November 2020 Resource Management SF: 855660**
When the Remove Indication of temporary location was selected, the Change Physical Items job did not change the record. That was fixed.
- **November 2020 Resource Management SF: 668820**
Search History was not properly displayed in Hebrew. This was fixed and other right-to-left improvements were done.
- **November 2020 Resource Management SF: 835726**
Normalization for the search of Persian alphabet characters and their respective Arabic alphabet characters was applied. The following normalizations were applied when indexing:
- Arabic letter KEHEH ك to Arabic Letter KAF ك

- Arabic letter GAF گ to Arabic letter KAF ك
- Arabic letter VEH ه to Arabic letter FEH ف
- Arabic letter JEH ج to Arabic letter ZAIN ز
- Arabic letter PEH پ to Arabic letter BEH ب
- Arabic letter TCHEH چ to Arabic letter JEEM ج
- Arabic letter QAF with three dots above ق to Arabic letter QAF ق
- **November 2020 Resource Management SF: 869902**
There were issues with Advanced search of Creation date for Physical items imported into Alma from a previous ILS. This was fixed.
- **November 2020 Resource Management SF: 808612**
Deleted records in itemized set counted towards the number of records in set. This was fixed. In addition, When running jobs on itemized sets of PO Lines or vendors, the counter in the message 'The selected set contains [X] members' was always zero. This was fixed.
- **November 2020 Resource Management SF: 850257**
Browsing by title with הא הידיעה returned results from 240 field. This was fixed.
- **November 2020 Resource Management SF: 864080**
For MARC21 records of type "Maps" (Leader pos. 06 = "e" or "f") and "Visual Materials" (Leader pos. 06 = "g", "k", "o", or "r"), the "Form of Item" field of the Analytics mms_display table was populated with the value of position 23 of field 008 instead of position 29. This was fixed. For this fix to take effect, full inventory indexing should be run.
- **November 2020 Resource Management SF: 493689**
Saving bib records with most of its heading linked in the MD Editor took about 8 seconds. The performance was improved.
- **November 2020 Resource Management SF: 660578**
Users were experiencing long response times when opening the new MD Editor. This was fixed.
- **November 2020 Resource Management SF: 00851829 00849182**
In the MD Editor, the cursor is not visible on pos 1 of the field. This was fixed.
- **November 2020 Resource Management SF: 843645**
New MD Editor: sorting by A-Z or Z-A when there were records with the same title or without title, clicking on such a record caused its position in the navigation panel to change. This was fixed.
- **November 2020 Resource Management SF: 854792**
Pushing records into new MD Editor after 200 records were pushed, the push appeared successful but the amount displayed in the new MDE was inaccurate. The success message was updated to 'The number of pushed records may include records that are already open in the MD Editor'.
- **November 2020 Resource Management SF: 00866316 00860892**
'Suppress from External Search' feature was added to the new MD Editor.
- **November 2020 Resource Management SF: 874256**
New Metadata Editor - Templates Display Configuration was out of order in Firefox. This was fixed.
- **November 2020 Resource Management SF: 00878715 00875152 00880729 00877176 00884274**
In the new Metadata Editor, the Field Information tab was not linking properly. This was fixed.
- **November 2020 Resource Management SF: 877127**
In the new Metadata Editor, some French translations were wrong. This was fixed. Corrections were uploaded for the November release.
- **November 2020 Resource Management SF: 00830093 00830066 00856116**
Users working in the new Metadata Editor were experiencing slow response and performance. This was fixed.
- **November 2020 Resource Management SF: 853630**
While working in Right-To-Left interface in the new MD Editor, the editor fields stayed Left-To-Right. This was fixed.
- **November 2020 Resource Management SF: 735719**
In the Metadata Editor, authority 130 and 430 2nd indicator (non-filing characters) were not considered during authority control. This was fixed. Re-indexing is required for this fix to take hold.
- **November 2020 Resource Management SF: 718851**
The order of subfields was changed by the PTC job. This was fixed by putting the \$\$9 after the subdivisions fields.
- **November 2020 Resource Management SF: 868832**

When an authority heading had subdivisions, the reference “See also” was displayed as created but did not work. This was fixed. MARC21 Authority - 'Corporate Name' index: additional subfields are indexed, as follows: field 110 (Heading - Corporate Name) - all subfields excluding numeric; field 410 (See From Tracing - Corporate Name) - subfields a-v, x-z, and 5; field 510 (See Also From Tracing - Corporate Name) - subfields a-v, x-z, 0 and 5. For this functionality to take effect, full inventory indexing should be run (with the 'Authorities' option selected in the upper part and 'Recreate Operational OPR' in the lower part).

- **November 2020 Resource Management SF: 840590**

The SBN selection in External Resources search was not remembered from session to session. This was fixed.

- **November 2020 Resource Management SF: 00815179 00759094 00816051**

When running import in Network Zone context with two duplicated records, the link id of the imported record was wrong. This was fixed.

- **November 2020 Resource Management SF: 807193**

OAI import completed with errors, but the error message was “Download 0 files from FTP server”. The message was fixed to reflect OAI.

- **November 2020 Resource Management SF: 857349**

OAI Import Profile was failing with the message 'FAILED: Unable to harvest record error upon testing'. This was fixed.

- **November 2020 Resource Management SF: 00870737 00863480**

Some standalone portfolios could not be updated via the import profile receiving YBP/GOBI full MARC records. This was fixed.

- **November 2020 Resource Management SF: 851821**

UNIMARC 615 \$n Subject Category Code was not a part of indexing. This was fixed. UNIMARC Bibliographic 615 \$n was added to Subject Category Code index.

- **November 2020 Resource Management SF: 790588**

Alma-SBN integration failed to contribute records for antiquarian cartography, graphics, written music with specific fields 1xx for these materials. This was fixed.

- **November 2020 Resource Management SF: 00853831 00852541**

Contribution into the central catalog when the Melinda (Aleph) record is newer than the Alma record > record was not merged, but an error was displayed instead. This was fixed.