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Alma 2020 Release Notes

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As many of you already know, Alma development periodically needs to take a "back seat," and maintenance, cloud infrastructure, and other important tasks need to be handled in order to ensure that Alma meets the highest standards of performance and high availability. The October 2020 release is devoted to such tasks.

We would also like to take this opportunity to update you on the following:

NERS Enhancements Update

The following NERS 2019 enhancements were developed and delivered:

- Enhancing security and management of API keys
- User profile - Add field for last active date
- Automate Borrowing Request Processes
- Option to not show related holdings locations
- Add Pop-Up Notice at Scan in Items
- Link resolver delivers physical holdings for wrong titles for PCI records
- Administration: Expand Repository Advanced Search Options
- Split role user manager in 2: the user manager and the patron manager
- Add ability to customize Purchase Request online form
- Portfolios in an electronic collection/package should inherit data displays from the collection's service

NERS 2020 - Final NERS Enhancement Requests for 2020 are:

- Provide the ability to identify broken links to electronic and digital resources
- Improve Repository Search functionality with free text options for MARC tags and subfields in Advanced Search
- Resource sharing: updates to due dates of borrowing request loans to be reflected in resource sharing and fulfillment

[Feedback](#)



Idea Exchange Statistics

- **292 Ideas** have already been **Completed**
- **69 Ideas** have the status **Planned**
- **20~ Ideas** are being considered and have the status **Under Review**.
- **700~** voters interacted with Alma on [Idea Exchange](#) in the last 30 days

Cloud Apps

Can you guess the most popular Cloud App – i.e. the Cloud App with the highest number of downloads?

The [HathiTrust Availability](#) Cloud App wins hands down! This Cloud App queries the HathiTrust API to look for availability for each displayed BIB record. A match is based on OCLC, ISBN, and ISSN numbers as cataloged in the record.

Want to know more about Cloud Apps? Check out the Cloud App [release blog](#) and the Cloud App [documentation](#).

Alma Education

Alma Webinars

Attendance Statistics for Alma webinars:

- Alma Product Webinars: 3966
- Best of Knowledge Days: 7925
- Best Practices for the Ex Libris Community During COVID-19: 1823

The top Three Most Attended:

- Alma & Primo Best Practices and Q&A in Light of COVID-19 – 911
- Using Alma Analytics to Perform Overlap Analysis & Deselection – 805
- Optimize and Streamline Alma Workflows – 754

Alma What's New Videos

There are now more than 1.65K subscribers to Alma's [What's New Videos](#)

19 [new videos](#) were posted in the first 8 months of 2020, with a total of 23,000~ views

And, the top 3 most viewed are:

- [New Alma Metadata Editor](#) – 6,984 views
- [Alma New Layout](#) – 3,772 views
- [Cloud Apps](#) – 1,236 views

GuideMe



Ex Libris' GuideMe has given additional support to Alma users in this time of increased need wherever they may be located, bringing just-in-time, step-by-step guidance on important workflows in Alma.

More than 20 GuideMe walkthroughs are currently available (depending on role and permissions) covering topics such as fiscal period management, normalizing bib records, and exporting and importing records for cleanup.

The top three walkthroughs, based on usage data are:

- **Rollover Ledgers** – the first step in the fiscal-period close process
- **Rollover PO Lines** – the second step in the fiscal-period close process
- **Rollover Resource Sharing Requests** – the final step in the fiscal-period close process

Read more about GuideMe on our [GuideMe blog](#) [here](#).

Community Zone Update

In collaboration with the Community Zone Management Group, it will not be possible to add or edit the following fields in the Community Zone by members of the community:

- 856 subfield u

- All 9xx fields excluding 906, 999 and 920

These fields will NOT be saved even if edited/added, as a new Normalization Rule, applicable only in the CZ, will prevent this.

A cleanup of these fields from Community Zone records will follow.

DARA

- DARA continues to grow and is widely used across all regions.
- 6628 recommendations have been implemented by 714 institutions
- The top 3 most popular recommendations are:
 - 50,000~ link local electronic collection to CZ
 - 45,000~ unavailable portfolios
 - 25,000~ link standalone portfolio to CZ

Statistical Trends Across All Institutions

Physical Loans – across all institutions

- 2020 started very strongly in regard to physical loans
 - with close to 5M transactions in January
 - dropping significantly from April to June with an average of 500,000 loans per month.
 - happily, we can now see a rising trend with 1.5M+ transactions for August

Digital Files – across all institutions

- Stats show a very sharp increase in the number of digital files
- We can see a significant jump from
 - 2.6M files in February
 - to 4.7M+ in March,
 - and 5.3M in August

Electronic Portfolios – across all institutions

- A very steady increase in the 1st 8 months of the year in the growth of electronic portfolios
 - Growing from 900,000~ in March,
 - To more than 1B in August

Electronic Collections – across all institutions

- A huge increase in the number of electronic collections
 - 340,000~ in March
 - 1.1M+ in June
 - 1.2M+ in August

Patron Requests – across all institutions

- Patron requests decreased sharply
 - from 1M+ in February to 150,000~ in April.
 - however, the situation has improved; August sees more than 600,000~ requests

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
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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
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

Instance	Will be implemented during
EU01	Completed
EU02	Completed
EU03	Completed
EU04	Completed
AP01	Completed
CA01	Completed
CN01	January 2021

Next Release Sneak Preview

[Click here](#) to view the next release sneak preview.

Main Features

Normalization of Community Zone - On Save

October 2020 Resource Management

In collaboration with the CZ Management Group, Ex Libris now prevents the following fields from being added or edited in the CZ by members of the community:

- 856 subfield u
- All 9xx fields **excluding** 906, 999 and 920

The fields are open for editing like any other Bib fields, however, edits to these fields are not saved. A Normalization Rule to the Community Zone (only) was added to prevent the saving of edits to these fields.

Cleanup of the above fields from the Community Zone will follow.

See [Saving Local Extension Fields to the Community Zone](#).

Additional Enhancements

No additional enhancements match your criteria.

Resolved Issues

- October 2020 Acquisitions SF: 00681407 00864770
It was not possible to schedule the PO Import approvals job. This was fixed.

