



Alma September 2020 Release Notes

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Alma September 2020 Make the Most

Make the Most of September's Release

Action Items

- ☐ [New Metadata Editor](#) - Ex Libris announces the rollout of the new Metadata Editor. In the current release, the new Metadata Editor contains the Records Management core functionality (the functionality available in the original Metadata Editor plus new features). Template and Rule management will be rolled out in the upcoming releases, giving users enough time to adjust to the changes. Starting from the September release, Alma users can switch back and forth between the new and the original Metadata Editors.
- ☐ [New Layout Enhancements](#) - Continuing the rollout of the new Alma layout, the new layout is now available for Alma users. Starting from the August release, Alma Administrators can turn the new functionality on (Opt-in). In September release, users who were opted in can switch between the current and the new layout as required.
- ☐ [New Auxiliary Digital Usage Type](#) - A new Auxiliary Digital Usage Type enables institutions to differentiate between full online availability and files which are auxiliary to other resource types, such as a digital table-of-contents for a physical resource. This content is available in Primo but not indexed as online availability.

Upcoming Issues to Note

RapidILL Integration

Alma and Rapid ILL now support a fully integrated end to end process on both the borrower and lender side. A library that is using Alma and Rapid ILL can experience the full workflow of requesting and receiving as a borrower, or shipping as a lender, using only Alma screens.

As borrower:

- The patron can submit a request through Primo, or the library can place a request via Alma
- The request is automatically forwarded to Rapid ILL for processing the borrower's request and for finding a lending request. Rapid will automatically reject this action if there is no available resource in Rapid that can fulfill the request
- When the resource is received in Rapid, the Alma request is automatically completed, and an email to the patron with a link to the resource is automatically sent by Alma
 - Alma can be configured to require manual forwarding of the email to the patron
- The received resource remains available to the staff use to view or forward again to the patron

As lender:

- When a lending request is created in Rapid it is automatically created in Alma as well.
- The staff can use the Alma Manage Fulfillment Options action to access the requested electronic resource or to request digitization of the physical resource
- The Ship Digitally action can be used to upload the digital file to Alma. Alma will automatically forward the document to RapidX, resulting in the request being fulfilled in Rapid and in Alma

Note

Contact Ex Libris support for this activation.

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
EU00, EU01, EU02	October 11	October 18
NA04, NA05, NA06, 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
EU02	Completed
EU03	Completed
EU04	Completed
AP01	Completed
CA01	Completed
CN01	January 2021

Alma September 2020 Main Stories

New Alma Layout Enhancements

September 2020 Administration and Infrastructure

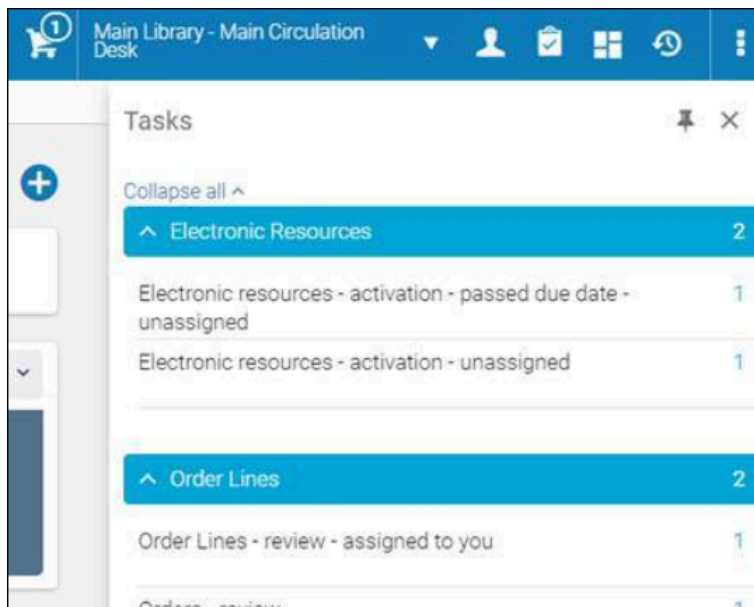
Continuing the rollout of the [new Alma layout](#), the new layout is now available for Alma users. Starting from the [August release](#), Alma Administrators can turn the new functionality on (Opt-in). In September release, users who were opted in can switch between the current and the new layout as they please. (For instructions, see [Turning On the New Layout for Users](#).) In the November release, the new layout will become the default.

Note

Ex Libris recommends that all users gain experience with the new Alma layout before the new layout becomes the default, which was moved from September 2020 release to November release.

The layout enhancements introduced in the September release cover the following areas:

- Configuration Area:
 - A new home page for the Configuration area was introduced, to better emphasize the switch to the Configuration area.
 - The navigation in the configuration area was made clearer. The Cancel/Back button workflow was emphasized for better clarity.
 - 'Switching a library' dropdown was visually emphasized and contains a few functional improvements as well.
- Menu Improvements:
 - The way tab navigation works with the menu was improved.
 - We are working toward having the menu accessible according to WCAG 2.1 standard.
 - The menu supports right-to-left alignment.
- Action Icons:
 - The Task list was changed to a panel that can be collapsed



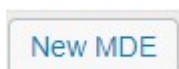
New Metadata Editor Enabled

September 2020 Resource Management

Ex Libris announces the rollout of the new Metadata Editor. In the current release, the new Metadata Editor contains the Records Management core functionality (the functionality available in the original Metadata Editor plus new features). Template and Rule management will be rolled out in the upcoming releases (see [Rollout Plan](#)), giving users enough time to adjust to the changes. Starting from the September release, Alma users can switch back and forth between the new and the original Metadata Editors.

To switch:

- to the new Metadata Editor, select



on the left-hand side of the top toolbar of the Editor.

- back to the original Metadata Editor, select



Old Editor on the left-hand side of the top toolbar of the Editor.

Note

Ex Libris recommends that all relevant users start familiarizing themselves with the new Metadata Editor prior to its Go-Live, which is planned to take place with the deployment of January 2021 release.

See [New Metadata Editor Functionality](#).

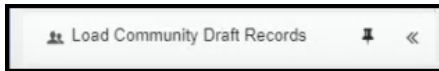
New Metadata Editor - Loading Records from Community Zone

September 2020 Resource Management

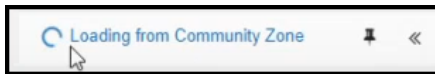
In the new Metadata Editor, this is how you can load records from the Community Zone.

To load draft records from the Community Zone:

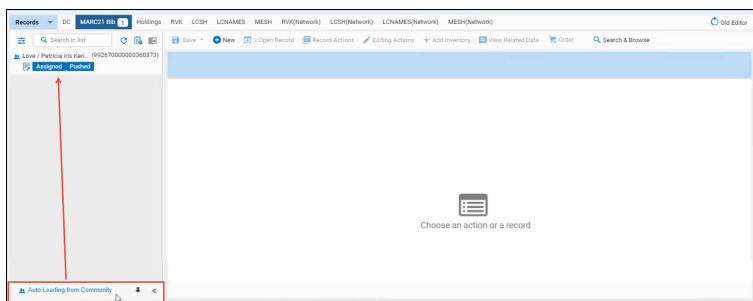
- To check if there are draft records in the Community Zone waiting to be edited, select the **Load Community Zone Records** button at the bottom of the navigation pane.



- Loading the records might take a few moments, at which time the button changes its text to **Loading from Community Zone** and is not clickable.



- Once records have been loaded:
 - Records loaded from the Community Zone are displayed in the records list. The button changes to **Auto-Loading from Community Zone** and is not clickable.



- If there were no records to load (or after the last community record was released from the list), the button returns to its initial state **Load Community Zone Records**, enabling you to come back at a later time and try again.

See [Load Community Draft Records](#).

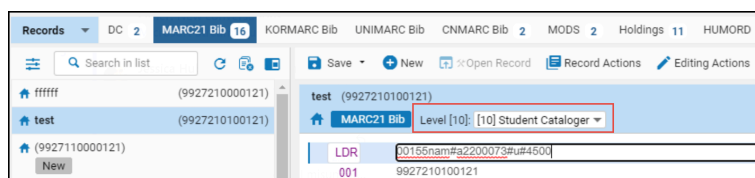
New Metadata Editor - Editing Cataloger Level Enhancements

September 2020 Resource Management

In the new Metadata Editor, enhancements were made to editing cataloger levels that allow you to access easily the cataloger level and change it.

To edit cataloging level in the MD Editor when cataloging permission levels have been implemented:

- Open a bibliographic record in the MD Editor (**Resources > Cataloging > Open Metadata Editor**).
The MD Editor displays the current cataloging level. Any user assigned this or higher cataloging level can edit the record.
In addition, you can change the cataloging level for the record. You can set any cataloging level equal to or below your cataloging level as the cataloging level for the record.



Cataloging Permission Levels in the MD Editor

- Select a new cataloging level for the record from the dropdown list.

3. Select **Save**. The current cataloging level of the record is updated to reflect your change.

For your convenience, you can specify the default cataloging level to be displayed in the dropdown, as follows:

To:	Do:
To always display in the dropdown your cataloging permissions level.	Set the use_record_cataloging_level_by_default customer parameter to False (default).
To always display in the dropdown the record's current cataloging level.	Set the use_record_cataloging_level_by_default customer parameter to True. When this is set to True, an overt action on your part is required to change the cataloging level to a different cataloging level. If you are making record changes that do not affect the cataloging level, you may prefer this option. See use_record_cataloging_level_by_default for more information.
To always display in the dropdown the cataloging level you selected most recently for a record.	Set the cataloging_level_user_preferences customer parameter to True.

See [Cataloging Privileges](#).

New Metadata Editor - Catalog Set Actions

September 2020 Resource Management

In [August release](#), the **Sets** tab was added on the Metadata Editor toolbar. Clicking the tab displays the sets sent for cataloging by the Manage Sets page.

Now on this page you can release multiple records from a specific catalog set in a single action. You can reload all set members, including the new ones, and remove these that were excluded from the set. Previously, you could only release records from a catalog set one by one, which could be time-consuming.

Now when right-clicking on a catalog set, the following actions are available:

- Release set - releases all the records and removes the set
- Release displayed records - if you filtered out some records, releases only the visible records.
- Reload set - if changes were done on the bib records elsewhere in Alma, refreshes the records.

See [Working with Catalog Sets in the Metadata Editor](#) and [Managing Search Queries and Sets](#).

Activate Collection for Full Text in CDI Only

September 2020 Resource Management

If you have electronic collections in Alma that are not active but you would like to make the content of the collection marked as available in CDI, you can now do this using the **Add CDI-only text activation** option. This is relevant for electronic collections that are defined as **Full Text Linking in CDI: Link in record**. The collection level record is published to CDI in the zero title file with the effect that the collection is set to full text available and is discoverable in CDI

The **Add CDI-only text activation** option is available as an action in staff search results for each electronic collection. Each electronic collection can be toggled to either add or remove the CDI-only text activation. The option is also available as a check box on the CDI tab of the Electronic Collection Editor.

This is applicable to customers that are fully flexible and easy active.

See [Managing Electronic Resources](#).

Coverage Percentage of CDI Records

September 2020 Resource Management

Items that are available for CDI now indicate the coverage percentage of the records in CDI. This indicator also includes the last date of calculation for this statistic. This information only displays if the coverage percentage has been calculated. If the date is not populated, it will not be displayed.

Check Version of a Central Catalog Bibliographic Record

September 2020 Resource Management

In July 2020 Alma release, the ability was introduced to reload on demand the most recent version of the Bib record that was loaded previously from the Central Catalog (see [Reload Bibliographic Records from Central Catalog On Demand](#)). With the September release, bibliographic records in Central Cataloging (Aleph, SBN, CALIS, etc.) will be loaded automatically from the central catalog by the Metadata Editor.

To support users, in this release Alma automatically loads the most recent version of Bib records when opening a Central Catalog record for editing. To enable this, set the reload_record_from_central_catalog customer parameter to True (the default is False).

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

Create Itemized Set from File: Support for matching ISBNs on 020 and 022 subfield a

September 2020 Resource Management

Now, when creating an itemized set from ISBNs or ISSNs, you can select whether to match on both valid as well as canceled / invalid fields (020/022 \$a and \$z) (as before) or to match only on valid fields (020/022 \$a).

In the existing functionality, when a set is created from an input file and the input file has ISBN or ISSN as the column header, the identifiers in the input file are also compared to the identifiers which are "Canceled/invalid" (020 z and 022 z). Now you can indicate in the input file's header column that you want to create an itemized set based on the valid ISBNs and ISSNs.

To do that, indicate one of the following header types in the input file's column header:

Header Types		
Content Type	Header	ID Prefix
All Titles	ISSN_A ISBN_A	99

See [Creating Itemized Sets](#).

General Publishing Profile - Option to Include Authority Headings

September 2020 Resource Management

The General Publishing profile now supports the ability to enrich the published data with Authority headings. Any update to

the selected authority headings triggers re-publishing of the data. The functionality of updating a record when preferred terms are updated will keep its current functionality.

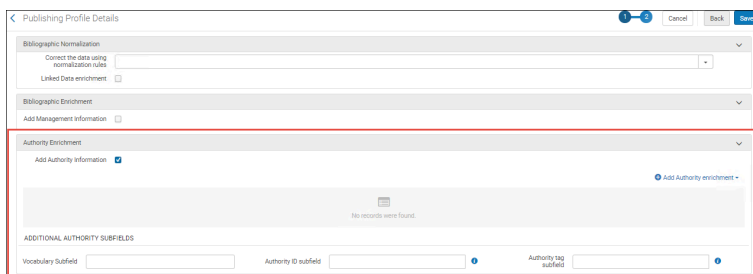
This is useful, for example, when the name 'Mark Twain' is embedded within a bib record and library would like to publish both 'Mark Twain' and the non-preferred term 'Samuel Clemens'.

The ability to enrich published data with Authority headings is disabled by default. If your institution would like to activate this behavior, please contact Ex Libris customer support.

Note

Institutions interested in this feature will have to re-publish the data to apply the new policy.

To support this development, the Authority Enrichment section was added to the **General Publishing Profile**. Here you can set up your authority enrichment scheme.

The screenshot shows the 'Publishing Profile Details' form. It has a top navigation bar with 'Cancel', 'Back', and 'Save' buttons. The form is divided into several sections: 'Bibliographic Normalization' (with a dropdown menu), 'Bibliographic Enrichment' (with a dropdown menu), and 'Authority Enrichment' (which is highlighted with a red box). The 'Authority Enrichment' section contains a checkbox for 'Add Authority Information' and a button for 'Add Authority enrichment'. Below this, there is a message 'No records were found.' and a section for 'ADDITIONAL AUTHORITY SUBFIELDS' with three input fields: 'Vocabulary Subfield', 'Authority ID subfield', and 'Authority tag subfield'.

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

Moving Information between Electronic Portfolios

September 2020 Resource Management

Now you can move local administrative information, such as PO-line, license and notes details, between portfolios in different collections, even if these portfolios do not share bibliographic records. Previously, it was only possible if both portfolios shared bibliographic records. This is possible if the portfolios share any of the following:

- The same bibliographic record (the same MMS ID, as before)
- ProQuest Title ID (the 'bkey' - populated in the "Parser" parameter of the portfolio)
- ISSN
- e-ISSN
- ISBN
- e-ISBN

This enables moving portfolio details from a local electronic collection to a Community Zone-activated electronic collection and encourages customers to move a locally-managed electronic collection to a Community Zone-managed electronic collection.

In addition, now you can move the '**Public access model**' information between electronic portfolios. To support this, the checkbox "Move public access model" was added to the third step of the **Move electronic portfolio information** job wizard.

Run a Job - Enter Task Parameters

1 2 3 4 Cancel Back Next

Move electronic portfolio information

Target electronic collection * Select from a list

Move PO lines ☐

Move licenses ☐

Move public access model ☒

If destination already has a public access model

☒ Override ☐ Skip

Move notes ☐

Note

This functionality will be available as part of the September Release Update.

See [Running Manual Jobs on Defined Sets](#).

SRU Institution Zone Holding Lookup - Look Up Electronic Inventory Managed in the Network Zone

September 2020 Resource Management

In a consortia environment, electronic inventory can be managed on behalf of the members in the Network Zone. SRU Institution Zone holding lookup now includes electronic inventory that is managed in the Network Zone on behalf of the Institution Zone.

For this purpose, the SRU Server integration profile was enhanced with a new "Include results of e-resources managed in the Network" option, available in the Institution Zone-level only. When this option is activated, then when searching in the Institution Zone repository, not only the bibliographic data and inventory availability from the Institution Zone is retrieved, but also the Network's bibliographic data and inventory availability for the specific member (if exist).

SRU

Code SRU
Integration Type SRU Server

General Information Actions Contact Info

BIBLIOGRAPHIC OPTIONS

Active ☒

Add Availability ☒

Include results of e-resources managed in the Network ☒

Add Representations Information ☐

Add Remote Representations Information ☐

Apply Normalization ☐

Username

Password

Suppress record/s from external search ☐

The new option on the SRU Server integration profile (Institution Zone-level only)

In some consortia with many members, the configuration of SRU integration profile is done by the Network and is distributed to all members, in order to reduce redundancy of the configuration by all members. In such cases, when the SRU integration profile is marked as "Managed in Network", the new option "Include results of e-resources managed in the Network" is visible in the Network Zone institution as well. The network can determine whether this profile is distributed to

members with this option activated or disabled.

NZ SRU server

Code: NZ SRU
Integration Type: SRU Server
Managed in Network: Yes

General Information | Actions | Contact Info

BIBLIOGRAPHIC OPTIONS

Active ☒
Add Availability ☒
Enrich with Members Availability ☒
Include results of e-resources managed in the Network ☒
Add Representations Information ☐
Add Remote Representations Information ☐
Apply Normalization ☐
Username:
Password:
Suppress record/s from external search ☐

SRU integration profile managed in the Network

Any member using this profile can decide to opt out and manage the profile locally by editing the Network configuration:

Name	Code	Description	Integration Type	Managed in Network	Updated By	Status Date
NZ SRU server	NZ SRU	-	SRU Server	✓	Network	15/07/2020

Edit
Job History
Unlink from Network

Opting out by a Network member

See [SRU/SRW Search](#).

New Auxiliary Digital Usage Type

September 2020 Digital Resource Management

You can now mark digital representations with the **Auxiliary** usage type. This is primarily used when the digital file is a table of contents for the other representations and so should be excluded from the representation delivery services. It will still appear in the Quick Access section of Primo's full record display.

Representation Details

Remote ☐

☒ Active ☐ Inactive

Usage Type *

Label Master

Note Derivative

Public Note Auxiliary

Auxiliary Digital Usage Type

To support this development, the new **Hide service Representation Delivery Service with Usage Type = Auxiliary** display logic rule ([Configuration > Fulfillment > Discovery Interface Display Logic > Display Logic Rules](#)) was added.

Discovery Interface Display Logic

Back

Institution Rules

Remove Selected Deactivate Selected Activate Selected Add Rule

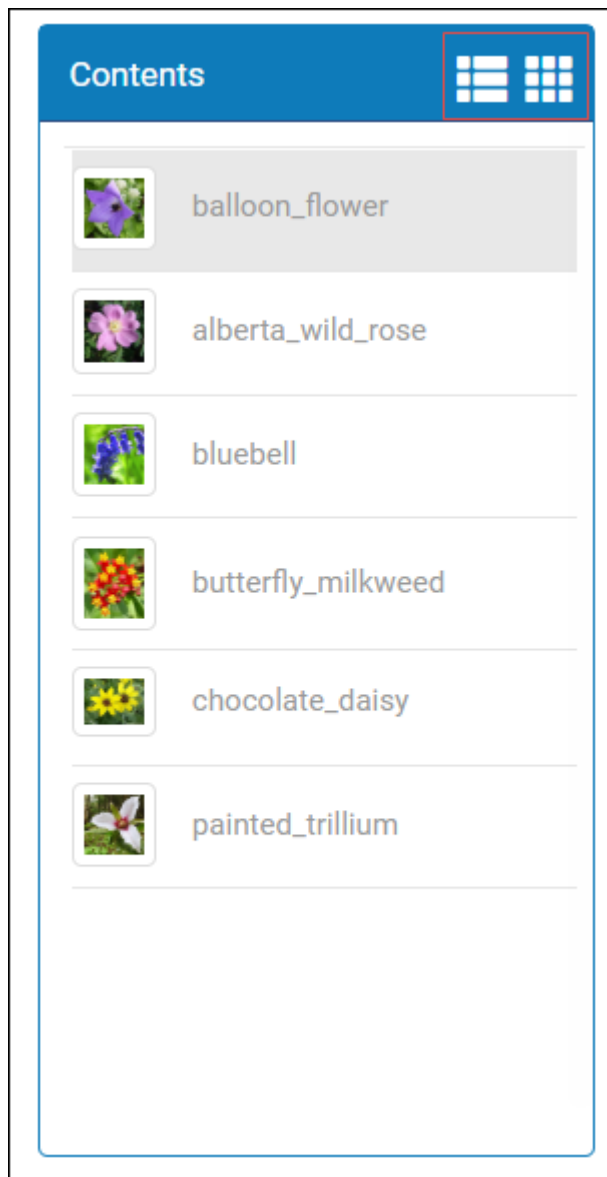
	Active	Rule Description
1	☒	Hide service Representation Quick Access
2	☒	Hide service Representation Quick Access with Obtrusive Copyrights (Alma representations only) = true
3	☒	Hide service Representation Delivery Service with Usage Type = Auxiliary

New Discovery Interface Display Logic Rule - Auxiliary

List View in the New Alma Viewer

September 2020 Digital Resource Management

You can now display the list of files of a representation in the new Alma Viewer in List View. Click the icons to toggle between List View and Thumbnail View.



List View

Vendor-Controlled PO Line Renewal

September 2020 Acquisitions

To save duplication of work, by simultaneously renewing the vendor subscription and the matching continuous PO line in Alma, you can enable a vendor to automatically update a PO line once the subscription is renewed on the vendor side. At this time, the option is available only for ProQuest renewable subscriptions. In Alma, a new check box is available on the Vendor Details page, **System Integration** tab, **Renew at Vendor System**. When enabling this option, you must supply the vendor with your API key to allow the vendor to perform the update to the relevant PO line. For ProQuest RenewMe, the API key is sent to e-renewals@proquest.com. To generate the API key, see the [Developer Network](#). When the check box is selected, a new button appears on the continuous Purchase Order Line Details page, **Renew at Vendor System**. Selecting this button opens a ProQuest RenewMe form, which includes the Alma PO line number. When the renewal process completes (in a separate browser tab), the Alma PO line is updated with the updated List Price, Renewal Date and Renewal Note.

This process can also be launched from the ProQuest RenewMe email notification sent to your institution periodically.

To enable this functionality, please contact ProQuest RenewMe customer support at: e-renewals@proquest.com.

See [Vendor Controlled Renewals](#).

Accrual accounting - Create Invoice from PO for One-Time Orders

September 2020 Acquisitions



Idea Exchange

Previously, institutions using accrual accounting could not create invoices from a PO. Now, these institutions have the option to create an invoice from a purchase order for one-time orders only.

Currency Exchange Rate Overrides

September 2020 Acquisitions



Idea Exchange

For institutions that purchase resources with a currency different than the default currency, and have agreements on specific exchange rates with their vendors, you can now define a fixed exchange rate in a new Explicit Exchange Rates code table (**Configuration Menu > Acquisitions > Invoices > Explicit Exchange Rates**). Any time a transaction is calculated, it will look for an exchange currency value here. For instance, if purchasing a resource in GBP, while your institution default currency is AUD, you can enter that 1 native currency (AUD) = 1.6 GBP and this value will be calculated when ever a transaction which requires a conversion between AUD and GBP will take place. The list of available currencies in the currency table is based on the currencies entered in the Currency Subset table (**Configuration Menu > Acquisitions > Currency Subset**). All currencies can be added to the new table with an explicit exchange rate except for the institution's default currency.

When a fund is encumbered, it is done for the converted amount.

- If an explicit exchange rate is defined on an invoice, that value is used. The new configuration table is not considered.
- Otherwise, if the fixed currency exists in the new table, the exchange rate is calculated from the value defined in the Explicit Exchange Rates table.
- If the currency is not defined in the new table, the daily exchange rates table is used to calculate the exchange rate (same existing functionality as today).

Example calculations

Setup:

- Institution default currency is AUD.
- Explicit conversion rates are:
 - USD - 0.70 (1 AUD=0.70 USD)
 - GBP - 0.55 (1 AUD=0.55 GBP)
 - EUR - 0.60 (1 AUD=0.60 EUR)

- CAD - 0.95 (1 AUD=0.95 CAD)

Example 1

The PO line price is in USD

- PO line price - 25 USD
- Fund currency - AUD
- Calculation - 25 USD / 0.7 = 35.71 AUD

Example 2

The PO line price is in USD. The fund currency is in ILS. In this case, the previous functionality performs the conversion from AUD to ILS.

- PO line price - 25 USD
- Fund Currency - ILS
- Calculation - 25 USD / 0.7 = 35.71 AUD. Because there is no ILS in the table rates, the 35.71 AUD is then converted to ILS at the rate of 1 ILS = 0.42 AUD, so 35.71 AUD / 0.42 = 85.02 ILS

The same calculation is performed in the Recalculate Exchange Rate job.

To enable this feature, you must set **currency_exchange_use_explicit_ratio** to **true** ([Configuration menu > Acquisitions > Other Settings](#)).

Note

This functionality will not be supported for invoices created via API. It will be added in a future release.

See [Configuring Explicit Exchange Rates](#).

RFID Multi-Scan Function

September 2020 Fulfillment



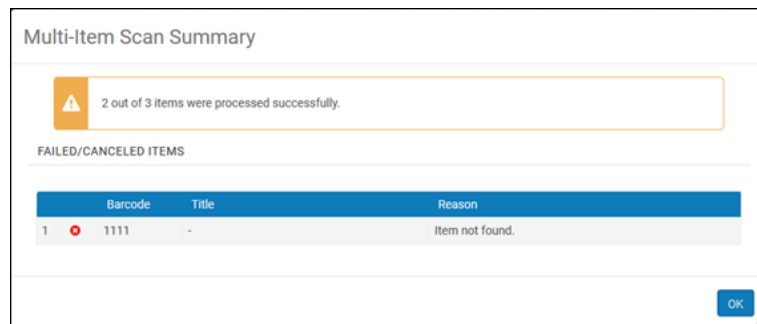
Idea Exchange

You can now configure your RFID reader to scan more than one item at a time. When the new check box on the RFID integration profile, **Handle Multiple Items**, is selected, the integration profile will accept multiple items on the RFID reader.

Once it is enabled, RFID can process the scans, either a single item, or multiple item as follows:

When the RFID button is pressed, the items on the RFID pad will be processed. When processing is complete, a summary confirmation popup will appear, detailing how many items were handled successfully, and presenting any alerts that came up during the scan. If all items are successfully processed, a success message is displayed. If an item requires action, the process is paused until you select **Confirm** or **Cancel**. Selecting **Cancel** only stops processing for the specific item. When

multi-scan processing is completed, a summary of the processing is provided. Items that require an action appear under Failed/Canceled Items. Items that do not need action appear under Items Requiring Attention.



The image shows a 'Multi-Item Scan Summary' dialog box. At the top, it says '2 out of 3 items were processed successfully.' Below this is a section titled 'FAILED/CANCELED ITEMS' containing a table with one row of failed data. The table has columns for 'Barcode', 'Title', and 'Reason'. The row shows barcode '1111', an empty title, and the reason 'item not found.' There is an 'OK' button at the bottom right.

Barcode	Title	Reason
1 1111	-	item not found.

Multi-scan Summary

You can use the RFID button on the following pages when there is either a single item or multiple items on the RFID pad:

- Scan in items
- Scan in items > change item information - On this tab, multiple items can be processed as stated above with the exception of the following circumstances;
 - When a new barcode is created.
 - When the RFID integration profile is configured to update items and **Update RFID** is selected on the tab.
- Manage patron services > Loans tab
- Manage patron services > Returns tab
- Return Items

For Bibliotheca, this is only supported when using staffConnect Link (using the Other type in the integration profile) or D-Tech. For additional assistance with StaffConnect link, contact support-ch@bibliotheca.com. For a list of supported RFID vendors, see [Alma - RFID Integration](#) on the Developer Network.

The multi-scan function applies only to reading, not updating. Additionally, please note the circumstances on the Scan In Items Change Information tab where multi-scan is not supported.

See [RFID Support](#).

Lender request Manage Fulfillment Option

September 2020 Fulfillment

The Manage Fulfillment Options action can now link directly to the article. If the lending request is for an electronically owned resource and has enough information to create a link to the article (e.g. publication date and pages). This depends on the electronic resource vendor's platform supporting of article level linking.

See [Managing Fulfillment Options](#).

Merge Records and Combine Inventory Job Enhancements

September 2020 Administration and Infrastructure

Multiple "Merge Records and Combine Inventory" instances can now run simultaneously if each has a separate input file with different record groups. In addition, the performance of this job is improved.

Support for Authentication Forcing in SAML Authentication

September 2020 Administration and Infrastructure

Now the SAML authentication of Alma supports authentication forcing when Alma authenticates users via SAML. Typically, when Alma authenticates users via SAML, it does so directly through the institutional IDP, thus providing end users with an SSO experience. As such, SAML-2 ForceAuthN was previously not supported by Alma. For more information on SAML ForceAuthN, see [here](#).

If you want to force authentication when Alma authenticates users via SAML, select the ForceAuthN checkbox in the SAML Integration Profile (**Alma Configuration > General > External System > Integration Profiles**).

The screenshot shows the 'Integration Profile' configuration page in Alma. It has tabs for 'General Information', 'Actions', and 'Contact Info'. Under 'SAML DEFINITIONS', there are options for 'Metadata upload method' (Metadata link, Metadata upload) and 'Upload SAML metadata file'. The 'Default SAML profile' is set to 'ForceAuthN', which is highlighted with a red box. There is also a 'Populate Profile' button and an 'IDP issuer' field with the URL 'https://prime10.com/edp/sbbiboleth'.

See [SAML-Based Single Sign-On/Sign-Off](#).

New Analytics Objects Subject Area

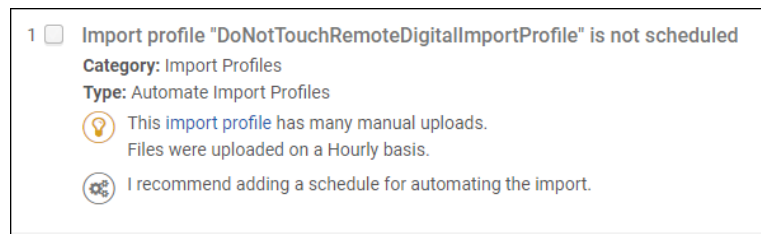
September 2020 Analytics

The new Alma Objects subject area is now available. You can use the fields of this subject area to create reports concerning analytics objects, such as scheduled reports and widgets. For more information, see [Analytics Objects](#).

DARA Recommendation to Automate MD Import Profiles

September 2020 DARA

DARA now identifies if you are manually running an MD import and recommends that you configure an MD import profile. Additionally, DARA can identify that you have an MD import profile configured without scheduling and that the vendor has an FTP server. DARA recommends that you configure the MD import profile to access the FTP server and to add scheduling to the profile.

The screenshot shows a DARA recommendation message. It starts with a number '1' and a checkbox. The text reads: 'Import profile "DoNotTouchRemoteDigitalImportProfile" is not scheduled'. Below this, it says 'Category: Import Profiles' and 'Type: Automate Import Profiles'. There are two icons: a lightbulb and a gear. The lightbulb icon is followed by the text: 'This import profile has many manual uploads. Files were uploaded on a Hourly basis.' The gear icon is followed by the text: 'I recommend adding a schedule for automating the import.'

Automate MD Import Profiles

For more information on DARA Recommendations, see [DARA – Data Analysis Recommendation Assistant.e](#)

View Changes Made by Jobs

September 2020 Fulfillment Course Reserves



NERS Enhancement (ID #6763)

In the **Recent Changes** tab of the Edit Reading List page in Alma, you can now view the changes made by certain jobs to the reading list or to citations within the reading list. In the past, only manual changes appeared in this tab.



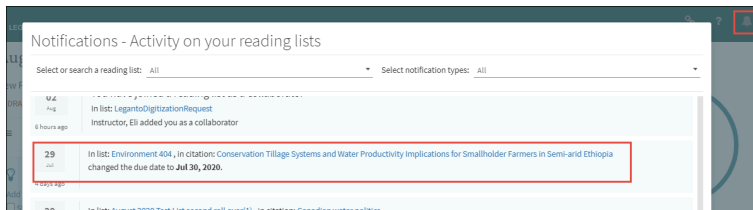
Created on	Type	User	Text
3 07/29/2020	The due date was updated in an item	Job ID:251412...	In list: Environment 404, in citation: Conservation Tillage Systems and Water Productivity Implications for Smallholder Farmers in Semi-arid Ethiopia. Job ID:251412330000121 changed the due date to Jul 30, 2020.

Changes made by job in recent changes tab

Changes resulting from the following jobs appear in the **Recent Changes** tab of an affected reading list:

- Reading List Citation Update Task
- Reading List Bulk Update
- Roll Over
- Activate/Deactivate Courses

If notifications are enabled, the changes also appear in the notifications dialog in Leganto, for students and instructors.



Select or search a reading list:	Select notification types:
All	All
29 Jul	In list: Environment 404, in citation: Conservation Tillage Systems and Water Productivity Implications for Smallholder Farmers in Semi-arid Ethiopia changed the due date to Jul 30, 2020.

Changes made by job in Leganto notifications

If email notifications are configured, the student/instructor also receive notifications via email.

APIs for Course Enrollment

September 2020 Fulfillment Course Reserves

Three new APIs have been added. These enable viewing enrolled users in a course, enrolling users in a course, and un-enrolling users from a course.

- Endpoint for "View Enrolled users in course" API:

```
GET /almaws/v1/courses/{course_id}/users
```

The response is a list of students enrolled in this course.

- Endpoint for "Enroll users to course":

```
POST /almaws/v1/courses/{course_id}?op=enroll_user&user_ids=id1, id2,...
```

The parameters entered are:

- op - the only supported value is enroll_user
- user_ids: a list of 1 or more Alma user IDs separated by a comma
- Endpoint for "Un-enroll users from course" API:

```
DELETE /almaws/v1/courses/{course_id}/users/{user_id}
```

For more information on these APIs, see the [Developers Network](#).

Search for Citations by Keyword

September 2020 Fulfillment Course Reserves



NERS Enhancement (ID #6805)

For simple Alma searches only, the **Keyword** option has been added to Citation searches to allow staff to search for specified keywords in citations' metadata (such as Author, MMS ID, Title, and so forth). When selecting the **Citations** type of search, **Keyword** is now the default selection. For more information, see [Searching in Alma](#).

The screenshot displays the Alma search interface. At the top, a search bar shows 'Citations' selected as the search type and 'Keyword' as the search criteria. A dropdown menu is open, listing various search criteria: Keyword, Title, Citation ID, Course Code, Course Name, Creator, ISBN, ISSN, Keyword (highlighted with a red box), MMS Id, Reading List Name, and Title. The background shows facets for Course Status (Active (101), Inactive (47)), Processing Department (Main Library Cour..., Biology Course Res, + More (2)), List Status (Processing (64), Complete (84), + More (3)), and List Assigned to. Search results for 'Ancient Egypt' are visible, including a list of books and a 'Section Name: Ancient Egypt'.

Search Citation Lists by Keyword

Note

- Citation searches by keyword do not support the use of Boolean operators (such as **AND** or **OR**), and if these operators are specified, they will be treated as keywords.
 - When special characters (such as hyphen, dash, slash, and so forth) are specified as search terms, the search will return results that both include and exclude the special characters.
-

Alma September 2020 Additional Enhancements

- **September 2020 Fulfillment**

When a loan is not renewed because the patron is expiring, the reason is now reflected in the report as "Patron card will expire."

- **September 2020 Analytics**

The **Only P** and **Only E** tabs were added to the Title Overlap Analysis dashboard. These tabs display reports of records that have only one type of inventory and do not perform an overlap analysis. Additionally, the **Overlap Any Inventory** tab was added that displays reports of records that have any overlap between physical, digital, or electronic items.

- **September 2020 Analytics**

An out-of-the-box dashboard and reports are now available for the API Usage subject area. For more information, see [Out-of-the-Box Reports](#).

- **September 2020 Analytics**

The following fields were added to the **Portfolio** and **Electronic Collection** dimensions of the E-Inventory subject area and to the **Bibliographic Details** folder for all subject areas in which it appears:

- Managed by Provider – indicates if the electronic resource is managed by the provider
- Provider Name – the name of the provider

- **September 2020 Analytics**

The following new options were added to the **Find Overlap By** drop-down list in the **Title level overlap analysis** dashboard by which you can determine the overlap:

- ISBN single (normalized)
- ISSN single (normalized)
- OCLC Control Number single (035a)

- **September 2020 APIs**

You can now get the list of users that were not successfully updated when the integration profile of type **Users** was run via the API. For more information, see the [Developer Network](#).

- **September 2020 APIs**

All portfolios activated from the Community Zone through the PO line API are not available.

- **September 2020 APIs**

A new field, last_patron_activity_date, is now available in the GET User API.

- **September 2020 Fulfillment Course Reserves**

A flag has been added to control whether the requester note in the purchase request form is auto-generated from the course information. This flag resides in the Other Settings table, found in **Fulfillment Configuration > General > Other Settings**. The requester note contains information about the course, instructor, number of copies, and number of participants and is pulled to PO lines and orders. For more information, see [Purchase Requests](#).

75	requester_note_auto_generate	fulfillment	false	For the Purchase Request form, this d
----	------------------------------	-------------	-------	---------------------------------------

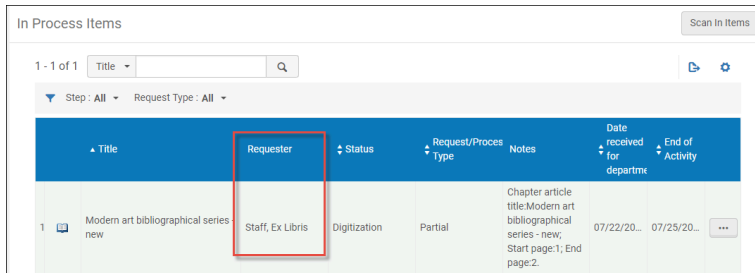
Note

This flag is set to "false" by default. To enable the auto-generation of the requester note, you must set the flag to

"true".

- **September 2020 Fulfillment Course Reserves**

When an instructor makes a digitization copyright request in Leganto, their name now appears in the **Requester** column of the In Process Items table in Alma.

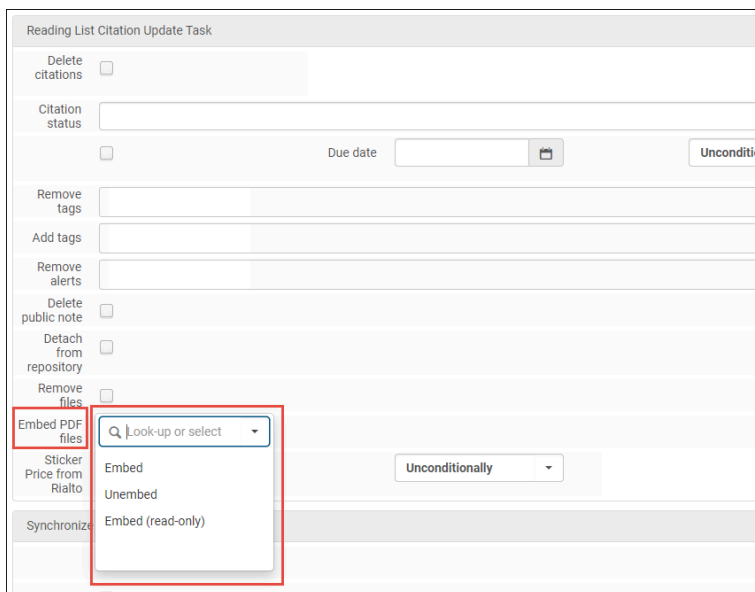


Title	Requester	Status	Request/Process Type	Notes	Date received for department	End of Activity
1 - 1 of 1 Modern art bibliographical series new	Staff, Ex Libris	Digitization	Partial	Chapter article title: Modern art bibliographical series - new; Start page: 1; End page: 2	07/22/20...	07/25/20...

Requester for digitization copyright request

- **September 2020 Fulfillment Course Reserves**

In the Reading List Citation Update job, you can now select to embed or unembed the PDF files attached to the citations. You can also select to embed the PDF files in read-only mode, such that they cannot be downloaded. For more information on running manual jobs, see [Running Manual Jobs on Defined Sets](#)



Reading List Citation Update Task

Delete citations ☐

Citation status

☐ Due date

Remove tags

Add tags

Remove alerts

Delete public note ☐

Detach from repository ☐

Remove files ☐

Embed PDF files ☒

Sticker Price from Rialto

Synchronize

Unconditionally

Embedding options in Reading List Citation Update job

- **September 2020 Fulfillment Course Reserves**

Now, when editing the Copyright Attributes of a citation, if you enter a page range in the **Required Pages** fields and the **Resource Total Pages** field has no value, then you must enter a value in the **Resource Total Pages** field. If you do not enter a page range in the **Required Pages** fields, the **Resource Total Pages** field can remain empty.

The screenshot shows the 'Copyright Attributes' tab in a software interface. Fields include 'Copyright Status' (Not Determined), 'Volume' (64), 'Number of Students' (0), 'Number of Copies for Staff', 'Required Chapters', 'Required Pages' (From 528 To 529), 'Copyright Auditing Required' (checked), 'Issue' (627), 'Number of Copies for Students', 'Resource Total Pages' (2), and 'Total Chapters Count'.

Resource Total Pages field mandatory

- **September 2020 Fulfillment Course Reserves**

To support cases when multiple courses use the same reading list, the **Activate/Deactivate Courses** job (**Configuration Menu > Fulfillment > Fulfillment Jobs Configuration**) is performed on the reading list as follows:

- **On activation** – The specified action is performed only when the first course becomes active.
- **On deactivation** – The specified action is performed only when the last course becomes inactive.

The screenshot shows the 'Activate/Deactivate Courses' configuration window. It includes a 'Status' section with 'Active' selected, a 'Schedule' dropdown set to 'Every day at 03:00', and two main sections: 'On activation' and 'On deactivation'. 'On activation' has 'Reading list status' set to 'Complete' and 'Reading list publication status' set to 'Anyone Full'. 'On deactivation' has 'Reading list status' set to 'Declined' and 'Reading list publication status' set to 'Draft'.

Activate/Deactivate Courses Job in Fulfillment

For more information, see [Configuring Fulfillment Jobs](#).

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

Reading Lists without citations are now displayed in the Course Reserves subject area.

Alma September 2020 Resolved Issues

- **September 2020 Acquisitions SF: 00830707 00847319 00822514**
The calculation of the disencumbrance was wrong in some cases. This was fixed.
- **September 2020 Acquisitions SF: 789519**
Purchase requests created from citations did not function correctly. This has been fixed.
- **September 2020 Administration and Infrastructure SF: 00839569 00565625**
In some cases, submitting any user details from Primo duplicated the user address. This was fixed.
- **September 2020 Administration and Infrastructure SF: 853225**
Creating linked users from REST API ignored the Linked Account Shared Fields configuration. This was fixed.
- **September 2020 Administration and Infrastructure SF: 851815**
When using the Populate Profile button when setting up a SAML integration profile, Alma sometimes picked the wrong certificate from the IdP metadata. The logic was refined to select a more appropriate certificate.
- **September 2020 Administration and Infrastructure SF: 00859965 00854281 00858195 00856900**
New Alma Layout: Clicking the Configuration Menu icon did not open the menu nor the screen. This was fixed.
- **September 2020 Administration and Infrastructure SF: 00855652 00862790 00869261 00868913 00859733 00855150 00864913 00859325 00855632 00868775 00870037 00867272 00860061 00864710 00855263 00866929 00859771 00868287 00867402 00869127 00868840 00861228 00867935 00864490 00865075**
New Alma Layout: The Configuration Discovery menu was the same as the normal Discovery menu. This was fixed.
- **September 2020 Administration and Infrastructure SF: 00856707 00857647 00856211 00865541**
New Alma Layout: The Layout and Menu settings could not be changed. This was fixed.
- **September 2020 Administration and Infrastructure SF: 00868351 00857195 00869587**
New Alma Layout: adding a user to the Allowed Emails table and hitting Save did not save the user to the table. This was fixed.
- **September 2020 Administration and Infrastructure SF: 00840623**
When hitting Back from Metadata Editor, the cursor jumped to the beginning of the records list, and not to the relevant record. This was fixed.
- **September 2020 Administration and Infrastructure SF: 00723862 00828709**
Embedding the Alma Universal Viewer did not work. This was fixed.
- **September 2020 Administration and Infrastructure SF: 816910**
If an image was very large, it was cut off in the New Alma Viewer. This was fixed.
- **September 2020 Administration and Infrastructure SF: 858644**
In the new Alma viewer, when using Internet Explorer (V.11), the descriptive metadata text sometimes overlaps itself depending on the zoom level. This was fixed..
- **September 2020 Analytics SF: 840943**
The Lending Requests analytics report did not run properly. This was fixed.
- **September 2020 Analytics SF: 475138**
In Course Reserves > Reading List Citations > Citation Origin, the value 'Brief' was displayed, which is not a possible value in Alma. This was changed to 'Manually added', which is the value displayed in Alma.
- **September 2020 Analytics SF: 808270**
When creating a report to display the number of PO lines by receiving date, multiple values were unexpectedly displayed. This was fixed.
- **September 2020 Analytics SF: 860999**
When the Receiving Date (Latest in POL) field was added to a report, it did not run properly. This was fixed.
- **September 2020 Analytics SF: 859562**
In the Fulfillment SA, when policy loan information was added to a report, it did not run properly. This was fixed.
- **September 2020 Analytics SF: 815272**
Alma failed to delete invoices with more than 1000 invoice lines. This was fixed.

- **September 2020 API SF: 825895**
The Run-a-job API returned an incorrect error message when the job could not run due to a block by an existing job. The error message now correctly states the reason for the error.
- **September 2020 API SF: 838651**
When retrieving bibliographic records via API, if a top level collection and its titles were added in DC, an error was displayed. This was fixed.
- **September 2020 API SF: 00846334 00844039**
When updating a PO line using API, a few date fields were sometimes moved by one day (expected_activation_date, subscription_from_date, subscription_to_date, renewal_date). This was fixed.
- **September 2020 API SF: 852683**
In some cases, the following APIs were returning the same records in the results: Get-portfolios, Get-Invoice-lines and Get-user-requests. This was fixed.
- **September 2020 API SF: 853072**
In the Create Request API, an incorrect error message was returned when the to/from pages fields had incorrect numbers. This was fixed.
- **September 2020 API SF: 859358**
When running the GET-Users API with an offset parameter larger than the total number of users, a misleading error message was returned. This was fixed. Now an empty list of users is returned.
- **September 2020 API SF: 842128**
In the Update Bib API, the suppress_from_external_search and suppress_from_publishing fields were not updating linked records. This was fixed.
- **September 2020 Digital Resource Management SF: 00835926 00858986 00859950 00830064**
When logged in to Primo and selecting a digital service, the new Alma Viewer opened, but the user was not logged in. This was fixed.
- **September 2020 Digital Resource Management SF: 842983**
If the representation ID was hidden in the List of Representations, the representation would not open properly. This was fixed.
- **September 2020 Digital Resource Management SF: 858645**
Images in files converted from docx to HTML did not display properly in the New Alma Viewer. This was fixed.
- **September 2020 Fulfillment SF: 00679794 00502218**
When scanning an item that had a Transit for Reshelving request in the Scan In items page, if the Automatically Print Slip field was set to Yes, the error message "Print Slip failed" appeared, although no slip should have been printed. This was fixed.
- **September 2020 Fulfillment SF: 00849307 00842073 00851175**
Translations of the request types were added to the Scan-In Interface and the Requests Queue pages.
- **September 2020 Fulfillment SF: 797108**
Previously, the renew status appeared on the notification to the patron with default text instead of the customized description. This was fixed.
- **September 2020 Fulfillment SF: 733582**
The request queue was displayed as empty for items in a temporary location. This was fixed.
- **September 2020 Fulfillment SF: 729409**
If the Activate/Deactivate Courses job got restarted in the middle of the job's run (e.g. due to a server restart) the job's report was sometimes incorrect. This was fixed.
- **September 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.
- **September 2020 Fulfillment SF: 00656957 00660691 00613937 00722446 00673680 00727744 00733968 00728339**
The Link Resolver match was incorrectly being made on the 022 \$y. This was fixed by a temporary customer parameter "temp_uresolver_ignore_022_subfield_y_for_matching". Once set to True, UResolver does not use 022 sub-field y for matching. The fix can be applied only after the full indexing process.
- **September 2020 Fulfillment – Course Reserves SF: 823643**
Some purchase requests could not be deleted. This has been fixed.

- **September 2020 Fulfillment – Course Reserves SF: 855004**
The code length of the Additional Reading List Statuses Code table has been increased from 20 to 50 characters.
- **September 2020 Fulfillment - Resource Sharing SF: 00627623 00648980 00810104 00821414**
The Other Details section of a Resource Sharing Borrowing Request sometimes showed information from an incorrect record. This was fixed.
- **September 2020 Fulfillment - Resource Sharing SF: 701342**
The available items in the drop-down menu for Primo resource requests were sorted by description inconsistently with the correct sorting done through the Get It tab, which displays the one-digit volume descriptions before the following volumes. This was fixed. The sorting is now the same in both actions.
- **September 2020 Fulfillment - Resource Sharing SF: 701755**
The XML of the Resource Sharing Shipping Slip Letter was missing the issue_level_description information. This was fixed.
- **September 2020 Fulfillment - Resource Sharing SF: 00699723 00758359**
In some cases, returning items generated an incorrect Resource Sharing Return Slip letter. This was fixed.
- **September 2020 Fulfillment - Resource Sharing SF: 844916**
The Rapid partner had no default external_id that caused the re-assignment of the Rota to have an active partner with no external_id. This was fixed.
- **September 2020 Fulfillment - Resource Sharing SF: 814254**
When a borrowing request is created for a non-periodical, the authorOfComponent element is now used to populate the Chapter author request field, and the titleOfComponent element is now used to populate the 'Chapter title' request field.
- **September 2020 Resource Management SF: 853876**
In the Change Holdings Information job, the normalization tasks dropdown was populated with Bibliographic normalization tasks. This was fixed.
- **September 2020 Resource Management SF: 864280**
Problem with Items/Holds linked to a specific Bib record. That was fixed.
- **September 2020 Resource Management SF: 00715159 00716908**
For some of contributed portfolios, URL or parser parameters disappeared in CZ. This was fixed.
- **September 2020 Resource Management SF: 728861**
In some cases, the Link Electronic Resources to CZ job was failing. This was fixed.
- **September 2020 Resource Management SF: 00856148 00848741 00856515 00848815**
In some cases, publishing to Primo did not reflect the relations – it did not create PLK fields. This was corrected.
- **September 2020 Resource Management SF: 726783**
The report of the Activate/Deactivate Courses job was enriched with more information.
- **September 2020 Resource Management SF: 854651**
The loading speed of the Repository Seach > Community tab was improved.
- **September 2020 Resource Management SF: 00800303 00571324**
When a network member institution edits a cached (linked) network record, the Cataloger Level is not updated in the local record. As a result, the record is not retrieved when the member institution searches for a cataloger level in the IZ tab. This has been fixed in three scenarios: (1) Update of a linked NZ record by a member institution; (2) Update of an NZ record (which has linked records in member institutions) by the NZ institution itself; (3) When a member institution clicks the “Link” button on an NZ record in the “Network” tab, thus linking the NZ record to the member for the first time.
- **September 2020 Resource Management SF: 853029**
Default value of 'content origin' filter in 'manage sets' page was not 'All' for all languages. This was fixed.
- **September 2020 Resource Management SF: 00806514 00855283 00869437 00830536 00857414 00858307 00847891 00859249 00855091 00852975 00802241 00865210 00849521 00821559 00829646 00812380 00823447 00863287**
Browse shelf listing showing results out of order, but when clicking Go again - the order corrects itself. This was fixed.
- **September 2020 Resource Management SF: 806369**
SRU used port 80 instead of port 443. This was fixed and now port 443 is used.
- **September 2020 Resource Management SF: 790902**
ISMN numbers beginning with M did not validate correctly. This was fixed.

- **September 2020 Resource Management SF: 00457470 00669321 00380400 00812026 00797958 00634818 00559471 00800600 00629754 00528741 00797802 00792078**
Text in angle brackets <> was not displayed in the Metadata Editor F3/ View and in Browse Bib headings. This was fixed.
- **September 2020 Resource Management SF: 64988**
When adding a new field in the Metadata Editor, and entering the field data and both two indicators data, sometimes the data was deleted and the cursor went back to the blank first indicator. This was fixed.
- **September 2020 Resource Management SF: 00844094 00617176**
In the first line of any field, diacritics did not display in the Metadata Editor. This was fixed.
- **September 2020 Resource Management SF: 756231**
ISMN validation: A warning message did not display when ISMN appeared in 12 digits, although ISMN has 13 digits by the standard. This was fixed. Input length is now restricted to 10 (prior to 2008) or 13.
- **September 2020 Resource Management SF: 790210**
When contributing musical and non-musical audio records to SBN, field 127 was not contributed to SBN central catalog and was erased from Alma. This was fixed.
- **September 2020 Resource Management SF: 855387**
Contribution to SBN was not working if the originating system ID was not an SBN. This was fixed.