



Alma March 2022

Release Notes

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Alma March 2022 Make the Most

Make the Most of March's Release

Action Items

- ☐ [New and improved Overlap Analysis Tool](#) - You can use the tool to better understand your electronic resource content overlap and availability to help your purchasing decisions.
- ☐ [Upload Electronic Holdings from Wiley](#) - Do You subscribe to Wiley content? You can now use the automatic upload for electronic holdings to automatically activate your Wiley journal and book content.

Upcoming Issues to Note

TLS Cryptographic Protocol Support

Read the following to avoid service disruptions.

TLS is a cryptographic protocol that provides authentication and data encryption between different endpoints (for example, the user's desktop and the application server). Various vulnerabilities (such as POODLE and DROWN) have been found in TLS versions 1.0 and 1.1 in recent years.

As announced in the latest security update, to avoid security vulnerabilities and to align with industry standards, Ex Libris will block TLS 1.0 and 1.1 traffic for Alma API in production environments and will support only TLS 1.2. The deprecation plan which was communicated will begin by October 2021 and will be concluded by May 2022:

- Canada – October 17, 2021
- APAC – February 20, 2022
- Europe – March 10, 2022
- America – May 15, 2022

For practical steps to be taken, see [Ex Libris Higher Education Platform API - deprecation of TLS 1.0 and TLS 1.1](#).

You can find additional information on TLS at:

- [Security Update - Deprecation of TLS 1.0 and TLS 1.1 Versions for Higher Education Platform API \(July 8, 2021\)](#)
- [Transport Security Layer \(TLS\) Support](#)
- https://en.wikipedia.org/wiki/Transport_Layer_Security

SAML Certificate Workflow Update

Starting in August 2021, to accommodate the updated expiration policy of the certificate vendors, the signed certificate will be issued twice yearly.

For example, the certificate made available in August 2021 will expire in June 2022 and the certificate made available in February 2022 will expire in December 2022. This means that institutions that wish to use the signed certificate must update it twice a year.

Ex Libris highly recommends using the provided self-signed certificate to reduce the frequency of certificate updates.

April Release Sneak Preview

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

Alma March 2022 Main Stories

Safari Certification Completed

March 2022 Administration and Infrastructure

As part of our continuous effort to enhance the Alma user experience, Alma is now certified for use in Safari browsers for Mac computers and Ipad in landscape orientation.

See [Browser and OS Requirements](#).

New SAML Certificate

March 2022 Administration and Infrastructure

The current DigiCert SAML Certificate will expire on June 8th, 2022. If your institution uses this certificate, Ex Libris recommends that you consult with the IT dept. in your institution, and if required, replace the certificate for Alma and/or Primo VE. If replacing the certificate, this must be done in coordination with your IDP.

For more information, see [Replacing a Signed Certificate](#).

Clickjacking Protection Open to All

March 2022 Administration and Infrastructure

Clickjacking protection (introduced in February 2022, see [Clickjacking Protection](#)) is now open to all institutions by default (no need to contact to Ex Libris Support to open it).

See [Preventing Clickjacking](#).

Integration with Swisslog SynQ Storage Management System

March 2022 Fulfillment

Alma's Remote Storage Integration Profile can now be configured to integrate with Swisslog SynQ storage management system. Setting the profile to work with SynQ will enable Alma to update SynQ about inventory changes and requests using direct API communication. For more information, see [Swisslog SynQ Remote Storage](#).

Require Explicit Confirmation of Fulfillment Messages

March 2022 Fulfillment

It is now possible to configure fulfillment messages to pop up without the **Confirm** or **OK** button being automatically in focus. This will require operators to explicitly navigate to the **Confirm** or **OK** button (using the mouse or keyboard) when confirming the message.

This new option prevents unintended confirmation of fulfillment messages resulting from hitting **Enter** or simply scanning in the next item.

Activating this option is achieved by accessing the **Fulfillment > Other Settings** menu and setting the `disable_enter_closing_fulfillment_popups` parameter to **'true'**.

Allowing Due Date After Patron Account Expiry Date

March 2022 Fulfillment



Idea Exchange

Alma now enables configuring the system to enable privileged staff members to extend a loan due date at check-out time beyond the expiry date of a patron. By setting the new `extend_due_date_beyond_user_expiry` parameter (using the **Fulfillment > Other Settings** menu) with the value of **MANAGER**, **OPERATOR** or **ALL** you can determine which circulation desk operator role is required to extend a due date past the patron account's expiry date. If you do not want to enable this parameter, keep the value as **NONE**.

This will allow lending items to patrons whose account is about to expire without having to manually change the calculated due date or the user record's expiry date.

Due date is shortened

Please notice that the due date was shortened since the patron card is expired before the due date

Extend due date

Ok

Extend Due Date

Note

The new parameter affects only loans in the patron workbench. The behavior of self-check loans, personal delivery loans, and renewals is not affected.

New and Improved Overlap Analysis Tool

March 2022 Resource Management

To achieve better collection development analysis capabilities of libraries' electronic holdings, the Overlap Analysis Tool has been improved to support additional use cases by introducing new functionality.

In addition, a new interface is now introduced for the Overlap Analysis Tool to enable easy and intuitive report creation and summary results.

Main new use cases that are now supported:

- When considering to order an electronic collection, can help users establish which part of this collection is already covered in other electronic collections available in your existing library content, to learn which collection has a better value for money, and to avoid content overlap and purchasing of duplicate resources.
- When considering to cancel electronic collections, can help users determine content overlap rate for possible resource

cancellation scenarios, in order to learn what full text access would be lost if a resource were cancelled.

To support the above use cases and additional use cases, new comparing options have been added:

1. Ability to select a Community Zone collection as a source for comparison.
2. Ability to select the entire Institution Zone as a target for comparison.
3. Add Network Zone holdings as an option for overlap analysis.

See [Working with Overlap and Collection Analysis](#).

Watch the [New & Improved Overlap Analysis Tool](#) video (4:42 minutes).

Upload Electronic Holdings from Wiley

March 2022 Resource Management

Automatic Upload of Electronic Holdings now allows libraries to update their holdings within the Wiley journals and books offerings in a single automated process. Once enabled, the process automatically downloads a KBART formatted holdings file from the Wiley platform, uploads the file, and updates your holdings in the Wiley collections.

For this purpose, the following dedicated collections were added to the Community Zone, these collections reflect all books and journals available from Wiley:

- Wiley Online Library - AutoHoldings Books
- Wiley Online Library - AutoHoldings Journals

See [Upload Electronic Holdings from Wiley](#).

UNIMARC Format Updates

March 2022 Resource Management

As part of ongoing updates of the UNIMARC format, the UNIMARC Bibliographic profile was updated to reflect the recent changes to the ABES and BNF formats. This includes:

- Adding new bibliographic 338 field (Funding note).
- Updating bibliographic field 100 with new values for positions 34-35.
- Updating bibliographic 110 with new values for position 0.

Library as a Basic Search Scope for Holdings Search

March 2022 Resource Management

When doing a Physical Holdings search, the Inventory Operator and other users can now limit the scope of their search to specific libraries they always search in. This reduces the need to define the library in the Advanced search or to use facets for every search. It is mostly relevant for librarians working in institutions with many libraries, where they are responsible for just a few of them.

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Holdings Search My Library - collapsed

Holdings Search My Library - expanded

See [Filtering Search Results](#).

Metadata Import Profile: Multi-step Matching

March 2022 Resource Management

When importing titles, the goal is to automatically establish whether the title already exists in the catalog. To achieve a single match, and avoid multiple matches, you can now configure multi-step match methods, by which Alma determines whether imported records already exist in the institution's catalog.

The new **Multi Step Match Configuration** mapping table ([Configuration > Resource Management > General > Multi Step Match Configuration](#)) enables you to define multiple match methods (from the existing list of options for match methods), which are then run in the order defined in this table.

Enabled	Family	Resource Type	Match Routine	System Identifier Profile	Updated By	Last updated
1	MARC21	Serial	Unique OCLC Identifier Match Method		HL_PNG	26/01/2022
2	MARC21	Serial	ISBN Match Method		HL_PNG	26/01/2022
3	MARC21	Serial	Extended Fuzzy Serial Match Method		HL_PNG	26/01/2022
4	MARC21	Serial	LCCN Serial Match Method		HL_PNG	26/01/2022
5	MARC21	Serial	Fuzzy Serial Match Method		HL_PNG	26/01/2022
6	MARC21	Non Serial	Unique OCLC Identifier Match Method		HL_PNG	26/01/2022
7	MARC21	Non Serial	ISBN Match Method		HL_PNG	26/01/2022
8	MARC21	Non Serial	Title Statement Extended Fuzzy Non-Serial		HL_PNG	26/01/2022
9	MARC21	Non Serial	ISBN Match Method		HL_PNG	26/01/2022
10	MARC21	Non Serial	ISBN Match Method		HL_PNG	26/01/2022
11	MARC21	Alt	ISBN Match Method		HL_PNG	26/01/2022
12	MARC21	Alt	ISBN Match Method		HL_PNG	26/01/2022
13	MARC21	Alt	ISBN Match Method		HL_PNG	26/01/2022
14	MARC21	Alt	ISBN Match Method		HL_PNG	26/01/2022
15	MARC21	Alt	ISBN Match Method		HL_PNG	26/01/2022
16	UNIMARC	Serial	ISBN Match Method		HL_PNG	26/01/2022
17	UNIMARC	Serial	ISBN Match Method		HL_PNG	26/01/2022

See [Multi Step Match Configuration](#), [Managing Import Profiles](#), [Configuring Other Settings \(Resource Management\)](#).

Metadata Editor: Default Action Changed to "Create New Record from Template"

March 2022 Resource Management

When left-clicking a template in the templates list of the Metadata Editor for a bibliographic or authority record, now the default action in the Template List is **Create New Record from Template**. This enables Catalogers to easily create a new record derived from the chosen template, without running the risk of accidentally changing it, as could be done previously, when the default action was **Edit**.

Watch the [Metadata Editor - Click on Template to Create New Record](#) video (1:08 minutes).

Additional Events Added to System Events Subject Area

March 2022 Analytics SF: 05307735 05324168

To make the System Events subject area more usable for customers, a large number of events were added to be available for reporting. This event list was created based on internal research into existing user reports and discussions with the Analytics Working Group. Currently over 200 events are available for reporting. For a list of the available events, see [System Events](#).

Note

For the first two weeks, the available data will be partial, since historical events are being loaded going back to July 1, 2019.

API for XSL Templates

March 2022 API

Alma now supports REST APIs that enable to retrieve and update the XSL templates used for customizing letters.

For more information, see: [Configuration and Administration](#) in the Developer Network.

Recommendation to Group Local Standalone Portfolios into Collections

March 2022 DARA

DARA now identifies if you have local standalone portfolios with the same base URL that probably belong to the same provider and recommends that you group them into a collection.

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☐

Local portfolios with "marxists.org" base url can be grouped to a collection.
Category: Electronic Inventory Management
Type: Group standalone portfolios

 There are 13 standalone portfolios with this base url. They probably belong to the same provider.

 I recommend grouping them into a local collection. This will make it easier to manage them.

Group Standalone Portfolios into Local Collections

Watch the [DARA: Group Local Standalone Portfolios into a Collection](#) video (51 seconds).

Alma March 2022 Additional Stories

- **March 2022 Administration and Infrastructure**

The Synchronize Changes from CZ job was removed from Monitor Jobs page, as it is an internal system process for updating the Institution Zone with relevant changes from the Community Zone. The business results of this internal process can be monitored via the below dedicated task lists:

- For Community Zone Authority updates, please use the [Authority Control Task List](#)
- For Community Zone Knowledge Base updates of electronic resources, please use the [Community Zone Update Task List](#)

The Library can see the date on which the institution was updated from the Community Zone in the Alma Help menu.

- **March 2022 Analytics**

It is now possible to have deleted holdings without items included in Alma Analytics reports. To enable this feature, contact Ex Libris support.

- **March 2022 Analytics**

The following fields were added to Lending Requests > Lending Request Details. They indicate the time from when the lending library sent the requested material until the patron received it.

- Days of Delivery Duration
- Hours of Delivery Duration
- Minutes of Delivery Duration

In addition, the **Received Date** field was added that indicates the date that the requested material was received.

- **March 2022 Analytics**

The **Query Type Group** field was added to Analytics Usage Tracking > Query Details. It indicates the source of the query, either Classic Reports and Dashboards or DV Projects. You can use this field to filter analytics usage tracking data and create reports with the ability to differentiate between Classic Reports and Dashboards and DV projects.

- **March 2022 DARA**

The frequency of the cleanup job of implemented recommendations was changed from weekly to daily.

Alma March 2022 Resolved Issues

- **March 2022 Acquisitions SF: 05299561 05316780 05319262 05319396 06231457**
PO-Line Inventory Material Type appears as "none" despite being in Alma / Oracle DB. Additionally, "Unknown" descriptions were displayed in the code table. These were fixed.
- **March 2022 Acquisitions SF: 05301751 05320540 05322777 00959043**
The letter "message" in the **Interested Users** letter is displayed in English and not in the configured language. This was fixed.
- **March 2022 Acquisitions SF: 00955094 05323620**
One-Time PO lines have subscription from/to date in the Invoice Line tab of the PO line. This was fixed and only Continuous PO lines will have these columns.
- **March 2022 Acquisitions SF: 00944946 05735716**
Multi-Choice questions get added without any values to survey forms. This was fixed.
- **March 2022 Acquisitions SF: 6207211**
Vendor Interface tabs missing blue dog-ear even when they contain content. This was fixed by adding a 'Has' content indicator to the following vendor interface tabs: **Notes, Inventory, Contact Information**.
- **March 2022 Acquisitions SF: 00940829 05317865 05751936**
PO Line - Claiming job was not sent in EDI file to vendor due to an issue with getting the EDI Note. This was fixed.
- **March 2022 Administration and Infrastructure SF: 6026641**
The payment of a single fee was not possible when the RFID is enabled. This was fixed.
- **March 2022 Administration and Infrastructure SF: 05318944 05320935 00945936**
In some cases of adding new user fines and fees, the user has not been indexed anew and the fine was not reflected upon search. This was fixed.
- **March 2022 Administration and Infrastructure SF: 00973778 05302606**
Filtering the Fine/Fee list by a type that does not match the fines listed on the user account would default back to "All". This was fixed and the filter list will consist only of existing types.
- **March 2022 Administration and Infrastructure SF: 05310372 06219168**
User's identifiers were not generated automatically in some cases. This was fixed.
- **March 2022 Administration and Infrastructure SF: 00970128 05301922**
Copy functionality copied icon information when using Firefox. This was fixed.
- **March 2022 Administration and Infrastructure SF: 5299399**
The Plus icon did not appear with **Add item**. This was fixed.
- **March 2022 Administration and Infrastructure SF: 00993573 05321111,**
When selecting **Manage in Network** for a specific line of a code-table, customized labels in languages other than English were not distributed to the Institution members sometimes. This was fixed.
- **March 2022 Fulfillment SF: 6227199**
The **Shortened Due Date Letter** displayed an inaccurate description. This was fixed.
- **March 2022 Fulfillment SF: 6218653**
In specific cases, an error appeared when marking In-process items as 'Done'. This was fixed.
- **March 2022 Fulfillment SF: 6041282**
The list of cancelation reasons was not sorted in the code table. This was fixed.
- **March 2022 Fulfillment SF: 00551514 05310755**
For items in remote storage of type ASRS, if the item's title contained diacritics, this sometimes caused errors in the communication between Alma and the ASRS. As a result, requests for these items failed. To solve this issue, a new option was added to remove the diacritics from messages sent from Alma to the ASRS. This option is controlled by a new customer parameter: `asrs_remove_diacritics`.
- **March 2022 Fulfillment SF: 5303199**

The 'red star' that marks mandatory fields is misplaced for labels having long text. This is fixed by adding width to CSS.

- **March 2022 Fulfillment SF: 00990042 05317461 05325886**
Placing a request on a specific holding from the **Manage Fulfillment Options** page created the request on all the title's items instead of only on the items from the selected holding. This was fixed.
- **March 2022 Fulfillment SF: 00982361 05312651**
Clicking **Done** when attaching documents to fulfill Digitization requests closed the request and did not advance the request to its next step. This was fixed.
- **March 2022 Fulfillment SF: 5301170**
In Get It Request form quotation marks (") caused the 260\$c field to map incorrectly to the **Publication Date** field in the form. This was fixed.
- **March 2022 Fulfillment - Resource Sharing SF: 05328621 06218574 00816949**
When trying to send a 'LookupAgency' request to a resource sharing partner (from the partner details page), the operation failed and an error message was displayed. This was fixed and it is now possible to send Lookup Agency messages to partners.
- **March 2022 Fulfillment - Resource Sharing SF: 00968508 05320700**
Resource sharing borrowing requests were updated to **Returned to Partner** immediately after being received. This was fixed and now when scanning in an item received for an overdue resource sharing borrowing request, a message will notify the operator that the request has been canceled and it will be returned to the lender.
- **March 2022 Fulfillment - Resource Sharing SF: 05300715 00948989**
When filling the Resource Sharing Request form in GetIt, the data submitted in the field **Additional Person Name** is not displayed in Alma. This was fixed.
- **March 2022 Fulfillment - Resource Sharing SF: 6045513**
A borrowing request was not received by the next partner on the rota after being manually rejected by the staff of the previous partner. This was fixed.
- **March 2022 Fulfillment - Resource Sharing SF: 00874364 05331127**
Leganto sources were excluded from the Alma Link Resolver Usage report. This was fixed.
- **March 2022 Fulfillment - Resource Sharing SF: 06245578 06246710**
Request Failed - submitting resource sharing requests on some records fail in Primo. This was fixed.
- **March 2022 Resource Management SF: 00956225 05371738 05355385 05355247 05324050 05323569 05321456 05314465 05312694**
In some cases, when a member institution updated a network Bibliographic record, the local (linked) Bibliographic record was not updated. This was fixed.
- **March 2022 Resource Management SF: 05318603 05327615**
Cannot 'Delete' Electronic Collections, as 'No PPS' error is displayed. This was fixed. Deletion of collections with no PPS is now enabled.
- **March 2022 Resource Management SF: 05308042 05308042**
In some cases, the interface name displayed twice in the Online services order. This was fixed.
- **March 2022 Resource Management SF: 00975442 05303745 05307240**
Job report did not include some failed records in the **Unpublished failed records** count, causing the numbers to not add up. This was fixed. The issue of 'Total records written to file = 0' no longer occurs.
- **March 2022 Resource Management SF: 00936853 05333215**
Repository Search: Thumbnails were not displayed for electronic resources with ISBN. This was fixed. Now Alma recognizes the ISBN value and presents the thumbnail as expected.
- **March 2022 Resource Management SF: 5300149**
Records suppressed from external search were included in the **Number of hits** result for a Z39.50 search. This was fixed.
- **March 2022 Resource Management SF: 5307674**
The Scopus template for citation link was erroneously being changed from https to http. This was fixed.
- **March 2022 Resource Management SF: 05305780 05305780 06237572**
The field marked as mandatory on the Resource Sharing form in Alma did not appear as mandatory in Primo VE. This was fixed.
- **March 2022 Resource Management SF: 00878477 05302605 05312708 05312819 05314035 05329428**

For local resource types, the **Pushto/ExportRIS** did not contain the type TY. This was fixed.

- **March 2022 Resource Management SF: 00983984 05312712**
Permalinks were not working for Search Webhook. This was fixed.
- **March 2022 Resource Management SF: 6225679**
In some cases, the **Pickup location** was displayed twice in the English interface's Request form. This was fixed.
- **March 2022 Resource Management SF: 05302009 05314469 00970599**
Search API failed for local records when the 'tab' parameter existed. This was fixed.
- **March 2022 Resource Management SF: 05319410 00965119**
In CT Results Tile Labels, nui.paging.pagenummer was ignoring the description/translation's order. This was fixed.
- **March 2022 Resource Management SF: 00957961 05323767**
Repository Search: Resource Types 'Atlas - Microfilm', 'Atlas - Microfiche' and 'Atlas - Microopaque' were not supported for Serials and Monograph/item (LDR pos 7 = s,m). This was fixed. The Resource Types for existing records will be recalculated during the semi-annual indexing planned for May 2022.
- **March 2022 Resource Management SF: 05302133 06051630 00969491**
New Metadata Editor: **Add inventory** using any holdings template (form mode) was creating corrupted holdings. This was fixed.
- **March 2022 Resource Management SF: 00854785 05311365**
New Metadata Editor: The menu item **View related bibliographic records** was displayed for Holdings records, though it is relevant only for Bibliographic records. This was fixed, and now this menu item is not displayed for Holdings.
- **March 2022 Resource Management SF: 5306536**
Some lines in the New Metadata Editor were not translated to Czech. This was fixed.
- **March 2022 Resource Management SF: 00906022 05299006 05299049 05302693 05316807 05330421**
New Metadata Editor: When adding a new field to a record with large fields, the page jumped up past the field being edited. This was fixed.
- **March 2022 Resource Management SF: 05328207 05326208 05323362 05322767 05321102 05316976 05316502 05306492 05303067 05299799 00978072**
New Metadata Editor: Retrieving translated labels took a long time, sporadically. As a result, the translated label was not displayed, but the English one. This was fixed.
- **March 2022 Resource Management SF: 05312657 00981965**
New Metadata Editor: When a member institution edited a Network Zone bibliographic record and then selected **Save and Release**, the record was not added to the Recent Entities list. This was fixed.
- **March 2022 Resource Management SF: 05302461 05302722 00972583**
New Metadata Editor: When editing a subject field, in some cases, it caused a different subject field to lose its link to the authority. This was fixed.
- **March 2022 Resource Management SF: 05331835 05329034 05318132 05317378 05305578 05300846 00878712**
Authority Preferred Term Correction and F3 incorrectly removed punctuation from field **100** subfields **\$\$a**, **\$\$c** and **\$\$e**. This was fixed.
- **March 2022 Resource Management SF: 05323610 00956062**
Copy heading from bib (via F3) copied only **\$\$a** for UNIMARC field **676**. This was fixed. When attempting to copy from the bibliographic heading, all the subfields will be copied and not the subfield "a" only.
- **March 2022 Resource Management SF: 05307012 05307281**
Local Authorities subject area of Alma Analytics: UNIMARC and CNMARC local authorities' information was not sent to Analytics. This was fixed.
- **March 2022 Resource Management SF: 05326180 00991785**
The update inventory process didn't activate the portfolio linked to the CZ. This was fixed.
- **March 2022 Analytics SF: 01007769 05318721**
An error occurred when running a report with the LC Classification Top Line field. This was fixed.
- **March 2022 Analytics SF: 05299523 00927392**
When an electronic collection was deleted, an analytics report using the **Modification Date** and **Modified By** fields did not display the correct date and user name of the modification. This was fixed.
- **March 2022 Analytics SF: 05309618 00797309**
Digitization requests canceled by patrons appear in Analytics as canceled by the library. This was fixed.

- **March 2022 Analytics SF: 5322821**
The values of the **Purchase Request ID** field (**Purchase Requests > Purchase Request Details**) were incorrectly treated as a numeric value and were rounded off in some instances. This was fixed.
- **March 2022 Analytics SF: 05299523**
When an electronic collection was deleted, an analytics report using the Modification Date and Modified By fields did not display the the correct date and user name of the modification. This was fixed.
- **March 2022 API SF: 05321045 05322757**
When using an API to export an invoice to ERP, the related PO line remained open. This was fixed.
- **March 2022 API SF: 01000634 05303189**
In some cases, updating a Resource Sharing partner via API resulted in a timeout. This was fixed.
- **March 2022 API SF: 05299092 00912192**
When using the REST API to pay for multiple fines/fees owned by different libraries, the receiving library was the same for all. This was fixed.