



# Alma March 2021

## Release Notes

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## Make the Most of March's Release

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### Action Items

[Denied Note for Unregistered Users](#) - Institutions can now add a secondary denied note for unregistered users, which will allow displaying a different message to logged out and logged in users who are denied access to a digital resource.

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## Upcoming Issues to Note

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### 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 certificated must update it twice a year.

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

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### Next Release Sneak Preview

April 2021 is a maintenance release that will not contain any new features.

## Main Features

### PO Line Infrastructure Upgrade

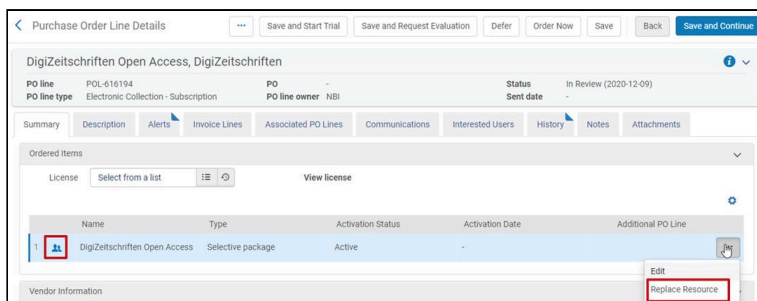
#### March 2021 Acquisitions

In upcoming releases, technical upgrades to the PO Line infrastructure will take place, which will not result in any functional changes.

### New Option To Replace Resource Associated With An Electronic PO Line

#### March 2021 Acquisitions

When editing an electronic PO line (Collection/Portfolio) users now have the option to detach the existing resource from the PO line and replace with another electronic resource associated with the Institution Zone, Community Zone or the Network Zone. Additionally, an indication to which "Zone" the resource is associated with, was added to the Ordered items table with the color coding Alma uses to indicate whether the resource is "Available" or "Not Available".



Utilizing the "Replace Resource" function will prevent the users from the need to delete a PO line in case it was associated with the wrong electronic resource. Institutions who are part of a Network Zone and their Electronic resources are managed by the Network Zone (but their purchases are handled locally) will be able to:

- Create a local PO line associated with an electronic resource.
- Send the order to the vendor.
- Once the resource is available for them, ask the Network institution to enable the electronic resource in the Network Zone and have it "Available for" them.
- Use the new function to replace the resource associated with the PO line with the Network Zone resource made available for them.

#### Note

In case the PO line doesn't have a license and the Network Zone resource has a license - the Network Zone license will be associated with the POL. In case the PO line has a license and the Network Zone resource has a license as well - the Network Zone license will not be associated with the POL.

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## Note

This operation is available for any resource type of type "Electronic" and the resource type for the replaced resource must be with the same "Type". For example: if the source resource is "Electronic Portfolio", only "Electronic Portfolio" can be selected as the new resource.

In case the resource replaced is associated with a different bibliographic record, the POL will be associated with this new bibliographic record and the user will be prompted with a pop-up asking whether to keep the detached resource or delete it. In case the user selected to delete the electronic resource and the bibliographic record for that resource has no other inventory associated to it, the a pop-up will also present the user with the options to handle this bibliographic record (depending on the settings done for `pol_handle_bib_record_without_inventory`).

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[Read more about this parameter here.](#)

Replace Resource

This PO line will be associated to the new resource as the Main order. In case the new resource has an existing Main order it will be overridden. Once complete this operation is irreversible.

Handle existing resource

Detach from PO Line and keep resource

Detach from PO Line and delete resource

Handling bibliographic records without inventory

Delete bibliographic records

Cancel Confirm

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## Multiple runs per day for PO packaging and EDI jobs

### March 2021 Acquisitions

In order to improve communication between Alma and vendors, additional scheduling options were added to the PO packaging job so that PO lines can be packed automatically to a PO several times a day and ready to be sent to the vendor. For institutions using EDI to communicate orders with their vendors, institutions now can have the EDI job run a few times a day. This will result in orders being sent to vendors closer to the time the orders were actually created in Alma. The 2 new scheduling options for both jobs are "Every 2 hours" and "Every 4 hours".

"PO Line package" job which handles purchase order lines that are not marked for manual packaging was added with two more scheduling options in addition to the existing job scheduling options (located in **Configuration > Acquisitions > Job configuration**):

PO Line package job

Status  Active  Inactive

PO Line continuous limit \*

PO Line one time limit \*

Package PO Line by Fund

Schedule

- Not scheduled
- Every 2 hours
- Every 4 hours
- Every Friday at 20:00
- Every Monday at 20:00
- Every Saturday at 20:00
- Every Sunday at 20:00
- Every Thursday at 20:00
- Every Tuesday at 20:00
- Every Wednesday at 20:00
- Every day at 09:00
- Every day at 15:00
- Every day at 16:00
- Every day at 21:00

Read more about [PO packaging job](#).

"EDI" job runs to communicate with vendors configured to work with EDI. Two more scheduling options were added in addition to the existing job scheduling options to allow the communication to run multiple times per day (located in **Vendor > EDI information > Input job parameter**):

Input Job Parameters

JOB SCHEDULING

Status  Active  Inactive

Schedule

- Not scheduled
- Every 2 hours
- Every 4 hours
- Every day at 11:00
- Every day at 18:00
- Every day at 23:00

Read more about [EDI job scheduling](#).

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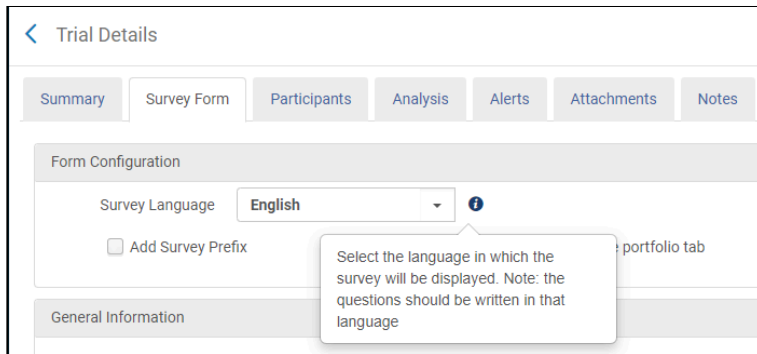
## New "Survey Language" field in the trial surveys editor

### March 2021 Acquisitions

In order to allow Survey composers the ability to send a survey form in a dedicated language (other than English), institutions utilizing the Trials functionality in Alma now have a new field "Survey Language" which was added to the survey editing form ("form configuration" section), this new field supports selecting the language in which the survey is sent to the user (up until today users which received the survey had the option to view it only in English).

When creating a new trial or editing an existing trial, the default language in this field will be the institution's default language.

Text for questions that are composed by the creator of the survey should match the language selected in the new "Survey Language" field.



The screenshot shows the 'Trial Details' page with a navigation bar containing 'Summary', 'Survey Form', 'Participants', 'Analysis', 'Alerts', 'Attachments', and 'Notes'. The 'Survey Form' tab is active. Under 'Form Configuration', the 'Survey Language' dropdown is set to 'English'. A tooltip points to the dropdown with the text: 'Select the language in which the survey will be displayed. Note: the questions should be written in that language'. There is also an 'Add Survey Prefix' checkbox and a 'portfolio tab' label.

Read more about [Managing Trials](#) in Alma.

Watch the [Compose a Trial Survey in a Selected Language](#) video (0:53 seconds).

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## New Metadata Editor

### New Metadata Editor Layout Turned On as Default for All Users

#### March 2021 Resource Management

Continuing the rollout of the [new Metadata Editor](#), starting from this release, the new Metadata Editor opens up for all Alma users as the default.

Users can switch back and forth between the new and the original Metadata Editors.

#### To switch:

- to the new Metadata Editor, select



The image shows a button labeled 'New MDE' with a blue border and a light blue background.

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

- back to the original Metadata Editor, select



**Old Editor** on the right-hand side of the top toolbar of the Editor.

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#### Note

Ex Libris recommends that all relevant users become familiar with the new Metadata Editor prior to it becoming exclusive use, which is planned to take place with the deployment of the June 2021 release.

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## Rules Management in Metadata Editor

#### March 2021 Resource Management

Ex Libris continues the rollout of the [new Metadata Editor](#). In the current release, the Rules Management core functionality was introduced (the functionality available in the original Metadata Editor plus new features).

See [New Metadata Editor Functionality](#).

## Rules Right-click Menu

### February 2021 Resource Management

You can now perform actions in the Rules area from the right-click menu in the new Metadata Editor. See below for the list of right-click actions:

Rules right-click Menu

Action	Available for	Description
Edit	Private rules, Shared non-default rules	Select to edit the rule (not available for out-of-the-box (default) rules and Community Zone rules).
View	All rules	Select to view the rule in cases when you cannot edit it.
Duplicate	All rules	Select to duplicate the rule to modify the copy and create another rule based on this rule.
Contribute to CZ	All rules	Select to contribute this rule to Community Zone (if you have this capability). The contributed rule appears both in the Shared folder and in the Community Zone folder.
Properties	All rules	Select to view and modify the rule properties, such as its name.
Delete	Institution rules, CZ rules contributed by your institution	Select to delete the rule (available for local rules and rules in the Community Zone that were contributed by your institution).
Test external records	Institution rules	Select to save and test the rule in Primo-VE. For details, see <a href="#">Testing Normalization Rules for External Data Sources</a> .

## Message to Users Opting-out from New Metadata Editor

### March 2021 Resource Management

Starting from the March release, only users with the below roles can opt-out from the new Metadata Editor and work in the classic Metadata Editor:

- CATALOGER
- CATALOGER\_EXTENDED
- CATALOG\_ADMINISTRATOR
- CATALOG\_MANAGER
- PHYSICAL\_INVENTORY\_OPERATOR
- PURCHASE\_MANAGER
- PURCHASE\_OPERATOR
- REPOSITORY\_MANAGER

Users who haven't opted-out or did not switch to the new Metadata Editor yet, will get a message with a link to opting-in and a warning that the classic Metadata Editor is only available till June 2021.

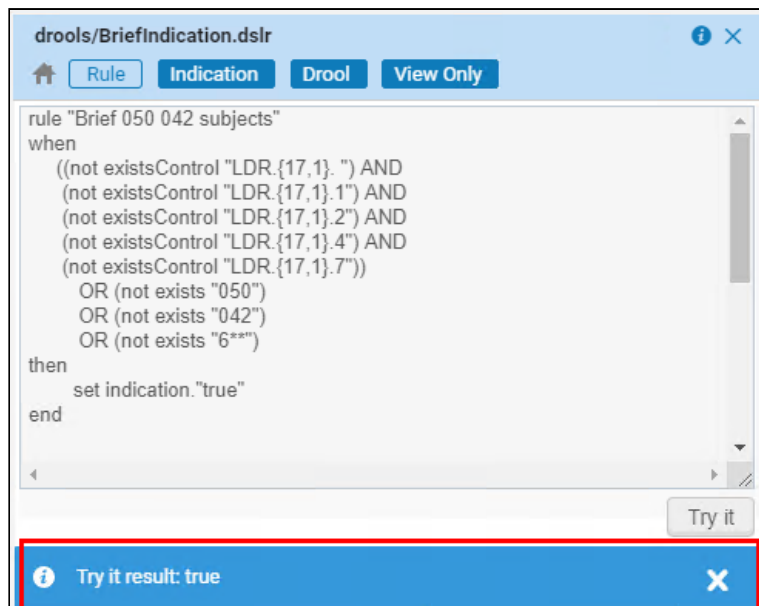
See [Usability Improvements](#).



## Enhanced Message Display

### March 2021 Resource Management

The display of messages in the new Metadata Editor was enhanced. Notification messages that appear in a specific context (related to records, rules, etc.), now appear in the relevant panel of the Metadata Editor:



## Opening New Holdings from the Add Inventory Menu

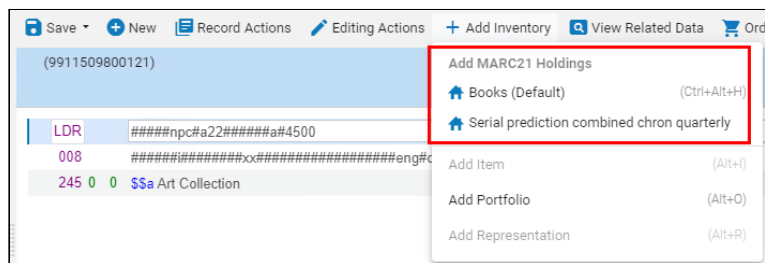
### February 2021 Resource Management



#### Idea Exchange

The ability to add new holdings was added under the **Add Inventory** menu (in addition to the existing ability to add them under the **New** menu). This makes it more intuitive for operators to create new holdings.

The same Holdings section that appears in the New menu now also appears in the Add Inventory menu. You can choose which template to use for creating the holdings in the same way as it is done in the New menu.



See [Add Inventory Menu](#).

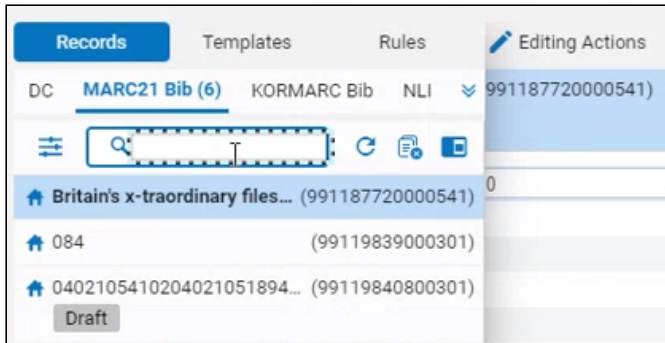
Watch the [Add New Holdings from the Add Inventory Menu](#) video (0:47 seconds).

## Accessibility Improvements in the New Metadata Editor

### February 2021 Resource Management

The below improvements were done with the purpose of making the new Metadata Editor compliant with the Americans with Disabilities Act (ADA). The improvements include:

- Ability to close the Navigation panel using keyboard, when it is opened in hover above the Metadata Editor. To close it, press **Escape**. Note that if a tooltip is opened in the Navigation panel, you have to press **Escape** twice - the first closes the tooltip, the second closes the Navigation panel.

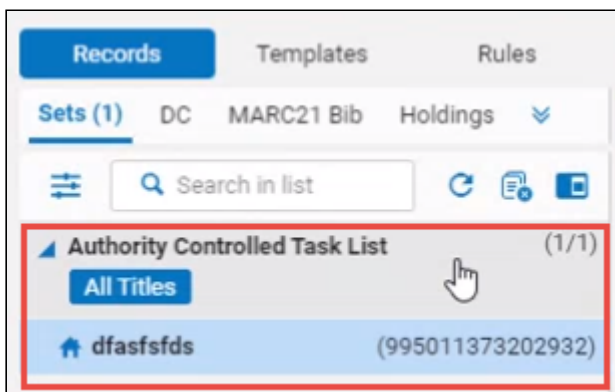


- You can now navigate up and down within the lists of items in the Navigation panel using the keyboard.
- You can now open the Alerts panel and navigate within it using the keyboard.
- Unique IDs were added to Html elements of each record/template/rule in the Navigation Panel and within the Editing area.
- The page title was set to "Metadata Editor" for screen readers.

## Editing Tasks from Authority Control Task List in the Metadata Editor

### February 2021 Resource Management

Now when you review tasks in the Authority Control Task List, you can edit the relevant record directly in the Metadata Editor. To support this, a new type of set "Authority Controlled Task List" was created under Sets in the Records area. To open records in the Metadata Editor, select the desired records in the Authority Control Task List and select **Edit** in the row list actions, or **Edit Selected** above the list.

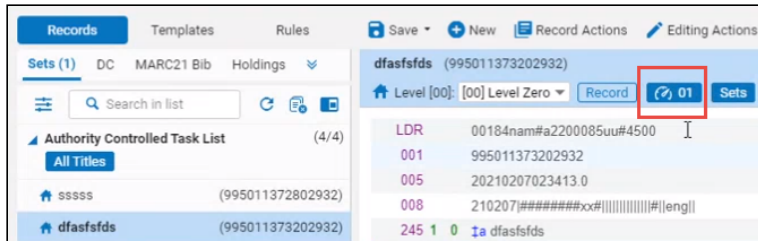


Watch the [Edit Records from Authority Control Task List in Metadata Editor](#) video (0:59 seconds).

## Managing Brief Levels in Record Header

### February 2021 Resource Management

The brief level indication now appears in the record header for all MARC bibliographic formats.



See [Working with Brief Record Levels](#).

## Side-by-side Editing of Primary and Searched/Browsed Records

### March 2021 Resource Management

Now you can view the searched/browsed record alongside your primary bibliographic record, whether on the right of the primary record, or on the left. This allows you full flexibility in how you want to display the records, while also providing easy navigation back to the search form to refine your search if needed.

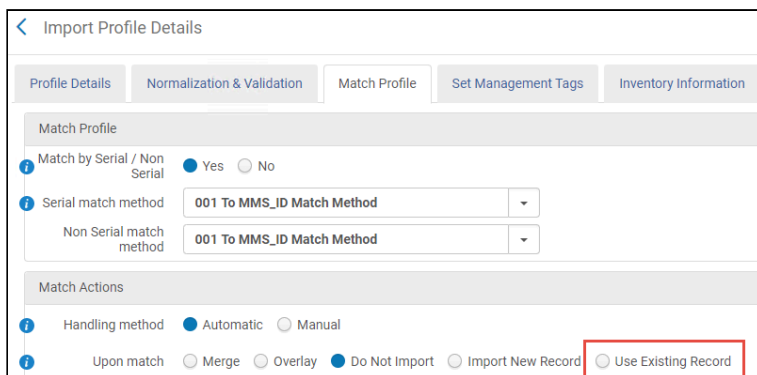
See [Working with Search Resources in the MD Editor](#).

## Use Existing Bibliographic Record when Creating a PO Line via "New Order" Import Profile

### March 2021 Resource Management

Continuing the enhancements to the "New Order" import profile (see [Associate a PO Line Created via the Import Profile to an Existing Portfolio](#)), now you can use the existing matched bibliographic record without modifying it, and associate the newly created resource and PO line under this matched bibliographic record. In case a matching resource is also found under the bibliographic record (see [Associate a PO Line Created via the Import Profile to an Existing Portfolio](#)), only a PO line will be created.

To support this, a new radio button "Use Existing Record" was added to the Match Profile tab of the **Import Profile** (New Order profile only). When this radio button is selected, Alma does not update the bibliographic record and only creates the resource and the PO line.



See [Managing Import Profiles](#).

## Community Zone Update Task List Improvements

### March 2021 Resource Management



## Idea Exchange

The **Community Zone Update Task List** is used to display all changes that were made to your Community Zone activated electronic resources as a result of Community Zone updates. The Community Zone was enhanced to enable faster and more efficient access to the data included in it. This includes new access points, information fields, actions, as well as more filters and sorting abilities. All the new features apply to both the **Review** and **All** tabs.

Community Zone Updates Task List

Review All

Submit Date Range: 18/01/2021 - 16/02/2021

1 - 20 of 42,755

Report Type: All Available For: All Electronic Service: All Resource Type: All Has Order: All Is Free: All Has Local Information: All

Library Name: All Collection Content Type: All Collection Type: All

Report Type	Electronic Collection Name	Title	Identifier	Submit Date	Avail. For	Before Change	After Change	Local Information
1 PORT_ADD	160213112311	Antenna design for mobile devices / Zhiqun Zhang	0-470-82449-8	16/02/2021 13:20:28 PM EST	All	-	-	-
2 PORT_ADD	160213112311	Motion control systems / Asaf Sabanović, Kouhei Ohnishi	0-470-82573-1	16/02/2021 13:20:28 PM EST	All	-	-	-
3 PORT_ADD	160213112311	Chaos in electric drive systems: analysis, control, and application /	0-470-82633-9	16/02/2021 13:20:28 PM EST	All	-	-	-

### Enriched Title Display

The Title of the portfolio is now identical to the way the portfolio's Title is displayed in the Service editor Portfolios list.

### Enhancements to Columns

All new columns are hidden by default.

- **Submit Date** (enhanced column) - now displays date and time of the change. When portfolios are added or deleted, this helps you know which came first from the task list, thus letting you know if content was removed without being re-added. The date and time formats are defined by customer parameters system\_date\_format and system\_time\_format.
- **Resource ID** (new column) - displays the local ID of the resource (portfolio ID / electronic Service ID / Electronic Collection ID), depending on the resource level of the selected Report Type.
- **Resource Type** (new column) - displays Electronic Portfolio / Electronic Service / Electronic Collection to let you know the resource level of every entry.
- **Is Free** (new column) - displays the electronic collection/electronic service's 'Is Free' parameter value (if the override is populated, displays the override value). For every Collection/Service, state Yes/No, and for Portfolio states the portfolio's Service's 'Is Free' value (inherited).
- **Collection Type** (new column) - displays the electronic collection's type: Selective package / Aggregator package / Database.
- **Collection content type** (new column) - displays the electronic collection type: Book Package / Journal Package / Mixed Package / Abstract & Index Package / Web Service / Database.
- **Library** (new column) - displays the library of the resource. If the library is inherited from the e.collection, displays "<Library\_Name> (e.collection)".
- **Orders** (new column) - displays the number of the resource's PO Lines. The number is a link, select it to view the relevant PO Lines. Select Back to return to the Community Zone Update Task List.
- **Local Information** (enhanced column) - previously appeared only on the Review tab. Now it was added to the All tab as well.

### Enhancements to Row Actions

- **Edit Electronic Portfolio / Electronic Service / Electronic Collection** - Select to open the resource in its editor (if you have the required permissions).  
If you do not have editing permissions to the resource, you will be able to view the resources but not edit them. This option is not available for deleted resources.  
To return to the Community Zone Update Task List after editing/viewing the resource, select the new "Review CZ Updates" button that appears at the top of the resource (see below for details).

- **Report To ExLibris** - Select to send a report for Ex Libris, in case of any issue.

### Enhancements to Reports

- **Portfolio deleted from non auto-active electronic service** - The report 'Portfolio deleted from non auto-active package' was renamed to 'Portfolio deleted from non auto-active electronic service'. This is because an electronic collection may have more than one electronic service, with one service set to auto-active and the other to non auto-active, so the portfolio inherits its auto-active status from the electronic service, not the electronic collection.
- **Portfolio deleted from auto-active electronic service** - This report was available previously in the **All** tab. Now is available on both tabs. The report lists the portfolios deleted from electronic services that are defined as "Activate new portfolios associated with service automatically" = Yes.

### New Filters

New filters were added:

- **Electronic Service** - Include the values **All / Auto-Active / Non Auto-Active**. This filter displays only entries of the Service level. This filter has no corresponding column.
- **Resource Type** - Includes the values **All / Electronic Portfolio / Electronic Service / Electronic Collection**. If any of the resource types is not displayed in the table, the filter does not provide the option to filter by it.
- **Has Order** - Include the values **All / Yes / No**. If any of the resource types is not displayed in the table, the filter does not provide the option to filter by it.
- **Is Free** - Include the values **All / Yes / No** on the electronic service and electronic collection levels only.
- **Has Local Information** - Includes the values **All / Yes / No**.
- **Library** - Includes the available libraries of the institution.
- **Collection content type** - Include the values **All / Book Package / Journal Package / Mixed Package / Abstract & Index Package / Web Service / Database**. If any of the resource types is not displayed in the table, the filter does not provide the option to filter by it.
- **Collection Type** - Include the values **All / Selective package / Aggregator package / Database**. If any of the resource types is not displayed in the table, the filter does not provide the option to filter by it.

### New Search Options

New search options were added to enable searching for a specific identifier, MMS ID, and Resource ID.

### Default Time Range Modified

The table's time range now defaults to the last 30 days.

### New Sorting Options

The table now supports the ability to sort from additional column headers:

- Identifier
- Resource Type
- Is Free
- Package Type
- Collection Type
- Library
- Orders

### New Selection Counter and Ability to Clear Selection

On the **Review** tab, a selection counter was added. The counter supports multi-page selection. Also, an action **Clear selection** was added, to enable easily clearing of the selected rows across pages.

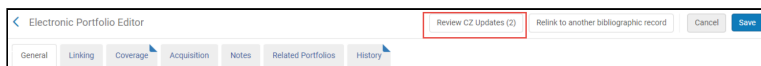
See [Working with the Community Zone Updates Task List](#).

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## New Access Points to the Community Zone Update Task List from Electronic Resource Editors

### March 2021 Resource Management

New access points were added to the electronic resource editors (Electronic Collection Editor / Service Editor / Portfolio Editor) that enable navigating from the editors to the Community Zone Update Task List page. The access point is the button "Review CZ Updates (X)", where "X" indicates the number of CZ updates available in the **Review** tab of the Community Zone Update Task List for that resource.



This button appears for resources linked to the Community Zone, including portfolios that were linked to CZ in the past and got localized due to portfolio deletion from the CZ. This button appears only for users with Repository Manager role (regardless if the role's scope is library-level or institution-level).

See [Accessing the Community Zone Update Task List from Electronic Resource Editors](#).

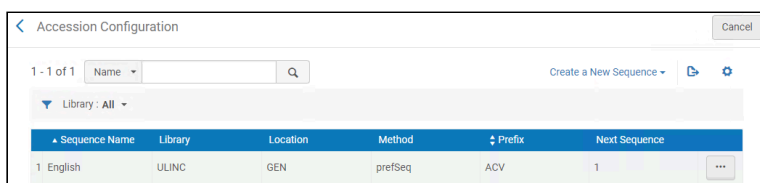
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## User Interface Improvements in Accession Number Generation Configuration

### March 2021 Resource Management

The user-interface that supports the generation of call numbers and temporary call numbers for items was enhanced to enable you to work quicker with a large number of call numbers:

- Pagination and search were added to the **Accession Configuration** page (**Configuration Menu > Resources > General > Accession Number**) and to the Accessions Number list that opens when generating a call number from the Metadata Editor.
- In the **Accession Configuration** page, saving is now automatic, which means all data that you enter is saved without the need to select the **Save** button (which was removed from this page.)



See [Configuring Accession Numbers](#).

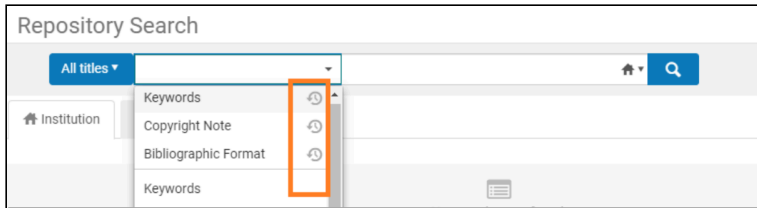
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## Accessibility Improvements

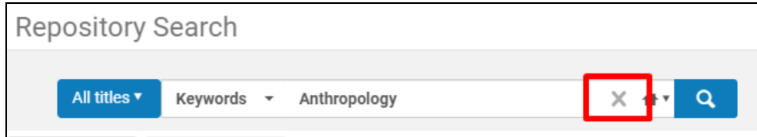
### March 2021 Resource Management

The following improvements were done with the purpose of making Alma compliant with the Americans with Disabilities Act (ADA):

- Recently used options in dropdown lists are now labeled with a recently-used indication.



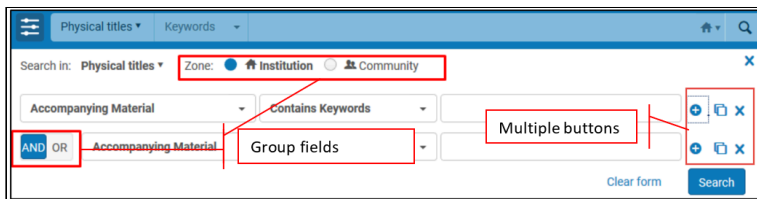
- The **Clear** button in the search bar is now accessible by keyboard navigation and is labeled.



- The Selection History button in pickup fields is now a label and complies with the screen reader expectations.



- The Search bar input field now displays an explanation of what to do in the field.
- All options in dropdown lists are now enabled to keyboard navigation, the screen reader reads the correct number of options.
- Input fields in the Advanced search were labeled appropriately.
- Group fields in the Advanced search are now marked as a group.
- When multiple buttons exist in the Advanced search, each now has its own label.



## Denied Note for Unregistered Users

### March 2021 Digital Resource Management

When defining access rights for digital objects, you can now configure a separate Denied Note for unregistered users. This allows you to have one note configured to inform unregistered users of the need to log in and a separate note for logged in users to inform them of additional conditions required for viewing the resource. To support this development, a new **Denied Note (override for unregistered users)** field was added to the Access Rights Policy page.

The screenshot shows the 'Access Rights Policy' configuration page. At the top, there are 'Cancel' and 'Save' buttons. The 'Details' section contains several input fields: 'Name' (required), 'Copyrights' (dropdown), 'Obtrusive Copyrights' (checkbox), 'Description', 'Denied Note', and 'Denied Note (override for unregistered users)'. The latter field is highlighted with a red border. Below the details is the 'Rules' section, which has an 'Add Rule' button and a filter set to 'All'. A message 'No records were found.' is displayed in the rules area. At the bottom left, there are radio buttons for 'If no match' and 'Deny Access'.

### Denied Note (override for unregistered users)

Enter the note in this field that you want to appear when access is denied for unregistered users. If no note is configured, the note configured in the Denied Note field is displayed.

For more information, see [Access Rights Policies for Digital Objects](#).

## PDF.js Viewer now Available to Display PDFs

### March 2021 Digital Resource Management

Alma now uses the PDF.js viewer when displaying PDFs to provide a rich tool set of viewing capabilities.

## Enhanced request cancellation after “date needed by” has passed

### March 2021 Fulfillment



#### Idea Exchange

The "Date needed by" field (also known as "Not Needed After"), which can be populated by the patron, was taken into account only in the "pick from shelf" workflow step, cancelling the request when the date was in the past without sending a cancel notification (since the patrons indicated that they are no longer interested).

Following this development, this behavior will be applied in other workflow steps in the request lifecycle:

- Queued requests that are not yet active but are past their date needed by will now be canceled by the "Request - handle last expiration date" (to avoid recalling items to fulfill requests that are no longer relevant).
- When an item is scanned in, if the "date needed by" of the request had passed, the request will be canceled.
- When an item is placed on the hold shelf, if the date needed by is earlier than the regular hold shelf expiry, the hold shelf expiration date will be populated by the date needed by (so that the request will not remain on the hold shelf after the patron is no longer interested).

A new cancellation reason, “date needed by has passed”, was added for requests that were canceled because the date needed by indicated by the patron was reached before the item could be placed on the hold shelf.



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## Note

Requests in transit will not be canceled when their date needed by is past, as the transit step needs to be completed. The cancelation will happen when the item is scanned in at the destination.

If a library is not interested in working with Date Needed By, it can hide the "notNeedAfter" field from the patron's request form. See: [Customizing Primo Request Forms](#), [Configuring Request Forms for Primo VE](#) or [Configuring the Request Forms for Alma-Summon](#).

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## Refresh "linked accounts" when using Primo VE My Account

### March 2021 Fulfillment

In Primo VE, when a Fulfillment Network patron uses the Primo VE My Account to view activity in another Alma institution, their linked account in that Alma institution is now refreshed using the user record at the patron's home institution. Refreshing the account allows an up to date assessment of the patron's eligibility to renew loans (e.g. if the patron is blocked).

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## Temporary renew of a Resource Sharing loan

### March 2021 Fulfillment-Resource Sharing

In Alma, when asking a lender to renew a RS loan that is about to become overdue, it is now possible to have the loan due date extended by a configurable short period (up to 9 days after the request renew date). This will prevent the loan from becoming overdue and accruing fines while the lender is contacted to arrange a renewal and new due date. Once the renewal has been confirmed with the lender, the loan and the borrowing request will be renewed to the agreed upon due date (using the existing workflow). The option is activated by selecting the new '**Extend due date when renew requested**' checkbox and populating the new "Extend due date by (days)" field on the resource sharing library configuration page.

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## Borrowing and lending request lists to display create and update time

### March 2021 Fulfillment-Resource Sharing



#### Idea Exchange

In Alma, the borrowing and lending resource sharing requests lists will now display the time as well as the date in the create and update date. This feature will enable institutions to sort borrowing and lending requests by date and time, to help libraries that want to handle digitization requests quickly and efficiently. The time display will depend on the institution's system\_time\_format customer parameter.

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## Recall process for SLNP requests

### March 2021 Fulfillment-Resource Sharing

A lender using Simple Library Network Protocol (SLNP) can now recall items by sending a recall email to the email address configured in the SLNP partner of the borrower. When recall is allowed in the partner's workflow and triggered by the operator or an incoming request, the Lending Recall Email Letter email is sent to the borrowing library and the lending

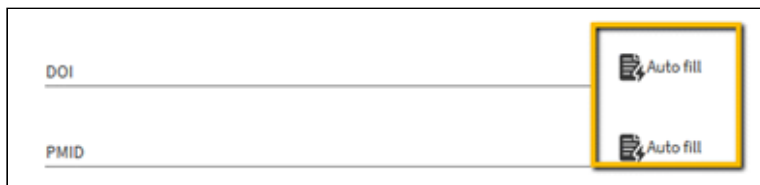
request is considered recalled.

---

## Primo VE Blank Request DOI/PMID Lookup Options

### March 2021 Fulfillment — Resource Sharing

It is now possible to add 'Auto Fill' buttons to the DOI and the PMID fields of the article request form. When clicked, Alma uses the value in the DOI or PMID fields to search for the article information and auto-completes the remaining form fields (such as article name and pages) based on these identifiers.



Activate this feature by enabling the new 'DOI Auto Fill' and 'PMID Auto Fill' fields on the **Discovery > GetIt Configuration > Resource Sharing Request** configuration form.

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## Additional Chapter and Article Information in Primo VE My Account Requests Lists

### March 2021 Fulfillment — Resource Sharing

Resource sharing requests listed in Primo VE's My Account requests lists are now richer with more information describing the requests' publication date, pages, and name of the journal.



Book chapter requests include their chapter title, author, and number in addition to the requested pages. The fields only display if they are populated.

---

## New System Events Subject Area

### March 2021 Analytics

The new **System Events** subject area is intended to replace the current Events subject area. The current Events subject area reports on a very large number of events, some of them redundant or not used, which makes it very difficult to produce effective reports on events that run in a reasonable amount of time. The new System Events subject area includes only a select number of events so that reports can be run quickly and efficiently. For a period of time, both subject areas will be available to allow customers to adjust to the new System Events subject area.

The following events are available in the **System Events** subject area:

- Events that are used in reports that the institution created and ran at least once in the past year.
- Events in out-of-the-box reports under Alma/shared/events/reports
- Events related to the creation, deletion, and update of invoice lines and invoices

For more information, see [System Events](#).

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## Borrowing and Lending Request Time in Hours and Minutes

### March 2021 Analytics

Previously, it was only possible to calculate borrowing and lending request time in terms of days. The following fields were added that enable you to create reports that calculate the borrowing and lending request time in hours and minutes:

- In **Borrowing Requests > Borrowing Request Details**:
  - Hours of Request for Partner
  - Hours of Request to Material Arrival
  - Hours of Request Sent to Material Arrival
  - Hours of Request Sent to Non-Fulfilled
  - Hours of Arrival to Patron Loan
  - Hours of Patron Check-In to Return
  - Minutes of Request for Partner
  - Minutes of Request to Material Arrival
  - Minutes of Request Sent to Material Arrival
  - Minutes of Request Sent to Non-Fulfilled
  - Minutes of Arrival to Patron Loan
  - Minutes of Patron Check-In to Return
- In **Lending Requests > Lending Request Details**:
  - Hours of Request
  - Hours of Request Created to Material Sent
  - Hours of Material Sent to Return
  - Minutes of Request
  - Minutes of Request Created to Material Sent
  - Minutes of Material Sent to Return

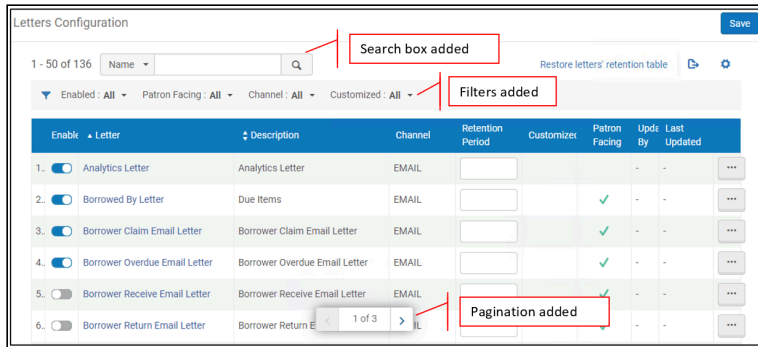
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## Enhancements to Letters Configuration Table

### March 2021 Administration and Infrastructure

The Letters Configuration code table was enhanced to enable you to find the desired letter quicker:

- You can now search for letters by name.
- Pagination enables you to jump between pages.
- Filters enable you to see a subset of relevant letters:
  - Enabled: To see letters you enabled during implementation and need to configure.
  - Channel: To filter letters by email, SMS or Webhook.
  - Patron Facing: To easily disable patron-facing letters if you do not want to send them out to patrons.
  - Customized: To see only letters that were customized or were not customized.



See [Configuring Letters](#).

Watch the [Enhancements to Letters Configuration Table](#) video (1:03 minutes).

## Importing Code Table UILeganto Labels

### March 2021 Administration and Infrastructure

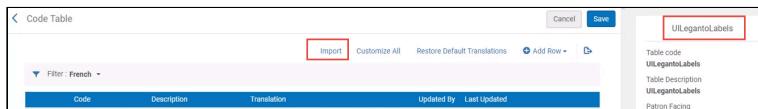
Now you can import the UILeganto Labels code table. This enables you to update the Leganto labels elsewhere and then import all of them into Alma. Note that the number of rows in the imported table must be identical to the number of rows in the table in Alma.

#### Note

It is advised that you export the existing Alma table (select



), make your changes and import it back to Alma.



## Support for Campus Name Translation

### March 2021 Administration and Infrastructure



#### Idea Exchange

Now you can translate Campus names ([Configuration > General > Libraries > Define Campuses](#)) to the languages defined in your system. The translated campus names subsequently appear in Alma and in Primo VE, for example in the pickup locations list, in Get It Request Form, and more, if you choose to display Primo VE in the interface language to which campus names were translated. This is an important ability for multilingual Primo VE sites.



See [Configuring the Institution and Its Libraries](#).

Watch the [Support for Campus Name Translation](#) video (0:54 seconds).

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## Chat with Support

### March 2021 Administration and Infrastructure

Staff users who have been assigned chat permissions can now chat with our Support team regarding the following types of Alma and Leganto issues directly from within the Alma management interface:

- Simple how-to questions and configurations
- Behavior and general inquiries
- Known issues



#### Chat Icon in Alma's Persistent Menu

This functionality is disabled by default. Only staff users who have been assigned the **Chat with Support** role will be permitted to open a chat session with our Support team. For more configuration information, see [Managing User Roles](#).

For more details, see [Online Chat Support](#).

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#### Note

Beginning on March 1, 2021, Chat will be available for Alma and Leganto customers who are in production in the European region. For production customers in the North American region, Chat will become available a couple of weeks later.

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## New Alma Layout - Exclusive Use

### March 2021 Administration and Infrastructure

Finalizing the rollout of the new Alma layout, the new layout is now exclusively available for Alma users. Users can no longer switch back and forth between the new and the old Alma layouts. For instructions on working with the new layout, see [The Alma User Interface](#).

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#### Note

To switch back to the old Alma layout in case of specific needs, please contact Ex Libris customer support.

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## Physical Inventory Viewer Privileges Added to All Relevant Roles

### March 2021 Administration and Infrastructure

Now all staff users can view all inventory (physical, electronic and digital), across the entire institution, regardless of the user role's scope. Users who do not have the permissions to edit the inventory can only view it.

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## Note

To limit the ability to view holdings and items in your institution only to certain roles, contact Ex Libris customer support.

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See [Managing User Roles](#).

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## The Licenses API was enhanced to support retrieving additional types of Licenses

### March 2021 API

It is now possible in Alma for the GET licenses API to retrieve a list of negotiations and amendments. Previously the GET licenses API returned a list of licenses of type='LICENSE' only and not negotiations or amendments.

The following newly added parameter 'types' are used to retrieve the license types:

- type=ALL (will return both licenses & negotiations)
- type=NEGOTIATION (only negotiation)
- type=LICENSE (only licenses)
- type=ADDENDUM (only amendments)

Amendments can also be retrieved using GET /almaws/v1/acq/licenses/{license\_code}/amendments ).

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## Note

Negotiation type licenses are only available in a Network Zone (NZ).

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## The Electronic Portfolio API now supports the "Public access model" field

### March 2021 API

Users now have the ability to use 'GET/PUT/POST' API for Electronic portfolios in order to create/update the **Public access model** field in portfolios. Previously, the API for electronic portfolios did not include information/update ability to the **Public access model** field which is found within the Acquisition tab of the Electronic Portfolio Editor.

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## Note

Valid values for the **Public access model** field can be found in the "Code" column of the "Access Model" table located in **Alma->Configuration->Acquisitions->Licenses -> Access Model**.

The access model code can be edited by the user. When using the create/update API, in case the access model code in the API does not match a code in Alma, this will not prevent the creation of the POL.

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## Enhanced Library Calendar

### March 2021 Fulfillment

The availability calendar in booking requests was enhanced to also reflect the times when the library is closed. If a pickup

location is selected before checking the availability calendar, the calendar will show when the library is closed, in addition to when no item is available for booking. This will help patrons to better understand when an item is available for booking. The closed times and the unavailable times will differ in color, and new customizable labels were added to specify in writing the time and nature of closed/unavailable windows in order to improve the availability calendar's accessibility.

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#### **Note**

As part of the May release, the "Check Availability" label's OTB value will change to inform patrons that in order to see the library's opening hours, they should first select a pickup location. As this is a patron-facing change, it will not be reflected in existing environment – libraries that wish to implement it will need to configure this label. For more information on customizing labels, see: [Modifying Display Labels](#) or [Configuring Display Labels for Primo VE](#).

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## Additional Enhancements

- **March 2021 Resource Management**

A new advanced search index 'Electronic Collection Content Type' was added on the Electronic Collection level. It enables you to search for electronic collections of a specific type.

- **March 2021 Digital Resource Management**

Quick Access for Primo VE is now available for mobile devices. For more information, see [Configuring the Quick Access Service](#).

- **March 2021 Digital Resource Management**

The IIIF infrastructure was upgraded for better performance in displaying high resolution images with all of the Alma viewers.

- **March 2021 Analytics**

The procedure for deleting an object from the community folder was changed. You now enter `DeleteObject` in the Description field in the Properties of the object. For more information, see [Deleting a Folder, File, or other Object from the Community Folder](#).

- **March 2021 Analytics**

The **Num of Rapid Local Override** field was added to **Borrowing Requests > Borrowing Request Details > Partner Level Requests**. It indicates the number of times librarians overrode the RapidILL block for borrowing requests when the borrowing library has the requested item locally.

- **March 2021 Analytics**

The **Combined Usage (last 12 months)** field, which is displayed in the repository search for electronic portfolios, as well as the corresponding **Usage by Title - Graph** report located under `/shared/Alma/Usage/Reports` are now based on COUNTER 5.

- **March 2021 Analytics**

In the **Titles Level Overlap Analysis** dashboard, the explanatory text was moved to the right of the fields for better readability in the following tabs:

- Overlap any inventory
- Only P
- Only E

Additionally, the explanatory text was added to the **Overlap P and P** tab.

- **March 2021 API**

The "GET" PO-line API was enhanced to include information regarding the ID of the portfolio associated with the PO line.

- **March 2021 API**

The Alma UI and API have been updated to clearly indicate "Process\_ID". Previously, there were instances that "Process\_ID" was referred to as "Job\_ID" and "Instance\_ID". This has been rectified to all instances to refer to "Process\_ID".



## Resolved Issues

- **March 2021 Acquisitions SF: 00906472**  
Update PO lines information job did not change the access model on the portfolio. This was fixed.
- **March 2021 Acquisitions SF: 00868295 00364446**  
The task list widget located on Alma's Dashboard presents the user with a count on how many PO lines "In Review" are assigned/unassigned. The count presented next to each task now takes into account the user's role scope. In case the user's scope is not institutional and is associated with a specific library or libraries, the count in the task list will include only PO lines "In Review" that are owned by the libraries associated with the user's role scope.
- **March 2021 Acquisitions SF: 00364446 00868295**  
The task 'Order Lines - review - unassigned' counts the number of unassigned order lines of the whole institution, instead of counting only the ones of the library in the user role scope. This was fixed."
- **March 2021 Acquisitions SF: 00788013**  
In Alma, searching for (Order lines> Receiving notes> ???) does not retrieve any results. This issue is resolved by the move to SOLR.
- **March 2021 Acquisitions SF: 00887981 00507810 00794470**  
Additional order with PO Line Type 'License Upgrade' did not close after the invoice is handled. This was fixed.
- **March 2021 Acquisitions SF: 00899232**  
Creating an invoice from file failed on 'Thread Timeout' for large Excel files. This page was removed from the 'Thread Timeout' mechanism.
- **March 2021 Acquisitions SF: 00702904**  
Attempting to delete a fund from summary fund displayed an error. This was fixed.
- **March 2021 Administration and Infrastructure SF: 00704276**  
Changing User Role from active to inactive, and vice versa, will be reflected on the Status Date of the user from now on.
- **March 2021 Administration and Infrastructure SF: 00755396**  
User History used to have issues parsing User Notes changes, with regards to Pop up notes information. This was fixed.
- **March 2021 Administration and Infrastructure SF: 00906039 00908904 00867187 00881322 00906725 00869782**  
Time zone gap affected searching dates in users records. This was fixed by considering time zone offset into querying.
- **March 2021 Administration and Infrastructure SF: 00910453**  
Importing records into a large mapping-table, such as Statistical Categories/Types, took very long causing the import to fail occasionally. This was fixed.
- **March 2021 Administration and Infrastructure SF: 00506714**  
In the View Files Details page of the Import Job, file names were truncated even when there was enough space in the column. This was fixed.
- **March 2021 Administration and Infrastructure SF: 00887416**  
New Layout: Patron Services - font weight of the right summary panel was different from the small-screen summary section. This was fixed.
- **March 2021 Administration and Infrastructure SF: 00900091**  
New Alma layout - User brief detail pop-up jumped and was cut off under Resource Request Monitoring. This was fixed.
- **March 2021 Administration and Infrastructure SF: 00900614**  
New Alma layout - Users that switched to the new UI were switched back to the old UI. This was fixed.
- **March 2021 Administration and Infrastructure SF: 00920618 00912862 00909580 00870390 00922063**  
New Alma layout: Long current location was not showing. This was changed to display cut names with 3 dots.
- **March 2021 Administration and Infrastructure SF: 00903423**  
New Alma layout - User Card was covered by the right-hand side menu of the new layout. This was fixed.

- **March 2021 Administration and Infrastructure SF: 00911162**  
Sometimes not all the menus appeared in the configuration menu. This was fixed.
- **March 2021 Administration and Infrastructure SF: 00891429**  
New Alma layout - Trying to View Fine/Fee Receipt redirected to Homepage instead of Showing Receipt. This was fixed and the receipt now opens in new tab.
- **March 2021 Administration and Infrastructure SF: 00823191**  
Users were unable to scroll past page one in iPad & iPhone Safari. This was fixed.
- **March 2021 Analytics SF: 00622887 00791102**  
In Analytics, in the Fulfillment subject area under the Loan Details folder, the Loan Note field contained no data even when the loan had a note. This was fixed.
- **March 2021 Analytics SF: 00914679 00914687**  
The shared institutional folder was missing for the institution, which caused an error when attempting to create an analytics object. This was fixed and the shared institution folder was added."
- **March 2021 API SF: 00822896**  
'GET Bib API' when used to retrieve a Network-Zone record with the members' holdings did not retrieve them when PrimoVE was active. This was fixed.
- **March 2021 API SF: 00894458**  
Retrieve Item API does not retrieve the permanent call number if the item is in a temporary location. The 'GET-Item API' now has a new field; [permanent\_call\_number], which holds the call number from the Holdings records the item relates to, even when in a temporary location."
- **March 2021 API SF: 00907944**  
When the 'Get-item-by-barcode API' was used with the lang (language) parameter, the redirect did not work well. This was fixed.
- **March 2021 API SF: 00909390**  
Update 'PO-Line API' failed when used with JSON payload and 'null' Library. This was fixed.
- **March 2021 API SF: 00889393**  
Refresh User API failed when Birth Date or Purge Date were set to false in the 'Linked Account Shared Fields' Mapping Table. This was fixed.
- **March 2021 API SF: 00906954**  
Retrieve all items for Bib record via API using the offset parameter retrieved the 1 item twice in subsequent requests. This was fixed.
- **March 2021 Digital Resource Management SF: 00892064**  
Lengthy note text did not display properly in the description panel of the New Alma Viewer. The text would display with a horizontal scroll bar instead of fitting within the panel. This was fixed.
- **March 2021 Fulfillment SF: 00862489 00885081**  
Records that had a publication date but not another date field resulted in the copyright rules calculation being incorrect. This was fixed.
- **March 2021 Fulfillment SF: 00863069**  
When the Closed Library Due Date Management policy was set to 'Move to next open day (same hour)' or 'Move to previous open day (same hour)', the Fulfillment Configuration Utility displayed a wrong loan due date time if the due date fell on a closed day. This was fixed."
- **March 2021 Fulfillment SF: 00710582 00450138 00427397 00897572 00428296 00901044 00550228**  
In the job report of a few detailed sections, the last character of the last barcode was truncated. This was fixed.
- **March 2021 Fulfillment SF: 00871339 00914212 00880895 00886568 00871297 00883938 00909389 00868465 00889681 00884590**  
Multi-item titles with many title-level requests resulted in slow loading for loans/returns. This was fixed by implementing performance improvements for scanning in requested items.
- **March 2021 Fulfillment SF: 00892542**  
Adding information to the job report: "Loans - Overdue and Lost Item" failed to handle an item when a comma as a decimal separator was used in the Replacement cost. This was fixed.
- **March 2021 Fulfillment SF: 00872391**  
Personal delivery requests for blocked patrons were not removed from 'Pick From Shelf' after scan-in. This was fixed.

- **March 2021 Fulfillment SF: 00899192**  
The number of requests under the item list in specific cases was incorrect. This was fixed.
- **March 2021 Fulfillment - Resource Sharing SF: 00898436**  
Journal title was lost when converting Patron Digitization Request for an article to a Resource Sharing Request. This was fixed by placing the journal title in the matching field of the borrowing request.
- **March 2021 Fulfillment - Resource Sharing SF: 00888430**  
The GES self ownership calculation ignored holding suppression. This was fixed. Items under suppressed holdings are now considered 'not available'.
- **March 2021 Resource Management SF: 00790058**  
The GetIt tab displayed a filter for year volume and description when there was only one item, because the holdings record has an 866 subfield x. This was fixed.
- **March 2021 Resource Management SF: 00915555**  
Primo VE GetIt was creating linked accounts from the logged-in institution, even if patrons were handled centrally in the Network Zone. Now, if patrons are managed centrally in NZ Primo VE Get It will create a user by copying the record from NZ, and not by creating a linked account from another IZ.
- **March 2021 Resource Management SF: 00886563**  
Shelf report returned incorrect results in specific cases. This was fixed.
- **March 2021 Resource Management SF: 00891902**  
While saving items with an empty barcode field OR barcode field that contained only space characters, the mechanism of generating barcode was not triggered. This was fixed.
- **March 2021 Resource Management SF: 00859471 00863221**  
'Link to community' functionality deleted the 'Public access model'. This was fixed, will be available after the SP job for fixing the data will run.
- **March 2021 Resource Management SF: 00860401 00883140**  
An encoding issue led to incorrect target URL for portfolios using parse params, where the parser was not Bulk::BULK and the parse param included a URL with a '&'. A fix was created, currently controlled by a customer parameter (temp\_encode\_amps\_for\_test\_access). This customer parameter is set to false in the OTB and will be set to true and then removed altogether within the next few months.
- **March 2021 Resource Management SF: 00895108**  
Portfolios with the same bib were not updated correctly. This was fixed.
- **March 2021 Resource Management SF: 00887725 00912880**  
'Localize/Activate portfolios from CZ' was not working using the Chinese UI. This was fixed.
- **March 2021 Resource Management SF: 00914014**  
Publisher and place of publication did not map as expected in portfolio loader. This was fixed.
- **March 2021 Resource Management SF: 00909677 00902594**  
There were duplicate records in the publishing file for ZDB holdings. This was fixed.
- **March 2021 Resource Management SF: 00891926**  
RSS Publishing: some details were written to the RSS file even if there were no published items. This was fixed.
- **March 2021 Resource Management SF: 00899227**  
The collections list and the collections facet displayed the default language collection name and not the translation in the current institution language. This was fixed.
- **March 2021 Resource Management SF: 00902103 00923602**  
Running the portfolio loader with the 'Add local portfolio' option selected created duplicate local portfolios when there was a large number of titles in the input file. A fix was created, currently controlled by a customer parameter (temp\_skip\_create\_local\_portfolios). This customer parameter is set to false in the OTB and will be set to true and then removed altogether within the next few months.
- **March 2021 Resource Management SF: 00812510**  
Some ISO 20775 holdings responses violated the schema by not having at least one holding entry. This was fixed. When the record has no holding items, the return XML will not include the holdings tag(<holdings>).
- **March 2021 Resource Management SF: 00919082**  
Configuring campuses and labels with a colon inside were breaking the Getit request form. This was fixed.
- **March 2021 Resource Management SF: 00893915**

When clicking on 'Online Access' from the search results in Primo, the ViewIt was opened and the viewer was attempting to open as a popup and was blocked. This was fixed. Direct linking logic for digital services was changed (and is now aligned to logic that works for electronic services). If direct linking is enabled for digital services - then the single/first digital service link is now directed automatically from the mashup, instead of opening a new tab.

- **March 2021 Resource Management SF: 00708854**  
Only 245 \$a \$b of the Loaned Title are Shown in Primo > My Loans. This was fixed. The logic of patron circ action loan title is now aligned with Alma logic.
- **March 2021 Resource Management SF: 00829279 00905314 00848394 00877959 00896613 00838386 00829305 00870835 00836431**  
For CZ items, there was an issue with the resource type based on index (database). This was fixed.
- **March 2021 Resource Management SF: 00837668**  
Article OpenURL from vendor led to an ebook instead of the Primo services page. This was fixed.
- **March 2021 Resource Management SF: 00855591 00664935**  
The ILL form Start page and End page were not populated as expected. This was fixed.
- **March 2021 Resource Management SF: 00797662 00830557 00887593**  
Collection features displayed in Primo VE although the collection was suppressed in Alma. This was fixed.
- **March 2021 Resource Management SF: 00870241**  
Location map code was missing from OTB and had no label. This was fixed. also, a tooltip was added to the button.
- **March 2021 Resource Management SF: 00884222 00871125 00910178**  
Primo VE: Loan type dropdown was locked and the patron could not choose the loan period for the request. This was fixed. For title level requests, an empty option is added to the drop-down regardless of the CP (temp\_getit\_add\_empty\_default\_option\_to\_request\_attributes), but for item level requests an empty option is added, and this is controlled by a customer parameter.
- **March 2021 Resource Management SF: 00794498**  
Primo VE: 'Dublin Core tag' selection ignored the 'Encoding Schema'.
- **March 2021 Resource Management SF: 00884291**  
'Only on cross consortia searches' option for physical inventory inclusion for other members did not work. This was fixed.
- **March 2021 Resource Management SF: 00878657 00894599 00915806 00899511 00909458**  
The order of fields configured in the Resource Sharing Form Customization was not reflected as expected. This was fixed.
- **March 2021 Resource Management SF: 00888898**  
Errors were encountered during federation passive sign-out. This was fixed.
- **March 2021 Resource Management SF: 00911744**  
Fixed a bug where manual registration for fulfillment network members didn't work.
- **March 2021 Resource Management SF: 00883587 00893730**  
Link Resolver did not return Unpaywall links in the View-It of a Services Page if generated by Primo Citation Linker or Google Scholar. This was fixed.
- **March 2021 Resource Management SF: 00900895 00898470**  
Resource sharing requests were not displayed in Primo VE. This was fixed.
- **March 2021 Resource Management SF: 00864018**  
An improper search, which passed in CDI (and not in Solr), in the **Blended** tab, resulted in no facets. This was fixed.
- **March 2021 Resource Management SF: 00719733**  
The 'opens in a new window' icon was not shown in the availability line in some cases and the text was not added to the tooltip. This was fixed.
- **March 2021 Resource Management SF: 00793848**  
Some regions in the user account area did not comply with accessibility demands. This was fixed.
- **March 2021 Resource Management SF: 00861480**  
Primo VE brief search results were not highlighted correctly. This was fixed.
- **March 2021 Resource Management SF: 00902407**  
Alma - CDI Publishing job completed with errors. This was fixed.
- **March 2021 Resource Management SF: 00871404**

Electronic collection 'CDI search activation' field update filter showed incorrect information. This was fixed.

- **March 2021 Resource Management SF: 00902049 00854780**  
New Metadata Editor: Pushing records to MDE caused a jump back to first results page. This was fixed.
- **March 2021 Resource Management SF: 00856950**  
New Metadata Editor: 1. 'Filter List' tooltip was modified to 'Filter and Sort list' 2. The abbreviations 'Asc' and 'Desc' are written out in full (as in the translations).
- **March 2021 Resource Management SF: 00863437**  
New Metadata Editor: In some cases, after starting the 'merge and combine' process, while waiting for the load to end, an error message appeared. This was fixed.
- **March 2021 Resource Management SF: 00881055**  
New Metadata Editor: Delete option for CZ authority did not appear when a contributor had an extended role. This was fixed.
- **March 2021 Resource Management SF: 00894429 00886025 00925679**  
When opening records that have a higher cataloger level via the 'Edit' button in the search results of record view, an external process was changing the original record. This was fixed.
- **March 2021 Resource Management SF: 00851829**  
New Metadata Editor: In Google Chrome a black border was displayed around the fields. This border was overlying diacritics and made it impossible to distinguish them. This was fixed.
- **March 2021 Resource Management SF: 00895526**  
New Metadata Editor: The language scripts for 'Alternate Graphic Representation' were not loaded in time and all relevant menu items did not display. This was fixed.
- **March 2021 Resource Management SF: 00879192**  
New Metadata Editor: wrong behavior of the checkboxes in Authority Control Task List. This was fixed.
- **March 2021 Resource Management SF: 00898094 00884085 00894231**  
New Metadata Editor: performing the ordering operation on a record did not release the record from the Metadata Editor. This was fixed.
- **March 2021 Resource Management SF: 00905923 00896907**  
New Metadata Editor: F3 heading control did not work after using the 'Enhance The Record' tool or the 'Expand from Template' tool. Also, the binoculars icons for the linked headings disappeared. The issue was fixed.
- **March 2021 Resource Management SF: 00910235**  
New Metadata Editor: Editing fixed fields via form > Edit > Exit form > the change was displayed only after clicking on the field. The issue was fixed.
- **March 2021 Resource Management SF: 00917761 00895003**  
New Metadata Editor: Menu item 'Release Records of Another Cataloger' was added under 'Record actions' menu. When no record is opened, this item is active and visible.
- **March 2021 Resource Management SF: 00857085**  
New Metadata Editor: when the user changed the description field under any rule properties, the change was not updated. The issue was fixed for the new Metadata Editor only.
- **March 2021 Resource Management SF: 00886849 00904210 00903372 00894940 00904093**  
New Metadata Editor: Browse Bib Headings - some headings with browse\_type = MARC\_6XXNAME were not found under Subjects+6XX heading type. This was fixed.
- **March 2021 Resource Management SF: 00898314**  
Metadata Import - Test Connection gave a success message even when the connection failed. This was fixed.
- **March 2021 Resource Management SF: 00883312**  
Merge and Combined failed with an error message. This was fixed.
- **March 2021 Resource Management SF: 00898881 00899054 00898573 00897765 00898374 00902724 00897790 00898493 00900748 00899139 00898418 00897762**  
In certain situations, the old Metadata Editor was not loading in Firefox. This was fixed.
- **March 2021 Resource Management SF: 00880820**  
Resource Types 'Atlas - Physical' and 'Atlas - Electronic' was not supported for Serials (LDR pos 7 = s). This was fixed. The Resource Type for existing records will be recalculated during the semi-annual indexing planned for May.
- **March 2021 Resource Management SF: 00898957 00756587**

When you had a record with some ISSN fields (022, 775) and one of them was wrong, there was a warning message. When you clicked on this warning message, the first field was highlighted, although the wrong ISSN was in another field. The issue was fixed for ISSN and for the following other types: IAN, ISBN, ISMN, OtherStandardNumber, UPC.

- **March 2021 Resource Management SF: 00884938**  
'Single match' in the import profile was not copied when copying the profile. This was fixed.
- **March 2021 Resource Management SF: 00904908 00907133**  
Import job finished with 'File failed in Loading' error due to file extraction issue. This was fixed.
- **March 2021 Resource Management SF: 00841694**  
SBN search view labels were changed.