



Alma May 2021 Release

Our Changing World, Our Changing Libraries
Superstar Corona Vaccine Developers

Alma May 2021

Release Notes

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Alma May Make the Most

Make the Most of May's Release

Action Items

[Generate Representation Labels from Templates](#) - You now have the flexibility to generate bulk representation labels, based on a label template that could include constant strings or bibliographic details with an optional regular expression.

Upcoming Issues to Note

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.

June Release Sneak Preview

Click [here](#) to view June's sneak preview.

Alma May 2021 Main Stories

4th and 5th reporting codes added to acquisitions entities

May 2021 Acquisitions

Two new reporting codes have been added to the Purchase Order Line editing screen; 4th and 5th reporting codes. The additions include the following in Alma:

- These new options within the PO line, Invoice line and Fund transaction screens (4th and 5th reporting codes).
- Two new menu links in Alma configuration menu (4th and 5th reporting codes).

Note

- The names of the fields in the Alma UI have been modified and are now called "1st reporting code, 2nd reporting code, 3rd reporting code, 4th reporting code and 5th reporting code".
- There is a new dedicated section for the reporting codes in the POL.
- Only the UI labels have changed. The tags for API and EOD remain the same.

Watch the [Additional Reporting Codes in PO Lines](#) video (1:53 minutes).

Receiving workbench incorporates sticky filters

May 2021 Acquisitions



Idea Exchange

Alma's receiving workbench (Manage items screen) now incorporates sticky filters. These sticky filters (*Sort Routine*, *Receiving Status* and *Location*) enable users to easily re-access these workspaces when either a user leaves the screen and returns after a short while or logs in again to Alma. The filters remember the selections made by users so that they don't have to be re-defined when re-accessing the system.

Note

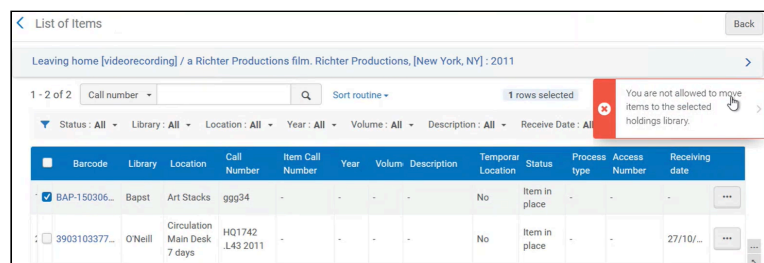
The Filter "Location" will be sticky only if there are items with the same location as previously selected. If a POL, which was opened, does not have items which match the value in the "Location" filter, the filter will automatically move to "All".

If a "Sort Routine" is selected by the user and then deleted by the system administrator, the user who will login to the receiving workbench will not see the **Sort Routine name** listed. The user will need to select a new sort routine.

Changing Holdings or Relinking Item is Possible Only in User Role Scope

May 2021 Resource Management

Now when changing holdings for an item or relinking item to a bibliographic record, the target library must be within the scope of the user role. This prevents moving item or changing holdings for an item, if a new holding is not in user scope. When attempting one of these actions and the target library is not in scope, the user receives an error message "You are not allowed to move items to the selected holdings library" and the action is aborted.



Note

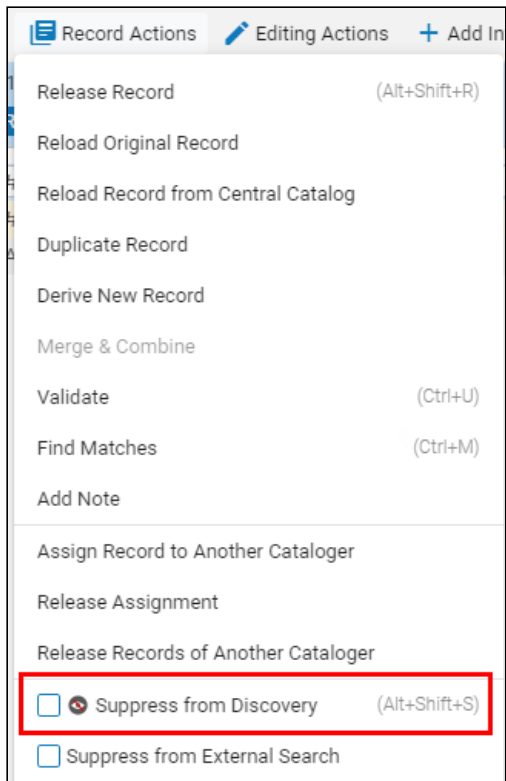
This functionality is disabled by default. To enable it, contact Customer Support.

See [Moving Items Between Holdings and Deleting Holdings Records](#) and [Moving Holdings Between Bibliographic Records \(Relinking\)](#).

'Suppress from Discovery' is Available for Unsaved Records

May 2021 Resource Management

The 'Suppress from Discovery' option is now available in the Record Actions menu of the Metadata Editor for new records before they are saved. This allows you to suppress from discovery new bibliographic records while creating them in the Metadata Editor. In addition, now you can use the new keyboard shortcut **Alt+Shift+S** to suppress records.

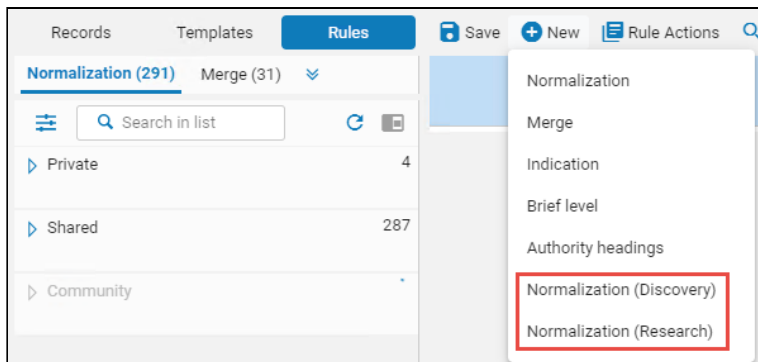


See [Menu Bar of the Metadata Editor](#).

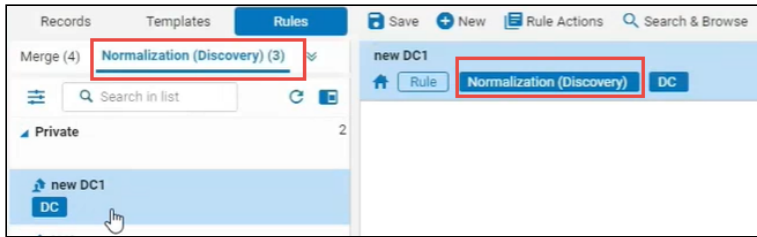
Discovery and Research Rules in the Rules Area

May 2021 Resource Management

Now the Discovery Display rules (rules that control the display of information from Alma in Primo VE) and Research rules are easily accessible and easily distinguishable in the Metadata Editor. To create these rules, when clicking **New**, now users can select **Normalization (Discovery)** (appears only if Primo VE is defined in the system) or **Normalization (Research)** (appears only when Esploro is defined in the system).



Each rule that you create has an appropriate badge (for example, "Normalization (Discovery)"), and appears in a dedicated tab (bearing the same name as the badge).



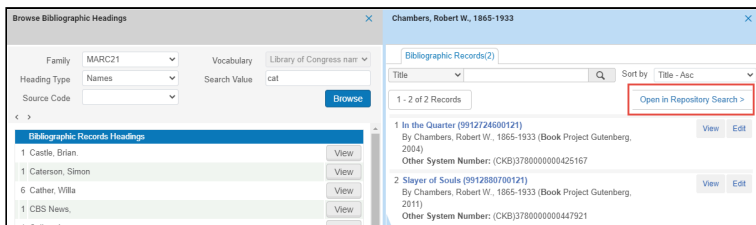
See [Working with Normalization Rules](#) (Alma), [Working with Normalization Rules](#) (Primo VE), and [Managing Asset Normalization Rules](#) (Esploro).

Heading Information in Metadata Editor and Repository Search

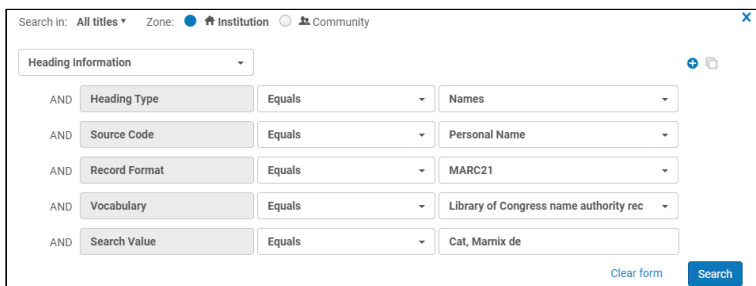
May 2021 Resource Management

The ability to search for bibliographic records that are related to a specific heading was improved as follows:

- In the Metadata Editor: When you search for bibliographic records related to a heading by **Browse Bibliographic Headings** > **View**, now you can open the results that display in the **Bibliographic Records** tab in the repository search. To do that, select the new option **Open in Repository Search**. Once the results are in the repository search, you can create a set that would include all these results, and work with the set as usual. This significantly improves the workflow for browsing bibliographic headings.



- A new option Heading Information was added to the Advanced Search. This option allows searching for bibliographic records related to a specific heading in the same way as by using **Browse Bibliographic Headings** in the Metadata Editor.



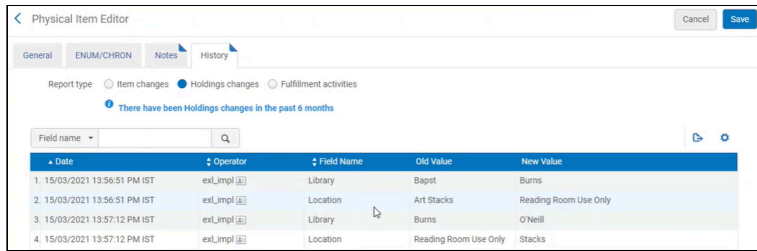
See [Browsing Bibliographic Headings](#) and [Performing an Advanced Search](#).

Information Loss Prevented when Changing Item Location by Moving the Last Item to a New Holdings

May 2021 Resource Management

When a holdings record holds only a single item, and you move this item to a different location, now the item remains associated to the same holdings record, and only its details are modified. Previously a new holdings record would be generated, and the information related to the previous holdings record, such as versions, notes, etc., would be lost. Now this information loss is prevented.

To notify users that there have been recent changes to the holdings record, an indication now appears in the **History** tab of the Physical Item Editor that states "There have been Holdings changes in the past 6 months". This indication appears when any type of change in the holdings took place, not only when the location has changed. Click the **Holdings changes** button to view the history of item changes.



Note that this behavior only takes place for a holdings record with a single item. When the holdings record has several items and you want to move some of these items, the existing functionality remains - a new holdings record is created and all the selected items are moved to that holdings record.

See [Updating Item-Level Information](#).

Field 060 Added to Search Index 'National Library of Medicine Call Number'

May 2021 Resource Management

MARC 21/KORMARC field 060 \$\$a,b was added to the index "NLM (National Library of Medicine)-Type Call Number". This in addition to MARC 21 field 096 \$\$a,z, which continues to be available for this index. Now searchers retrieving records from NLM can find records by using "NLM-type Call Number" index based on both fields 060 and 096.

Note

Full inventory indexing must be run for this development to take effect.

Metadata Editor Accessibility Improvements

May 2021 Resource Management

The following improvements were done with the purpose of making Alma meet Level A and AA of the W3C Web Content Accessibility Guidelines (WCAG 2.1) and Section 508 of the US Rehabilitation Act for features and functions.

On the search result panel in the Metadata Editor (for example, Browse Shelf Listing panel), the users can use the mouse to navigate between the records and pages. However, some users might find the repetitive use of the mouse problematic. Now these users can navigate the results list by using the keyboard's keys.

You can navigate as follows:

- Use **Tab/Shift +Tab** to navigate from the fields panel to the results panel.
- Use **e Tab/Shift +Tab** to navigate the different results panel tabs.
- Use **Tab/Shift +Tab** to browse next and previous pages. Press **Enter** to open the desired page.
- Use **Tab/Shift +Tab** to navigate between results in the panels. Press **Enter** to open the desired result.
- Use the **Enter** to open the ellipsis button, and use the up/down arrows to move between the options. To close the options, press **Esc/Tab** (focus on the next button) or **Shift +Tab** (focus on the previous button).



In addition, more accessibility improvements were made to improve the ability of screen readers to correctly convey the state of elements to the reader, on Browse Bib Heading panel, in the Editing panel and in the Filter and Sorting panel.

Alma Accessibility Improvements

May 2021 Resource Management

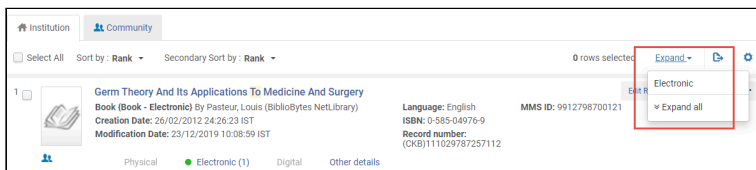
The following improvements were done with the purpose of making Alma meet Level A and AA of the W3C Web Content Accessibility Guidelines (WCAG 2.1) and Section 508 of the US Rehabilitation Act for features and functions:

- **Form fields** – A label was added for the "X" button. Page sections now have group labels.
- **Record List View** – In internal search the labels of the search box and the search icon are now accessible by keyboard.

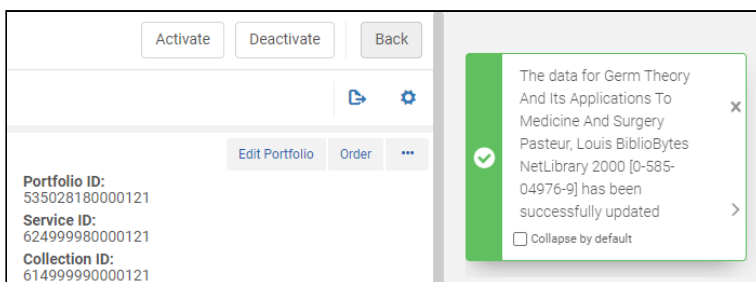
The **Sort Routing** action is now accessible by keyboard:



The **Expand** action is now accessible by keyboard, and you can open and close the list using keyboard keys, see the selection there (if any), and remove or change it:



- **Floating Messages** – the floating messages are now accessible by keyboard navigation. You can press on the icon to open the message and to navigate to the **Collapse** and **Close** buttons with keyboard keys. In addition, now the message indicates if there is a list of comments in the message or a single comment.



Holding Search - Additional Indexes

May 2021 Resource Management

Additional indexes were added to holdings search. This allows you to conduct a more refined search for physical title and physical items. All these indexes are part of Advanced search only.

The screenshot shows a search interface with the following elements:

- Search in: Physical titles
- Zone: Institution (selected) / Community
- Search input: encoding
- Search type: Contains Keywords
- Buttons: Clear form, Search
- Dropdown menu: Holdings (expanded) with 'Encoding level' selected.

New indexes

Index name	Taken from	Possible Values	Show in	Part of Keywords
Encoding level	LDR pos17	<ul style="list-style-type: none"> 1 - Holdings level 1 2 - Holdings level 2 3 - Holdings level 3 4 - Holdings level 4 5 - Holdings level 4 with piece designation m - Mixed level u - Unknown z - Other level 	Advanced	no
Type of record	LDR pos06	<ul style="list-style-type: none"> u - Unknown v - Multipart item holdings x - Single-part item holdings y - Serial item holdings 	Advanced	no
Receipt, acquisition, or access status	008 pos06	<ul style="list-style-type: none"> 0 - Unknown 1 - Other receipt or acquisition status 2 - Received and complete or ceased 3 - On order 4 - Currently received 5 - Not currently received 6 - External access 	Advanced	no
Method of acquisition	008 pos07	<ul style="list-style-type: none"> c - Cooperative or consortial purchase d - Deposit e - Exchange f - Free g - Gift l - Legal deposit m - Membership n - Non-library purchase p - Purchase q - Lease u - Unknown z - Other method of acquisition 	Advanced	no

Index name	Taken from	Possible Values	Show in	Part of Keywords
Completeness	008 pos16	0 - Other 1 - Complete 2 - Incomplete 3 - Scattered 4 - Not applicable	Advanced	no
Creation date (physical holdings)	HOL creation date	date field	Advanced	no
Modification date (physical holdings)	HOL modification date	date field	Advanced	no
URL method	856 \$2	text	simple and advanced	no
URL materials specified	856 \$3	text	simple and advanced	no
URL access status	856 \$7	text	simple and advanced	no
Pattern first level of enumeration	853 \$a	text	simple and advanced	no
Pattern second level of enumeration	853 \$b	text	simple and advanced	no
Pattern third level of enumeration	853 \$c	text	simple and advanced	no
Pattern fourth level of enumeration	853 \$d	text	simple and advanced	no
Pattern fifth level of enumeration (NR)	853 \$e	text	simple and advanced	no
Pattern sixth level of enumeration (NR)	853 \$f	text	simple and advanced	no
Pattern frequency	853 \$w	text	simple and advanced	no
Textual holdings	866 \$a 867 \$a 868 \$a	text	simple and advanced	no
Linkage Number	014 \$a	text	simple and advanced	yes
Control Number (Holdings)	001	text	simple and advanced	yes
Other System Number (035a)	035 \$a	text	simple and	yes

Index name	Taken from	Possible Values	Show in	Part of Keywords
			advanced	
Other System Number (035z)	035 \$z	text	simple and advanced	yes
Other System Number (035a+z)	035 \$\$a,z	text	simple and advanced	yes
OCLC Control Number (035a)	035 \$a (OCLC prefix)	text	simple and advanced	yes
OCLC Control Number (035z)	035 \$z (OCLC prefix)	text	simple and advanced	yes
OCLC Control Number (035a+z)	035 \$\$a,z (OCLC prefix)	text	simple and advanced	yes
Action note note	583 \$\$x,z	text	simple and advanced	yes
Action Note Authorization	583 \$f	text	simple and advanced	yes
URL	856 \$u	text	simple and advanced	yes
URL non public note	856 \$x	text	simple and advanced	yes
URL link text	856 \$y	text	simple and advanced	yes
URL public note	856 \$z	text	simple and advanced	yes
Textual holdings nonpublic note	866 \$x 867 \$x 868 \$x	text	simple and advanced	yes
Textual holdings public note	866 \$z 867 \$z 868 \$z	text	simple and advanced	yes

Note

Full inventory indexing must be run for this development to take effect.

See [Search Indexes](#).

Overlap Analysis Tool - Support for Sites with Distributed Electronic Resources

May 2021 Resource Management

Sites who manage distributed electronic resources using the 'Available For' group setting can now use the Overlap and Collection Analysis tool for collection development analysis. Using the Overlap and Collection Analysis tool it is possible to analyze the overlap of electronic resources for specific library/campus according to the 'Available For' group settings.

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

Semi-Annual Re-indexing

May 2021 Resource Management

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

- Holding Search - Additional Indexes. See [here](#).
 - Field 060 added to search index 'National Library of Medicine Call Number'. See [here](#).
 - Support for Czech Alphabet. See [here](#).
 - Extended Lookup for Authority UNIMARC Classification. See [here](#).
-

Solution for Institutions with 'Active for Search' restricted collections

May 2021 Resource Management

Alma now allows institutions to use the search activation function for collections that require a subscription for search (for example, A&I databases). Such collections are marked on Alma as 'CDI search rights: Subscription'. Previously, it was only possible to activate these collections in Alma in the same way you activate a full text collection (or use the 'CDI only full text: Yes' setting) to indicate the institution had a subscription and the collection would become searchable in CDI. This was not intuitive and led to a lot of confusion, not least because such collections do not usually contain any full text. With this release, both types of activations are now possible. No changes are needed for collections that you already activated, and you can continue to fully activate these type of collections. Additionally, activation for search in CDI is now also possible and has the same effect as the full activation: both types of activations will ensure the collections will be discoverable in CDI.

Note

This change is relevant for Fully Flexible setting customers only.

Generate Representation Labels from Templates

May 2021 Digital Resource Management

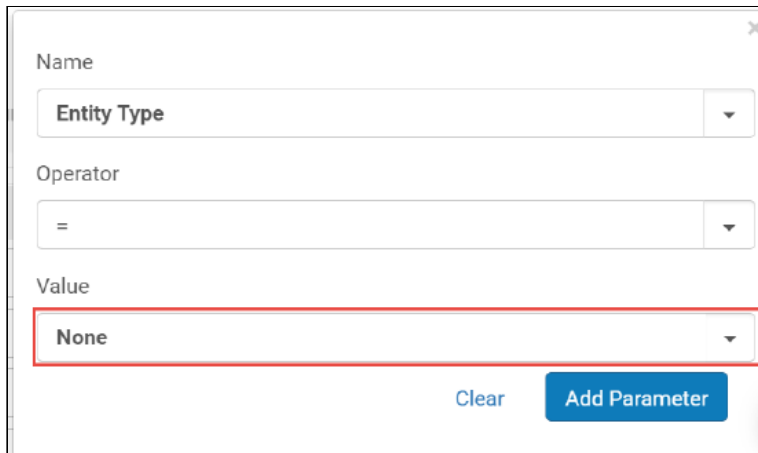


Idea Exchange

You can now add labels to representations based on a template that you configure. The labels can be fixed text or based on a field from the bibliographic record with an optional regular expression. Labels can be added to representations

individually or in bulk using a job. In addition, a job can be used to remove the labels from representations in bulk.

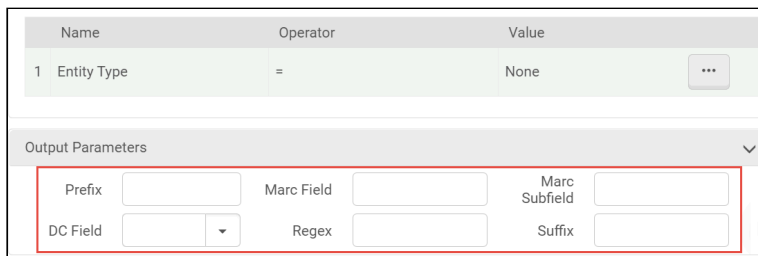
You configure the representation templates from the Representation Label Template Setup Editor ([Configuration > Resources > General > Representation Label Templates](#)). To create a template for representation labels, create a parameter with an entity type equal to **None**.



The screenshot shows a form for creating a parameter. It has three main sections: 'Name', 'Operator', and 'Value'. The 'Name' field is a dropdown menu with 'Entity Type' selected. The 'Operator' field is a dropdown menu with '=' selected. The 'Value' field is a dropdown menu with 'None' selected, which is highlighted with a red border. At the bottom of the form, there are two buttons: 'Clear' and 'Add Parameter'.

Entity Type - None

The following fields are displayed.



The screenshot shows a table with three columns: 'Name', 'Operator', and 'Value'. The first row contains '1', 'Entity Type', '=', and 'None'. Below the table is a section titled 'Output Parameters' with a dropdown arrow. This section contains several input fields: 'Prefix', 'DC Field', 'Marc Field', 'Regex', 'Marc Subfield', and 'Suffix'. The 'DC Field' dropdown is set to a value, and the 'Prefix' and 'Suffix' fields are empty.

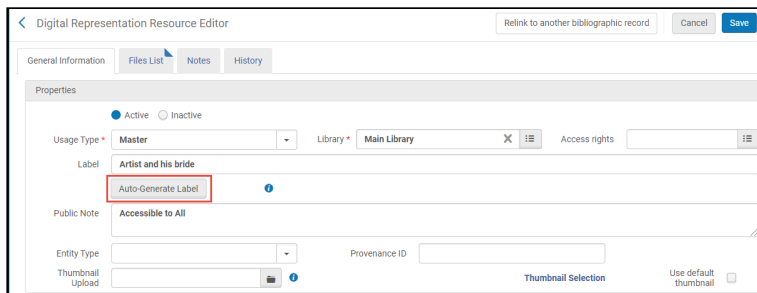
Representation Label Output Parameters

Enter information in the fields to determine the text of the label. For more information, see [Configuring Representation Label Templates for General Representations](#).

You can add the labels defined in the templates to representations:

- To a single representation:

The **Auto-Generate Label** button now appears for all representations.



The screenshot shows the 'Digital Representation Resource Editor' interface. It has a top navigation bar with 'General Information', 'Files List', 'Notes', and 'History'. Below this is a 'Properties' section with various fields: 'Usage Type' (Master), 'Library' (Main Library), 'Access rights', 'Label' (Artist and his bride), 'Public Note' (Accessible to All), 'Entity Type', 'Provenance ID', 'Thumbnail Upload', and 'Thumbnail Selection'. The 'Auto-Generate Label' button is highlighted with a red border in the 'Label' field area.

Auto-Generate Label

Select the button to add a label to the representation according to the template you configured.

- To a set of representations:

Create the set of representations to which you want to add the labels. Configure the Global Representation Changes job to run on the set.

Change Fields

Active Active Inactive Suppress bib without active inventory Yes No

Usage Type **Master**

Library

Label Empty Generate Condition: **Unconditionally**

Public Note Condition: **If field empty**

Global Representation Changes

From the Label row, select **Generate**.

To remove labels from the set, from the Label row, select **Empty**.

For more information, see [Global Representation Changes](#).

Suppress Bibliographic Records Without Active Inventory

May 2021 Digital Resource Management



Idea Exchange

You can now configure the Global Representation Changes job to suppress bibliographic records that have no active inventory after the job is run. To configure this feature, select the **Suppress bib without active inventory** option when selecting Inactive from the Label row.

Change Fields

Active Active Inactive **Suppress bib without active inventory** Yes No

Usage Type **Master**

Library

Suppress Bib Without Active Inventory

For more information, see [Global Representation Changes](#).

Additionally, when manually setting an individual representation to **Inactive**, if there are no other active representations on the bibliographic record, a pop-up appears asking if you want to suppress the record.

Confirmation

Handling bibliographic record without active inventory Do nothing Suppress bibliographic record

Confirm

Handling Bibliographic Record Without Active Inventory - Confirmation

In addition, a parameter was added to the Update Representation Rest API to suppress bibliographic records without active

representations.

Support ability to Waive All/Large lists of Fines/Fees in User Record (Fines and Fees tab)

May 2021 Fulfillment

Alma now enables user to select fines and fees across the full paginated fees list (among multiple pages) and waive them. A 'Waive All' option is added to the Fines\Fees tab. Previously, users could only waive selected fines and fees on a currently displayed page.

For more information, see [Managing User Fines and Fees](#).

Note

The new ability to select fines and fees across the full paginated fees list (i.e. selecting from different pages) implies that any personalization a user may have previously done for the fees' list columns will have to be redone following this release.

It is not possible to waive more than 100 selected fees in one action.

Watch the [Waive All the Fines and Fees of a Patron](#) video (1:13 minutes).

Search user records by phone number

May 2021 Fulfillment

In Alma, phone numbers are now a searchable user field. Phone numbers can now be entered in the simple or the advanced search to find users. Previously, this was not a supported search user field in Alma.

Note

Since phone numbers are encrypted upon save, a phone search will be an exact match search (e.g. if country code is entered in the phone number it should be used when searching), on numeric values only (any non-numeric values, e.g. hyphens, spaces or brackets, will not affect the search).

Sort user list by User Group and Expiration/Purge Date

May 2021 Fulfillment



Idea Exchange

Alma now enables the User List to be sorted by User Group, Purge Date and Expiration Date. When using the advanced search, a set can be created to include multiple user groups. These groups or the expiry/purge date can now be sorted. The purge date column is hidden by default and can be added to the displayed columns.

Pop-up message when scanning in an item with a request note

May 2021 Fulfillment



Idea Exchange

A new 'Requester Note' message has been added to the *Scan In Messages Configuration* screen. By default, this message is enabled and will appear as a 'Pop-Up'. The message will be displayed when an item that is scanned in has a 'Requester Note' associated to it.

Watch the [Requester Note Appears Upon Scanning In an Item](#) video (1:39 minutes).

Enhanced export when sending requests to remote storage

May 2021 Fulfillment

The integration profile for exporting requests to remote storage was enhanced in the following ways:

1. Privacy enhancement: For integration types XML and XML/NCIP (regardless of system type), a new configuration, "Include patron info in physical item requests", now allows libraries to have patron information in the exported XML for physical requests.

Note

For digital requests, patron information is controlled by an existing configuration ('Handles digitization requests locally' in the remote storage). In the past, this affected physical requests as well - this was fixed, and digital requests handling will no longer affect physical requests. Libraries that wish to include patron information in physical requests will need to enable the new checkbox in the integration profile.

It is our recommendation that libraries that choose to export patron information will use an encrypted sFTP connection (see [FTPing encrypted files to Alma using PGP](#)).

-
2. XML file changes: For integration types XML and XML/NCIP (for system "BIBSYS" and "XML" only), the following information is added to the exported file:
 - Request note
 - Title (exists today for manual description requests only, will be added for all request types)
 - Author
 - ISSN/ISBN
 - Place & date of publication
 - When patron information is exported, it will now include requester's preferred address
 3. Request itemization enhancement: A new "itemize remote storage requests" option was added to the remote storage integration profile (export request section). This allows libraries to choose if remote storage requests are itemized upon export (as today) or when waiting for export to remote storage.
For more information, see [Requests to Remote Storage Facilities](#).
 4. The label "System (for EXL purposes...)" is modified to "System" – as the remote storage system may impact the XML file format for integration types XML and XML/NCIP.

Locate status added to the audit trail of borrowing and lending Resource Sharing requests

May 2021 Fulfillment-Resource Sharing

Locate status has been added to the audit trail of borrowing and lending RS requests. This allows librarians to see when locate status changed between "Locate not run", "Resource located" and "Locate failed". This change in the 'locate status' is reported in the request history.

Prefer electronic format in lender locate

May 2021 Fulfillment-Resource Sharing

Alma can be configured to show preference to electronic format articles in the lender side locate process. If a requested article is found in electronic format then that resource will be considered the only option for the lender. Other potential physical options are considered only if no electronic resources are found. This behavior is activated by the new "Prefer Uresolver locate results" switch that can be switched on at the Lending Setup section of the resource sharing library. Note that electronic resources are considered a match only if their coverage matches the details of the request. This affects both the automatic and the manual locate process on the lender side.

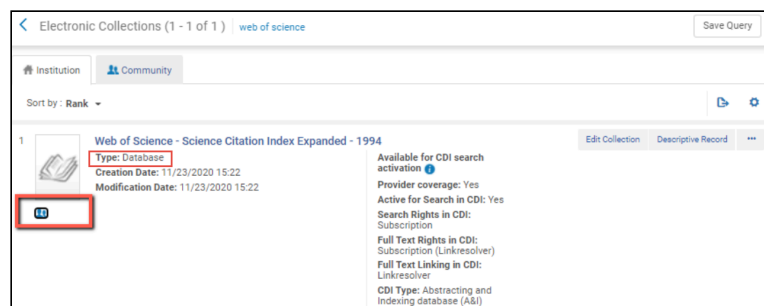
For more information, see [Configuring Parameters of a Resource Sharing Library](#).

Combined Search - Support For Electronic Collections of Type Database

May 2021 Collaborative Networks

Electronic collection of type 'Database' (electronic collection with no portfolios) managed in the Network Zone for all members or for specific members (using an 'Available For' group) will now be included in the Institution Zone's combined search for the relevant member.

Using combined search results provides consortia members quick access to electronic resources that are managed for them in the Network Zone.



Note

This functionality is supported for institutions where combined search is enabled. Contact Customer Support to enable combining Institution and Network Zone search results. For details, see [Combining Institution and Network Zone Search Results](#).

New Acquisitions and Fulfillment Dashboards

May 2021 Analytics

The following new out-of-the-box dashboards were added to Alma Analytics. For each dashboard, a new analytics object of type **Dashboard** was added. The dashboards are now available as links from the Analytics menu in Alma according to the following roles:

- Acquisitions – Claims Dashboard (Ex Libris)
and
- Acquisitions – Fund Reports (Ex Libris):
 - Acquisitions Administrator
 - Fiscal Period Manager
 - Fund Manager
 - Invoice Manager
 - Invoice Operator
 - Invoice Operator Extended
 - Ledger Manager
 - Purchasing Manager
 - Purchasing Operator
 - Purchasing Operator Extended
 - Receiving Operator
 - Receiving Operator Limited
 - Vendor Account Manager
 - Vendor Manager
- Fulfillment Loans Returns and Overdue Dashboard (Ex Libris):
 - Circulation Desk Manager
 - Circulation Desk Operator
 - Fulfillment Administrator
 - Fulfillment Services Manager
 - Fulfillment Services Operator

The old **Acquisitions – Claims** dashboard is now marked to be deprecated and will be removed for the June release.

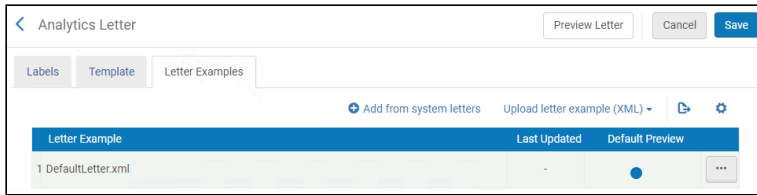
Improved Letter XML Examples

May 2021 Administration



Idea Exchange

When configuring letters, users can make use of out-of-the-box XML examples. These examples were now enriched to provide more detail that can help users to customize the letters. To view these examples, open the DefaultLetter.xml file that is located in the **Letter Examples** tab of the Letters Configuration page for the desired letter.



See [Configuring Alma Letters](#).

Testing Authentication on SAML Integration Profile

May 2021 Administration

Alma supports the SAML 2.0 Web Browser SSO profile. This enables Alma to exchange authentication and authorization information, allowing a user to sign in or out of an external system and be automatically signed in or out of Alma, or vice versa. For the details of configuring this profile, see [SAML-Based Single Sign-On/Sign-Off](#).

The **Save And Test** button has been added to the log-in integration profiles (SAML, CAS, LDAP and social log-in profiles). This removes the need to log out from Alma and log in again, and if the authentication fails, provides a clear indication of what went wrong.

Currently, this is available for the SAML integration only. In the upcoming releases, this will be supported on all authentication integrations.

See [Testing Authentication on SAML Integration Profile](#).

Download Staff Login Report via API

May 2021 API

Previously in Alma, creating a login report required a staff member to login, produce and download the Excel spreadsheet, and convert it to CSV. Alma now enables institutions (via API) to retrieve staff login data via a new API and further execute processes as they desire, e.g. export it to a CSV file. For more information on creating the report via the API, click [here](#) and scroll to section labeled **Staff Login Report**.

Fund Management APIs

May 2021 API

Alma enables institutions to create a richer integration with their finance systems with updated capabilities of retrieving funds and associated transactions. The Fund Management APIs have added the following two capabilities:

- Search and Retrieve Ledgers and Funds
- Search and View Transactions for a fund

For more information, see [Fund Management APIs](#).

API for running Import profile on a single BIB record

May 2021 API

Alma introduces a new API designed for running Import profiles on a single BIB record. The new API, labeled "Importing a single record" will execute the following:

- Receive an import profile ID as a parameter
- Receive a BIB record as payload
- Run the import profile on the BIB and return the resulting BIB record:
 - If **no** match found - a new record is created.
 - If match found - the matched record is used.

Note

This will be done in a similar way to the existing "[Import a single record](#)" option in Alma: In order to run the API you will need to have a defined import profile. The API will import a bibliographic record only – not inventory records.

This API is intended for individual record imports. Bulk imports should be performed via the MD Import functionality.

New fields added to the REST Item APIs

May 2021 API

A number of existing item fields in Alma (previously not supported by API) have now been added and are supported in the REST Item APIs. Listed below are the added item fields:

- Issue date (get, put, post)
- work_order, process_at (currently will be added only to GET and will not be supported in PUT/POST)
- temporary location source (get, put, post)
- break indicator (get, post, put)
- pattern type (get, post, put)
- linking number (get, post, put)
- type of unit (get only)

Alma May 2021 Additional Enhancements

- May 2021 Acquisitions SF: 00922507**
 When Alma harvests usage reports from a vendor's URL, not all vendors know to accept the 2 date formats which are sent via the URL. Alma was enhanced to inter-operate error codes that are sent from the vendor, send another request with 1 date format and add an additional request (if needed) with another date format.
- May 2021 Fulfillment**
 Alma's search for partner records has been enhanced. Previously, the records were only searchable by name and code. The enhancement now allows other elements to be searched, i.e. partner symbol, email address (from parameters tab) and customer code (for AFN).
- May 2021 Fulfillment**
 An enhancement to the current export capabilities in Alma has been made. The existing export job will now include the following:
 - Request comment
 - Bib metadata - description, author, title and year
 - User data (requester ID, full name and preferred address)
- May 2021 Analytics**
 Out-of-the-box reports are now available for the System Events subject area that was released in March. These reports were taken from the old Events subject area.
- May 2021 Analytics**
 The new **Invoice Related Events** report was added to the System Events folder.
- May 2021 Analytics**
 The **Invoice-Internal copy Ind** field was added to Funds Expenditure > Invoice Line. It indicates if an internal copy of the invoice exists.
- May 2021 Analytics**
 The **User Record Type** field (Users > User Details) now indicates if the user is a Contact user.
- May 2021 Analytics**
 The following folders were renamed for improved clarity:
 - Usage Data Details** was renamed to **Usage Data Details – Release 4**
 - Usage Data Details – JR5** was renamed to **JR5 Usage (Release 4)**
- May 2021 Analytics**
 Tool tips were added to the following fields in E-Inventory > Cost Usage fields to indicate the source of the data:

E-Inventory Field	From Usage Data Field
E-Inventory > Cost Usage Measures > Usage DR	Usage Data > Usage Data Details - Release 5 > DR - Unique Title Requests
E-Inventory > Cost Usage Measures > Usage TR_B1	Usage Data > Usage Data Details - Release 5 > TR_B1 - Unique Title Requests
E-Inventory > Cost Usage Measures > Usage TR_J1	Usage Data > Usage Data Details - Release 5 > TR_J1 - Unique Item Requests

- May 2021 Analytics**
 The following Acquisitions reports will be removed for the June release:
 - Non-Serial Issues Claims Report (Items without material type issue and expected receiving date greater than seven days that have not been received)

It will be replaced by: POLs with Items which should have arrived in the last 2 years and have not - all material types

- Serial Issues Claims Report (Items with material type issue and expected receiving date greater than seven days that have not been received)

It will be replaced by: Report name: POLs with Items which should have arrived in the last 2 years and have not - material type journal

Alma May 2021 Resolved Issues

- **May 2021 Acquisitions SF: 00711710 00912097 00897014 00744723**
The fund sum was calculated incorrectly when a discount was issued. This was fixed.
- **May 2021 Acquisitions SF: 00822860 00886965**
Resolved all errors that occurred during Network Zone record import when a Purchase Order was created with the customer parameter `central_record_management = ENFORCE_NETWORK`.
- **May 2021 Acquisitions SF: 00886172**
The OCLC Record Manager could not login to Alma if either the password or the institution code was shorter than 10 digits. This was fixed.
- **May 2021 Acquisitions SF: 00937976 00907331 00901294 00903410 00924058 00902453 00917207 00918145 00934322 00922500 00919193 00929176 00916696 00916900 00936170 00945025 00890474 00930744 00938045 00888675 00898818 00894997 00916738 00922362 00930802 00910841 00869615 00890390 00936306 00916697 00940440 00887889 00897309 00929108 00934475 00937347 00919842 00944351 00923465 00940831 00916016 00894552 00925020 00909082 00939768 00935659 00927833**
When users open a PO Line in View Mode and click the 'Edit' button, the PO Line is assigned to them no matter the PO Line status. When the user leaves the page without saving, the PO Line remains assigned to them without any possibility to release this assignment. This issue was fixed. Now only when the PO Line is in an assignable task list (i.e. InReview or Deferred) it will be assigned to this user.
- **May 2021 Acquisitions SF: 00905535 00896787**
'Query to requester' will be sent from the Email that is defined in the Letter configuration as the 'From Address'. If this is not defined or disabled, the logged in user's email will be used.
- **May 2021 Acquisitions SF: 00845021 00798482 00720149 00934417**
An issue occurred when all attached POLs are closed or cancelled, but the PO status is 'Sent'. This occurred when closing the last PO Line of a PO where at least one of the PO Lines is cancelled. This was fixed.
- **May 2021 Acquisitions SF: 00930308 00932320**
The search list from SOLR did not sort alphabetically. This was fixed.
- **May 2021 Acquisitions SF: 00895222**
Fund with 'no limits' cannot be added. This was fixed.
- **May 2021 Acquisitions SF: 00634314 00631919**
The default display status of received items in PO lines was 'Not Received'. This was fixed.
- **May 2021 Acquisitions SF: 00660809**
In a department with multiple printers, Alma always printed to the default printer instead of to the selected printer when using the Print Slip action in the Manage In Process Items page and when using the Print Interested Users List action in the Receive New Material page. This was fixed and now the correct printer is used.
- **May 2021 Acquisitions SF: 00831505**
Scanning an item belonging to a PO Line in Acquisitions did not set the PO Line to be in Receiving Workbench. This was fixed.
- **May 2021 Administration and Infrastructure SF: 00834284**
When the pick up location is not at the item owner, the Hold Shelf Letter is sent without considering the Hold Shelf Delay. This was fixed.
- **May 2021 Administration and Infrastructure SF: 00916717**
Patron Active Balance was, on occasion, inaccurate due to active fines with currency 'null'. This was fixed.
- **May 2021 Administration and Infrastructure SF: 00915783**
When viewing fines and fees, if the list's sort order was by the Fine/Fee type column but the column contained values that were disabled in the Fine/Fee code table, an Oops error appeared and the list failed to load. This was fixed.
- **May 2021 Administration and Infrastructure SF: 00329994 00345289 00355215 00504169 00798265**
The label for user ID in the User Details page was incorrectly displaying 'Primary Identifier' and not ID. This was fixed.
- **May 2021 Administration and Infrastructure SF: 00925095 00869431 00375335 00793490 00619207 00548039**

The report events for the SIS job were showing 'succeeded to update users' and 'Succeeded to create users' with severity as 'Error'. This was fixed, the severity is now 'Information'.

- **May 2021 Administration and Infrastructure SF: 00805686**
Deleting a user identifier prevented a user from being indexed, but searching for the deleted identifier kept returning the user. This was fixed.
- **May 2021 Administration and Infrastructure SF: 00817490**
Creating new Job Categories failed to save the category when an ampersand was used in their description. This was fixed by forcing the new Job Categories descriptions to be created without an ampersand.
- **May 2021 Administration and Infrastructure SF: 00854858**
User Manager Role was allowed to edit a library's contact info even though the General System Administrator Role was 'Read only'. This was fixed to consider only General System Administrator role for that matter.
- **May 2021 Administration and Infrastructure SF: 00881938**
Before the fix, the 'Add from Profiles' option in Analytics objects did not appear with the Analytics Administrator role. After the fix, The 'Add from Profiles' option in Analytics objects does appears for Analytics Administrator.
- **May 2021 Administration and Infrastructure SF: 00905553**
Occasionally when sorting, itemized sets of Users had issues moving between pages in the members list.
- **May 2021 Administration and Infrastructure SF: 00902871**
Refreshing a Linked User would set the current time and date to the Creation Date of the refreshed user. This was fixed.
- **May 2021 Administration and Infrastructure SF: 00910453**
Occasionally, importing a large Excel file into a mapping table failed. This was fixed so that when there are more than 20 lines, the import phase is skipped.
- **May 2021 Administration and Infrastructure SF: 00889450**
The 'Copy' bubble did not properly copy backslashes. This was fixed.
- **May 2021 Administration and Infrastructure SF: 00898037**
New Alma Layout: Offers autocompleted from incorrect search indexes. This was fixed.
- **May 2021 Administration and Infrastructure SF: 00917055 00915833 00936201 00914743**
New shortcut Ctrl+Alt+C that opens the configuration menu was overlapping with the old shortcut to clear item returns. This was fixed. New shortcuts are triggered only if there are no old shortcuts.
- **May 2021 Administration and Infrastructure SF: 00938456**
New Alma layout: User details were not printed when printing out the Manage Patron Services page. This was fixed.
- **May 2021 Administration and Infrastructure SF: 00904099**
In the Hold Shelf letter, the system notes were not translated for some languages. This was fixed.
- **May 2021 Administration and Infrastructure SF: 00729272**
The Scheduled Jobs Status widget did not display the correct date. This was fixed.
- **May 2021 Administration and Infrastructure SF: 00907804**
DARA Library Filter did not consider the Category Filter in some cases. This was fixed.
- **May 2021 Analytics SF: 00896296**
There was a problem with deleting subscribers. To correct this, a new code table was created to be used by customers to configure subscribers.
- **May 2021 Analytics SF: 00909753**
There was an error when using PO Line Creation Date fields with PO Line Creation Date Filter (field). This has been fixed.
- **May 2021 Analytics SF: 00919386**
The aggregation rule for the MMS ID field was changed from Count Distinct to Sum and now returns correct results.
- **May 2021 API SF: 00825563**
The GET-Request API was missing an 'Additional Request ID'. This field (additional_id) has now been added.
- **May 2021 API SF: 00878633**
Using REST API to suppress an Institution Zone (IZ) record did not suppress them from the PrimoVE index of the Network Zone (NZ). This was fixed.
- **May 2021 API SF: 00897991**
When using the Update-Bib API to modify local fields on an Institution Zone (IZ) Bib linked to the Network Zone (NZ),

the local fields were not indexed. This was fixed.

- **May 2021 API SF: 00921289**
The GET Invoice Lines API returned inaccurate amounts caused by rounding. This was fixed.
- **May 2021 API SF: 00913049**
When calling Get Job Instances in API for General Publishing in the Network Zone, the section "Counters" was empty. This was fixed.
- **May 2021 Fulfillment SF: 00918549**
Occasionally, items that went through a resource sharing process, the Due Date Reminders job did not process some loans due to redundant milliseconds in the loan's due dates. This was fixed by avoiding the milliseconds in the due dates.
- **May 2021 Fulfillment SF: 00921881**
An error occurred when returning an item with a work order that was set to 'Do not pick from shelf'. This was fixed.
- **May 2021 Fulfillment SF: 00618917**
The expired requests that were automatically cancelled by the Requests - Handle Expiration Step job did not incorporate a cancellation reason. This was fixed and now the cancellation reason for these requests is 'Request expired'.
- **May 2021 Fulfillment SF: 00665576 00871063**
Items with quotation marks in the item description field are not requestable via Primo. This was fixed.
- **May 2021 Fulfillment SF: 00857705 00889397 00896036**
The row action Print Slip in the Pickup from Shelf screen did not work as expected when there were multiple requests behind a single list entry. This was fixed.
- **May 2021 Fulfillment SF: 00917461**
Purchase Request form field length is extremely short and does not expand to make visible pre-filled or added metadata. This was resolved by changing the Requester note for PRIMO to be a text area.
- **May 2021 Fulfillment SF: 00941900 00942622 00944836**
Fulfillment network requests displayed incorrect values for the Held Since/Process Date fields. These fields were incorrectly filled with the values from the Held Until/Expiration Date fields. This was fixed.
- **May 2021 Fulfillment - Resource Sharing SF: 00902421**
The locate process search for an article author resulted in a locate failure. This was fixed, the author will not be part of the locate for article title.
- **May 2021 Fulfillment - Resource Sharing SF: 00910843**
A lending request received via ISO18626 with no publicationType in the message was created as an 'Article' by default. This was fixed, the default type for ISO18626 now is 'Book', either by sending '<publicationType>Book</publicationType>' or not sending the publicationType.
- **May 2021 Fulfillment - Resource Sharing SF: 00820765**
When a 'Ship Physically' request or a 'Move' request was created for a title with a single item the request was created on the item-level instead of on the title-level. As a result, if a new item was added to the title, the request was still attached to the old item even if the old item was not available. This was fixed.
- **May 2021 Fulfillment - Resource Sharing SF: 00902040**
Item call numbers should be added in the 'Signatur' field of SLNP shipped messages. If the item call number does not exist, the call number is taken from the holding.
- **May 2021 Resource Management SF: 00897491**
Inventory Network Groups with a comma in the name are not supported; an error message will now appear and prevent groups with commas in the name from being saved.
- **May 2021 Resource Management SF: 00864280**
It was not possible to save certain holdings records with Items/Holds linked to a specific bibliographic record. This was fixed.
- **May 2021 Resource Management SF: 00886083**
The 'Item Policy' drop-down list in the Physical Item Editor was not translated (i.e. all entries were only in English) in non-English interfaces. This was fixed. In addition, the list is now alphabetically sorted.
- **May 2021 Resource Management SF: 00939058 00934357 00932055 00910844**
New Metadata Editor: Selecting Relink to another bib from Physical Items list > Add holding > Add new holding > Minimize the new Metadata screen brought the user back to Physical Items list. This was fixed.

- **May 2021 Resource Management SF: 00897506 00900660**
In Export jobs, deleted records were processed and appeared in the report. This was fixed.
- **May 2021 Resource Management SF: 00937257**
User with Purchasing Operator / Purchasing Manager could not get the ability to dismiss all in CUTL page. This was fixed.
- **May 2021 Resource Management SF: 00922189**
Publishing platform job: Delivery URL did not use CNAME in URL. This was fixed.
- **May 2021 Resource Management SF: 00914396** Publishing to Primo > Headings enrichment = yes > Multilingual authority > "lat" is published in \$\$9 (not as expected). This was fixed.
To have a clear indication of the type of information that is published in each sub-field, the following will be done:
The headings information (A descriptive value mapped in "Add Authority enrichment"- Value in Subfield '9') will be published in \$\$9 (as today).
The language information will be published to Primo in \$\$L
- **May 2021 Resource Management SF: 00906774**
Network Publishing - Records with physical inventory and inactive representations showed 'online availability' in Primo if published from the NZ. This was fixed.
- **May 2021 Resource Management SF: 00840536**
The order of the list of collections in the Collection Editor was not alphanumerical. This was fixed.
- **May 2021 Resource Management SF: 00899156**
When running a normalization process on a set of records that contained a data issue, this cause the job to fail. This was fixed.
- **May 2021 Resource Management SF: 00918557**
Add Members to Set for Physical titles job was failing if the file contained OCLC numbers and identifiers starting with 'ocl'. This was fixed.
- **May 2021 Resource Management SF: 00881949**
When calling Alma via SRU/OAI in Dublin Core, dc:contributor and dc:creator subfields \$\$d and \$\$0 were attached to the name (\$\$a) without any space or subfield delimiter. This was fixed. A delimiter was added between subfields.
- **May 2021 Resource Management SF: 00705346 00795077**
General electronic services that use the rft.mms_id parameter in their URL template used the wrong MMS ID on deduped records. This was fixed.
- **May 2021 Resource Management SF: 00712873**
The Local Fields Test dialog for normalization rules for search and facets did not work. This was fixed.
- **May 2021 Resource Management SF: 00843627 00756319 00755746**
Reordering the Open Access service did not work. This was fixed.
- **May 2021 Resource Management SF: 00896391**
Searching with a special character that is replaced in char conversion to empty (?-u3007, ?-u3005) caused an error and no results. This was fixed.
- **May 2021 Resource Management SF: 00758045**
Accessibility WCAG 2.0: Some skip links were not working with VoiceOver + Safari. This was fixed.
- **May 2021 Resource Management SF: 00915044 00895195**
Deleted Springer Auto Holdings eBooks were still appearing in Primo. This was fixed.
- **May 2021 Resource Management SF: 00904746**
CZ records appeared with NZ icon in CZ search in consortia members with DNZ. This was fixed. The NZ icon is now hidden in this case.
- **May 2021 Resource Management SF: 00910383 00919461**
Pickup location defaulting to patron home institution did not work in Primo VE. This was fixed. The 'ful_network_default_pickup_inst' business logic was implemented when getting the request form (title and item level). If the CP is 'local', the item owner will be the default institution. If the CP is 'patron', the patron source institution will be the default institution. In all other cases (including 'blank') the field will be blank.
- **May 2021 Resource Management SF: 00886544**
Primo VE: Availability information was missing, delivery failed for records in Everything scope due to delivery ID request/response mismatch. This was fixed.

- **May 2021 Resource Management SF: 00754741**
The condition of 008(21) for Journals was not lowercase. This was fixed. The condition was changed to lowercase (008(21) <> |m|d|w).
- **May 2021 Resource Management SF: 00921715**
Primo VE - SLSP - there were some typos in discovery OTB labels. This was fixed.
- **May 2021 Resource Management SF: 00521993 00897379**
When a record created by the system ('Ex Libris') is updated by a user, the value in 'created by' changes to this user. This was fixed.
- **May 2021 Resource Management SF: 00868820 00918474 00934279**
New Metadata Editor: The 'Add Holdings' button was not working for a user with a lower cataloger level than the record's in a specific scenario. This was fixed.
- **May 2021 Resource Management SF: 00928237**
New Metadata Editor: Insert Directional Characters (RTL) - the text moved left, but the cursor stayed right. This was fixed.
- **May 2021 Resource Management SF: 00878099**
New Metadata Editor: 'Modified By' info for Community Zone records displayed user username and the institution code, instead of displaying only the institution code. This was fixed.
- **May 2021 Resource Management SF: 00915219 00879196**
New Metadata Editor: 'Error while validating data with profile' appeared after adding a portfolio to an Network Zone/Community Zone-linked record. This was fixed.
- **May 2021 Resource Management SF: 00881119 00885375 00882482 00888623**
New Metadata Editor: The new local record created from the 'Copy to Catalog' action retained Cataloger Level from the network record. This was fixed. The local record will get the minimum Cataloger Level value '00', which will allow the staff catalogers to work on the record.
- **May 2021 Resource Management SF: 00898199 00935704**
New Metadata Editor: Duplicate record menu option was erroneously available for Community Zone records. This was fixed. Now the menu does not include the Duplicate record option.
- **May 2021 Resource Management SF: 00933831 00938140 00936752 00914923**
New Metadata Editor: the 'Add Local Extension' option was missing in single institution for Community Zone records. This was fixed.
- **May 2021 Resource Management SF: 00903774 00907876**
New Metadata Editor: The cursor was thrown to the end of a field when subfield delimiter was inserted in the middle of an existing Hebrew text line. This was fixed.
- **May 2021 Resource Management SF: 00893034**
New Metadata Editor: When searching external resources, Search Resources > SBN > "Header information not defined for this presenter" appeared in the results pane. This was fixed.
- **May 2021 Resource Management SF: 00915392**
New Metadata Editor: Records list > information popup upon hover on a record: the title was center-aligned to both margins. This was fixed.
- **May 2021 Resource Management SF: 00793741**
New Metadata Editor: Editing an holding record with 853 field and using the MARC21 Expand Holding By 863/4/5 Task in some cases caused the Save Record action to fail. This was fixed.
- **May 2021 Resource Management SF: 00917416**
New Metadata Editor: In some institutions, when entering the new Metadata Editor from the Alma menu, sometimes the 'Old Editor' button did not appear in an accessible place. This was fixed.
- **May 2021 Resource Management SF: 00934825 00905790 00929647**
New Metadata Editor: The shortcut for 'Add Alternate Graphic Representation' (Alt F1) and all its submenus (Alt F2, Alt F3, Alt F5. Alt F6) did not work. Also, the label description of the menu (Alt F1) was missing. This was fixed.
- **May 2021 Resource Management SF: 00910847**
New Metadata Editor: when entering or changing the location information in the holding tab 852 \$\$b, the field seemed to reload every change. This was fixed.
- **May 2021 Resource Management SF: 00919541 00934557**
New Metadata Editor: when creating GND record from the right-click action 'New Record From Template', the record

was not created on the correct level (Community Zone). This was fixed.

- **May 2021 Resource Management SF: 00940760 00499589 00917364**
Editing a MARC 21 bib record in the MD editor with \$\$j in x11 (111 611 711 811) field broke the link to the authority. This was fixed. Broken links will be fixed gradually with the May semi-annual indexing.
- **May 2021 Resource Management SF: 00901321**
MARC bib records didn't use the 1st indicator for tag 130 for the non-filing characters of UNIFORM TITLE. This was fixed. This will be deployed gradually, with the semi-annual indexing starting on the May release.
- **May 2021 Resource Management SF: 00912205**
For 830 Bib Fields, the headings links behaves exactly as in 6XX regarding subdivisions – incorrectly, because 830 does not have subdivisions. Subfield \$x in 830 should behave as \$v. The issue was fixed. For already existing records, the links will be fixed by the semi-annual indexing, which starts in May.
- **May 2021 Resource Management SF: 00915918**
GND records with a higher cataloging level can be pushed to the MD Editor by users with lower cataloging permissions.. This was fixed. Now user's cataloger level is compared against the record's cataloger level before pushing record to new MD Editor.
- **May 2021 Resource Management SF: 00867145**
The field 312 was not being converted to the NoteLegame field in SBNMARC and was not being sent to SBN. This was fixed.
- **May 2021 Resource Management SF: 00890091**
The field 311 was not being converted to the NoteLegame field in SBNMARC and was not being sent to SBN. This was fixed.
- **May 2021 Resource Management SF: 00861689 00907589**
SBN integration - The update of an Uniform title in SBN was producing an error 'Authority was contributed but failed on non-preferred fields'. This was fixed. If CATALOGER_LEVEL field does not exists (is null) in HFRUSER, the livello is taken from 980 field.
- **May 2021 Resource Management SF: 00905342**
When managing location information in an SBN record, the merge rules from the SBN import profile were applied on the record. This was fixed. Now When managing location information in an SBN record, only the 899 fields in the Alma record is updated, and no merge operation is executed.
- **May 2021 Digital Resource Management SF: 00851461**
The advanced search for digital files by file size did not work properly. This was fixed.
- **May 2021 Digital Resource Management SF: 00896287**
Searching for digital files with some search parameters resulted in an error. This was fixed.
- **May 2021 Digital Resource Management SF: 00916128**
The new Alma Viewer allowed copying from protected PDFs. This was fixed.
- **May 2021 Digital Resource Management SF: 00924845**
The MD import of MODS records failed in certain situations. This was fixed.
- **May 2021 Digital Resource Management SF: 00926774**
After the premium sandbox was refreshed, representations were not accessible. This was fixed.
- **May 2021 Digital Resource Management SF: 00937268**
When direct linking was enabled for digital services, the mashup ViewIt did not work properly for remote representation services. This was fixed.