



Alma June 2021

Release Notes

CONFIDENTIAL INFORMATION

The information herein is the property of Ex Libris Ltd. or its affiliates and any misuse or abuse will result in economic loss. DO NOT COPY UNLESS YOU HAVE BEEN GIVEN SPECIFIC WRITTEN AUTHORIZATION FROM EX LIBRIS LTD.

This document is provided for limited and restricted purposes in accordance with a binding contract with Ex Libris Ltd. or an affiliate. The information herein includes trade secrets and is confidential.

DISCLAIMER

The information in this document will be subject to periodic change and updating. Please confirm that you have the most current documentation. There are no warranties of any kind, express or implied, provided in this documentation, other than those expressly agreed upon in the applicable Ex Libris contract. This information is provided AS IS. Unless otherwise agreed, Ex Libris shall not be liable for any damages for use of this document, including, without limitation, consequential, punitive, indirect or direct damages.

Any references in this document to third-party material (including third-party Web sites) are provided for convenience only and do not in any manner serve as an endorsement of that third-party material or those Web sites. The third-party materials are not part of the materials for this Ex Libris product and Ex Libris has no liability for such materials.

TRADEMARKS

Ex Libris, the Ex Libris logo, Alma, campusM, Esploro, Leganto, Primo, Rosetta, Summon, ALEPH 500, SFX, SFXIT, MetaLib, MetaSearch, MetaIndex and other Ex Libris products and services referenced herein are trademarks of Ex Libris, and may be registered in certain jurisdictions.

The absence of a name or logo in this list does not constitute a waiver of any and all intellectual property rights that Ex Libris Ltd. or its affiliates have established in any of its products, features, or service names or logos.

Trademarks of various third-party products, which may include the following, are referenced in this documentation. Ex Libris does not claim any rights in these trademarks. Use of these marks does not imply endorsement by Ex Libris of these third-party products, or endorsement by these third parties of Ex Libris products.

Oracle is a registered trademark of Oracle Corporation.

UNIX is a registered trademark in the United States and other countries, licensed exclusively through X/Open Company Ltd.

Microsoft, the Microsoft logo, MS, MS-DOS, Microsoft PowerPoint, Visual Basic, Visual C++, Win32,

Microsoft Windows, the Windows logo, Microsoft Notepad, Microsoft Windows Explorer, Microsoft Internet Explorer, and Windows NT are registered trademarks and ActiveX is a trademark of the Microsoft Corporation in the United States and/or other countries.

Unicode and the Unicode logo are registered trademarks of Unicode, Inc.

Google is a registered trademark of Google Inc.

iPhone is a registered trademark of Apple Inc.

Copyright Ex Libris Limited, 2021. All rights reserved.

Document released: June 2021

Web address: <http://www.exlibrisgroup.com>

Ex Libris, a ProQuest Company

Alma June Make the Most

Make the Most of June's Release

Action Items

['Type of Request' Indicator on Patron Request or Work Order](#) - A new "Item is requested by the library" block preference can be used to activate alerts about the specific request type on the item when items are scanned in.

[New Reports Added to Consortia Folder](#) - Some great new Consortia Analytics reports have been released for help with duplicate collection analysis as well as overlap analysis within a consortia. These can be used as is, or copied and modified for your particular need.

[New Dashboards Added to Alma Analytics](#) - A new set of OTB dashboards is being released, which provide a comprehensive set of reports for all activities of a library. These will also be added as preconfigured analytics objects – if you want to change these settings you can do so after the release is deployed

[Assigning Recommendations](#) - This great new feature supports the ability to configure specific recommendations for specific staff users, and also to be able to assign them between the relevant users for handling.

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 certificate must update it twice a year.

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

July Release Sneak Preview

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

Alma June Main Stories

Manage the Price Threshold and Amount Threshold for PO Lines and Invoices at the Library Level

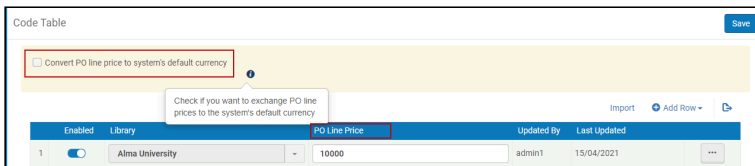
June 2021 Acquisitions

Alma has now enhanced the configuration of PO Line and Invoices price and amounts threshold to also be managed at the library level. The previous configuration was at the institution level only. This level is retained as the default option. If a value is configured on both the institution and on the library level, Alma will prefer (select) the PO Line/Invoice owning library definition (if it has been defined). For more information, see: [Manage Price Threshold and Amount Threshold for PO Lines and Invoices at the Library Level](#).

The existing customer parameters will be removed and replaced with 2 new configuration tables:

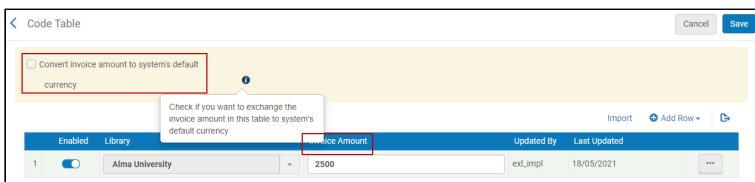
1. **PO Line Price Threshold** configuration table (Configuration Menu -> Acquisitions -> Purchase Orders):

- High -Level price allows institutions to define the threshold amount on a PO line/invoice which will trigger an alert for the PO line/invoice, for example, institutions may want to prevent orders (PO lines) created in the system automatically (API/EOD) from progressing in their workflow in case the order's amount is higher than 100 USD (or any other default currency the institution had defined) so the institution can configure a High -Level price of 100 which will add an alert to any PO line created with an amount exceeding 100 USD.



2. **Invoice Amount Threshold** configuration table (Configuration Menu -> Acquisitions -> Invoices):

- Alma has now enhanced the configuration of High-Level price PO Line and Invoices to also be managed at the library level. Previous configuration of High-Level price was at the institution level only. The new configuration maintains that the institution level is the default High-Level price, but with an added option to add a High-Level price at the library level. In case there is a value configured on both the institution level and on the library level, Alma will check the PO Line/Invoice owning library, if there is an entry within the new configuration table for the owning library, Alma will use it, if there is no entry for the specific library, Alma will use the value defined on the institution level.



Note

Existing Customer Parameters for Invoice and PO Line have been deprecated and are not functioning.

- In case the institution already had a value customized within one of the Customer Parameters (Configuration Menu -> Acquisitions -> Other Settings table), this value will pass automatically to the new configuration tables. To update the values, go to the new configuration screens.
- In case no value was customized by the institution, the default value (institution level) will be:
 - Invoice = 2,500
 - PO Line = 10,000

Two New PO Line Types for Digital Inventory

June 2021 Acquisitions



Idea Exchange

Alma now supports acquisition workflows for digital material that enables institutions to manage ordering and receiving of digital material. To enable this functionality, two new PO Line types were created:

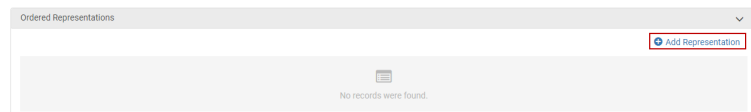
- Digital One Time (DIGITAL_OT)
- Digital Continuous (DIGITAL_CO)

| | | | | | | | |
|---|-------------------------------------|--------------|--------------|-----------|---------|-----------|---------|
| 5 | <input type="checkbox"/> | DIGITAL_CO | Digital - Si | Continuou | Digital | Represent | LOCALMM |
| 6 | <input checked="" type="checkbox"/> | DIGITAL_NONA | Digital - N | One-Time | Generic | Service | LOCALMM |
| 7 | <input type="checkbox"/> | DIGITAL_OT | Digital - O | One-Time | Digital | Represent | LOCALMM |

Enable the new PO Line types for the functionality to work. By default, they are disabled.

PO Line type "Digital" is created with **no inventory** (both One Time and Continuous), there is a need to associate a representation with the PO line. There are 2 ways to associate a representation with a PO line:

1. **From the PO Line editing page**, there is an option associate a new representation. When selecting the **+Add Representation** action from the PO line's "Ordered Representation" section, the Representation editor screen will open for the creation of a new representation. Title, Library and PO Line number will be pre-populated in the representation when it is created via the PO Line, as they are inherited from the PO Line. The digital title will need to be associated with a collection and the representation must contain files. Once users create the representation and click **Save**, they will be redirected to the PO line and the representation will be attached to it. To complete the process, click on **Save and Continue** located on the top right corner of the PO line's editing page.



2. **From a new/existing representation**, to add a PO Line to a representation, the representation must be associated with an existing Title. Once the user edits the representation, adds a PO line and clicks **Save**, **Alma will automatically attempt to push the PO line to the next step of the workflow.**

After a Digital PO Line is created, the workflows differ for One Time and Continuous:

- **One Time PO Line:** In review > Closed
- **Continuous PO Line:** In review > Waiting for renewal OR Waiting for manual renewal

To provide purchasing roles the ability to edit a representations from the PO Line, a new privilege is added: UPDATE_REPRESENTATION_FROM_ACQ.

Note

A PO Line can not be "Saved and continued" without a representation. If user attempts to "save and continue", the PO Line will prompt the user with a warning message that the information is missing.

Watch the [Two New PO Line Types for Digital Inventory](#) video (2:50 minutes).

Extended Availability for the Classic Metadata Editor

June 2021 Resource Management

The availability of the Classic Metadata Editor was extended for users in production till October 2021 release. It will give more time to the users in production to test all changes that were done in the new Metadata Editor. Also this will allow more time for the users to be educated on and get used to the new Metadata Editor.

See [Usability Improvements](#).

Improved Integration with SBN Italian Union Catalog

SBN MARC Version Upgraded to 2.03

June 2021 Resource Management

Alma now supports the SBN MARC format, version 2.03.

Note

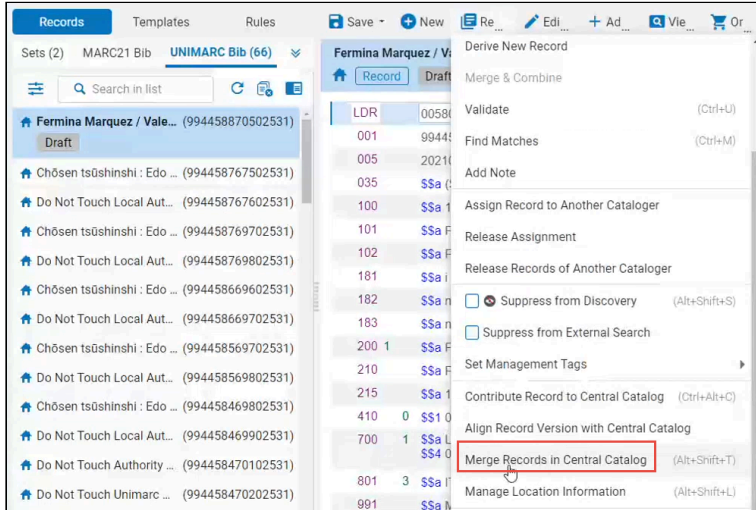
To upgrade your system to this version, contact Ex Libris customer support. Note that upgrading to this version means that you will get different results when searching authority records of the Titoli Uniformi type: the uniform title term will be in 231/431/531 fields and not in 230/430/530 fields.

Merge Records In Central Catalog

June 2021 Resource Management

Institutions working with the Italian Central Catalog SBN on level 4 now can perform a fusione (merge) operation in SBN. This is available for both SBN bibliographic and authority (AU,MA,TU,UM,SO,CL) record types. To support this, a new option "Merge Records in Central Catalog" was added to the Metadata Editor (**MD Editor > Editing Actions menu**). Note that this option is available only for UNIMARC bibliographic and authority records.

If the records to be merged do not have a counterpart in SBN database, the operation does not take place, and you receive an error message.



Note

- The option is visible only if a Central Catalog integration profile for SBN is defined.
- To perform a merge of records in SBN, the "Merge Records in Central Catalog" privilege must be selected for your user role. Currently the Catalog Manager role has this privilege enabled by default. Other roles must have enable this privilege.

For details, see [Menu Bar of the Records Area](#), [Contribution of Redirection to SBN](#).

Metadata Editor - Color Improvements

June 2021 Resource Management

The color-coding on the Metadata Editor was made consistent across all tabs and registries.

The color-coding of the Metadata Editor now consistently indicates the following:

| Color | Sample | Description |
|------------|--------|---|
| Dark Blue | | The records currently displayed in the Navigation Pane are from this tab. |
| Light Blue | | The record being edited in the Editing pane, and its pane is currently in focus (when the Editing pane is in split mode). If there is no light blue record, this means that the record being edited (marked in dark blue color) is the |

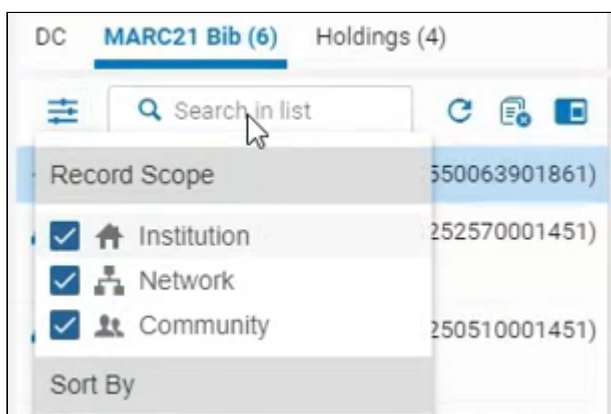
| Color | Sample | Description |
|-------|--------|---|
| | | record currently focused as well as belongs to the tab currently displayed in the Navigation Pane. |
| Grey | | The record being edited in the Editing pane, but its pane is currently not in focus (when the Editing pane is in split mode). |
| White | | There are no opened records under this tab in the Editing pane, and it is not currently selected to display in the Navigation pane. |

Metadata Editor Accessibility Improvements

June 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.

- The filtering area of the Navigation panel is now accessible by keyboard keys:



- To navigate within the Filter and Sort selection box by arrows
 - To select or clear a checkbox option, press the Space key.
To select or clear a radio-button option, navigate with arrows.
 - To apply your selection, press Tab to focus the "Apply" button, and press Enter to perform the action..
 - To close the Filter and Sort selection box, press Esc.
 - To go back to the previously selected element, press Shift+Tab.
 - Once you closed the Filter and Sort selection box, press Tab to move to the other elements of the Navigation Panel.
- Now you move between registries in the Navigation panel using keyboard keys. The selected registry is highlighted in light gray color, so you can always know where the focus is. In addition, the name of the currently selected tab will now be read by the reader, so that you know what the selected tab is.
 - Now the reader can read every section of the Browse Bibliographic Heading form.

Alma Accessibility Improvements

June 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:

Color Contrasts

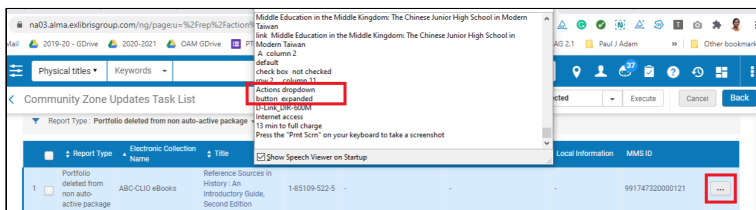
- Visual boundaries and colors of screen controls were adjusted to maintain 3:1 contrast ratio with its background.

Lists

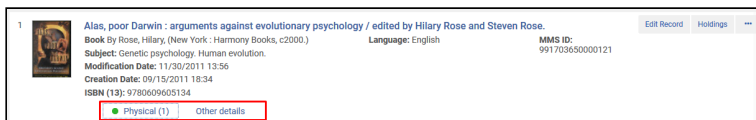
- "Search in List" button – Triggering operation by keyboard button (**Enter**), and discernible text with the explanation of the purpose of the button were added to the reader:



- Customize list – Group labels were added to the checkboxes list in the reader
- "Select All" checkbox and "Select Record" checkbox – A label for screen reader was added with explanation of the purpose of the checkboxes
- "More Actions" button – The state of the button (collapsed or expanded) was exposed in the reader:



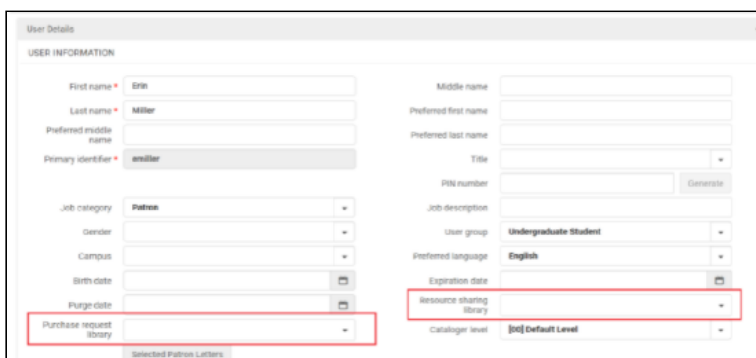
- Drawers – The tabs were made accessible and the currently-chosen tab is exposed:



- Pagination - adding accessible names to "Next", "Previous" and "Jump To" buttons and exposing which page is currently displayed.
- "Results per page" – the selected amount of results to display is now exposed in the reader.

Forms

- Combo-box – attributes were added to explain to screen reader that there is a list with options in clicking



- Checkboxes – Group labels were added to screen reader

USER MANAGEMENT INFORMATION

Patron has institutional record Yes No

Password

Verify password

Force password change on next login

EMAIL ADDRESSES

Email types Alternative Personal School Work

ADDRESSES

Address types Alternative Home School Work

- An accessible name was added for the **Back** button:

Facets << Physical Titles (1 - 20 of 54) where (Title contains keywords 'psychology' AND Material Type equals 'Book')

Material Type Book (54)

Resource Type Book - Electronic (7) Sort by: Title - Asc Secondary Sort by: Rank

- Chosen facets - Accessible names were added and keyboard navigation was added for the "Remove Facet" button:

Facets << < Physical Titles (1 - 2 of 2) where (Title contains keywords 'psychology' AND Material Type equals 'Book')

Material Type Book (2)

Resource Type Book - Physical (2) Sort by: Title - Asc Secondary Sort by: Rank

Publication Year Language: Hebrew

Facets

- The state of panel (collapsed or expanded) is now exposed and the buttons all have descriptive text.
- Every facet group now has a correct count with the number of items in group.
- The state of every facet group (collapsed or expanded) is now indicated:

Facets << Physical Titles (1 - 20 of 54) where (Title contains keywords 'psychology' AND Material Type equals 'Book')

Material Type Book (54)

Resource Type Book - Electronic (7) Book - Physical (46) Undefined (1) Sort by: Title - Asc Secondary Sort by: Rank

Language English (50)

1 Alas, poor Darwin : arguments against evolutionary psychology / edited by Hilary Rose and Steven Rose.
Book By Rose, Hilary, (New York : Harmony Books, c2000.) Language: English MMS ID: 991703650000

- Focus order – a shortcut was added when focusing on title for focus on facets and back to title.

Advanced Notice! Limiting Actions Related to Portfolios and E-collections According to User Role's Scope

June 2021 Resource Management

Note

This is an advanced notice for a future release. The described development is not being released in June 2021.

In an upcoming release Ex Libris will introduce new functionality that will enable limiting electronic resource management actions according to user role's scope. Various staff user's actions such as editing, updating, deleting, activating,

deactivating, etc., will be enabled/disabled based on the library scope of the user role (whether a specific library or institution level (across libraries)). This functionality will provide better control over staff activities across libraries.

As part of this development, library ownership defined at the level of the collection will be inherited by all portfolios under the collection. This means that a portfolio cannot be owned by a different library than the library defined at the collection level. The release of this functionality will include the removal of any library defined at the portfolio level (unless there is no library defined at the electronic collection level).

To know if your institution has cases in which the library at the level of the collection is different than the library at the level of the portfolios, Ex Libris recommends that you run the following report: "Ex Libris - Portfolios with portfolio library unit different than electronic collection library unit" in the folder: **/shared/Community/Reports/Shared Reports/Reports/Inventory – Electronic**. This will give you the option to review the library setup of the electronic resource in your institution, and allow you to do the data corrections necessary before the release of the new functionality.

For Q&A regarding this functionality, see [Q&A: Limiting Actions Related to Portfolios and E-collections According to User Role Scope](#).

For a full description of the functionality, see [Limiting Actions Related to Portfolios and E-collections According to User Role Scope](#).

Additional Sorting and Filtering Abilities for Sets

June 2021 Resource Management



Idea Exchange

The following enhancements were introduced on the **Manage Sets** page, **Run a Job** page, and on **Publishing Profiles** page > **Select Set** list:

- Now you can sort the list of sets by any of the existing fields. This helps you easily locate sets, for example, if you sort by date, you can find the latest created sets. To sort, select the



icon in the heading of the column by which you would like to sort. Once a column displays sorted information, its icon changes to



- Now you can filter the list of sets by content origin (to display only sets that were created by the institution or in the Community Zone). To do so, use the "Content Origin" filter above the table.

Once you sorted or filtered the list, these sorting and filtering options are used in the next Alma sessions as well.

The screenshot shows the 'Manage Sets' interface. At the top, there are tabs for 'My Sets', 'Public Sets', and 'All Sets'. Below the tabs is a search bar and a table. The table has a header row with columns: 'Active', 'Name', 'Type', 'Content Type', 'Content Origin', and 'Creation Date'. The 'Content Origin' column is highlighted with a red box, and a dropdown menu is open below it, showing 'All' as the selected option. The table contains one row of data: '1', a toggle switch, 'electronic portfolio title women', 'Logical', 'Electronic portfolios', 'Institution only', and '10/01/2018 15:50:52 PM IST'.

See [Managing Search Queries and Sets](#).

All Users Allowed to Manage Their Own Sets

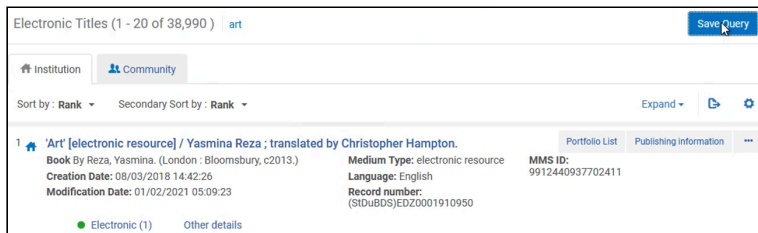
June 2021 Resource Management

All roles who can perform a repository search were now given the ability to do the following:

- Save a query in order to create a set,
- Manage sets - have the link shown, and relevant options of set management open

Saving a query

- When performing a search in the repository, the **Save Query** option is now enabled for all users for any entity available in the search options.

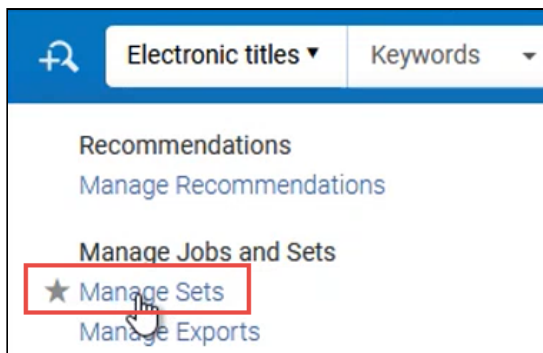


Adding a set

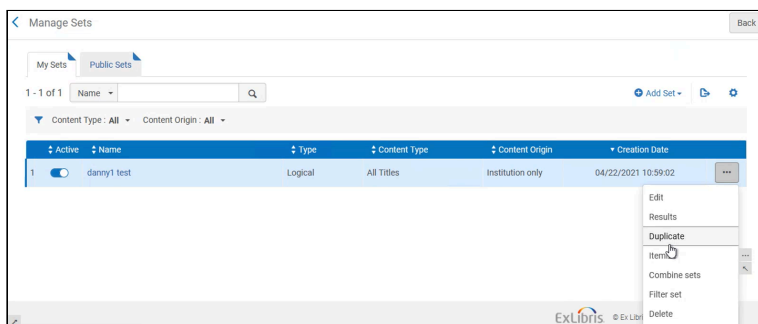
- The user can now add sets, as long as the set belongs to the content types types that the user is allowed to work with according to the user's roles.

Managing sets

- The "Manage Sets" link is now open to all users



- **Manage Sets** page - for sets created by the user, all of the actions are now enabled. For sets created by other users - the user can view and use the set (but not to edit the set).



For details, see [Managing Search Queries and Sets](#).

Watch the [All Users Allowed to Manage Their Own Sets](#) video (1:05 minutes).

General Publishing Profile - Option to Include Authority Headings

June 2021 Resource Management

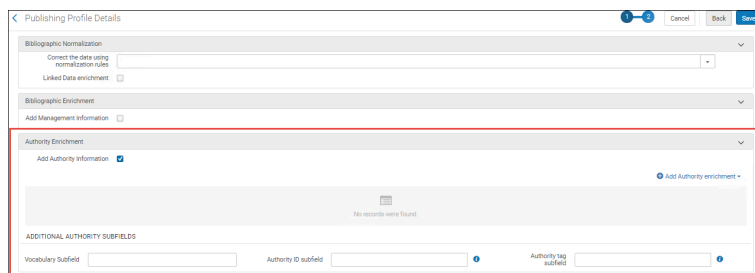
The General Publishing profile now supports the ability to enrich the published data with Authority headings. Any update to the selected authority headings triggers re-publishing of the data. The functionality of updating a record when preferred terms are updated will keep its current functionality.

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

Note

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

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

A screenshot of the 'Publishing Profile Details' form. The form is divided into several sections: 'Bibliographic Normalization', 'Bibliographic Enrichment', and 'Authority Enrichment'. The 'Authority Enrichment' section is highlighted with a red border. It contains a checkbox for 'Add Authority information' which is checked, and a button for 'Add Authority enrichment'. Below this, there is a message 'No records were found'. At the bottom of the form, there are three input fields labeled 'Vocabulary Subfield', 'Authority ID subfield', and 'Authority tag subfield'.

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

Courtesy Letter Indication for Block on Patron

June 2021 Fulfillment

If the loan was not renewed due to patron level block, then the courtesy notice will correctly show the reason for blocking the renewal.

'Type of Request' Indicator on Patron Request or Work Order

June 2021 Fulfillment

The pop-up message that alerts the circulation desk operator about existing requests on the scanned item will now include the 'type of request' when an item has a pending or active request. This enables better separation between items that are requested by other patrons and items that are requested for library processes, such as a move request. A new "Item is requested by the library" block preference controls this popup.

'Notify Users' on Cancellation Requests for Staff Requests

June 2021 Fulfillment



Idea Exchange

Alma now sends cancelation notices to requesting staff via email when a move or work order request is canceled. Cancelling any non-patron request (such as work orders or move requests) with the 'Notify User' checkbox enabled will send the cancelation letter to the request creator, such as the operator who placed it.

Ability to Change Alma Full Text Activation to CDI -Only Full Text Activation

June 2021 Fulfillment-Resource Sharing

In cases where an electronic collection is active for full text you can now change it so it will only be active in CDI using the action 'Change to CDI-only full text activation'

When using the option 'Change to CDI-only full text activation', the following will occur:

- The collection will be activate for full text in CDI only.
- In case of aggregator/selective collection:
The full text service will be deactivated, and a confirmation pop-up message will be shown:
"The service of this collection will be deactivated. The collection will be active for full text only in CDI, not in the Alma link resolver."
- In case of database type of collection:
The BIB record will be suppressed, and a confirmation pop-up message will be shown:
"The collection will be deactivated. The BIB record will be suppressed. The collection will be active for full text only in CDI."

User Details Subject Area Enhanced

May 2021 Analytics



Idea Exchange

The User Details subject area has been enhanced with the following improvements:

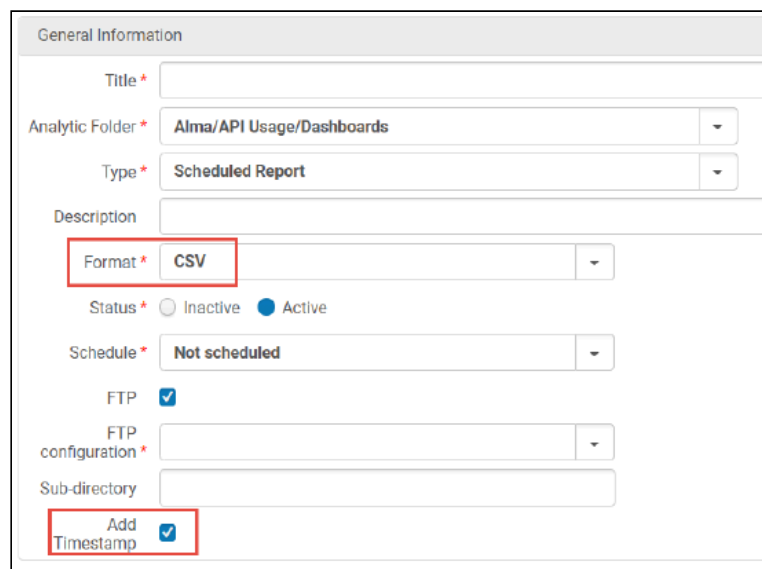
- You can now create reports with fields from different folders as is possible in other subject areas.
- The **User Measures** dimension was added, which contains measure fields relating to the number of users.
- The following fields were added under the User Details dimension:
 - Cataloger Level – the cataloger level of the patron
 - Patron Letters Opt In – the letters for which the patron has opted in
 - Patron Letters Opt Out – the letters for which the patron has opted out
 - Has Role Other Than Patron – indicates if the patron has a role other than Patron
 - Has Role Other Than Patron and Instructor – indicates if the patron has a role other than Patron and Instructor
 - Is Blocked – indicates if the patron is blocked
- The **Proxy For** dimension was added, which contains fields that indicate for whom the patron is a proxy.
- The names of the various Status, Type, and Note fields were expanded to include the dimension name to clarify which fields are intended.

Enhancements to Scheduled Report Configuration

June 2021 Analytics

The following enhancements were added to the configuration for Scheduled Dashboard Alma Analytics Objects:

- You can now produce scheduled reports in CSV format.
- If you configure Alma to place the report on an FTP server, you can now have a timestamp included in the file name of the report. This prevents the file from being overwritten the next time the report is run.



The screenshot shows a configuration form for a Scheduled Report. The form is titled "General Information" and includes the following fields and options:

- Title * (text input)
- Analytic Folder * (dropdown menu, currently set to "Alma/API Usage/Dashboards")
- Type * (dropdown menu, currently set to "Scheduled Report")
- Description (text input)
- Format * (dropdown menu, currently set to "CSV", highlighted with a red box)
- Status * (radio buttons for "Inactive" and "Active", with "Active" selected)
- Schedule * (dropdown menu, currently set to "Not scheduled")
- FTP (checkbox, checked)
- FTP configuration * (dropdown menu)
- Sub-directory (text input)
- Add Timestamp (checkbox, checked, highlighted with a red box)

Enhancements to Scheduled Report Configuration

For more information, see [Scheduling and Subscribing to Alma Analytics Reports](#).

New Dashboards Added to Alma Analytics

June 2021 Analytics

The following new 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 specific roles that you can configure:

- Acquisitions Dashboard (Ex Libris)
- Analytics Objects Dashboard (Ex Libris)
- Analytics Usage Tracking Dashboard (Ex Libris)
- API Usage Dashboard (Ex Libris)
- Benchmark Analytics KPI Dashboard (Ex Libris)
- Cost per Use for Electronic Inventory and COUNTER reports Dashboard (Ex Libris)
- Cost per Use for Physical Inventory and loans Dashboard (Ex Libris)
- E-Inventory Dashboard (Ex Libris)
- Fines and Fees Dashboard (Ex Libris)
- Physical Items Dashboard (Ex Libris)
- Licenses Analysis Dashboard (Ex Libris)
- Purchase Requests Dashboard (Ex Libris)

- Overlap Analysis Dashboard (Ex Libris)
- Usage via Alma Link Resolver Dashboard (Ex Libris)
- Usage via COUNTER Reports - Release 4 Dashboard (Ex Libris)
- Usage via COUNTER Reports - Release 5 Dashboard (Ex Libris)
- Monthly Usage Data - Release 5 Dashboard (Ex Libris)
- Vendor analysis - physical one time Dashboard (Ex Libris)
- YoY (Year over Year) Dashboard (Ex Libris)

New Reports Added to Consortia Folder

June 2021 Analytics

The following out-of-the-box reports were added to the Consortia folder. These reports can aid an institution in evaluating overlap as well as unique titles across the consortia:

- **Titles with inventory in only one institution based on field 035 subfield a with library and location** – displays titles held by only one institution in the consortia. The analysis uses the field 035 subfield a as a basis for determining the uniqueness of the title. This report is designed to be run in the Network Zone.
- **Duplicate electronic collections in different member institutions linked to Community Zone** – displays a list of electronic collections that were activated from the Community Zone from multiple member institutions. The electronic collections were not activated from the Network Zone using the Available For functionality and therefore cause many duplicate titles across the member institutions.
- **Duplicate titles by ISBN for NETWORK institution** – displays duplicate titles by ISBN in a Network Zone institution and excludes titles linked to the Community Zone. This report is designed to be run in the Network Zone.
- **Duplicate titles by ISSN for NETWORK institution** – displays duplicate titles by ISSN in a Network Zone institution and excludes titles linked to the Community Zone. This report is designed to be run in the Network Zone.
- **Duplicate titles by Title Author Combined and Normalized for NETWORK institution** – displays duplicate titles by the field Title Author Combined and Normalized in a Network Zone institution and excludes titles linked to the Community Zone. This report is designed to be run in the Network Zone.
- **Duplicate titles by 035a for network institution** – displays a list of titles that exist in the Network Zone institution and are duplicate titles. The records are determined to be duplicates based on the 035 field subfield a.

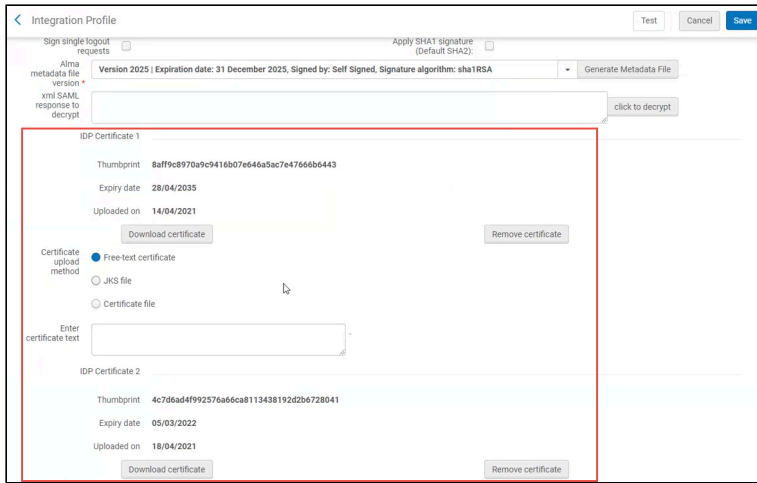
Enable Easy Rollover of IDP Certificate

June 2021 Administration and Infrastructure

When a SAML IDP changes their certificate (for security reasons), the certificate needs to be updated on the integration profile. If the certificate is not updated at the same time on both systems, this can cause downtime, since Alma does not trust the response from the IDP that was signed with the "wrong" certificate.

Now Alma allows holding two certificates simultaneously, and tries to authenticate using both certificates. This allows the institution to add the new certificate ahead of time, without removing the old certificate until after the IDP has made the switch.

To support this, a new set of fields was added on the SAML intergration profile that enables uploading the second certificate. In addition, now the information describing each certificate (thumbprint, expiry date and upload date) are displayed for easy recognition of each certificate.



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

Assigning Recommendations

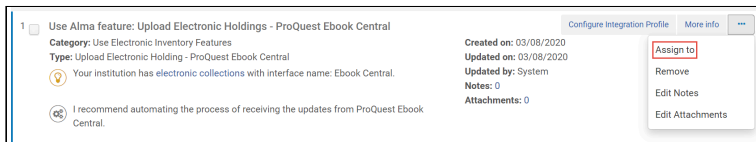
June 2021 DARA

You can now assign recommendations to a specific user. This can be done both for a specific recommendation and for all the recommendations of a type. This can be useful in the following ways:

- Administrators can assign individual recommendations to be handled by a specific user in the library.
- Users can assign a recommendation to themselves and prevent it from being displayed to other users.
- A user that handle all of the recommendations of a specific type can have all those recommendations automatically assigned to that user only.

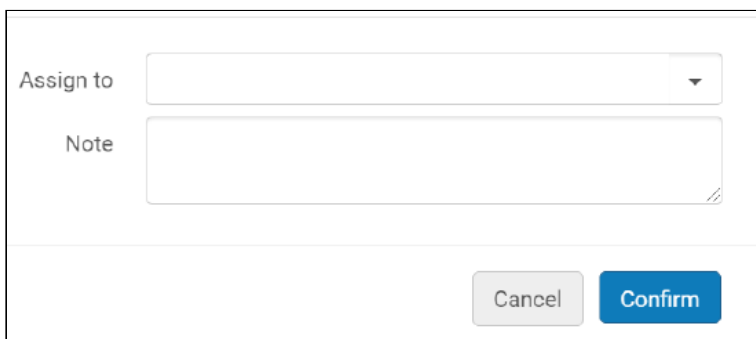
To support this feature, the following enhancements were implemented:

- A new **Assign To** option was added to the Actions menu for recommendations:



Assign To

After selecting this option, a drop-down list is displayed from which you can select a user to which to assign the recommendation.



Assign To Drop-Down List

Note

Only users with roles configured to view the recommendation are available in the drop-down list.

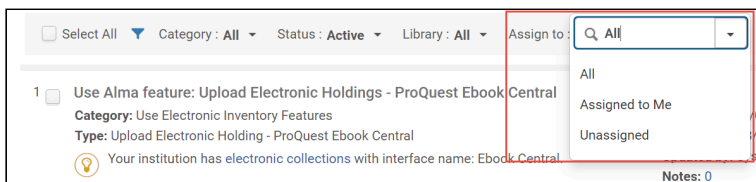
You can also add a note.

- After assigning a recommendation to a user, the assignment is indicated in the information of the recommendation:

Created on: 03/08/2020
Updated on: 03/05/2021
Updated by: System
Notes: 0
Attachments: 0
Assigned to: Implementor, Ex Libris

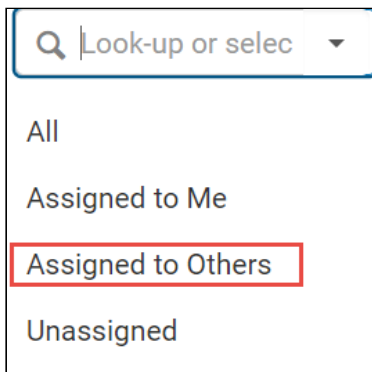
Assigned To Information

- You can filter recommendations to display only recommendations assigned to you, unassigned recommendations, or all recommendations:



Assigned To Filter

- Users with the new **Recommendation Manager** role can view recommendations assigned to others:



Assigned To Others

- You can assign recommendation types to a specific user. This allows only that user to view all the recommendations of that type. To support this feature, a new **Assign To** field is available when configuring DARA ([Configuration > General > General Configuration > DARA Recommendations](#)):

[←](#) Recommendation Type

RECOMMENDATIONS

Roles

Assign to

Assign To - Recommendation Type

Note

Only users with roles configured to view the recommendation type are available in the drop-down list.

Watch the [Assigning DARA Recommendations](#) video (1:36 minutes).

Alma June Additional Enhancements

- **June 2021 Analytics**

The **Operator Identifier 1** and **Operator Identifier 2** fields were added to Fines and Fees > Staff Operator Details. They allow you to enrich the user details exported to Analytics with additional identifiers.

- **June 2021 Analytics**

Two additional reporting code fields (#4-5) were added for reporting codes and reporting code descriptions to the PO line dimension for all subject areas in which it appears. The names of the fields were also changed, so that the reporting code fields are as follows:

- Reporting Code - 1st
- Reporting Code - 2nd
- Reporting Code - 3rd
- Reporting Code - 4th
- Reporting Code - 5th
- Reporting Code Description - 1st
- Reporting Code Description - 2nd
- Reporting Code Description - 3rd
- Reporting Code Description - 4th
- Reporting Code Description - 5th

- **June 2021 Analytics SF: 00720550 00844304**

The **DC License** and **DC Rights** fields were added to the Bibliographic Details dimension for all subject areas in which it appears. These fields contain the license and rights information from Dublin Core bibliographic records.

- **June 2021 Analytics**

The following Acquisitions reports were removed:

- Non-Serial Issues Claims Report (Items without material type issue and expected receiving date greater than seven days that have not been received)

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

- **June 2021 Analytics**

The following improvements were made in the Physical Items dashboard:

- An indication of the total number of items was added to the **Item Count by Library and Location** tab and to the **Item Process Type** tab.
- In the Inventory > Physical Items dashboard, the Physical Items > **Num of Items** field was renamed to **Num of Items (Deleted + In Repository)**.

- **June 2021 Analytics**

In the Fulfillment > Fines and Fees Dashboard for the **User Cash Transactions** and **Library - Type Transactions** tabs, when there are no results, the message displayed is now: `No Transactions meet the criteria specified in the filters.`

- **June 2021 Analytics**

The **TR_J1 - Unique Title Requests** field was removed from the Usage Data Details - Release dimension in the

Usage Data subject area. This field was removed because it was erroneously added when COUNTER Release 5 was added to Alma and Alma Analytics.

Alma June Resolved Issues

- **June 2021 Analytics SF: 00892520**
When creating reports on physical item requests, sometimes the report was empty. This was fixed.
- **June 2021 Analytics SF: 00927515**
When running reports with a Material Type Description of 'Undefined', no results were displayed. This was fixed.
- **June 2021 Analytics SF: 00920187**
Fields from the Physical Items dimension were visible in the Purchase subject area. This was fixed.
- **June 2021 Analytics SF: 00700466**
Clicks to Bx recommendations were not counted in Analytics reports in the Link Resolver subject area after Direct Linking became active in Primo. This was fixed.
- **June 2021 Acquisitions SF: 00861383**
Library field was empty for Print book - Standing order in PO Line list Standing Order drawer. This was fixed.
- **June 2021 Acquisitions SF: 00921897**
When attempting to approve and order a purchase that links to a Deleted Bibliographic record - an oops error was displayed. This was fixed and now when the Purchase request is approved, a proper error message is displayed.
- **June 2021 Acquisitions SF: 00880216 00565025 00557072**
'ERP Number' field is not indexed by any existing index in the 'Order lines'. This was fixed by adding the ERP number to the order lines search.
- **June 2021 Acquisitions SF: 00922811 00889862**
If the PO Line is in status Auto Packaging and the resource is activated through E-Activation task list, the notification to the interested user was not sent. This was fixed.
- **June 2021 Acquisitions SF: 00882585 00805405 00891636 00895324 00891320 00836304 00800393 00891272**
Sushi Harvesting failed when created with an empty report. This was fixed.
- **June 2021 Acquisitions SF: 00913259**
Events subject area of Alma Analytics created reports where Acquisition Work Order was inaccurately associated with SUSHI Jobs. This was fixed.
- **June 2021 API SF: 00905645**
Returning of items was not possible when RFID was connected. This was fixed.
- **June 2021 API SF: 00835518**
Get PO-Line API returned inaccurate sum per fund in some cases. This was fixed.
- **June 2021 API SF: 00919349**
REST API Usage in Analytics wasn't up to date in some cases. This was fixed.
- **June 2021 CLO SF: 00930552**
Few fields (library, po_line, counter_platform, free & license) in the Update-collection API didn't support empty input. This was fixed.
- **June 2021 Fulfillment SF: 00681243**
If an item is still found in **Acquisitions > Post Receiving Processing > Receiving Department Items** but its Acquisition technical services request doesn't exist, the item can be loaned to patrons. When clicking on 'Done' for such an item in the Receiving Department Items list, the item status changes from loan to transit though the item stays on loan to the patron. This was fixed.
- **June 2021 Fulfillment SF: 00887339**
In specific scenarios, the barcode switched after several scan-in operations. This was fixed.
- **June 2021 Fulfillment SF: 00915251**
Accessing the Request Task Names at the Network, will now have the button for Save and Distribute.
- **June 2021 Fulfillment SF: 00928775**
The Request Queue screen was sometimes empty if the requested title had multiple holdings with an identical library, location and call number values. This was fixed.

- **June 2021 Fulfillment SF: 00913079**
Unable to send borrowing request a second time to once active partner after Remove and Recalculate Rota. This was fixed, conditionally that the Rota Assignment Rules actually changed the Rota.
- **June 2021 Fulfillment SF: 00935829 00928529**
Fixed the typo in Advanced Configuration Policy 'Is Requestable for Physical Resource Sharing'
- **June 2021 Fulfillment SF: 00813692**
When the interface language is traditional Chinese and the preferred language for the user is English, 'shortened_due_date' notifications are not being translated. This was fixed.
- **June 2021 Fulfillment SF: 00792155**
The delayed Place on Hold Shelf letters was previously attached by System. This was fixed and this will now be written on the operator who made the triggering operation.
- **June 2021 Fulfillment SF: 00909522**
When clicking Done in Item in the department when the PO Line has Interested users, an error was displayed. This was fixed
- **June 2021 Fulfillment SF: 00915832**
From now on, every time the approval requests list is opened from the task list widget, previous search conditions and filters will not take effect and the whole list will be loaded.
- **June 2021 Fulfillment SF: 00950922**
Availability calculation did not work for reading rooms. This is now fixed.
- **June 2021 Fulfillment - Resource Sharing SF: 00798500 00657835**
Lending requests with the following statuses are now able to perform check in action from UI:
 - Overdue
 - Recalled
 - Damaged
 - Lost
 - Lost and fee communicated
- **June 2021 Fulfillment - Resource Sharing SF: 00898321**
When a borrowing request for a non-physical format was received in a different format as physical, the return row action was not visible so it was not possible to return it. This was fixed.
- **June 2021 Resource Management SF: 00912602**
Items Creation Policy has been added to the Update Inventory profile by mistake. This was fixed.
- **June 2021 Resource Management SF: 00570510 00925192 00883455**
Add Physical item > Holdings Type = Existing: 1) If the selected record held only locations out of the user's physical inventory role scope, an OOPS message popped up. 2) If the selected record held both scoped and unscoped locations, the location dropdown was not populated with the allowed locations. These issues were fixed.
- **June 2021 Resource Management SF: 00911896 00902000**
In some cases, an incorrect number of related holdings records was displayed in the results of a 'Physical Titles' search. This was corrected.
- **June 2021 Resource Management SF: 00915917**
When **Resources > Add Physical Item > Choose Holdings Type > Existing**, the Physical Material Type customized definitions were not taken into consideration: not active entries appeared; for non-English interfaces, the translated values did not appear. This was fixed.
- **June 2021 Resource Management SF: 00926074**
Holdings record could not be deleted when the holdings list was filtered. This was fixed.
- **June 2021 Resource Management SF: 934292**
Indexing problems with Proquest DDA integration profile set-up. This was fixed by deploying the Handle Bibs With No MD Representation SP Job.
- **June 2021 Resource Management SF: 00921421**
OpenURL was empty in the Link Resolver Usage. This was fixed.
- **June 2021 Resource Management SF: 00806754 00901610**
Directional characters were added automatically by the system and published, preventing the exact phrase to be found in Primo. This was fixed.
- **June 2021 Resource Management SF: 00895129**

The CP 'Cataloging_level_user_preferences' was not effective to record the last selected Cataloger Level between network and local records. This was fixed.

- **June 2021 Resource Management SF: 00914895 00916249**
Profiles for Contribute Record to Central Catalog were missing when opening the record directly in new Metadata Editor. This was fixed
- **June 2021 Resource Management SF: 00854512 00798909 00911883 00928358**
New Metadata Editor: When the user pressing F3 and clicking on 'Headings from bibliographic records' tab for the searching, the response time is slow. This was fixed.
- **June 2021 Resource Management SF: 00926033 00947296**
New Metadata Editor: Many users experienced slowness in the new MDE the first time it was opened. There was no clear indication of when the loading was complete, so users got used to pressing buttons over and over until 'it started working'. To give a clear sense of the loading time, we added a loading blocker until the MDE completes loading the first time.
- **June 2021 Resource Management SF: 00949955 00939703 00913318**
New Metadata Editor: Pushed records not showed Local Extensions fields when pushed from Network Zone search. This was fixed.
- **June 2021 Resource Management SF: 00918427**
New Metadata Editor: Adding a record to the editing list for linked Authority records did not cause the record to be added to the Navigation list. This was fixed.
- **June 2021 Resource Management SF: 00934153 00934184 00918605 00926130**
New Metadata Editor: Shared templates could be modified by any cataloger, not only by 'Cataloger Extended'. This was fixed.
- **June 2021 Resource Management SF: 00940763 00927154 00942837**
New Metadata Editor: View Related Data / Add Inventory / Order menus were unavailable when the record was opened in View mode, when edited by another cataloger. This was fixed.
- **June 2021 Resource Management SF: 00934511**
New Metadata Editor: An internal error occurred when automatically reloading a record from the Central Catalog. This was fixed.
- **June 2021 Resource Management SF: 00919056 00942590 00935037 00924664 00942038**
New Metadata Editor: In the German environment, the cataloger level on GND authorities was not displayed at all. This was fixed.
- **June 2021 Resource Management SF: 00923181 00934036**
New Metadata Editor: After enabling network authority templates (that this network authority vocabulary managed only local) in the 'Template display configuration' screen, the authority templates were not available in the 'New' menu. This was fixed.
- **June 2021 Resource Management SF: 00926030**
New Metadata Editor: When opening two records, and clicking 'Field Information' on one of the records, the second record moved to the left, but the title of the record belonged to the second record. This was fixed.
- **June 2021 Resource Management SF: 00936734 00930982**
New Metadata Editor: In some cases, when editing a Network Zone record, the record opened in the Metadata Editor with missing information in the record's header and did not appear in the records list. This was fixed.
- **June 2021 Resource Management SF: 00937360 00952384 00956008 00935505 00955321**
New Metadata Editor: When a record was opened on the left pane and a rule on the right pane, and the user clicked Preview the rule > back > Made changes > clicking the 'Save' button, nothing happened. This was fixed.
- **June 2021 Resource Management SF: 00949152 00942725 00956089 00940930 00940624 00945177 00937983 00937085 00945742 00944300 00933231 00934137 00934932 00957777**
New Metadata Editor: When the records list was unpinned, and there were two presenters in Split mode when clicking on action that collapsed the left presenter, the right presenter extended to the right side. The was fixed.
- **June 2021 Resource Management SF: 00944389 00926542**
New Metadata Editor: When opening a record and clicking the 'i' icon, modification appeared to be by the current user at the time of opening the record. This was fixed.
- **June 2021 Resource Management SF: 00937112**
New Metadata Editor: After closing the right editing pane in split mode, the focus remained on the registry list of the

record that was closed instead of moving to the registry list of the record that remained open in the Navigation pane. This was fixed.

- **June 2021 Resource Management SF: 00953449**
New Metadata Editor: It was unable to duplicate CZ Authorities. This was fixed.
- **June 2021 Resource Management SF: 00930913 00854790**
New Metadata Editor: 'Push selected records to Metadata Editor' did not consider locking time. This was fixed.
- **June 2021 Resource Management SF: 00943710 00942268**
New Metadata Editor: The Order button did not work for a specific record (that contained ':' character). This was fixed.
- **June 2021 Resource Management SF: 00920239 00919043 00939486 00907495**
New Metadata Editor: Templates with ':' in the text were wrongly parsed, and failed record creation from the template. This was fixed
- **June 2021 Resource Management SF: 00928965 00939485 00919106 00907500**
New Metadata Editor: Community templates that were enabled via the Templates display configuration did not appear in the 'New' menu after log out. This was fixed.
- **June 2021 Resource Management SF: 00912542 00923265**
After selecting 'Copy to Catalog' from a Community Zone record, the 'Search Resources' option was still grayed out. This was fixed
- **June 2021 Resource Management SF: 00904630 00886025 00943926**
New Metadata Editor: User could not add a local extension or inventory to Network Zone record with a higher cataloging level. This was fixed.
- **June 2021 Resource Management SF: 00890003 00940854**
New Metadata Editor: Community Zone and Network Zone records did not show the Suppressed icon. This was fixed.
- **June 2021 Resource Management SF: 00929118**
New Metadata Editor: When editing a data field that contained Hebrew/Arabic characters, the cursor was not displayed well. This was fixed.
- **June 2021 Resource Management SF: 00927543**
For NLI authorities, when external authority equals 50 and user cataloger level equals 20 in the external authorities mapping table, we got an error while trying to save the authority. This was fixed.
- **June 2021 Resource Management SF: 00947283 00916325**
New Metadata Editor: When a record was created from a template that contained a field 990 \$\$9 local, the local indication was not displayed. This was fixed.
- **June 2021 Resource Management SF: 00952454**
The user couldn't create an NZ auth record from the shared NZ template. this was fixed
- **June 2021 Resource Management SF: 00826608**
It was not possible to delete an authority record. This was fixed.
- **June 2021 Resource Management SF: 00893019**
New Metadata Editor: In the Editing Records menu, the 'Reload Record From Central Catalog' option was mistakenly disabled for authority records. This was fixed.
- **June 2021 Resource Management SF: 00904877**
When localizing SBN authority records of type Titoli uniformi (Uniform titles) and Titoli uniformi musica (Uniform music titles), the localization data returned from SBN was not added to the Alma record. This was fixed.
- **June 2021 Resource Management SF: 00947638 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 exist (is null) in HFRUSER, the livello is taken from 980 field.
- **June 2021 Resource Management SF: 00911821**
Due to technical issues, some NZ publishing jobs completed with errors. This was fixed.
- **June 2021 Resource Management SF: 00928101**
Export Bibliographic Records job- When large sets were selected for the job, an error message was sometimes obtained on the 'Enter Task Parameters' screen. This was fixed.
- **June 2021 Resource Management SF: 00928103**
Change Physical Items job ignored condition for changing temporary location information. This was fixed.

- **June 2021 Resource Management SF: 00917105**
When going back from the Items list to search results, the list appeared from the first entry, not from the entry from which you opened the items list. This was fixed.
- **June 2021 Resource Management SF: 00927442**
Alma language facet showed code rather than description for ISO 639-1 language for Maori. This was fixed.
- **June 2021 Resource Management SF: 00921894 00926699**
New Alma Layout: When using Advanced Search immediately after sign-in and using "Enter" on the keyboard, it resulted in an empty screen. The results appeared only after performing a Simple Search, then the Advanced Search again. This was fixed.
- **June 2021 Resource Management SF: 00885542**
For some related items, Get It did not show that the related item was available. This was fixed. Matching related holdings and items by filters in bib record field 773\$g (MARC21/KORMARC) or 461\$v / 463\$v (Unimarc/CNMARC): the bib filters are now checked against item data, only if the filter exists (there is a value in \$g) AND there is data in the corresponding item field. Examples: Year filter - \$g yr: 2015 - is checked only if an item has a value in the 'Chronology I' field; Volume filter - \$g no: 1 ==> non-empty 'Enumeration A' field, or barcode; Issue Number filter - \$g iss: 4 ==> non-empty 'Enumeration B' field; Part filter - \$g pt: 5 ==> non-empty 'Enumeration C' field; Pages filter - \$g p: 10-20 ==> non-empty 'Pages' field. Notes: (1) Filters are taken into account only when the customer parameter 'display_specific_related_items' is set to 'true'. (2) If no specific match is found according to the defined filters, no filtering can be done despite the customer parameter.
- **June 2021 Resource Management SF: 00751264 00931323**
Primo VE: Pickup location of other institution was missing under **My Account > Requests**. This was fixed.
- **June 2021 Resource Management SF: 00719307 00937156**
Renewal rejection status was not translated when renewing selected or all loans. This was fixed.
- **June 2021 Resource Management SF: 00908444 00858857 00902088 00837461 00905807 00792784**
Duplicate items appeared in PrimoVE Collection Discovery. This was fixed.
- **June 2021 Resource Management SF: 00723486**
Primo VE: the user interface prevented semi-colon to be displayed in the Brief Record Display. This was fixed.
- **June 2021 Resource Management SF: 00859382**
Default material type for purchase requests wasn't changed according to the configuration screen. This was fixed.
- **June 2021 Resource Management SF: 00907254**
Full view details links occasionally referred to browse search. This was fixed.
- **June 2021 Resource Management SF: 00788605**
Primo VE>My Library Card: Overdue icon did not appear unless overdue records were on the list. This was fixed. If there is no alert in the response's loans, the system checks if the user has any overdue or due loans and according to that, it will be marked if it has an alert or not.
- **June 2021 Resource Management SF: 00891196**
Full Record Display - Get it - Borrow and Scan buttons did not have meaningful alternative text labels. This was fixed.
- **June 2021 Resource Management SF: 00918224**
NA91: Links from Alma to Primo Studio did not work. This was fixed.
- **June 2021 Resource Management SF: 00699854 00709884**
Accessibility: navigating Advanced Search with screen reader was confusing. This was fixed.
- **June 2021 Resource Management SF: 00708854**
Only 245 \$a \$b of the Request Title were shown in Primo > My Requests - PrimoVE. This was fixed.
- **June 2021 Digital Resource Management SF: 00883572**
Thumbnails and URL links did not appear in Primo for digital titles. This was fixed.
- **June 2021 Digital Resource Management SF: 00930300 00924748**
Digital repository and digital import profiles for Digital Commons were not able to harvest qualified DC. This was fixed.
- **June 2021 Digital Resource Management SF: 00924501**
The Export Handles job did not run on a MODS record. This was fixed.
- **June 2021 Digital Resource Management SF: 00934038 00945534**
New Metadata Editor: Alma Search Options Show only Collections After Linking Bib to Collection, Searching Shows we Remain in the 'Add Collection' Wizard. This was fixed.

- **June 2021 Administration and Infrastructure SF: 00936152 00881202 00939395**
New Metadata Editor: After a record was copied to Catalog in the right-side editor, the Merge and Combine menu was still grayed out. This was fixed.
- **June 2021 Administration and Infrastructure SF: 00942244 00908755 00928027 00953983 00940670 00937275 00936131 00935019 00908781 00933889**
New Metadata Editor: in Expand from Template, long template names are cut off. This was fixed by expanding the popup.
- **June 2021 Administration and Infrastructure SF: 00923628**
Advanced search for Statistical Note with a wildcard led to an empty page. This was fixed.
- **June 2021 Administration and Infrastructure SF: 00914399**
Itemized set creation from file: wrong format record at the input file caused the 'Add members to set' job to fail, without a clear indication about the wrong input. This was fixed; the wrong line will be indicated.
- **June 2021 Administration and Infrastructure SF: 00924518**
The access rights for concurrent users are not reset after a user logs out. This was fixed.
- **June 2021 Administration and Infrastructure SF: 00952048 00880425**
Previously, the Fines and Fees Report used the code from 'Workbench Payment Method'. Now the code uses the customized description from this table.
- **June 2021 Administration and Infrastructure SF: 00896831 00923094**
When a user that is defined as a requester of a Purchase Request is about to be deleted, an error message will now be displayed, 'The user is a requester of a purchase request and cannot be deleted'
- **June 2021 Administration and Infrastructure SF: 00909405**
Users are erroneously blocked from accessing links to digital files from the View It link. This was fixed.