Alma July 2021

Release Notes

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Alma July Make the Most

Make the Most of July's Release

Action Items
☐ Open the descriptions in the Genders code table for update - The list of gender value is now fully customizable. You can disable existing values, or add new values by changing the description and activating any of the added place holder categories. This will affect the list of gender options in the user form.
☐ Library input parameter to user registration rules - The User Registration Rules can receive a library input. This way, you can set up separate rules depending on the library at which the registration took place. For example, registering at a library desk in some libraries may be set up to trigger a fee and grant patron permissions at that library for a couple of months, while registering at a library desk in other libraries may be set up to not trigger a fee and grant patron permissions at that library for a full year.
☐ Push user records to ILLiad - If you use Alma's capability to push borrower requests into ILLiad, you can now do that without having preloaded the user records in ILLiad. Your ILLiad partner record can be set up to push also the patron information into ILLiad in real time.

Upcoming Issues to Note

Sandbox Refresh

As a reminder, premium sandboxes will be updated in August according to Alma's premium sandbox refresh policy.

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.

Top Trending Books

Starting with the October release, the Top Trending Books dashboard widget will be removed from the list of available dashboard widgets. The Top Trending Books dashboard widget is currently available for institutions that opted into sharing their anonymized data (Configuration menu > General > Data sharing Selection and development section). The deprecation

of this dashboard widget is done due to the low adoption of institutions who opted into the "Selection and Collection Development" functionality and this is imperative in order to conduct analysis and provide reliable and effective data to be presented within the widget.

August Release Sneak Preview

Click here to view August's sneak preview.

Alma July Main Stories

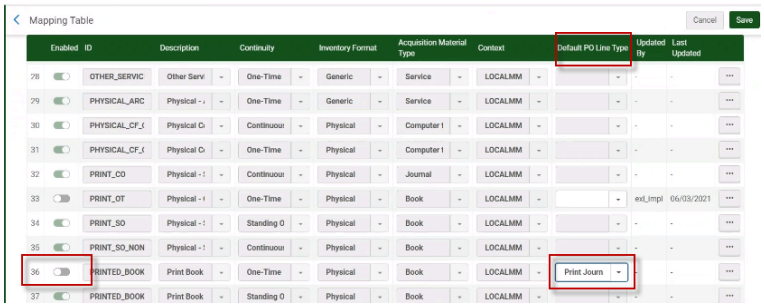
Default Type For Disabled PO Line Types

July 2021 Acquisitions

A new functionality will verify that the "PO Line Type" is active for orders created via API/purchase request. If a certain PO Line type is disabled, Alma will automatically look at the new "default" column and create the PO Line type according to it. These PO Lines will be added with an assertion (alert).

This functionality can be configured in **Configuration Menu > Acquisitions > Purchase Order > PO Line Types** as follows:

- Add a default type for the disabled PO Line type ("Default PO Line Type" column).



PO Line Types Mapping Table

Selecting a "Default" value will affect the following workflows:

- When an order is **created via API**, Alma will validate that the specified "PO Line Type" is actually enabled by the institution, If Yes, Alma will continue.
  - If the PO Line Type is not enabled but does have a "Default" type, Alma will add a new assertion to the PO Line that will state that the order's original "Type" is not enabled and the PO Line was created with the default "Type" value.
  - If the PO Line Type is not enabled and a default value was not selected in the "PO Line Types" table, Alma will add a new assertion to the PO Line stating that the order's original "type" is not enabled, and no "default" value was selected the PO Line was created with the original "type".
- When an order is **created via Purchase Request**, currently the "type" for the PO Line which will be created once a purchase request is approved is determined based on the user selection within the Purchase Request form. If the institution would like approved purchase requests to create a PO Line type different from the default stated above, see Configuring default "types" for disabled PO Line types.

Control "Interested User" Options For Automatically Created PO Lines

July 2021 Acquisitions

Idea Exchange

An enhancement in the PO Line's "Interested Users" management area allows institutions to control whether to disable/ enable the interested users options for PO Lines created via Purchase Request and EOD process. Additionally, a new job was created to provide institutions the ability to update the Interested users options on a set of PO Lines. Below is a short explanation for each option:

1. When working on a purchase request, a new "Interested Users" field allows users to define the options that will pass to the PO Line which will be created once the purchase request is approved.

Interested Users field

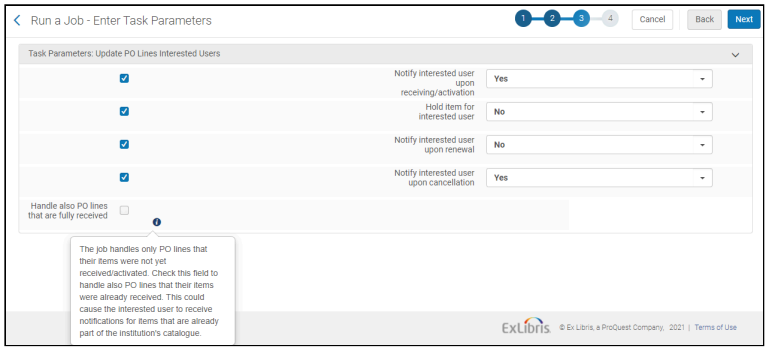
For backwards compatibility (previously the first two options below were always selected by default) the parameters controlling these options are now set to 'True' by default. The default selection of options can be defined by the institution (**Configuration Menu > Acquisitions > General > Other Settings**). For this purpose, the following customer parameters were created:

Parameter	The option it controls	Default value of parameter
po_line_hold_for_interested_users	Hold Item	True
po_line_notify_for_interested_users_upon_cancelation	Notify upon cancelation	True
po_line_notify_for_interested_users_upon_receiving_activation	Notify user upon receiving/activation	False
po_line_notify_for_interested_users_upon_renewal	Notify upon renewal	False

2. PO Lines created via EOD process (new order import profile) has a new control over the interested users options for PO Lines created via this process.

Interested users options for PO Lines

3. A new job, "Update PO Lines Interested Users" located within the "Update PO Line" jobs area (**Admin > Run A Job**) provides institutions the ability to update the "Interested users" options on a set of PO Lines (the new Job does not handle closed and canceled PO Lines).



Update PO Lines Interested Users

See Manually Creating a PO Line and Configuring Other Settings (Acquisitions).

CDI New Information Field, Search Fields and Facets

July 2021 Resource Management

A new field has been added in Alma: ‘CDI Last Market Update’. This field will indicate the 'last update date' for an electronic collection in CDI.

Alma has incorporated new CDI related search fields that are available in the Advanced Search for Electronic collections.

- CDI Activation required (This search field is visible for EasyActive customers only)
- CDI Provider Coverage
- CDI Type (Alma subscribes to only some titles in this collection)

Support for Swedish and Norwegian Special Characters

July 2021 Resource Management

Idea Exchange

The handling of Scandinavian characters was enhanced as follows:

- Special characters cataloged in non-Scandinavian languages (such as French letters with accents), are now normalized during indexing. This means that a search for a term including these special characters now behaves as if the search was done without them. (However, the opposite does not happen: a search for a term without these special characters is not treated as if done with these special characters.)
- Support for Swedish and Norwegian special diacritics in Browse Bibliographic and Authority Headings was added.
- Sorting of Swedish and Norwegian/Danish special characters in Staff Search & Browsing was added.

Note

To apply these changes for bibliographic/authority/inventory data, contact Ex Libris Customer Support.

See Scandinavian Characters.

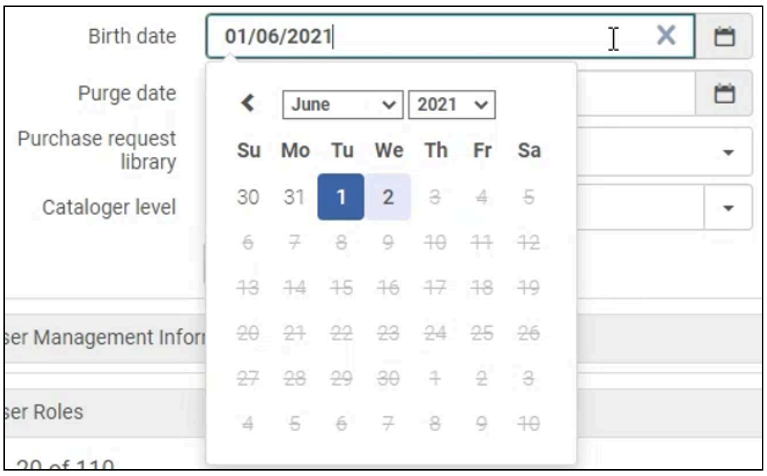
Alma Accessibility Improvements

July 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 contrast - the colors of low-contrast elements were changed to more prominent.
- An indication for active state or hover was added.
- 200% zoom with no content loss is now supported.
- Increased text spacing with no content loss is now supported.
- The loading blocker for screen reader users was exposed.

- Recent entities – support for keyboard navigation in entities filter is now supported
- Date picker – keyboard navigation and labels for screen reader users is now supported. To open the calendar, press Enter on the Calendar icon.

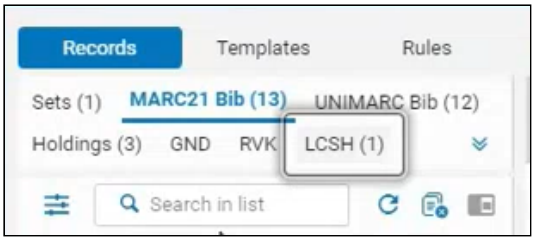


Metadata Editor Accessibility Improvements

July 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.

- Menu actions - screen-reader related improvements
- Navigation panel - keyboard navigation is now supported on the displayed registry tabs (using tab key) and on the collapsed registries list (open using Enter, navigate using up/down arrows, select with Enter)



- Panels of the Editing area - keyboard navigation between the two panels (in case of a split screen) and the Alerts area is now supported. Use tab/Shift +tab to move between the elements.
- Browse Bib Headings - support for tab navigation

- "Open in Repository Search" is now accessible via tab navigation

New Metadata Editor: Improved Display of Format Tabs

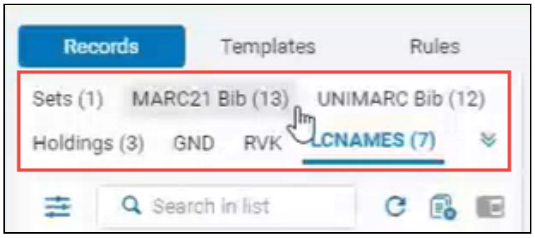
July 2021 Resource Management

In the Records area, the format tabs are now displayed in two rows instead of one--this enables you to see more formats, and removes the need to select the

icon when opening one of these tab.

In addition, the default order in which tabs are displayed is now the following: the sets, the bibliographic formats, the holdings, the authorities, and finally the DC formats (select

to display them).



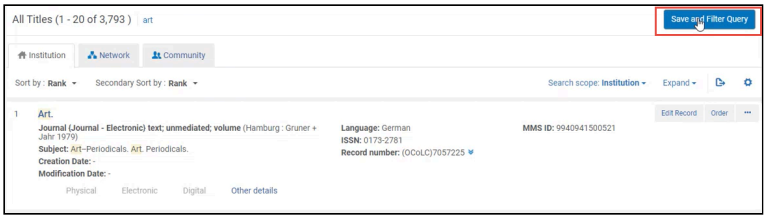
Enhanced Ability to Filter a Set Using an Indication Rule

July 2021 Resource Management

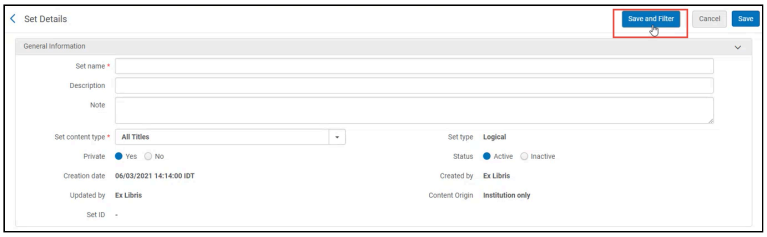
NERS Enhancement (ID #6795)

Filtering logical sets using indication rules can now be done faster and with less clicks, and each set now displays a link to the set it was filtered from or a link to its filtered sets (as appropriate for the set).

The button for saving a query that appears for all types of repository Title searches (All Titles, Physical Titles, Electronic Titles, Digital Titles), is now called "Save and Filter Query" (previously was called "Save Query"). This was done only on repository Title searches since filtering logical sets is possible only on these search types.

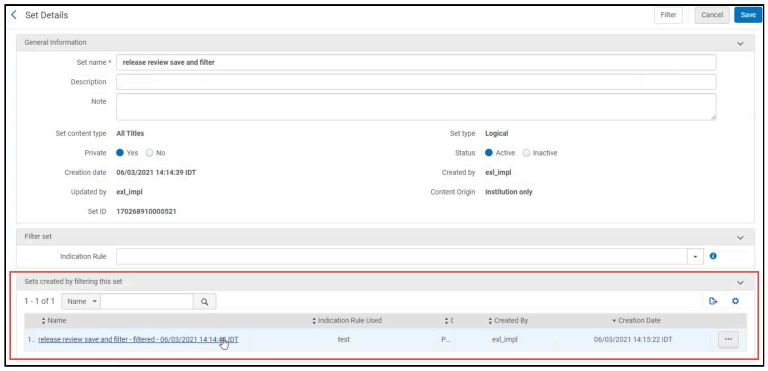


Once you select this button, the Set Details page opens where you define the set to create from the search results. On this page, a new button "Save and Filter" allows you to initiate the process of saving a set that is to be filtered.



Once you select this button, a new page opens where you can create the filtered set of that main set. The main set is created in the background in the meantime. Select "Filter This Set" to create an itemized set that consists of the filtering done on the main set according to the selected rule.

When the new set is ready, it appears on the Set Details page of the main set; click on the link to open it. A similar section appears for the original set from which this set was created, listing all its filtered sets. The row actions list for the new set contains all the actions that can be achieved on this set, identically to the actions available from the Manage Sets page.



See Filtering Sets.

Automatic Generation of Call Number Prefix and Suffix

July 2021 Resource Management

The mechanism of generating call numbers and temporary call numbers for items and holding records was enhanced as follows:

- You can now enter a new prefix on-the-fly when working with items and holding records. Alma generates the call number based on that prefix and saves the prefix in the list of prefixes for future use. This speeds up call number generation.
- You can now concatenate a suffix to the call number.

Note

- To enable the method of call-number generation on-the-fly, contact Ex Libris staff.
- Suffix concatenation is disabled by default. Contact Ex Libris staff.

Call numbers and temporary call numbers are generated on the fly as per the below:

- **Physical item's call number generation**: The **Physical Item Editor** > **Location Information** tab allows you to update item-level information for physical items and generate the call number. If the prefix does not exist in Alma and you want to set it, enter the desired prefix for the sequence in the "Choose Prefix" field, and select **Generate**. The system presents the following message: "*An accession number sequence with the prefix <prefix> was selected and will be used to generate the call number upon save. The expected value is <expected value>*." In addition, Alma saves this prefix for future use in the Accessions Numbers configuration table, see Configuring Accession Numbers.

  See Updating Item-Level Information.

- **Holding-level Call Number Generation:** The 852 field $h allows you to update holdings-level information for items and generate the call number. If the prefix does not exist in Alma and you want to set it, enter the desired prefix for the sequence in the 852 field $h, and then enter '?' (question mark), and (optionally) the suffix. Then select **Generate Accession Numbers** (in **Record Actions** menu) or press **Ctrl+Shirt+A**.

  The system populates the 852 $h with the specified prefix + sequence (+ suffix). In addition, Alma saves the prefix for future use in the **Accessions Numbers** configuration table.

  To change the accession number, delete the value in 852 $h. You are redirected to the **Accession Configuration** page, where you can select a different accession number. Clicking **Select** automatically returns you to the Metadata Editor and populates the 852 $h with the selected value.

  Note

  - To apply the 'Accession Number' on holding level, the 'Physical Location' configuration for the Library+Location should be set with 'Accession Placement'. See Configuring Accession Numbers.
  - The 852 subfield that stores the generated number can be $h OR $j OR $p--the exact field is set at the **Physical Location** table > "Accession Placement" field. The above refers to 852$$h as the placement of the accession number; however, the same logic applies also when other placement ($j OR $p) is defined in the **Physical Location** table.

  See Holding-level Call Number Generation.

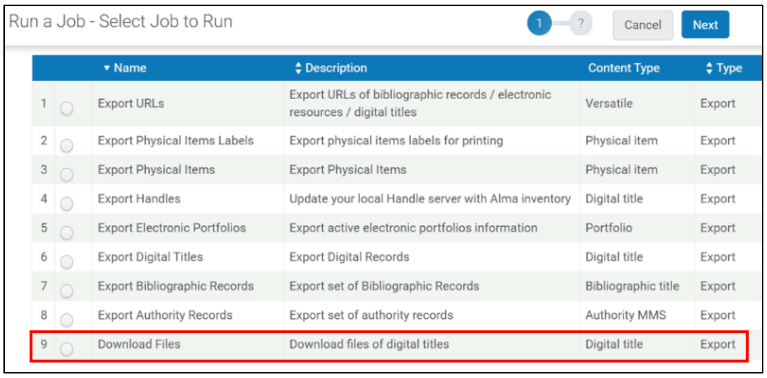
Watch the Automatic Generation of Call Number Prefix and Suffix video (2:43 minutes).

Download Digital Files in a Set

July 2021 Digital Resource Management

Idea Exchange

You can now download the digital files of a digital title set into a zip file. To support this feature the new **Download Files** job is now available (Admin > Manage Jobs and Sets > Run a Job > Download Files.



Download Files

After the job runs, you receive an email with a download link to download a zip file with the digital files.

For more information, see Download Files.

Watch the Download Files of a Digital Set video (1:31 minutes).

Add/Renew Patron Role from Circulation Desk

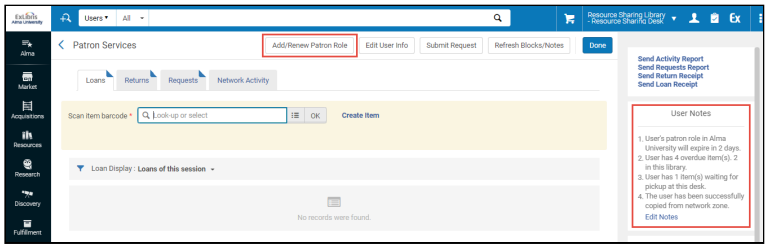
July 2021 Fulfillment

Alma now enables staff operators to easily add a patron role to a user, as well as view and update the patron role's expiration date. Previously, this functionality was only possible by User Managers and is now attainable by operators in the circulation desk. The new functionality performs the following:

- Adds the new patron role either in the institution or the scope the desk operator is currently in (depending on the User Registration Rules).
- Renewing a patron role is only allowed if the scope is at the "institution/specific library" which the operator is currently at.

This is possible by using the new "Add/Renew Role" button at the Manage Patron Services page.The button appears only in the user's Circulation Desk Operator role has a 'renew patron' privilege.

In addition, the Expiration Alert Period that is defined in the User Registration Terms of Use will be used to warn (in the User Notes area of the Patron Services Workbench) about an expected expiry of the patron role in the current library or institution. This is in addition to the previous behavior where this parameter warned about an expected expiry of the user account.



Add/Renew Patron Role (Patron Services)

Add Library Input Parameter to User Registration Rules

July 2021 Fulfillment

User registration rules have been enhanced to support library-specific registration rules (to support different registration fees to different libraries). Previously, user registration rules could be used to add a patron role at the physical library. However, the rules are sensitive only to a user group as input. Therefore, different registration fees could not be automatically applied to the same user when registering at different libraries. The new functionality supports different registration fees to different libraries.

- If patron role is created using the Renew Role option (for example, when a loan is blocked due to missing patron role), then the user registration rules use the physical library of the loaned item as the scope and not that of the 'currently at'.
- If patron role is created using the 'Register User' option, then the user registration rules use the scope of the 'currently at' library.

Creating Fines/Fees at Library Level

July 2021 Fulfillment

Alma now allows the option to have fines and fees related to a user to be created in relation to a specific library. Previously, manually assigned fees were only attainable on an institution level or derived from the item barcode they are attached to. The new enhancement enables the following:

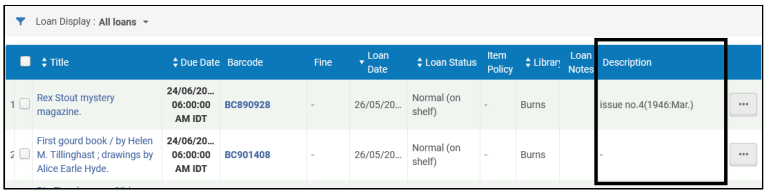
- Ability to manually add a library-owned fine/fee.
- Ability to add a library-owned fine/fee using API.

Description Column Added to the Patron Services Workbench

July 2021 Fulfillment

Idea Exchange

A new 'Description' column can be added to the list of loan items in the Manage Patron Services page. The column shows the value of the physical item's 'Description' field.



Description Column in Patron Services

View Digitized Content in 'My Account' (Primo VE)

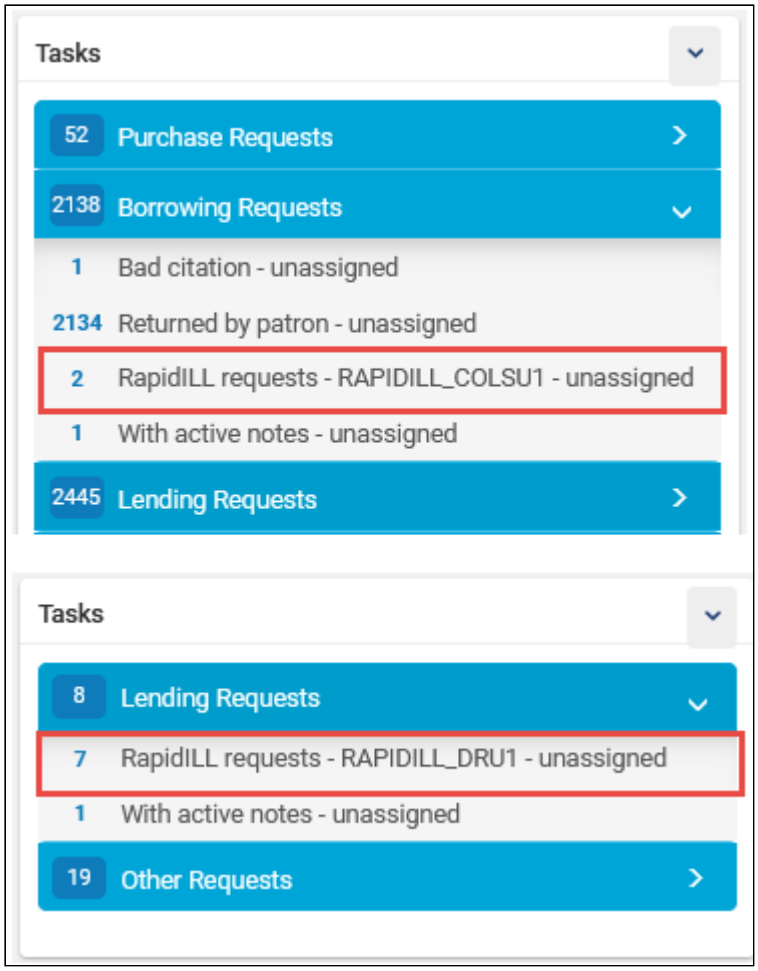
July 2021 Fulfillment-Resource Sharing

Completed digitally received resource sharing requests will allow downloading the file from Primo VE and remain accessible in Primo VE as per the number of days that the library has configured to keep the file. This depends on the 'Document delivery files cleanup' job being active in the institution. For more information, see the Primo VE 2021 Release Notes.

Quick Access to RapidILL Requests

July 2021 Fulfillment-Resource Sharing

Alma now enables users to easily and quickly access RapidILL requests in the system by introducing new tasks showing unassigned resource sharing requests (borrowing and lending) attached to RapidILL partners. Previously, to view RapidILL requests, users had to access the task list. The newly added quick access tasks add benefit to RapidILL requests which require a quick turnaround for both lender and borrowing sides.



RapidILL Requests in Borrowing and Lending Requests

Convert 'Hold' to 'Resource Sharing' Requests for Personal Delivery

July 2021 Fulfillment-Resource Sharing

Idea Exchange

In Alma, institutions can now convert 'Hold' requests to 'Resource Sharing' requests if the pick-up location is personal delivery and the resource sharing library supports personal delivery. Whenever a convert action is triggered, either by a request expiry or as an online action, it will successfully convert a personal delivery request. Previously, Alma did not allow personal delivery requests to be converted to resource sharing requests.

Note

The conversion will only work if the resource sharing policy allows the same personal delivery (home/office) as the converted request.
See: 'Automatically Converting a Hold Request to a Resource Sharing Request' for more information on converting hold to resource sharing requests.

Push User Records to ILLiad

July 2021 Fulfillment-Resource Sharing

Alma can now use ILLiad APIs to push user records to ILLiad (a resource sharing management system). The push will only occur if this is configured by the library and the user does not already exist in ILLiad. Before pushing a request to ILLiad, Alma will verify that the account exists and create a user account if not.

The resource sharing partner record for ILLiad API was enhanced to allow configuring the following API values:

- Search user in ILLiad using – the value which Alma will use to locate / create a user in ILLiad (user identifier or preferred email)
- NVTGC -free string
- Status - free string
- NotificationPreferences - repeatable free text field with two comma separated values. The first will be sent as ActivityType and the second as NotificationType. For example - {RequestPickup,Email},{RequestOverdue,Email}.
- Notification method - 'Electronic', 'Phone' or 'Mail'
- Delivery Method - 'Hold for Pickup' or 'Mail to Address'
- Loan Delivery Method - 'Hold for Pickup' or 'Mail to Address'
- Electronic Delivery
- Authtype - 'Default','ILLiad'

Create user in ILLiad

Alma will look up for the user in ILLiad. The value that will be used for the match will be from the above mentioned 'Search user in ILLiad' using mapping.

The ILLIAD response will either provide details of their user record or will indicate a user cannot be found, in which case, Alma will attempt to automatically create a user record in ILLiad.

‘Convert to Resource Sharing’ Option Available for ‘In Transit’ Requests

July 2021 Fulfillment-Resource Sharing

Idea Exchange

In Alma, the ‘Convert to resource sharing’ option is now available for ‘In Transit’ requests. Previously, this option was available only if the request was in "pick from shelf" or "not yet active".

Customization of the Genders Code Table

July 2021 Administration and Infrastructure

Idea Exchange

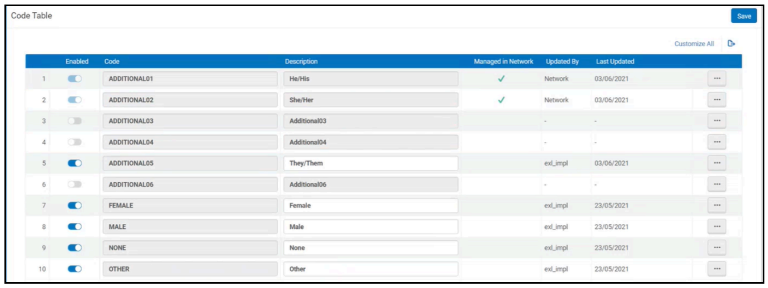
Institutions can now change the values of the list of user genders to conform with their local legislation. This can be done in the Genders table (**Configuration > User Management > User Details > Genders**). Once gender values have been defined, they can be assigned to users in the User Details page.

The Genders table contains four default genders: male, female, other and none. These values can be disabled and their description can be altered. In addition, the institution can define its own gender values in the "Additional" fields, up to total of 10 gender values in a list.

Note

Every change to the gender values will affect existing users to which this gender is assigned.

In a Network Zone, genders can be defined from the Network institution, in which case the gender values defined from the network are locked for editing by the member institutions.



See User Details, Configuring User Genders.

Watch the Configuring Genders in Alma video (1:28 minutes).

Fund Management APIs - Full set of Management APIs

July 2021 API

Alma now incorporates a full set of CRUD (Create, Read, Update and Delete) APIs for managing funds and ledgers. Previously, Fund APIs were limited to just GET services. The new set enables institutions to integrate financial systems and be able to create, modify and delete library ledger/fund structure as needed.

Fund Management APIs:

- Search and retrieve ledgers and funds
- Search and View transactions for a fund
- Create/Update/Delete Funds
- Business functions: Allocate, Transfer

Item API - Generate Description

July 2021 API

Alma's user interface (UI) currently has a specific function to generate "item descriptions" when handling items received. This operation of generating an item description has now been extended to be performed via the API.

Alma July Additional Enhancements

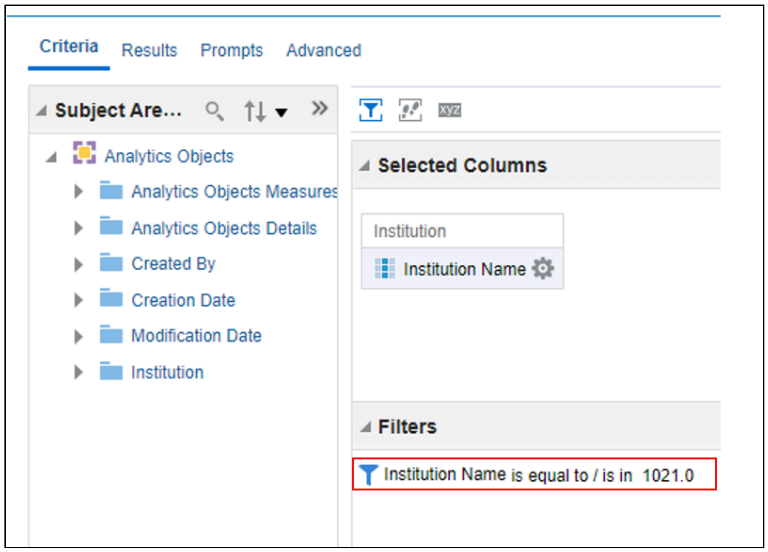
- **July 2021 Digital Resource Management**
  The display of the Alma Viewer in landscape mode for mobile devices was improved.
- **July 2021 Analytics**
  The following fields were added to the E-Inventory subject area:
  - No. of Portfolio (In Repository Contributed to CZ) – the number of portfolios in the repository contributed to the Community Zone
  - Portfolio Contributed to CZ – indicates if portfolios were contributed to the Community Zone
  - No. of Electronic Collections (In Repository Contributed to CZ) – the number of electronic collections in the repository contributed to the Community Zone
  - Electronic Collection Contributed To CZ – indicates if electronic collections were contributed to the Community Zone
- **July 2021 Analytics**
  The **Num of Locate Failed Requests** field was added to **Lending Requests > Lending Request Details** and **Borrowing Requests > Borrowing Request Details**. It indicates the number of failed locate requests.
- **July 2021 Analytics**
  The following fields were added to User dimensions located in subject areas besides the Users subject area:
  - Cataloger Level
  - Has Role other than Patron
  - Has Role other than Patron and Instructor
  - Is Blocked
  - Patron Letters Opt In
  - Patron Letters Opt Out

  These fields were added to:
  - Borrowing Requests > Requester
  - Course Reserves > Librarian
  - E-Inventory > Cost Usage POL Approver
  - E-Inventory > Electronic Collection PO Line Approver
  - E-Inventory > Portfolio PO Line Approver
  - Fines and Fees > User Details
  - Fulfillment > Borrower Details
  - Funds Expenditure > PO Line Approver
  - Leganto Student Usage > Student Details
  - Physical Items > PO Line Approver
  - Purchase Requests > Purchase Request Approver
  - Purchase Requests > Purchase Request Assigned To

- Purchase Requests > Purchase Request Creator
- Purchase Requests > Purchase Request Modified By
- Purchase Requests > Purchase Request Requester
- Requests > Requester

- **July 2021 Analytics**
  On the Alma Analytics Object page (**Analytics > Analytics Objects > Analytics Objects List**), the Analytics Folder and Name fields are now on their own lines which gives these fields additional space to display values.
- **July 2021 Analytics**
  The following three new tabs were added to the **Consortia Network** dashboard:
  - Logins in last 30 days – the number of logins in the last 30 days
  - Logins in last 365 days – the number of logins in the last 365 days
  - Bibliographic records – the number of active (not deleted) bibliographic records per institution in consortia

  The Logins to Alma per institution tab was removed.
- **July 2021 Analytics**
  Reports created with the **Institution Name** field that was filtered to a specific institution now run faster. Reports that were created before this enhancement require the filter to be reapplied to benefit from this enhancement. An indication that the report is now benefiting from the improved speed is that in the filter text under the report, the institution code is displayed and not the institution name.



Filtered Institution Field

Alma July Resolved Issues

- **July 2021 Acquisitions SF: 00900736 00367719**
  When creating PO Line, the list of Acquisition Methods are not sorted and does not reflect the order list in Code table. This was fixed.
- **July 2021 Acquisitions SF: 00796250 00711237 00794740 00854784 00935320 00923964 00946720 00922044 00827911 00800644 00919984**
  Claim was triggered twice automatically for the same PO-Line with one item. This was fixed.
- **July 2021 Acquisitions SF: 00854138**
  When using the 'Invoice Service' API with Op=Rejected, the Invoice would get stuck in 'In-Review' status. This was fixed.
- **July 2021 Acquisitions SF: 00944768**
  Creating an Invoice from PO with hundreds of POLs generates an Oops error. This was fixed.
- **July 2021 Acquisitions SF: 00943760**
  Warning and suggestion given not to delete a vendor, but simultaneously vendor is deleted. This was fixed.
- **July 2021 Acquisitions SF: 00868116 00865167 00878278 00941275 00858821**
  The Public Access Model field in ViewIt was not showing translations for languages other than English. This was fixed.
- **July 2021 Acquisitions SF: 00868204**
  Relink of previously cancelled PO line gave an error. This was fixed.
- **July 2021 Acquisitions SF: 00959759 00943032 00957654 00958093 00958051 00958058 00958931 00958914**
  There was a problem with the 'Status' facet in SOLR. This was fixed.
- **July 2021 Acquisitions SF: 00845140**
  PO Line's resource is 'not active' when resource is 'active'. This was fixed.
- **July 2021 Acquisitions SF: 00851960**
  Running 'Update PO Line information - Advanced' changed the PO Line owner if the field was selected and then the task parameter was unchecked. This was fixed.
- **July 2021 Administration and Infrastructure SF: 00808430**
  Updating the password from Primo VE without entering the old password used to display a success message without actually updating the user password. This was fixed and an error message is now displayed.
- **July 2021 Administration and Infrastructure SF: 00886503 00723941 00938182 00833885 00939745 00912870 00721952 00666833**
  When trying to add or delete a service unit from a receiving operator, an error message was displayed. This was fixed.
- **July 2021 Administration and Infrastructure SF: 00920283 00808876**
  Alma continued to send emails to BCC address after BCC was disabled in letters. This was fixed. CC and BCC labels work now in any letter where they existed (previously worked only for some), and are turned on/off according to their 'enabled' status.
- **July 2021 Administration and Infrastructure SF: 00884328**
  The Job Event Details page in some cases displayed an unexpected title. This was fixed.
- **July 2021 Administration and Infrastructure SF: 00910041**
  Monitor Requests & Item Processes page: Active requests were not visible in the German interface. This was fixed.
- **July 2021 Administration and Infrastructure SF: 00938771**
  Some image files were not displayed properly in the Alma Viewer in low resolution screens such as with laptops. This was fixed.
- **July 2021 Administration and Infrastructure SF: 00941975**
  A PDF did not open with the correct page number in the Alma Viewer when pdf.js was enabled. This was fixed.
- **July 2021 Analytics SF: 00919852 00622887 00791102**
  In Analytics, in the Fulfillment subject area under the Loan Details folder, the Loan Note field contained no data even when the loan had a note. This was fixed.

- **July 2021 Analytics SF: 00895798 00933448 00920440 00901848**
  The Analytics report for DARA for the Identical system control number displayed an error when run in the Network Zone. This was fixed.
- **July 2021 Analytics SF: 00934006**
  Electronic Collections that no longer have CDI information in Alma, still have this data showing in Alma Analytics. This was fixed.
- **July 2021 Analytics SF: 00918108**
  When a renewal was done through Primo VE and not a circulation desk, analytics reports created with fields from Fulfillment > Renewal Circulation Desk did not display loan data properly. This was fixed.
- **July 2021 Analytics SF: 00923724**
  The out-of-the-box report for SCONUL '4.1 Total unique loans with prompt by loan date (does not include in-house loans)' did not work properly. This was fixed.
- **July 2021 Analytics SF: 00953265**
  The Event Date and Time field (System Events > Event Date) was not working properly. This was fixed.
- **July 2021 API SF: 00923160**
  API GET request for holdings does not include the correct suppressed status if the holdings are suppressed on location level. This was fixed.
- **July 2021 API SF: 00889205**
  The 'Update Item information' API was changing the 'Due Back By' date back by 1 day in some cases. This was fixed.
- **July 2021 API SF: 00940833**
  When creating a user by API, the 'Created By' field in the contact information was populated with the default value of 'System'. This was fixed and it now has exl_api
- **July 2021 Fulfillment SF: 00909429**
  Request_note not displaying complete note in automatic printing of Fulfillment Resource Request Slip Letter. This was fixed.
- **July 2021 Fulfillment SF: 00936299 00914803 00909681**
  An end of term event that was configured at the institution level and indicates it was inherited by the library would not allow the library to select the event as a due date. This was fixed.
- **July 2021 Fulfillment SF: 00944817**
  Library selected from configuration menu changes when using quick link created for 'Opening Hours'. This was fixed.
- **July 2021 Fulfillment SF: 00937292**
  The Create Physical Item Work Orders job sometimes created requests even though the work order type/department did not support the item's library. These invalid requests caused errors when trying to handle the requests or edit the requested items. This was fixed.
- **July 2021 Fulfillment SF: 00933017**
  Ampersands inside parse parameters were encoded before being written to the database even when the parse parameters came from the link value and when the parse parameter was not a URL. This was fixed.
- **July 2021 Fulfillment - Course Reserves SF: 00899257**
  If the customer parameter course_restricted_bib_data_will_be_deleted was set to true, records that were marked as course restricted were sometimes not republished to primo after the course became inactive. This was fixed.
- **July 2021 Fulfillment – Resource Sharing SF: 00915116 00931453**
  Whenever a lending request got rejected and a new one was created with the same External identifier (wrong behavior), the ship operation will fail to find the relevant request and the shipping interface page would lose some details as a result. This was fixed.
- **July 2021 Fulfillment – Resource Sharing SF: 00934172 00940126**
  When a date needed by is added to a borrowing request (either from discovery or from Alma), it now appears in the borrowing request details even after the request was cancelled.
- **July 2021 Fulfillment – Resource Sharing SF: 00888187**
  Primo's ILL request form did not translate the values in Level of Service list. This was fixed.
- **July 2021 Fulfillment – Resource Sharing SF: 00943624 00940200**
  In case of blocked Primo's Blank ILL request, the error message 'Resource sharing request service is not available' wasn't displayed. This was fixed.

- **July 2021 Fulfillment – Resource Sharing SF: 00924832**
  When sending an ISO Request message to the lender, the 'Publication Date' was not sent for customers using registryId UNIMARC. This was fixed.
- **July 2021 Fulfillment – Resource Sharing SF: 00929537**
  The 'Send Overdue Message' to Resource Sharing Borrowing Partner job did not send the messages to partners of profile type ISO18626. This was fixed.
- **July 2021 Resource Management SF: 923897**
  "If an e-resource had an Available For setting for an Inventory Network Group that was a non-Alma institution, the AF settings showed as blank in the Network search. This was fixed.
- **July 2021 Resource Management SF: 00921919**
  In some cases the Create Physical Item Work Orders job created bad requests. These bad requests caused errors when trying to update the requested items. The job was fixed.
- **July 2021 Resource Management SF: 00934052 00953100 00947354**
  When the customer parameter 'include_subfields_delimiter_in_analytics' was set to 'true', subfield $$9 was not extracted from Holdings fields (specified in the 'Holding Local Parameters for Reports' code table) to create fields local_param_1 to local_param_10 in the inventory_holding Analytics table. This was fixed.
- **July 2021 Resource Management SF: 00880386 00909951 00939649**
  In some cases, when the title of the selected entity included special characters, its was displayed wrong. This was fixed.
- **July 2021 Resource Management SF: 00916090**
  An error message 'The field description is mandatory, please enter the required data.” was displayed when creating PO Line from local portfolio. This was fixed. PO-Line creation was enabled in case of 'standalone' portfolio via portfolio list in All titles search result.
- **July 2021 Resource Management SF: 00903193**
  Due to a gap between SFX and Alma, in some specific cases, OpenURL was returned with available services. This was fixed.
- **July 2021 Resource Management SF: 00918989**
  The job 'Synchronize Changes from CZ' failed in some cases for some customers. This was fixed.
- **July 2021 Resource Management SF: 00899507 00899121**
  The new fields PORTFOLIO_MODIFICATION_DATE and PORTFOLIO_CREATE_DATE created by Alma are now being used by Analytics.
- **July 2021 Resource Management SF: 00936366**
  ETask Task status was not updated according to the selection of the customer. This was fixed.
- **July 2021 Resource Management SF: 00957184 00950030 00960244 00953865 00952236 00954849 00951296 00951658**
  Vendor was sending a KBART File which Alma could not process due to the KBART file being incorrectly formatted. The parsing of KBART file by the AutoHoldings job was improved, so that there is a lesser chance of the job failing due to incorrect/corrupt fields in the vendor's KBART File.
- **July 2021 Resource Management SF: 00769625 00943176**
  Clicking the 'Download EAD' button on a Top Level Collection did not work for collections with more than 1000 branches. This was fixed.
- **July 2021 Resource Management SF: 00938795 00951890**
  A Collection that was linked to deposit profile that was already deleted could not be deleted. This was fixed.
- **July 2021 Resource Management SF: 00938120**
  Collection Name and Description were not consistently translated. This was fixed.
- **July 2021 Resource Management SF: 00923768 00933207**
  The Merge and Combine job did not check that Preferred record was not deleted. This was fixed. The job now makes sure that the primary record in each group from the input file is not deleted. If it is, the status of the group in the output file will be 'skipped', and the 'message' column will contain the following text: 'Primary record is deleted'. This fix is relevant also for Merge and Combine jobs done by the MD Import.
- **July 2021 Resource Management SF: 00583574 00744692 00504861**
  Special Danish character written format (OE) was not searchable in Manage Patron Services’ automatic dropdown list, i.e. ø was searchable, but oe was not.

- **July 2021 Resource Management SF: 00906327**
  The Country of Publication index was searchable by code only. This was fixed. The 'Country of publication' index was improved to suggest a list of countries' names. This will be deployed gradually, with the semi-annual indexing starting on the May release.
- **July 2021 Resource Management SF: 00927122**
  Disconnection issues occurred in the middle of working in Alma. This was fixed
- **July 2021 Resource Management SF: 00868325 00915716 00889742 00937416 00889093**
  Previewing records that failed to load for import data to Primo VE job threw a Java exception. This was fixed.
- **July 2021 Resource Management SF: 00859382**
  Default material type for purchase requests wasn't changed according to the configuration screen. This was fixed.
- **July 2021 Resource Management SF: 00867286 00914567**
  Custom CNAME permalinks were not resolving. This was fixed.
- **July 2021 Resource Management SF: 00907764**
  Dublin Core record templates did not work when the dc:identifier had values with less than 18 characters. This was fixed.
- **July 2021 Resource Management SF: 00920532**
  Primo VE: 'Search Inside' was missing when permalink was not for the English user interface. This was fixed.
- **July 2021 Resource Management SF: 00923728 00934733 00891635 00944985 00928363 00934427**
  Digitization requests were created without a requester. This was fixed.
- **July 2021 Resource Management SF: 00923624 00927495 00927931 00950814 00944979 00936538**
  Primo VE: Libraries and location facets occasionally were not translated. This was fixed.
- **July 2021 Resource Management SF: 00943029**
  The Links section was displayed although there were no links to display. This was fixed.
- **July 2021 Resource Management SF: 00945385**
  Primo VE: SAML authentication was not working for *.com.cn URL. This was fixed.
- **July 2021 Resource Management SF: 00887440**
  MARC21 controlled field 008 holds the Place of publication in position 15-17 = 3 values. But the drop-down menu contains also the list of discontinued codes, identified by a hyphen preceding the first letter in the code string and 3 letters. When choosing this type of code and then open the field form editor again, this dropdown is empty. This was fixed - the hyphen removed from the discontinued codes with a hyphen and 3 letters, and '(old code)' added to the description of the code.
- **July 2021 Resource Management SF: 00941824 00926032 00932383 00929533**
  New Metadata Editor: After opening the 'Field Information' pane, when clicking the editing pane of this field, the field became locked for editing. This was fixed.
- **July 2021 Resource Management SF: 00879570 00935615**
  New Metadata Editor: When pressing F8 on an existing record, a new filed was added, but also a dropdown for the controlled vocabulary of the field in focus was displayed. This was fixed, and now the controlled vocabulary does not appear.
- **July 2021 Resource Management SF: 00903774 00907876**
  New Metadata Editor: The cursor was thrown to the end of a field when the subfield delimiter was inserted in the middle of an existing Hebrew text line. This was fixed.
- **July 2021 Resource Management SF: 00950258 00899518**
  New Metadata Editor: 'Go to' link popup for 856 remained on screen after removing the field. This was fixed.
- **July 2021 Resource Management SF: 00931596 00899170 00944137 00915630**
  New Metadata Editor: On smaller screen resolutions, the 'Old Editor' Button sometimes was hidden. This was fixed.
- **July 2021 Resource Management SF: 00942108 00886923**
  New Metadata Editor: Search Resources panel did not close after import. This was fixed.
- **July 2021 Resource Management SF: 00893239 00878145 00954155 00918532 00889118 00899065 00948517 00963558**
  New Metadata Editor: After the user collapsed a record that was already saved, the Draft icon appeared for this record. This was fixed.
- **July 2021 Resource Management SF: 00934569**

New Metadata Editor: Ctrl+S removed directional characters. This was fixed.

- **July 2021 Resource Management SF: 00937212 00932552 00935222**
  New Metadata Editor: In some cases, when opening a record for the first time, the performance was slow. This was improved.
- **July 2021 Resource Management SF: 00929957**
  New Metadata Editor: For Network Zone records, users could not add more than one field by using F8. This was fixed.
- **July 2021 Resource Management SF: 00943642**
  New Metadata Editor: Changing Cataloger Level suggestion was not sticky while editing the Record. This was fixed.
- **July 2021 Resource Management SF: 00952488**
  Metadata Editor: Normalization Rule's 'Preview' action and the Indication Rule's 'Try It' action could not be used if the tested record was modified without saving. This was fixed.
- **July 2021 Resource Management SF: 00948986**
  New Metadata Editor: Editing Actions > Add Alternate Graphic Representation menu item did not have a shortcut Alt+F1, instead pressing Alt+F1added alternate field. The was fixed.
- **July 2021 Resource Management SF: 00937623**
  When editing a Community Zone record, for the 650 field second indicator 7, F3 was not returning results. This was fixed.
- **July 2021 Resource Management SF: 00867598**
  SBN integration: there was an incorrect label for Fingerprint search and a missing filter option for filed 140. This was fixed.
- **July 2021 Resource Management SF: 00915919 00888285**
  Added functionality to the SBN contribution code to check if the record in Alma has no originating system version. If there is no originating system version, the contribution is preceded by a call to retrieve the version from SBN before contributing. The fix requires setting the customer parameter temp_enable_sbn_null_version_fix to true (default value).
- **July 2021 Digital Resource Management SF: 00905167**
  Sometimes in Primo, a digital service such as the Alma Viewer did not recognize a signed in user and displayed an access denied message. This was fixed.
- **July 2021 Digital Resource Management SF: 00933181 00959298 00952518 00951960**
  Generation of digital file thumbnails timed out before it could finish. This was fixed.
- **July 2021 Digital Resource Management SF: 00943034 00891800**
  Importing digital files larger than 5GB failed. This was fixed.
- **July 2021 Digital Resource Management SF: 00949818**
  When opening the Alma Viewer configuration page, an error message appeared. This was fixed.
- **July 2021 Digital Resource Management SF: 00949903**
  On the page that appears when selecting Add Representation for a digital title, the Upload option is selected, but the ability to upload files is grayed out. This was fixed.
- **July 2021 Digital Resource Management SF: 00920266**
  When selecting the 'Group Representation Delivery Services by' option for View It (Configuration > Fulfillment > Discovery Interface Display Logic > Other Settings), it was not possible to change the Alma Viewer label. This was fixed.