



Alma April 2022

Release Notes

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Alma April 2022 Make the Most

Make the Most of April's Release

Action Items

- ☐ [Defining Library as a Basic Search Scope for Physical Items Search](#) - Always searching items from the same libraries? Now you can define your own search scope to only see items from the libraries relevant to you.

Upcoming Issues to Note

TLS Cryptographic Protocol Support

Read the following to avoid service disruptions.

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

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

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

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

You can find additional information on TLS at:

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

SAML Certificate Workflow Update

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

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

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

May Release Sneak Preview

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

Alma April 2022 Main Stories

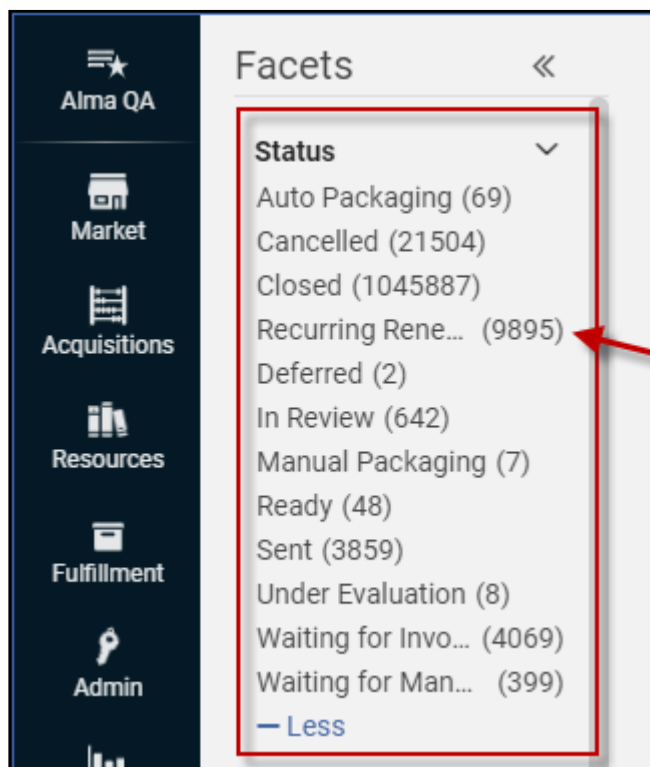
Name Change to PO Line Workflow Step from: "Waiting for Renewal" to "Recurring Renewal"

April 2022 Acquisitions

The existing PO line workflow step (status) "Waiting for Renewal" name is modified and now named "Recurring Renewal". This workflow step is still associated with "Continuous" PO lines that have Automated renewal or Manual Renewal selected. PO lines that are set for Manual Renewal still change their status to "Waiting for Manual Renewal" when the relevant renewal time arrives. This is a label change only and is set to better reflect to the user the workflow step of PO lines that are either renewed automatically or manually.

Note

This change will be reflected in all areas of Alma including facets and has no other implications.



PO Line Workflow Status Step - Recurring Renewal

Search PO Lines By Their Internal Note

April 2022 Acquisitions



Idea Exchange

The existing "All" index was enhanced to search PO lines by their internal notes. Users can search by the full note description or perform a search by partial description of the note content.

Created On	Updated On	Note
14/03/2022	14/03/2022	Staff, Ex Libris (J)
02/09/2021	02/09/2021	RESV HIST1063/Sellers-Garcia

Watch the [Search PO Lines by Their Internal Note](#) video (53 seconds).

Support for 'Reply to' Address in Letters

April 2022 Administration and Infrastructure



Idea Exchange

Library-specific letters/emails can now have a specific 'Reply to' address. This allows patrons to reply back to the appropriate library.

See [Configuring Institution/Library Contact Information](#).

Watch the [Add a 'Reply' to Email Address for Library Specific Letters](#) video (1:45 minutes).

Option to Set the Lender Locate to Ignore Electronic Resources for Physical Requests

April 2022 Fulfillment-Resource Sharing

It is now possible to configure the Resource Sharing library so that electronic titles are automatically bound to a new lending request, only if the request is made in digital form.

The new option makes the lender locate process more accurate by matching electronic titles only if the request is for a digital supply.

The new option is configured on the Resource Sharing library configuration. For more information, see: [Configuring Parameters of a Resource Sharing Library](#).

Push Borrowing Requests for Further Processing in Tipasa or WorldShare

April 2022 Fulfillment-Resource Sharing

It is now possible to push borrower requests into Tipasa or WorldShare, where they will be further processed as borrower requests. In the case of Tipasa, NCIP updates are also sent to Alma as required. This is similar to an already existing integration option with ILLiad.

This new option enables requests that have not been fulfilled by a local peer-to-peer rota to be automatically pushed into the above mentioned broker systems, where they are further processed as a broker-managed request. This eliminates the need to manually transfer such requests to these systems.

For more information, see [Resource Sharing Partners](#).

New “Is Filled” Indication in Borrowing Requests Analytics Subject Area

April 2022 Fulfillment-Resource Sharing

The new “is filled” indication in the Borrowing Requests SA makes it easier to report on fulfilled requests.

Regular Expression for Creating Users in ILLiad

April 2022 Fulfillment-Resource Sharing

Whenever requests are exported to ILLiad with a user ID, the user that is used can be manipulated with a regular expression in order to match the ILLiad ID structure. For example, ID may be an email address but be exported without the domain information. The regular expression may be defined on the new **User identifier regex** attribute of the ILLiad partner record. For more information, see [Resource Sharing Partners](#).

Configuring Browse Bibliographic Headings and Selection Display – UNIMARC & CNMARC

April 2022 Resource Management

Starting from February 2022, institutions that work with MARC 21 profiles can configure the mapping for bibliographic headings browsing for MARC21 profiles, based on the pre-defined mapping provided by Ex Libris out-of-the-box (see [Configuring Browse Bibliographic Headings and Selection Display](#)). Now institutions that work with UNIMARC and CNMARC profiles can also define their own mapping. This helps librarians that are browsing through bibliographic headings to see the information they find relevant for their institution.

To support this ability, a new configuration table **Bibliographic Headings Display Subfield Mapping** was added to the configuration of the bibliographic profiles. This table shows the out-of-the-box values and the mapping that is currently implemented for the institution and enables the institution to define a new mapping of subfields.

See [Configuring Browse Bibliographic Headings and Selection Display](#).

General Publishing - Publish Portfolio Static URL

April 2022 Resource Management

Library staff can now publish a static URL that is defined at the level of an electronic portfolio. This is especially useful when

the library needs to share electronic portfolios with 3rd party systems that need direct access to electronic resources (as opposed to access via Alma Link Resolver).

To support this, the General Publishing page now includes an option to extract the portfolio Static URL.

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

Defining Library as a Basic Search Scope for Physical Items Search

April 2022 Resource Management

Continuing the development from February 2022 (see [Library as a Basic Search Scope for Holdings Search](#)), when doing a Physical Items search, the Inventory Operator and other users can now limit the scope of their search to specific libraries they always search in. This reduces the need to define the library in the Advanced search or to use facets for every search. It is mostly relevant for librarians working in institutions with many libraries, where they are responsible for just a few of them.

See [Searching in Alma](#).

Watch the [Select Libraries as Search Scope for Physical Items Search](#) video (1:14 minutes).

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

April 2022 Resource Management

Continuing the enhancement from last month (see [Metadata Editor: Default Action Changed to "Create New Record from Template"](#)), when left-clicking a template in the templates list of the Metadata Editor for a holdings record, now the default action in the Template List is **Create New Holdings Record from Template**. This enables Catalogers to easily create a new holdings record derived from the chosen template, without running the risk of accidentally changing it, as could be done previously, when the default action was **Edit**.

In case creation of a new record is not possible due to missing referenced bibliographic record, the Edit action will be performed with a confirmation message "New holdings record cannot be created due to missing relevant bibliographic record. Are you sure to continue with editing the template?". Selecting **Yes** opens the template in edit mode.

The default action for the Community Zone record remains "View".

Avoid Multiple Matches by Preferring the Last Created Record for Repository MD Import

April 2022 Resource Management

When importing titles, the goal is to automatically determine whether the title already exists in the catalog. To achieve a single match and avoid multiple matches (since this requires manual intervention), the last created record can now be preferred.

Note

If this option is selected, then in addition to the creation date, only the "Disregard matches for bibliographic CZ linked

records" filter is applied to matches.

This option is applicable only in the Repository and New Order import profile types.

See [Managing Import Profiles](#) and [Monitor and View Import Jobs](#).

Upload Electronic Holdings from Wiley

April 2022 Resource Management

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

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

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

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

Automatic Upload of Electronic Holdings		
Last updated: Mar 10, 2022, 2:44 PM by Liz Berezin Page restriction: Semi-Public		
The following table lists the available providers from which you can automatically upload electronic holdings into Alma.		
Provider	Upload Frequency *	See More
Springer	Weekly	Upload Electronic Holdings from Springer
Elsevier	Weekly	Upload Electronic Holdings from Elsevier
ProQuest Ebook Central	Daily	Upload Electronic Holdings from ProQuest Ebook Central for Subscriptions/Owned/DDA
Ovid	Weekly	Upload Electronic Holdings from Ovid
Wiley	Weekly	Upload Electronic Holdings from Wiley

New Digital Waitlist Subject Area Added to Alma Analytics

April 2022 Analytics

The new **Digital Waitlist** subject area was added to Alma Analytics. With the fields of this subject area you can create reports that describe the usage of the waitlist feature in Alma, such as the session start, end, and grace period. This subject area allows you to answer the following business questions:

- How many sessions were in a specific timeframe?
- How many of those sessions were in the waitlist?
- How many session returned the resource early?
- What is the average actual session time?
- What is the average waiting for a given Rep ID?
- What is the actual session length for a given Rep ID?
- What is the average session length?

- How many users missed the Grace Period?
- What is the average Grace Period used?

For more information about the Digital Waitlist subject area, see [Digital Waitlist](#).

For more information about the Waitlist feature in Alma, see [Configuring a Patron Waitlist](#).

License API Enhancements

April 2022 API

The following enhancements are made to the License REST APIs:

- PUT/POST License attachments
- Added the ability to retrieve licenses that were created/updated since a specific date, using these 4 new parameters:
 - create_date_from
 - create_date_to
 - modify_date_from
 - modify_date_toA

For more information, see: [Acquisition Licenses](#) in the Developer Network.

Alma April 2022 Additional Enhancements

- **April 2022 Analytics**

The **Access Model** field was added to the PO Line dimension in the Funds Expenditure, Physical Items, and Purchase Requests subject areas. It displays the public access model for the electronic resource.

- **April 2022 Analytics**

The following field names were changed in the Analytics Objects Measures dimension of the Analytics Objects subject area to improve clarity:

- **Num of Users Subscribers** was changed to **Num of Used Subscriptions**
- **Num of Widget Users** was changed to **Num of Used Widgets**

In addition, the following fields were marked to be deprecated:

- Num of Users Subscribed to Dashboard (to be deprecated)
- Num of Users Subscribed to Report (to be deprecated)
- Num of Users Subscribed to Scheduled Report (to be deprecated)

Alma April 2022 Resolved Issues

- **April 2022 Analytics SF: 05959895 05809011 05707447 05320828**
The **Loan Note** field (**Fulfillment > Loan Details**) did not display data. This was fixed.
- **April 2022 Analytics SF: 05960054 05313668**
Subfield **\$5v** (for volume) did not display data for the 800, 810, and 811 fields. This was fixed.
- **April 2022 Analytics SF: 06052416**
The **Electronic Collection Additional PO Lines** field (**Electronic Collection >E-Inventory**) did not display data. This was fixed.
- **April 2022 Acquisitions SF: 05333166**
Creating an Electronic collection PO line from Network Zone 'all titles' did not create a local collection. This was fixed.
- **April 2022 Acquisitions SF: 05314976 06213159**
PO line Advanced search by PO Status and Vendor code did not work correctly. This was fixed. This fix requires full indexing on PO line in SOLR.
- **April 2022 Acquisitions SF: 06238468**
When clicking on **Save and Receive** without selecting any item, an error is displayed. This was fixed.
- **April 2022 Acquisitions SF: 05306707**
In cases of file validation failure, an error is displayed. This was fixed to an invalid file error.
- **April 2022 Acquisitions SF: 05325487**
Export PO process was completed successfully but the PO was not sent. This was fixed.
- **April 2022 Acquisitions SF: 05314978**
Order line search results lagged and were slow to display. This was fixed by improving the search results from SOLR.
- **April 2022 Acquisitions SF: 05306524 06022844**
Purchase Request displayed disarranged after checking patron information. This was fixed.
- **April 2022 Acquisitions SF: 05320474**
Searching for an invoice with "parenthesis" in the Receiving Workbench failed to get the data. This was fixed and is available with the moving of the Receiving WB to SOLR (April 2022 release).
- **April 2022 Acquisitions SF: 06253704 06242783 06232267 06223021**
Claiming a job completed with an error when trying to create the **Claim Notification** for continuous PO lines that do not have items. This was fixed.
- **April 2022 Acquisitions SF: 05311245 05307728 05301550**
The vendor account manager did not have the privilege to edit contact details. This was fixed.
- **April 2022 Acquisitions SF: 05317741**
Sometimes the calculation of the fund balance took a while and caused the next transactions in the file to take the old balance. This caused the fund to be in a negative balance. This was fixed.
- **April 2022 Fulfillment SF: 05312364**
In some cases, the location of an active hold shelf item used to be wrong. This was fixed.
- **April 2022 Fulfillment SF: 06047424**
Previously when there was a corrupted booking request without an expiration date, a candidate item was not able to be loaned. This was fixed.
- **April 2022 Fulfillment SF: 05299844**
Some of the events reported by the **Fines\Fees Notifications** job had a severity of Error instead of Information. This was fixed.
- **April 2022 Fulfillment SF: 05310817 05331083 05320448 05324240 05317752 06205562**
Fulfillment Admin Role was unable to edit organization details as General System Administrator could. This was fixed.
- **April 2022 Fulfillment SF: 06211504 05311954**
In some cases, refreshing a linked user could delete its local fines and fees. This was fixed by enabling the

temp_save_user_with_new_fines_fees_handling customer parameter.

- **April 2022 Fulfillment SF: 05310443 05308830 06258300 05307579**
Fixed 'create_time' in request by adding a field; **current_time** to **general_data** which represents the time the slip was created.
- **April 2022 Fulfillment SF: 05327972**
When exporting digitization requests to a remote storage, partial digitization fields (**pages, chapter/article**) were missing. These fields are now added to the exported XML file (in the partToDigitize xml element). Note: These fields will only be included if, in the remote storage configuration page, the **Handles digitization requests** locally checkbox is checked.
- **April 2022 Fulfillment SF: 06068081 05306279**
Recalculation of remote storage work order requests sometimes messed up the data of these requests. As a result, these requests were not exported to the remote storage. This was fixed.
- **April 2022 Fulfillment - Resource Sharing SF: 05324464 06258026 05303613 05307789 05333113**
The tasks widget showed an inaccurate counter for Lending requests - With active notes - Assigned to you. This was fixed.
- **April 2022 Fulfillment - Resource Sharing SF: 05327313**
In some cases, the **Primo Resource Sharing form** displayed incorrect results in the item level description drop-down list. This was fixed.
- **April 2022 Fulfillment - Resource Sharing SF: 06259508**
Borrowing requests received by an item-less library got a status of **Received - not for loan**, and the lending requests remained set to **Shipped Physically**. This was fixed.
- **April 2022 Fulfillment - Resource Sharing SF: 05321346 05319090 05982747 05317573**
Opening ILL form in Primo VE used to ignore the configured default format in **Resource Sharing Request Discovery** configuration. This was fixed. Note: Switching citation types in the form will match Book-Physical and Article-Digital pairs.
- **April 2022 Resource Management SF: 05311490 06261526**
Series displayed 800, 810, and 811, but subfield \$\$v for volume was missing. This was fixed: 800/810/811 subfield \$\$v - will be displayed when: field 490 with the first indicator '0' and \$\$v don't exist and field 830 \$\$v don't exist. To apply the fix, run reindexing on titles.
- **April 2022 Resource Management SF: 05300475**
Change Physical Items job could not use the task Use Inventory number sequence if the Item Sequence was not associated with any library. This was fixed.
- **April 2022 Resource Management SF: 05308158**
Repository Search > Physical Items results: 1. When selecting this link and then returning back to the page, the link disappeared. 2. When the number of requests is 0, the value was linkable. These issues were fixed. The Number of requests value is now linkable and leads to the requests page.
- **April 2022 Resource Management SF: 06246850**
When the Use default thumbnail check box was selected, it was no longer displayed. This was fixed.
- **April 2022 Resource Management SF: 05319361**
Add Members to Set Job Report: the downloaded error file contained a list of all records instead of just the errors. This was fixed.
- **April 2022 Resource Management SF: 05317035**
Poor performance loading time was experienced for Alma Get It title. This was fixed. An index was added to improve performance.
- **April 2022 Resource Management SF: 05300602 06245421**
There was a problem with the way that PrimoVE was determining which institution made the API call. On some records, there was a link inside the record that had VID of another institution and that caused Primo to think that it needed to log in to that institution. This was fixed.
- **April 2022 Resource Management SF: 05319465**
Journal categories were missing after clicking DB search. This was fixed. The indication about the categories appears now between journal and DB categories.
- **April 2022 Resource Management SF: 06052222**
In some cases, if there was a collections facet, the filtering of the DEI terms from the subject facet was skipped. This

was fixed.

- **April 2022 Resource Management SF: 05301855**

There were some values of the KORMARC control-field 008 that were missing for the rare book record type. It was fixed.

- **April 2022 Resource Management SF: 05320896**

New Metadata Editor: The Controlled Vocabulary validation mechanism allowed input value that includes punctuation, even if the predefined controlled vocabulary for this field holds the same value without punctuation. A new configuration parameter was added to control this aspect - 'controlled_vocabulary_remove_punctuation' under the Alma Configuration menu > Resources > Other Settings. When this parameter is set to true, when comparing the value in the record to a controlled vocabulary, remove the following values - : , ; / .

- **April 2022 Resource Management SF: 05322313**

When searching the external search resource DNB, the last two blanks in the 008 field were omitted on import. This was fixed.

- **April 2022 Resource Management SF: 05317392**

New Metadata Editor swaps set contents when working with multiple sets, after the merge and combine operation for two records in the same set. This was fixed.

- **April 2022 Resource Management SF: 05304058**

New Metadata Editor: 'Link Fields' did not respect 'Add alternate graphic representation script code' setting. This was fixed (no more sub-menu for 'Link Fieds' menu item in this specific configuration).

- **April 2022 Resource Management SF: 05302765**

New Metadata Editor: the View versions and View notes menu options were enabled for a record opened in a view-only mode locked by another user. This was fixed.

- **April 2022 Resource Management SF: 05332907**

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

- **April 2022 Resource Management SF: 05321649**

New Metadata Editor: Duplicate Record operation is not available for a bibliographic record with a higher cataloger level than the user. This was fixed.

- **April 2022 Resource Management SF: 05322452 05319568**

Resource Types Map - Electronic was not supported for Serials (LDR pos 7 = s). This was fixed. The Resource Type for existing records will be recalculated during the semi-annual indexing planned for May 2022.

- **April 2022 Resource Management SF: 05306730**

When the Windows Language was defined as Hebrew, the shortcuts for Enhance the Record (Ctrl+Alt+W and Ctrl+Alt+E) added nikud symbols Kamatz and Holam. This was fixed. Now the OS shortcut Ctrl+Alt+E is prevented.

- **April 2022 Resource Management SF: 05317386 05312362**

New Metadata Editor: When a user was restoring a record from a previous version, the system was not restoring it properly. This was fixed.

- **April 2022 Resource Management SF: 05331146 06045552**

New Metadata Editor: in the form view for 008 field, the dropdown of language code (35-37) shows the value '- No information provided'. Selecting this value was adding the code '- N' - but the form editor still showed an empty value. This was fixed and now the code 'No information provided' adds ### as expected.

- **April 2022 Resource Management SF: 06053475**

Metadata Import: Management Tags conditions were not copied as part of the Import Profile copy action. This was fixed.

- **April 2022 Resource Management SF: 06243440 06253099**

When the PO Line did not have a PO or a vendor invoice number populated, this caused the process to get stuck in the finish step. This was fixed.

- **April 2022 Resource Management SF: 05315706**

In some cases (for example MD Import), Alma strips trailing zeroes from system numbers (usually 035\$a) during normalization, e.g. (IMF)AFDWEH0000000 --> (IMF)AFDWEH. A new parameter was added to control this behavior. Note that this parameter handles only cases with exactly 7 trailing zeroes. To retain the trailing zeroes, please contact Alma support turn the new customer parameter 'normalize_system_number_retain_trailing_zeros' to 'true' (the default value is 'false'). Also, whenever the value of this parameter is changed, full inventory indexing needs to be run.

- **April 2022 Resource Management SF: 05332949**

Author number generation for CNMARC gave the wrong value. This was fixed.

- **April 2022 Resource Management SF: 05322386**
There was a problem contributing a new record that included field 321 to SBN. That was fixed.
- **April 2022 Resource Management SF: 05300649**
Adding one of the fields: 701/ 702/ 711/ 712 to a TU record did not work. In addition, changing and deleting 7XX fields on the Alma side did not update the record on SBN side. These were fixed.
- **April 2022 APIs SF: 06023167**
There were performance issues for API calls getting records/holdings with many items. This was fixed and the response time for the Get-Items API with **expand=due_date** was improved.
- **April 2022 APIs SF: 05319034**
Canceling work order requests was not working. This was fixed by the Get-Request API **task_name** to hold 'Rejected' for requests which are in rejected status.
- **April 2022 APIs SF: 05322232**
In **Retrieve Bib Loan Information** API, in some cases loans appeared as 'renewable: false' when they were actually renewable. This was fixed.
- **April 2022 APIs SF: 05307330**
The Invoice API was reporting inaccurate invoice-line and total amounts. This was fixed.
- **April 2022 Cloud Apps SF: 06022856**
Cloud Apps failed to receive up-to-date information about the logged-in user after changing 'currently-at'. This was fixed.
- **April 2022 Administration and Infrastructure SF: 05304182**
Updating a code table by importing an Excel file has caused rows to become inactive in some code tables (such as User Block Definition). This was fixed.
- **April 2022 Administration and Infrastructure SF: 06263235**
The fee type was explicitly set to lower case. This is now fixed and Alma will not modify the case in which the type appears (hence, can be controlled by the customer).
- **April 2022 Administration and Infrastructure SF: 06048729 05321770**
Translations were missing from a few lines in the Task list. This was fixed.
- **April 2022 Administration and Infrastructure SF: 05318622 06263376 06263386**
Sample data for a few letters were improved.
- **April 2022 Administration and Infrastructure SF: 06037554**
There was a problem sorting the resource sharing locate profiles by description. This was fixed.