

ExLibris  
Alma

2017

User Name:

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Login

Alma August 2022 Feature Release

Looking Back at 10 Years  
of Alma Login Themes

# Alma August 2022

## Release Notes

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## Alma August 2022 Release Highlights

Explore the August release highlights [here](#)

.Select [here](#) to view the full list of new features

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## Upcoming Issues to Note

### Sandbox Refresh

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

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### Alma Roadmap Highlights

The next version of the Alma Roadmap Highlights (July 2022 update) document is available [here](#).

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### SAML Certificate Workflow Update

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

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

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

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## Alma August 2022 Main Stories

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### Re-Order Request Queue

#### August 2022 Fulfillment



#### Idea Exchange



#### NERS Enhancement (ID #7343)

It is now possible to re-order the requests in a title's queue. Previously, it was only possible to override which will be the currently active request. This is possible by setting the new 'Manual Priority' field on the request form which is used to create a new request or to update an existing request.

Editing a request (including its 'Manual Priority') is now also possible from the Request Queue page (**Fulfillment > Resource Requests > Monitor Requests & Item Processes**; by selecting the **Place in Queue** value in one of the items).

The new option makes it possible to determine the sequence of requests that receive an item, without having to manually re-do the work every time the item becomes available.

Contact [support](#) to activate the Circulation Desk Operator roles, Fulfillment Services roles, and/or the Requests operator role with the 'Prioritize Requests Privilege' privilege.

Watch the [Change Order of a Title's Request Queue](#) video (1:20 minutes).

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## Disable Submit Button When No Known Partner Exists

#### August 2022 Fulfillment-Resource Sharing

It is now possible to configure the Primo request form not only to indicate whether there are known partners that can fulfill the request, but also to prevent submitting the form if indeed no known partners have been found.

This enables libraries to prevent patrons from placing requests for resources that are known not to be held by any potential lender in the network, avoiding the frustration of placing a request that cannot be fulfilled.

For more information, see [Configuring Resource Sharing Requests Forms](#).

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## Improved Handling of Publication Dates in Resource Sharing Copyright Rules

#### August 2022 Fulfillment-Resource Sharing

The improvement is aimed at making the resource sharing copyright rules work better with article requesting. Prior to this improvement, a rule that would be defined to block the 6th request for a title published within the last five years worked well with books. However, it did not calculate correctly the publishing date of a requested article. With this improvement, article

publication date is also correctly calculated.

Note: Before this development, article publication dates were not recorded in Alma. Therefore, a new parameter (copyright\_default\_publication\_date) can be configured in the Fulfillment configuration > Other Settings menu to determine how such past requests should be considered. For example, setting the parameter's value to 2017 will make Alma consider these requests as requests for 2017 articles, and a rule with 'publication date > 2017' will consider the old requests to not be a match. The default empty value means old requests will always be considered a match to the copyright rule.

In addition, a new 'Years Since Publication' option in the Copyright Rules enables defining the publication date criteria based on the time since the item was published.

This improvement enables the copyright rules to control resource sharing requests for articles. For example, the rule successfully blocks the 6th request for an article published within the last five years only when the previous five requests are also for articles published within the last five years. The new 'Years Since Publication' option in the Copyright Rules makes it easier to define rules based on when the item was published than the current 'Publication Date' option.

For more information on copyright, see [Configuring Copyright Management](#)

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## New UI for Resource-Sharing Task Lists for Borrowing Requests and Lending Requests

### August 2022 Fulfillment - Resource Sharing

The next-generation Alma UI design is now available for the Borrowing Requests and the Lending Requests task lists. Individual users can opt-in to use the new task list layout, or continue using the previous version of the layout.

The main new features of the new UI are:

- **Right pane:** A work area can be opened in a pane on the right side of the request list. This makes it possible to edit most aspects of the request without losing sight of the request list, and also speeds up the editing process.
- **Multiple facet selection:** Multiple criteria can be selected in each facet category, providing more flexibility in the creation of a filtered request list.
- **Streamlined access to notes and patron queries:** Notes and patron queries can be seen, added, and edited in the new right pane. This makes these important elements more noticeable and easier to manage when reviewing the request list or processing requests.
- **Status and assignee information as facets:** Activity status and assignee information are facet categories, enabling searching for requests by specifying multiple activity statuses and a number of specific assignees.
- **Sliding panel:** When access to the full request form, with all of its tabs, is required, it opens in a panel that "slides" out from the right side of the right panel, only partially covering the task list. This enables work on all aspects of the request without losing sight of the request-list context.

By default, in this release the request lists continue to be opened in the previous UI. However, users can opt-in to use the new layout if they wish. For more information about opting into using the new UI for features for which it is available, see [Opting In or Out of a New Feature](#).

A webinar on the new Resource Sharing task lists will be delivered as part of the Alma 2022 Roadmap and Webinar Series on August 10. You can register on the [Education and Knowledge Webinars](#) page or the [Alma 2022 Roadmap and Webinar Series](#) page.

Watch the [New Resource Sharing Task List](#) video (3:34 minutes).

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## Retrieve Most Up-To-Date Record from Central Catalog

August 2022 Resource Management



### Idea Exchange

This feature is applicable to institutions that synchronize their bibliographic records with an external catalog. When opening a bibliographic record in Alma for edit, Alma retrieves the latest record version from the central catalog and compares it with the existing Alma version. In case there is a difference, the cataloger is displayed with the option to retrieve the latest record version from the central catalog. This insures that the cataloger works with the most up-to-date records.

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## Call Number Type for Holdings Matches New Location's Type

August 2022 Resource Management



### Idea Exchange

A new configuration option was added in Alma. When holdings records are created by changing an item's location, if the location has a call number type configured, the call number type of the new holdings is updated to match that configured for the new location. This saves the manual work required to change the call number type to match the one used in the items' new location.

For instance, a relevant use case is when moving a large group of items to a new location, where they are shelved using a different call number type.

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## Enhanced Copy-Paste Options in New MetaData Editor

August 2022 Resource Management



### Idea Exchange

The New Metadata Editor now supports several copy-paste options. The options include

- The standard cut (Ctrl+X), copy (Ctrl+C) and paste (Ctrl+V) options for cutting, copying, and pasting content that utilizes the standard browser functionality and clipboard.
- The existing "cut field", "copy field" and "paste field" functionality (including the support for copying and pasting multiple fields using Ctrl+select) use dedicated clipboard and keyboard shortcuts (Ctrl+Shift+X, Ctrl+Shift+C, Ctrl+Shift+V), so as not to interfere with copying and pasting other content.

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## GND Profile Updates

August 2022 Resource Management

Some changes were introduced to the GND format:

- 451 \$9 and 551 \$9 - whole controlled vocabulary lists were removed
- 670 \$b - a new controlled vocabulary list was created
- 500/510/511/530 \$9, 667 \$a, 670 \$a - various updates made

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## Enhanced Scheduling Options for Publishing to OCLC

### August 2022 August 2022 Resource Management

Libraries are now able to configure a more flexible schedule for publishing to OCLC (Online Computer Library Center). This is especially useful for libraries that experience connectivity issues with OCLC servers and can now schedule publishing to OCLC for times when the servers are less busy.

Watch the [Enhanced Scheduling Options for Publishing to OCLC](#) video (1:13 minutes).

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## Enhanced Change Physical Items Information Job Report

### August 2022 Physical Resource Management



#### Idea Exchange



#### NERS Enhancement (ID #7177, 7350)

The report for the **Change Physical Items Information** job now includes error reporting and the items handled. This is especially useful when a library wants to follow up on the bulk changes performed.

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## Item Retention Indication for Managing Collaborative Collections

### August 2022 Physical Resource Management

Alma now enables librarians to mark items as committed to retain and prevent withdrawing them. It is also possible to specify retention reason and note manually or in bulk, and this is also supported in import, export and API workflows. This is especially useful when several libraries pool their resources together and some of the library's items should be retained even when internal usage is low. This is reflected in Alma Analytics in order to help libraries to manage their collaborative collections.

The following fields were added for physical items: Committed to Retain, Retention Note, and Retention Reason (the list of reasons can be configured by an administrator).

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## Accession Number - Library Level Definition

### August 2022 Physical Resource Management

To enhance support for Library independence within an institution it is now possible for a library to define library level accession sequences for controlling automatic generation of holdings and item accession numbers. Currently, accession sequences can be auto-generated in the institution level or in the library and location levels.

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## Note

This is only available for customers using the enhanced accession number generation functionality.

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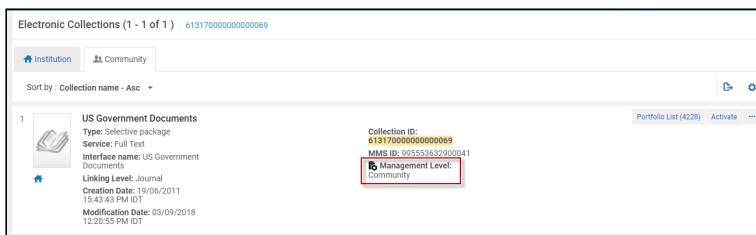
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## New Collection Management Level Indication for Community Zone Collections

### August 2022 Electronic Resource Management

A new collection **Management Level** indicators on Community Zone collections are set to provide better transparency for the community to understand how and by whom each collection is maintained". Here are the **Management Level** options:

- Ex Libris (Managed by Ex Libris)
- Community (Managed on title level by community)
- Not maintained (The vendor no longer supports this collection - this is a dynamic list that will continue to be assessed by Ex Libris Content Operations over time)
- Contributed by Institution (Collection contributed and managed by an Alma institution)



### Search result for Community managed collection

Watch the [Management Level Indication for Community Zone Collections](#) video (1:22 minutes).

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## Option to Delete Portfolios from Community Zone Collections Which are Managed by the Community

### August 2022 Electronic Resource Management

Currently, there are five Community Zone electronic collections that are managed by the Alma community whose institutions have proper Community Zone contribution settings. These users can **Create (contribute)** and **Edit (re-contribution)** Community Zone portfolios for these five community managed electronic collections. A new addition now enables these users to **Delete** portfolios from these five community managed electronic collections.

The option to delete portfolios from community managed collections enable full community independence over these collections and provides customers holistic control over content as now there is the options to contribute, edit and delete portfolios from community managed collections.

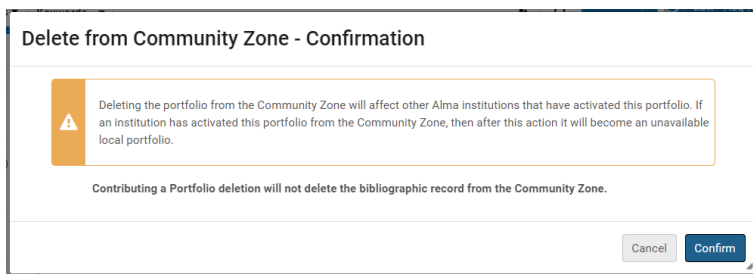


Community managed electronic collections

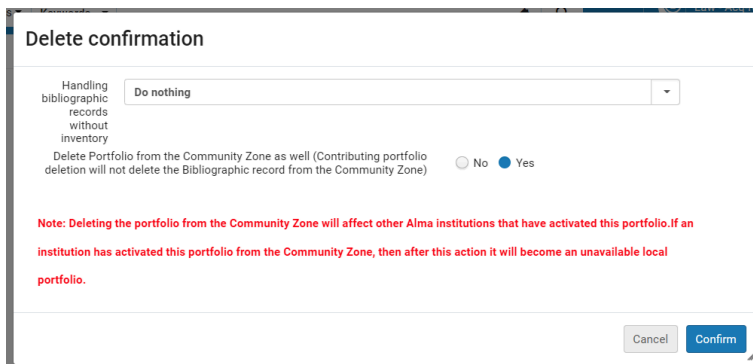
Collection name	Collection Community Zone-ID
Free E- Journals	61110976638852340
Miscellaneous EJournals	61111016833201000
Miscellaneous Free eBooks	61100000000001091
Miscellaneous eBooks	61100000000001090
U.S. Government Documents	61317000000000069

The option to delete a portfolio was added in 2 places:

1. New action on the Community Zone portfolio.



2. Enhancement to the existing **Delete** action on Institution Zone portfolios that are activated from the five Community Zone collections.



To delete portfolios directly from the Community Zone tab, users will need to make sure their institutions have Community Zone contribution privileges (please contact [Ex Libris support](#) to enable contribution option).

The existing privileges for deleting Institution Zone portfolios are maintained (**Electronic Inventory Operator Extended** role with the "Delete" privilege).

In case a Community Zone portfolio is deleted, any Institution Zone portfolio linked to the deleted portfolio will change its availability to "Not Available" and the portfolio is unlinked from the Community Zone.

BIB records are not deleted when a portfolio is deleted from the Community Zone.

The deletion of the record from the Community Zone is irreversible and is not immediate and may take a while to be

reflected in the Community Zone.

In the Institution Zone - the deletion is possible from:

- Portfolio list
- Service editor
- Portfolio search

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## Efficient Management of Electronic Resources Using KBART

### August 2022 Electronic Resource Management

Alma Portfolio Loader now supports using KBART format files for electronic resource management of electronic collection portfolios (in addition to the existing Alma Proprietary format).

Numerous providers use KBART format files to share the library electronic holding. These files can now be used directly in Alma Portfolio Loader without the need to convert the file to Alma proprietary format.

Watch the [Load Portfolios to a Collection Using KBART Format](#) video (2:01 minutes).

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## Upload Electronic Holdings from Taylor and Francis

### August 2022 Electronic Resource Management



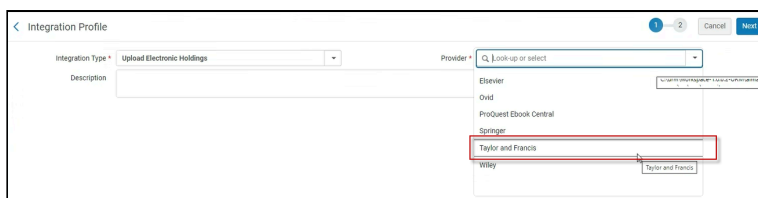
#### Idea Exchange

Automatic [Upload of Electronic Holdings](#) enables libraries to update their holdings within the Taylor and Francis ebook electronic collection. Once the Upload Electronic Holdings integration profile is configured and enabled, the process automatically downloads a KBART formatted holdings file from the Taylor & Francis platform, uploads the file and updates your holdings in the Taylor and Francis electronic collection. This integration saves users from the need to manually update the portfolios which were updated on the Taylor and Francis side.

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#### Note

All portfolios that are updated via the various upload electronic holdings integrations modifies the portfolio as **Available**.



#### Integration Profile

For more information see [Upload Electronic Holdings from Taylor and Francis](#)

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## Dublin Core - Enable Normalizing Metadata Fields for Search and Display

### August 2022 Digital Resource Management

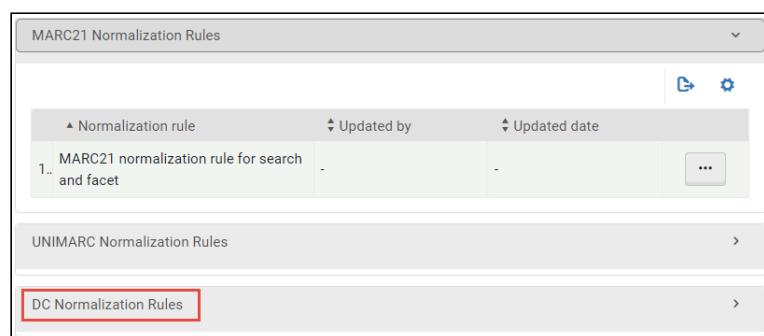
Libraries are now able to define how to display metadata elements from Dublin Core (DC) and which DC terms to index. This allows more flexibility when displaying or indexing DC fields (DCTERMS and DCAP - DC application profiles fields).

The flexibility extends for Dublin Core (DC) records' mapping for display, search and facet.

An option is added to include local fields with normalization rules for search and facet from DC records, and also an option to edit the existing rules for display fields.

As with MARC21 and UNIMARC, it is now possible to use the **Manage Display** and **Local Fields** pages to customize the mapping of data for the DC format.

With the new **DC Normalization Rules** section, you can now customize the normalization rules for the out-of-the-box Display fields (such as **Description** and **Genre**) on the "Define a Display Field" page.



The screenshot shows a web interface for managing normalization rules. At the top, there is a dropdown menu labeled "MARC21 Normalization Rules". Below it is a table with columns: "Normalization rule", "Updated by", and "Updated date". The table contains one row with the text "MARC21 normalization rule for search and facet". To the right of this row is a three-dot menu icon. Below the table are two more sections: "UNIMARC Normalization Rules" and "DC Normalization Rules", each with a right-pointing arrow. The "DC Normalization Rules" section is highlighted with a red rectangular box.

### DC Normalization Rules

**Local fields enable you to create custom mappings for data from a DC source for search and facets as well as for display.**

For more information, see [Adding a Local Field](#).

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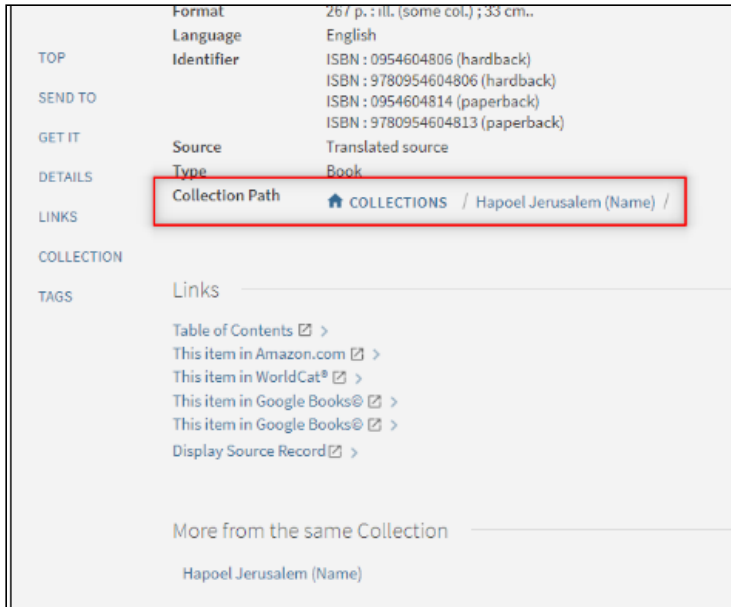
## Display Collection Discovery for Specific Libraries/Institutions

### August 2022 Digital Resource Management



### NERS Enhancement (ID #7402)

Primo enhanced its ability to display Collection Discovery for Alma libraries or campuses making it more granular to the level of libraries, based on Alma's association of collections to libraries. Previously, Collection Discovery was only at the institution level that created an undesirable display of materials for one library displaying in all other libraries when they are not owned nor accessible by any other library. The enhancement enables targeted localization of Collection Discovery by granular levels, for both individual libraries by view and institutions libraries in consortia. This enables sites to select to display Collection Discovery elements for only those selected views and libraries.

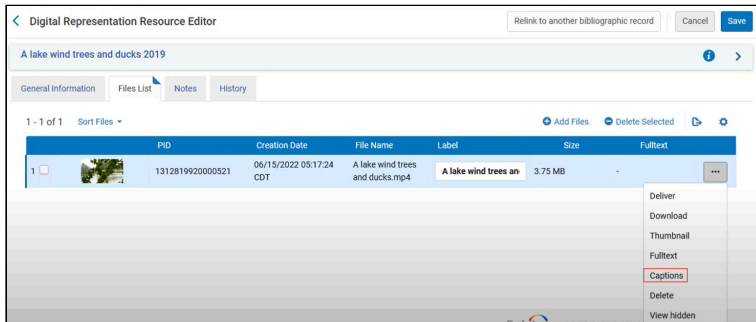


Collection Path indicating the specific library

## Captions Now Supported for Video Files

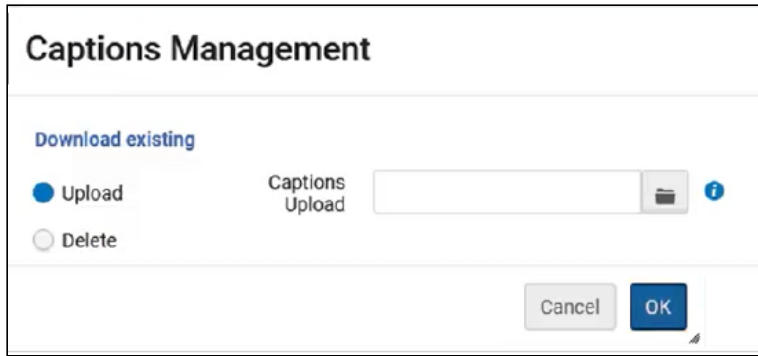
### August 2022 Digital Resource Management

The Alma Viewer now supports the display of captions for video files. To display captions, you must upload a captions file in .vtt format that contains the captions. To support this, .vtt files for captions can now be uploaded in bulk as part of an import and a new **Captions** option was added to the actions available for a video file on the **File List** tab for a representation in the Digital Representation Resource Editor:



### Captions

Selecting this option displays the Captions Management page where you can upload a captions file, delete an uploaded captions file, and download an uploaded captions file.



### Captions Management

After you upload a captions file for the video, the captions appear when the video is played.

You can toggle the captions to be on or off from the viewer by selecting the closed captions icon and selecting **captions on/captions off**.



### Toggle Captions

In addition, you can now search for files with captions in the Alma repository with the **Digital File > Has Captions** option.

Watch the [Load Portfolios to a Collection Using KBART Format](#) video (2:01 minutes).

For a video describing adding captions to video files, see [Adding closed captions and subtitles for videos in Alma Digital](#).

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## Universal Viewer Now Supports Non-Image Files

### August 2022 Digital Resource Management

The Universal Viewer now supports the display of non-image files such as PDFs, video, and audio files.

This was made possible by a major upgrade of the IIIF framework to Presentation API v3, in addition to a Universal Viewer upgrade, which allows for the delivery of a wider range of file formats by the Universal Viewer.

The following is an example of a video file playing in the Universal Viewer:



### Video File in Universal Viewer

Watch the [Universal Viewer for Alma Digital Now Supports Non Image Files](#) video (4:38 minutes).  
 For a video describing this feature, see [Universal Viewer for Alma Digital Now Supports Non-Image Files](#).

## Additional Community Zone collections for associating OASIS/GOBI Portfolios created via Real Time Order

### August 2022 Acquisitions

For orders originating from OASIS/GOBI, Alma attempts to locate the relevant portfolio located within a Community Zone collection using the vendor-proprietary identifier number or the ISBN/ISSN and activate it within the relevant collection in the institution. For this functionality to work it is important that the relevant collection is activated from the Community Zone in the institution. In cases where Alma does not find a matching portfolio in the relevant Community Zone collection or if the relevant collection is not activated in the institution, a stand-alone portfolio is created in Alma and is not linked to a Community Zone portfolio. See [OASIS/GOBI vendors list](#) for a list of Community Zone collections that support this functionality.

For OASIS, support was added for the following Community Zone collections:

Provider name	Collection name	Collection ID
Manchester University Press	Manchester Hive	615490000000000250
John Benjamins	John Benjamins Books	613820000000000062
Gale GVRL	Gale eBooks	611000000000000731

For GOBI, support was added for the following Community Zone collections:

Provider name	Collection name	Collection ID
John Benjamins	John Benjamins Books	613820000000000062
Duke University Press	e-Duke All Books	6154100000000000518
Gale GVRL	Gale eBooks	6110000000000000731
Wolters Kluwer	Books@Ovid Purchase	612430000000000018
Manchester University Press	Manchester Hive	6154900000000000250

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## General Publishing Network Zone - Option to Exclude Member's Local Bibliographic Records

### August 2022 Collaborative Networks

When publishing consortia records from the Network Zone it is possible to exclude local records that are managed by members.

This is especially useful when members' local records are private to the member.

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## Configure the User Form

### August 2022 Administration and Infrastructure



#### Idea Exchange



#### NERS Enhancement (ID #7456)

It is now possible to configure the fields that appear in the **Patron Registration** and the **Edit User Info** (from the Manage Patron Services page) forms in Alma.

The new option makes it possible to configure a form that is fine-tuned to the library's needs and manages only the information the library wants to manage.

For more information, see [Configuring Patron Information](#).

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#### Note

It is also possible to determine which address/email/phone types appear on the form. This option can be activated by Ex Libris. Please contact [support](#) for assistance.

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Watch the [Configure the Quick User Management Form](#) video (2:06 minutes).

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## Configurable Sorting by User Name in Users List

### August 2022 Administration and Infrastructure

Previously, sorting the users' list by name was only possible by the users' last name. A configuration option now enables

changing the way names are used for sorting, for example, to sort by first+middle name and then by the last name.

The configuration can be done by using the **User Management Configuration > User Name Display** menu to configure the `sort_user_list` line.

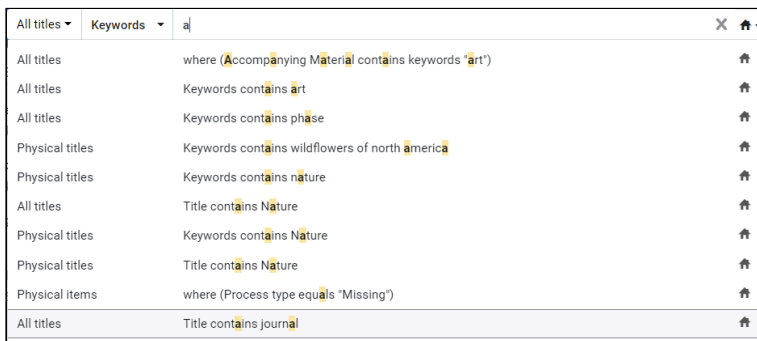
This enables libraries to set the name sorting to be aligned with how they've chosen to display names in the user list, for example, first+last name or last+first+middle name.

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## Accessibility Improvement: Search Terms Now Emphasized with Yellow Highlight in Addition to Being Bold

### August 2022 Administration and Infrastructure

To improve accessibility and clarity, search terms are now emphasized by a yellow color mark in addition to them being bold.



All titles ▾	Keywords ▾	a	✕	🏠
All titles	where (	<b>Accompanying Material</b> contains keywords "art")		🏠
All titles	Keywords contains	<b>art</b>		🏠
All titles	Keywords contains	<b>phase</b>		🏠
Physical titles	Keywords contains	wildflowers of north <b>america</b>		🏠
Physical titles	Keywords contains	<b>nature</b>		🏠
All titles	Title contains	<b>Nature</b>		🏠
Physical titles	Keywords contains	<b>Nature</b>		🏠
Physical titles	Title contains	<b>Nature</b>		🏠
Physical items	where (Process type equals	"Missing")		🏠
All titles	Title contains	<b>journal</b>		🏠

### Search Terms

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## New Security Directives Added to Content Security Policy

### August 2022 Administration and Infrastructure

Content Security Policy is a layer of security that helps to detect and mitigate certain types of attacks, including cross-site scripting and data injection attacks. To enhance security, the following directives were added to the Content Security Policy:

- form-action – restricts URLs that can be the target of form submissions
- base-uri – restricts URLs that can be used in HTML 'base' element
- script-src – restricts valid sources for JavaScript
- frame-src – restricts URLs that can be loaded in nested elements such as `<frame>` and `<iframe>`
- connect-src - restricts URLs that can be loaded using a specified list of web APIs

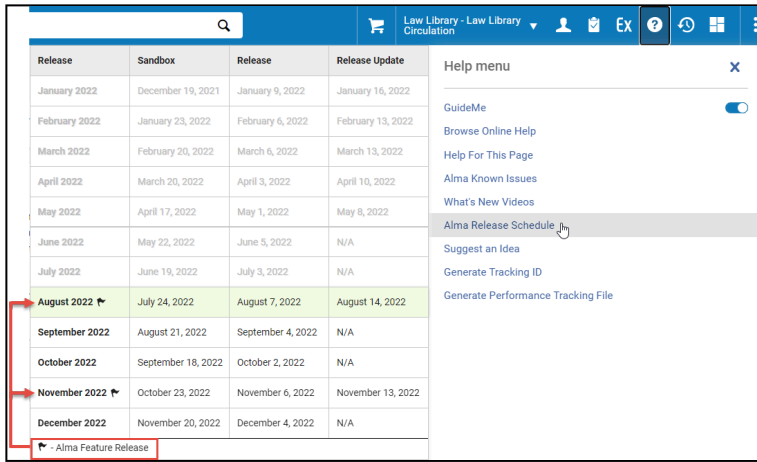
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## Visual Enhancement to Alma Release Schedule in UI

### August 2022 Administration and Infrastructure

Alma has visually enhanced its Alma Release Schedule from the UI's Help menu. The new tabled format and added icon enable a visual distinction indicating when the quarterly feature releases are scheduled.





### Alma Release Schedule from Help Menu

## New Feature Rollout Configuration

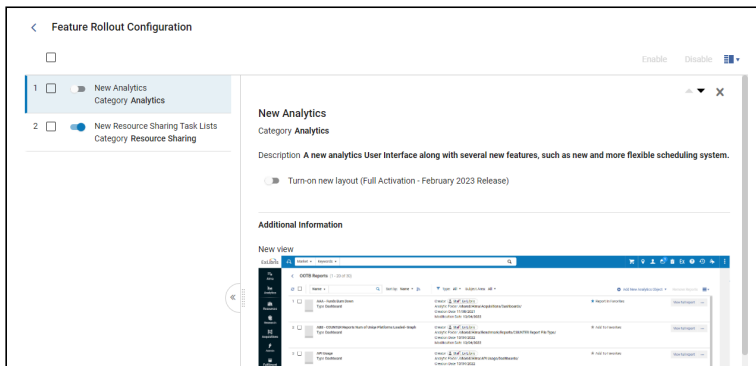
### August 2022 Administration and Infrastructure

As Alma shifts more and more areas and functions to its new user interface there is a growing need to enable a controlled and gradual process for the user to learn and get used to the new features. The new feature rollout configuration is designed to respond to this need by enabling individual users and institutions to easily select whether they would like to "Opt-in" and try out and use new layouts or continue using the previous versions temporarily during their initial rollout periods. In addition to the user benefiting from a gradual learning process, this option also enables Ex Libris staff to ensure that new features are working properly and for Alma users to become acquainted with them before they fully replace any existing processes. Rollouts of new features take place over a period of at least two quarterly releases. Once the rollout period is over, new features are implemented globally and cannot be deactivated.

Individual users can activate and deactivate new features for themselves from the **User** menu (*persistent menu* >



> Feature Rollout Configuration). For additional information, see [Opting In or Out of a New Feature](#).



### Feature Rollout Configuration for individual users

Institutions can change the default option for their institutions in the configuration settings (**Configuration Menu > General > User Interface Settings > Feature Rollout Configuration**). For additional information, see [Feature Rollout Configuration](#).

The screenshot shows the 'Feature Rollout Configuration' page for 'New Analytics'. The left sidebar lists three configuration items: 'New Analytics' (Turned-on), 'New Resource Sharing Task Lists' (Turned-on), and 'New Unified PO Line Task List' (Turned-off). The main content area for 'New Analytics' includes a description, a 'Phases' section with a default setting of 'Off by default (Default from November 2022 until January 2023)', and a 'User Statistics' section showing 329 users. A bar chart indicates that 50 (15.2%) users are in 'turn on mode' and 279 (84.8%) are in 'turn off mode'. Below this is a 'User Status List (50)' table with columns for Name, Status, and Turn on / off date.

Name	Status	Turn on / off date
1. Smith, Jamie	Turned-off	19/06/2022
2. Staff, Ex Libris	Turned-off	19/06/2022
3. Baister, Mary	Turned-off	19/06/2022

### Feature Rollout Configuration for institutions

Watch the [Opting In or Out of a New Feature](#) video (2:34 minutes).

## New Privilege to Control Access to User History

### August 2022 Administration and Infrastructure

A new Privilege has been created that makes it possible to control which user roles have access to user history. This new option makes it possible to keep private user information more secure by preventing users who do not need to see this information, such as circulation-desk operators, from being able to access it.

If your system includes roles that currently have access to user history, and you would like to limit their access to this information, please contact Ex Libris support.

Watch the [New Privilege to Control Access to User History](#) video (1:04 minutes).

## Test a Printer Configuration Option

### August 2022 Administration and Infrastructure



#### Idea Exchange

Alma has incorporated a **Test** option on the Printer configuration page (**Configuration menu > Fulfillment > General > Printers**) that enables users to send a test HTML to the printer to verify that the printer is operational with Alma.

Printers Back

1 - 4 of 4

+ Add Printer

Code	Name	Printouts Queue	Email	Description	Serviced Units	
AcqE...	Acquisitions / Tech Services printer		D0FCE58EF1337...	-	Technical Services	...
Rsrvs...	Course Reserves printer		D0FCE58EF1337...	-	Course	Edit Delete Test
UTDE...	UTD Email Printer		D0FCE58EF1337...	UTD Printer with email address	-	...
UTDP...	UTD Print Daemon	✓	D0FCE58EF1337...	Print Profile to use with Alma Print Daemon	-	...

### Test printer option

## OpenURL Service Details Dimension Available for Reporting on Clicked Services

### August 2022 Analytics

You can now create reports for the number of times a service was clicked. To allow this feature, the **OpenURL Service Details** dimension was added to the Link Resolver Usage subject area. It contains the following fields:

- Electronic Collection ID
- Electronic Collection Name
- Interface Name
- Is Clicked Service
- Is Digital Service
- Is Electronic Service
- Is Network Service
- Portfolio ID
- Service Type

For more information, see [OpenURL Service Details](#).

## Collaborative Collections Retention Item Designators - API

### August 2022 API

Collaborative collecting agreements are increasingly critical for libraries in managing collections and access across institutions. Formal agreements require libraries to commit to retain specific items. As a result, three new fields were added to the Item-related APIs:

- retention\_note
- retention\_reason
- committed\_to\_retain

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## Note

The above mentioned fields are related to the previous release (where these new fields were added to items).

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For more information, see [Rest Item](#).

Watch the [Commit to Retain an Item for a Collaborative Collection](#) video (3:01 minutes).

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## Support Copying of License Terms Using the License API

### August 2022 API

The Copy Network Zone License Cloud App now enables users to copy licenses with all attached entities including License Terms that exist in the Network Zone to the Institution Zone.

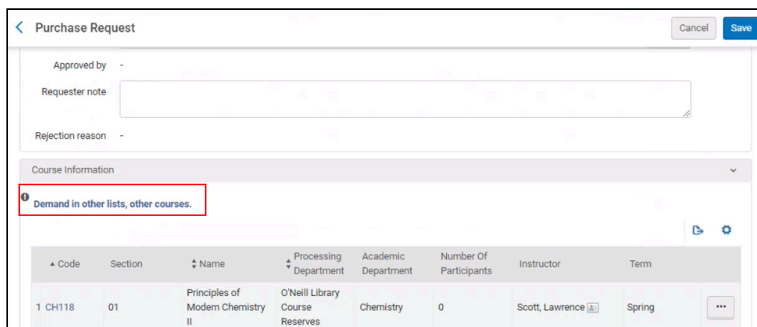
For more information, see [Copy Network Zone License](#) in the Developer Network.

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## Use "Demand in Other Lists" to Support Purchasing Decisions

### August 2022 Fulfillment - Course Reserves

For purchase requests created from a citation, the **Course Information** section of the purchase request now includes a **Demand in other lists, other courses** link. Selecting the link opens the **Manage Resource Options** window, enabling you to easily view information (such as course, number of participants, tags, etc.) about this citation in other lists and courses.



The screenshot shows a 'Purchase Request' form. The 'Course Information' section is expanded, and a link labeled 'Demand in other lists, other courses' is highlighted with a red box. Below this is a table with the following data:

Code	Section	Name	Processing Department	Academic Department	Number Of Participants	Instructor	Term
1 CH118	01	Principles of Modern Chemistry II	O'Neill Library Course Reserves	Chemistry	0	Scott, Lawrence	Spring

### Demand in other lists, other courses link in a purchase request

For more information, see [Managing Purchase Requests Created from Citations](#).

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## View Reading List Tags in the Demand in Other Lists Table

### August 2022 Fulfillment - Course Reserves

When reviewing and processing citations, library staff can view "Demand in other lists". And use it to understand which other reading lists or courses utilize the same resource. The **Demand in other lists, other courses** table now includes a new **Citation Tags** column. This column enables library staff to easily determine which citation tags are associated with the citation in other lists. For citations with multiple tags, the tags are listed separated by a semicolon (;). The column is hidden by default.

Course Code	Course Name	Section ID	Academic Department	Processing Department	Instructor	Start Date	End Date	Number of Participants	Reading List Name	Reading List Status	Section Name	Citation Tags	Citation Status
1 83608	83608	-	-	Main Library	-	22/0...	22/0...	20	Assignment	Being Prepared	-	Mandatory Reading	Being Prepared
555	555	-	History	History	Multiple	09/0...	10/0...	15	ChangeList...	Being Prepared	Resources	Mandatory Reading	Being Prepared

## Citation Tags column

# Automatically Assign Reading Lists

## August 2022 Fulfillment - Course Reserves

To automate the process of assigning reading lists to library staff for processing, we added the parameter **auto\_select\_list\_assignee** ([Configuration > Fulfillment > General > Other Settings](#)). When a reading list is associated with a course and **auto\_select\_list\_assignee** is set to `true`, the list is automatically assigned to a processing department operator ([Configuration > Fulfillment > Courses > Processing Department > Operators tab](#)) from the course's processing department at random. When set to `false`, the **Assignee** can only be set manually. The default setting for this parameter is `false`.

Code	Name	Status	Assigned	Due Back Date	Alerts
0.605727247745196	Medicine in Ancient Times	Being Prepared	-	31/12/2016	-
0.4443919792238504	Introduction to Health & Human Services	Being Prepared	-	13/05/2021	✓
0.27827926340899267(1)	Animal Population(1)	Being Prepared	-	-	-

## Reading List Assignee

Name	...
1 Abait, Latina	...
2 Baccam, Louanne	...
3 Aase, Luther	...

## Course Operators

If the **Operators** list for a processing department is blank, the list will not be automatically assigned.

When multiple courses are associated with a list, the **Assignee** is selected from the processing department of the first course that was associated with the list.

For imported reading lists, if the import file includes an **Assignee**, the **Assignee** is assigned to the reading list. If the file **Assignee** is blank, the list is assigned to an operator from the processing department at random.

For rolled over reading lists, if the rollover job is configured to copy the **Assignee**, the **Assignee** is assigned to the list. If the **Assignee** is blank, or the rollover job is not configured to copy the **Assignee**, the list is assigned to an operator from the processing department.

If a course is deleted or unassociated with a list, the current **Assignee** remains assigned to the reading list.

For more information, see [Assigning a Reading List Automatically](#).

## Alma August 2022 Additional Enhancements

- **August 2022 Administration and Infrastructure**

Librarians are now enabled to view entities they have worked on 14 days prior, allowing more data retention within Alma.

- **August 2022 Administration and Infrastructure**

Recent Entities now reflect activities that you performed for the last 14 days.

- **August 2022 Fulfillment**

A booking request's start and end times are now displayed in the Pick From Shelf list. This makes it easier for staff working on the list to organize and prioritize their work on it.

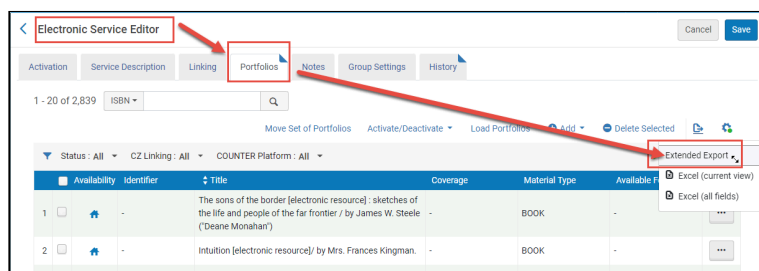
- **August 2022 Fulfillment**

**Holdings ID** and **Item ID** have been added to the columns of the **Manage In Process Items** list. This makes it possible to export this list with these values included so that library applications that use Alma APIs can use them as required.

(Note that the columns are hidden by default in Alma, so you will only see them if you select them in the table settings).

- **August 2022 Resource Management**

When using the **Extended Export** option available under (**Electronic Service Editor > Portfolios (tab) > Export (icon)**), the output file is now upgraded to \*.xlsx. This format enables users more options and improves efficiency.



### Electronic Service Editor

- **August 2022 Analytics**

The **Has Local Extensions** field was added to the Bibliographic Details dimension in all subject areas in which it appears. It indicates if the Community Zone-linked record has local extensions (Y/N).

- **August 2022 Analytics**

The **Digital Resource First Access Date** and **Digital Resource First Access Date (Calendar)** fields were added to Borrowing Requests > Borrowing Requests Details. The fields display the date that the digitally received resource was first accessed by the requesting patron.

- **August 2022 Analytics SF: 06317880**

The **Public Access Model** field was added to E-Inventory > Portfolio. It displays the patron facing access model of the portfolio, which is presented to the patron in the discovery system.

In addition, the **Access Model** field was added to E-Inventory > Portfolio PO Line. It displays the internal access model of the portfolio.

For more information on access models, see [Managing Access Models](#).

- **August 2022 Analytics**

The following fields were added to the Physical Item Details dimension in the Physical Items, Requests, Lending Requests, and Fulfillment subject areas:

- Has Committed to Retain – indicates if the library has committed to retain the item

- Retention Reason – the reason the library has committed to retain the item
- Retention Note – a free-text note concerning the library's commitment to retain the item
- **August 2022 Analytics SF: 05307735 05324168**  
The following events are now reported by the **System Events** subject area:

Alma Events

Event Type	Event Description
169	The user has failed to login to the system
3370	Community linked record updated with local extensions
4200	Send message to remote storage successfully
4201	No response from remote storage
4202	Failed to send message to remote storage
4203	Failed to connect to remote storage
4900	Loading patron user group succeeded
4901	Loading patron user group failed
5001	Wrong Data found when parsing element for User
6116	Import Job External system Task Chain Fail for User
9171	Failed to send Inventory Add message
9172	Inventory Delete message was sent successfully
9173	Failed to send Inventory Delete message

- **August 2022 Analytics**  
Consortia members can now create cost usage reports for shared electronic resources managed in the Network Zone. For more information, see [Including Network Zone Electronic Inventory in Analytics Reports](#).
- **August 2022 Analytics**  
To more accurately calculate the cost usage for a title, if the **COUNTER Platform (defined in E-Resource of UI Alma)** field is empty, Alma Analytics now derives the platform from the **Vendor Interface > Interface Name** field.
- **August 2022 Analytics**  
The **No Charge** field was added to the PO Line dimension in every subject area in which it appears (E-Inventory, Funds Expenditure, Physical Items, Purchase Requests). It indicates if the **No Charge** checkbox on the PO Line Details page was selected, which is done for titles that were marked for purchase following a process of DDA/PDA, but are open access free-of-charge titles.
- **August 2022 Analytics**  
The **Lost Item Fee Amount**, **Lost Item Fee Currency**, and **Lost Item Fee VAT** were added to Borrowing Requests > Borrowing Request Details and Lending Requests > Lending Request Details. These fields enable you to create reports concerning the fee charged for lost items.
- **August 2022 Analytics**  
The deprecated **Events** subject area is no longer being updated with new information.
- **August 2022 Fulfillment - Course Reserves**  
To enable the library to communicate with course instructors and reading list owners, the following preferred email fields were added to the Course Reserves, Leganto Student Usage, and Leganto Instructor Usage Events subject



areas:

- Review Requester Preferred Email > Reading Lists
- Reading List Owner Preferred Email > Reading Lists
- Course Instructor Preferred Email > Courses
- **August 2022 Fulfillment - Resource Sharing**

Updates are now disseminated to partners downloaded from the Ex Libris Resource Sharing Directory. If an institution makes changes that impact the partner information in the Resource Sharing Directory, such as email, address, etc., this information is updated on the partner record downloaded by other institutions.

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**Note**

The Locate profile is not updated.

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For more information, see [Contributing to the Resource Sharing Directory](#).

## Alma August 2022 Resolved Issues

- **August 2022 Acquisitions SF: 05331633**  
When creating an invoice in the Hebrew Interface and trying to set a negative number for the total amount field, it changes it to a positive number. This was fixed and the total amount field now accepts a positive or negative number up to 14 digits with an optional decimal point.
- **August 2022 Acquisitions SF: 05316780 06231457 05299561 05319396 05319262**  
PO-Line Inventory Material Type appears as 'none' despite being in Alma / Oracle DB. Additionally, 'unknown' descriptions were displayed in the code table. These were fixed and the material types and descriptions are no longer displayed as 'none' and 'unknown'.
- **August 2022 Acquisitions SF: 06040267 06350222**  
Clicking on a PO line with multiple funds from the **Invoice Lines** tab in the Invoice goes to a fund instead of the PO line. This was fixed and users are directed to the PO line rather than the fund.
- **August 2022 Acquisitions SF: 06276197**  
When changing vendor for PO Line of type **Electronic Collection in Recurring Renewal** status, Alma closes the PO Line and creates a new one in the In review state. This caused unnecessary full indexing on all the portfolios under the collection and the indexing was executed online. The resolution to this issue handled two areas:  
1 - Move the indexing to the background  
2 - Ignore unnecessary indexing and only save the collection data and the DNX
- **August 2022 Acquisitions SF: 06035313**  
In the PO Line Renewal Letter, the library address was not filled in. This was fixed and now the address of the library that owns the PO line is included in the letter.
- **August 2022 Acquisitions SF: 06387683 06377301 06371118 06394303**  
When using advanced search for PO Lines by interested users an error was displayed. This was fixed and the error is no longer displayed.
- **August 2022 Acquisitions SF: 06303468**  
Orders from related records in the Network Zone produce wrong results in the PO Line. This was fixed. Regardless of which related record is ordered, the PO line displays the correct results.
- **August 2022 Acquisitions SF: 05319186**  
No results were found in invoice searches when searching for invoice owners in the **All** index. This was fixed by adding the **Owning library** to the Invoice searchable columns and index.
- **August 2022 Acquisitions SF: 05302665**  
The license term was not displaying properly in Alma/Primo VE. This was fixed and the term and parameter are now listed correctly.
- **August 2022 Acquisitions SF: 06270771**  
When a vendor code contains the character '&', saving it results in an error. This was fixed and now the vendor code in the message will not have the '&' character in the vendor code. The vendor code will be saved as entered in the UI, but the message will ignore the '&' in the vendor code.
- **August 2022 Acquisitions SF: 06378629**  
When reviewing the vendor's list pages sometimes pages are duplicated and display the same information as the previous one. This was fixed and the list is now displayed accurately and ordered.
- **August 2022 Administration and Infrastructure SF: 06317555**  
An FTP issue caused the Import From Bursar job to fail in marking a processed file as 'Handled', resulting in the same file being processed again in the next run. This caused incorrect credit fees to be created by the job. This was resolved and the incorrect data was cleaned up and the job was fixed so that this will not happen again by adding an FTP test at the beginning of the job. In addition, if the job now fails to mark a file as 'Handled', the changes done while processing the file will be automatically undone.
- **August 2022 Administration and Infrastructure SF: 06340157 06204800**  
Circulation desks that were deleted still appeared in user roles if the circulation desk was attached to a profile. This

was fixed and now when a circulation desk is deleted, it is completely deleted regardless of its attachments.

- **August 2022 Administration and Infrastructure SF: 06438738**  
When using the Copy and Edit function from the simple record view, the new working copy was only created in the write CZ and not in the read-only CZ. This caused the save record draft functionality to fail in the MD Editor (which would also be apparent after performing a function like **Enhance the Record**). This has been fixed.
- **August 2022 Administration and Infrastructure SF: 06367813**  
Ful Pickup Print Slip Report Letter could be sent even if disabled at **Configuration > General > Letters > Letters Configurations**. This was fixed and now the letter is not sent if disabled.
- **August 2022 Administration and Infrastructure SF: 06284594**  
The anonymization of patron user accounts during the PSB refresh generates a lot of accounts with identical primary IDs. This was fixed.
- **August 2022 Administration and Infrastructure SF: 06223002**  
Accessibility - Contrast Ratio Requirements relating to WCAG 2.1 Success Criterion 1.4.3 AA. This was fixed and all accessibility issues are resolved.
- **August 2022 Administration and Infrastructure SF: 06223066 06045734**  
When trying to navigate back through the search index selection via Alt+Tab, users are shifted forward to the search box instead of back towards the search type selection. This was fixed.
- **August 2022 Administration and Infrastructure SF: 06223075**  
Alma accessibility page issues receive HTML validation error that starting page tag is missing `<!DOCTYPE html>`. This was fixed.
- **August 2022 Administration and Infrastructure SF: 06238008**  
When resizing the browser window while using Microsoft Edge, Alma's content does not adjust. This was fixed and the content correctly adjusts to the window size.
- **August 2022 Administration and Infrastructure SF: 05311368**  
Embed UV: fix to support showing download and share buttons
- **August 2022 Administration and Infrastructure SF: 05301823 05307627 05307328 06239354**  
HLS files were not displayed in Alma Viewer in mobile view. this has been fixed by upgrading HLS Angular component to 1.1.5 version
- **August 2022 Administration and Infrastructure SF: 06023242**  
Digital Representation viewer Time Remaining Modal confusing about how to close it. This was fixed. The user now can use the X marker to the right of the text in the time remaining display to close the time remaining display.
- **August 2022 Fulfillment SF: 05313221**  
When selecting the View Hidden option on Loans under the Manage Fulfillment Activities workbench and there are no loan notes, the code appears with the following incorrect values: `/infra/images/pix.gif`. This was fixed and now information values are displayed, such as: No, Null, or a hyphen.
- **August 2022 Fulfillment SF: 06304293 05326191**  
An error message appeared when immediately changing the **Due Date** at checkout for a newly created item. This was fixed.
- **August 2022 Fulfillment SF: 06357068 06045362**  
Previously, the Availability check indicator in the Resource Sharing request form indicates **Item Available for Request** although the bib record only exists in the Network Zone and is not held by any institution. This was fixed.
- **August 2022 Fulfillment SF: 06277702**  
When placing a Fulfillment Network item on the hold shelf, the Ful Resource Request Slip Letter prints the scannable request image, but not the item barcode image. This was fixed and now both the request ID and barcode are printed.
- **August 2022 Fulfillment SF: 06369563**  
In some scenarios, requests got stuck in **Cancelled** status which caused a failure to create new requests on the item. This was fixed and now items are able to be requested.
- **August 2022 Fulfillment SF: 06395048**  
Previously, not all of the material types were mapped in the SIP2 response. This was fixed and now all the material types are mapped in SIP2 response.
- **August 2022 Fulfillment SF: 06391719 06366811**  
The MMS ID field was not displayed in the **Monitor Requests & Item Processes** page even when enabled. This was fixed and this field is now displayed correctly when enabled.

- **August 2022 Fulfillment SF: 06353808**  
Patron requests were sometimes not displayed in Primo-My Account when the patron had migrated requests. This was fixed.
- **August 2022 Fulfillment SF: 06314937 06057261**  
When receiving only one item, the Fulfillment note is not filled in the XML of the Resource Sharing Receive Slip Letter. This has been fixed. In addition, a confirmation popup was added before the letter printing, if the due date is in the past.
- **August 2022 Fulfillment SF: 06305981 05329222**  
In specific cases, 'borrowing locate' failed when creating a borrowing request from an external resource. This was fixed.
- **August 2022 Fulfillment SF: 06277029**  
When de-selecting the **Is Resource Sharing Library** checkbox from within the library details configuration, a confusing pop-up confirmation message appears. This was fixed and the message was updated to describe the situation more accurately. The message was changed,  
From: The library has active borrowing...  
To: The library may have active borrowing...
- **August 2022 Fulfillment SF: 06315714 06237738**  
Resource Sharing Lending Auto sends a message with an incorrect due date when an item was unavailable due to being shipped for another lending request. This was fixed. The due date in such cases is now 'unknown date'.
- **August 2022 Fulfillment SF: 06345727**  
In Primo search, an article outside of local coverage (based on issue) is appearing for a portfolio where only local coverage should be applied. This was fixed coverage can be set based on 'issue' and not only 'year'.
- **August 2022 Fulfillment SF: 06221940 06269784**  
**Real-Time Item-Level Descriptions** for Resource Sharing drop-down list showed a Description from a different bib record. This was fixed.
- **August 2022 Fulfillment SF: 06293343**  
For fulfillment network requests the Destination column in the **Request Queue** screen was empty. This was fixed.
- **August 2022 Resource Management SF: 05302726**  
The format of the PO line reference number breaks a search when the search criteria contained special characters, such as a forward slash. This is fixed and users need to contact Alma support to set the following system customer parameter to 'true' (`po_line_reference_use_contain_search`). Setting it to true will cause the PO line reference search to use 'contains' instead of 'equals' as the search type.
- **August 2022 Resource Management SF: 06310966 06288031**  
No results were found when selecting all locations under a specific library in a permanent physical location for an advanced physical holdings search. This was fixed and the results are now displayed.
- **August 2022 Resource Management SF: 06298231**  
In Physical Holdings searches, the locations facet displayed name/code inconsistently. This was fixed so that the value displayed in the locations facet is dependent on the Library/Location Display configuration.
- **August 2022 Resource Management SF: 06348405 05350201 06243148 05323954 06321465**  
Community Zone searches were showing gray house icons for DB e-collections that were active locally. This was fixed. Active DB collections are defined as databases with a native interface URL and where the bibliographic record is not suppressed.
- **August 2022 Resource Management SF: 06254857**  
When the **Upload Electronic Holdings** job for Ovid was set up with multiple profiles, only one of the vendor files was used to create activations for all of the groups (because the other files were overwritten by the next). This was fixed.
- **August 2022 Resource Management SF: 06296933**  
When a bibliographic record contained a local extension value and a portfolio was loaded to this bib record, it was updated and the local extension value was deleted. This was fixed by setting the following added system customer parameter to 'true' (`temp_save_existing_mms_record_in_load_portfolio`).
- **August 2022 Resource Management SF: 05332406**  
When trying to download a representation from the Universal Viewer using the **Current View** option, a '400 Bad Request' error message was displayed. This was fixed and the error message is no longer displayed.
- **August 2022 Resource Management SF: 05319625**

In Alma, the full **Author** field value is displayed. However, in analytics, the **Author** field is truncated to a maximum of 260 characters. This was fixed and now the full **Author** field value (beyond 260 characters) are displayed.

- **August 2022 Resource Management SF: 06313962**

In the Digital Uploader, when selecting the **Submit Selected** button when no ingest is selected, no message was displayed to users that the submission would fail. This was fixed, and now when selecting the **Submit Selected** button and no ingest is selected, or if an ingest is selected but it cannot be submitted (due to the absence of a metadata file), an appropriate message is displayed.

- **August 2022 Resource Management SF: 06347231 06438523**

Publish bibliographic record (DataSync) to OCLC jobs report successful publishing even when there was an FTP error. This has been fixed and in such cases, the job will indicate a 'failure' status.

- **August 2022 Resource Management SF: 06193779 06317836**

MARC21 Bibliographic 008 field, position 35-37 Language: The value ||| or its definition of 'No attempt to code' does not show up in the drop-down even though it is a valid code according to MARC21 guidelines. If you manually enter ||| in the 008 positions 35-37 outside of the form editor, three warnings are received saying that character is not valid for that position. This was fixed. A new option was added to the New Metadata Editor relevant drop down and to the repository search index drop down - 'None of the above' with the code of three fill characters (|||).

- **August 2022 Resource Management SF: 06349492**

After a Merge and Combine operation in the New MetaData Editor, the resulted record either does not appear on the list to the left and the loading screen continues indefinitely, after saving this record. This was fixed.

- **August 2022 Resource Management SF: 06366879**

New Metadata Editor: Upon clicking F3, if the headings in the list are in the expanded mode presentation, the headings do not appear in the Bibliographic Records Matching Headings tab. This was fixed.

- **August 2022 Resource Management SF: 06248331 06053940 06319327 06373644 06290041 06250330 06216686 06273181**

The New Metadata Editor takes nearly one minute for the first time a bib record needs to be edited. This was fixed by a technical re-design for performance improvements when opening the New Metadata Editor for the first time.

- **August 2022 Resource Management SF: 06289030**

The resource type Microforms, based on 008 pos. 23, is still assigned to Maps if the Material Type definition for Map is using LDR pos. 6 = f. This was fixed and the Resource type format for Microforms was updated for MARC21 in the case of Map {Manuscripts - Physical}.

- **August 2022 Analytics SF: 06047995 06403531 06399493**

The number of rows that were possible to export in formatted Excel format was limited. This was expanded to 1,000,000 rows.