

# Alma November 2022

## Release Notes

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## Alma November 2022 Release Highlights

Explore the November release highlights [here](#).

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

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## Upcoming Issues to Note

### SAML Certificate Workflow Update

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

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

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

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## Alma November 2022 Main Stories

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### Item Call Number and Remote Storage ID Can Be Included in Item-Level General Electronic Service URLs

#### November 2022 Fulfillment

It is now possible to configure item-level General Electronic Services to include the item's **Item Call Number** and its remote **Storage Location ID** in the generated URL. This new feature provides more accurate linking from Primo GetIt to third-party applications (such as Aeon) via a General Electronic Service. For information about these fields, see [Working with Items](#). For more information about item-level General Electronic Services, see [Item-Level General Electronic Service](#).

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

#### November 2022 Fulfillment - Resource Sharing

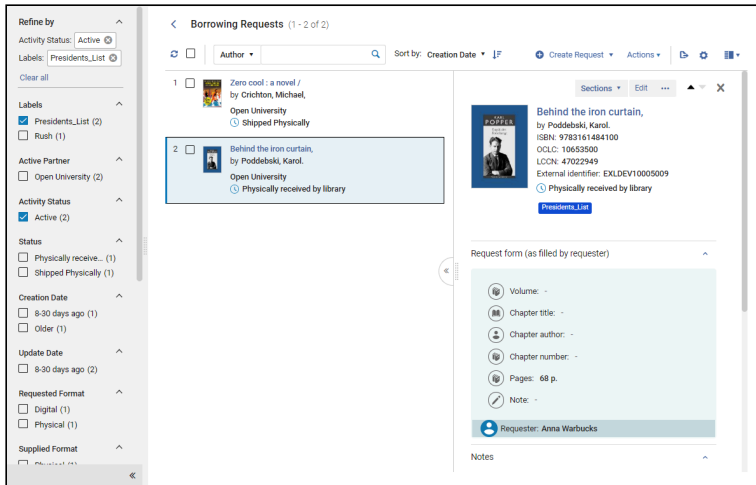
The next-generation Alma UI design is now activated by default for the Borrowing Requests and the Lending Requests task lists. Individual users can opt-out to use the previous version of the layout during this quarter.

The main new features of the new UI are:

- **Details 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 open in the new UI. However, users can opt-out to use the old 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](#).

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



### Borrowing Requests task list - New Layout with Details pane open

## Option to Push Borrowing Requests for Further Processing in Relais

### November 2022 Fulfillment - Resource Sharing

Borrowing requests can now be sent to Relais broker systems through Alma, as they can with ILLiad and Tipasa/WorldShare ILL. This new option enables requests that have not been fulfilled by a local peer-to-peer rota to be automatically pushed to the Relais system, where they are further processed as broker-managed requests, eliminating the need to manually transfer such requests.

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

## Restrict Editing Bibliographic Metadata Fields

### November 2022 Resource Management

Consortia central office is now able to control which Bibliographic metadata fields can be added, edited, or deleted by Network Zone members and Network Zone institution allowing the consortia office to maintain the quality of Network Zone Bibliographic records by preventing unwanted edits of specific fields.

In addition, there is an option to define a restriction based on a user's cataloger level.

#### Example use cases:

- Consortia Central Office wants to protect the Network Zone bibliographic record 035 field from any edits by the consortia members.
- Consortia Central Office wants to prevent consortia members from editing Bibliographic 6XX fields of a certain vocabulary.

For more information, see [Restrict Editing of Metadata Fields](#).

To watch a video, see [Restrict Editing Bibliographic Fields by Network Zone Members](#).

## Indication Added to Verify No Proxy Used in CDI Links for OA Links

### November 2022 Resource Management

Alma now verifies that links returned by CDI do not use a proxy for OA links. This is especially useful for customers that have a proxy set up but do not want to use the proxy for OA links.

For more information, see [Access to Services](#).

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## CDI Linking Preferences to be Configured in Alma and Transferred to CDI

### November 2022 Resource Management

You can now set the preferred order of links to the electronic full text in CDI (Link in Record and Quicklinks) if more than one link is available. Prior to this release, this configuration option was available only for links using the link resolver. Note that this setting is separate from the link resolver settings because preferences are configured at the collection level for the link resolver, while they are configured at the platform level for CDI. The new CDI linking preference options are configured on the new Central Index and proxy set-up page (**Configuration > Fulfillment > Discovery Interface Display Logic > Central Index**) and applied to single link display (Link in Record links and Quicklinks) as well as multiple links display (see [Display All Links](#) setting). If no preference is set, the default provider preference is alphabetical by provider. For more information, see [View It](#).

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#### Note

This feature will not be fully functional until the CDI December release on December 7. Additional details will be provided at that time.

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## Semi-Annual Re-indexing

### November 2022 Resource Management

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

- Medical Subject Headings (MeSH) include headings from field 651\_2, see here ([URM-174349](#)).\_\_Feb2022 Res Issues
- Bib headings created from 730 and 630 fields linked to local authorities, see here ([URM-169986](#)).\_\_Nov2022 Res Issues
- Records with 092/082 are found with Dewey Decimal Class Number, see here ([URM-173554](#)).\_\_??
- Physical holdings index search with pattern levels of enumeration, see here ([URM-168826](#)).\_\_Nov2022 Res Issues
- Annual changes to the UNIMARC/CNMARC/KORMARC Format & Crosswalk, see [here](#).
- Japanese characters are searchable for solr\_searching\_language HK (Chinese-Hongkong), see here ([URM-118103](#)).\_\_Nov2022 Res Issues
- New authority index Other Standard Identifier (024), see [here](#).

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## Normalization of UNIMARC and CNMARC 1XX Fixed Position Fields

### November 2022 Resource Management

A new function was added to enhance the Alma DROOLS to support the normalization of UNIMARC and CNMARC 1XX fixed position fields. As a result of the enhancement, UNIMARC and CNMARC tag 1XX are treated as Control Fields in

Normalization Rules and no error messages are displayed.

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## Exclude Heading from Linking

November 2022 Resource Management



### Idea Exchange

It is now possible to exclude specific headings from being linked to an authority record by automatic processes.

This is especially useful when a field contains data that is similar to an existing heading but is not really related to that heading. This prevents the field from incorrectly getting associated with the heading and improves the integrity of the library's metadata.

This is advantageous in cases where a creator's name is identical to an authorized creator, and not enough data exists to distinguish the two and prevent linking (for example, a library catalogs an old thesis work by John Smith and has no further biographic information on the creator).

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#### Note

This functionality is not available for Community Zone records or Community Zone-linked bibliographic records.

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## GND Profile Updates

November 2022 Resource Management

Some changes were introduced to the GND format:

- \$i and \$4 are added to fields 700, 711 and 730
- The subfield names are identical to the ones in \$i and \$4 in fields 710, 750, and 751, that were provided in the last version of the XML profile.

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## New Authority Index Other Standard Identifier (024)

November 2022 Resource Management

A new authority index Other Standard Identifier (024) is added to the staff search. The new index "Other Standard Identifier" will be activated by default in the February 2023 release. Existing data will be indexed gradually with the semi-annual indexing job in the following weeks. These records will be available for search in the Keywords search.

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#### Note

If you are willing to enable the new index option in the Repository Search UI, configure [Resources > Search Indexes > auth\\_other\\_standard\\_identifier](#).

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## Portfolio Loader/Export - Support Split Coverage

November 2022 Electronic Resource Management



## Idea Exchange

When using the **Extended Export** function ([E.Collection search > Portfolio list > Extended Export](#)), the exported file now supports the export of portfolios with multi-coverage (in addition to the existing support for single-coverage). The exported file is structured and formatted so that it is suitable for use in the portfolio loader ([E.Collection search > Edit Service > Portfolios \(tab\) > Load Portfolios](#)).

This enables users to utilize the exported file, easily edit it and upload it using the portfolio loader. The portfolio loader loads all of the date ranges for the various coverages and does not require the user to manually update multi-coverage portfolios.

See [here](#) for an example file that presents the structure of the Export/Load file. In this example you can see a single portfolio with multi coverage, each row represents different coverage information for the same portfolio.

Watch the [Support for split coverage in the portfolio loader and portfolio export](#) video (14:00 mins).

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## Enable the Improved ProQuest Ebook Central Upload Electronic Holdings

### November 2022 Electronic Resource Management

For institutions utilizing ProQuest Ebook Central Upload Electronic Holdings and that have not yet moved to the improved process, we recommend you to do so. Doing this will have multiple advantages:

- **Frequency**  
Ex Libris moved from full synchronization on a weekly basis to daily incremental processing, which is faster and keeps your collection as up-to-date as possible.
- **Subscription Titles**  
In addition to the activation of ProQuest Ebook Central Owned and DDA titles, the integration now supports the activation of Subscription titles.
- **Purchase Model Indication**  
Each Portfolio will include an indication of ProQuest Ebook Central Purchase Model: Owned, DDA, or Subscription (including the subscription collection names).
- Titles that are missing from the Community Zone at the point of the daily integration are automatically activated once added to the Community Zone.

Customers that are currently not using the PQ EBC Upload Electronic Holdings integration, and would like to utilize it, can enable the integration according to the instructions outlined [here](#).

Customers who are already using the PQ EBC Upload Electronic Holdings integration, and would like to utilize the improved one, will be moved to the new integration by Ex Libris. For details, please contact Ex Libris Support.

For more information, see [Upload Electronic Holdings from ProQuest Ebook Central for Subscriptions/Owned/DDA](#).

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## Report to Ex Libris Action Removed from Electronic Collections Whose Management Level is not "Ex Libris"

### November 2022 Electronic Resource Management

Electronic collections with the following Management Level will have the "Report to Ex Libris" action removed:

- **Community**



These collections' titles are fully managed by the community, with available functionality to add, edit and delete titles independently.

- **Not maintained**

These collections have no current/active source/provider for Ex Libris to maintain the title list and/or linking. So long as the collection is useful and functional, we keep it in the Community Zone to avoid disruption, but there is no provider/source to maintain the title list and therefore cannot be further supported. If the collection becomes non-functional, Ex Libris will consider its removal from the Knowledgebase.

- **Pending deletion** (deletion date is added next to this value)

These collections are deleted within 4 weeks, in alignment with our existing procedure. This information will continue to be published also in the Alma CKB Release Notes.

- **Contributed by Institution**

These collections have been contributed by an institution and any questions can be addressed by them. Ex Libris is working on generating contact information for those institutions, should they need to be reached.

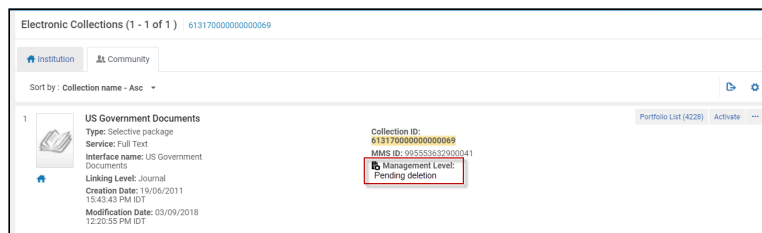
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## Management Level Indication Labeled "Pending Deletion" Added for Community Zone Electronic Collections

### November 2022 Electronic Resource Management

A new collection Management Level indicator, "**Pending deletion**", is being added as part of the existing Collection Management Level feature released in August 2022.

The **Pending Deletion** status indicates that this collection is planned to be removed in the coming 4 weeks, in alignment with Ex Libris's existing procedure of notification. The benefit of this feature is that it is in-product as well as indicates the planned deletion date. This information will continue to be published as part of the Alma CKB Release Notes as well.



### Community Zone E-Collection Management Level Indicator - Pending deletion

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## Usage Reflection for Community Zone Collections

### November 2022 Electronic Resource Management



#### Idea Exchange

Each Community Zone Collection now has 2 new indicators:

1. **Usage** - how many times the Community Zone collection/portfolio was activated.
2. **Region** - From which region this collection was activated from.

There are 3 main regions:

- Asia Pacific
- Europe, Middle East, and Africa
- North America & Latin America

Adding these two pieces of information enables users (that browse the Community Zone in order to activate resources) to better understand which resource is most suitable for activation.

### Note

An "Active" collection is a collection that was activated from the Community Zone (in the Institution Zone) and has a condition that causes it to be available for discovery. This happens in these two scenarios:

1. The electronic collection has an available service and has at least one available portfolio.
2. The electronic collection has no service but its level URL is not empty and its Bibliographic record is not suppressed.

The information regarding the number of activation(s) and region(s) is refreshed every one week. The information is reflected in the Community Zone collections search results only.

## Automatic Registration of Handle URLs for Digital Files

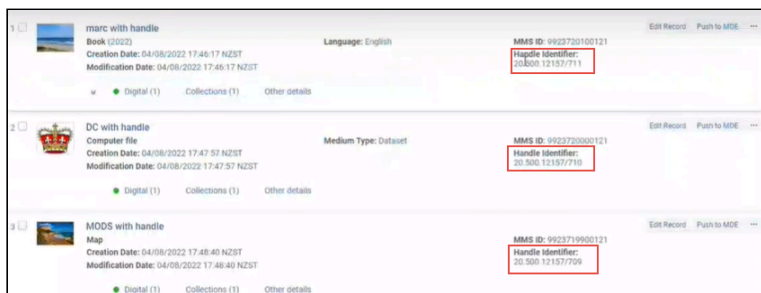
### November 2022 Digital Resource Management SF: 05307590

Alma now supports the automatic registration of Handles with an Ex Libris hosted Handle.Net server. Until this development, institutions had to set up their own Handle server along with an FTP/SFTP site to transfer and register the Handles with their Handle server. This process is now automated using a new Ex Libris hosted Handle server and a new Handle integration profile to allow a smooth and easy integration without any servers set up from the customer's side. The new Handle integration profile integrates directly with the hosted Handle server and creates the Handles using the existing control number functionality (see [Configuring Control Numbers](#)).

The following options are available on the integration profile:

### Handle Integration Profile

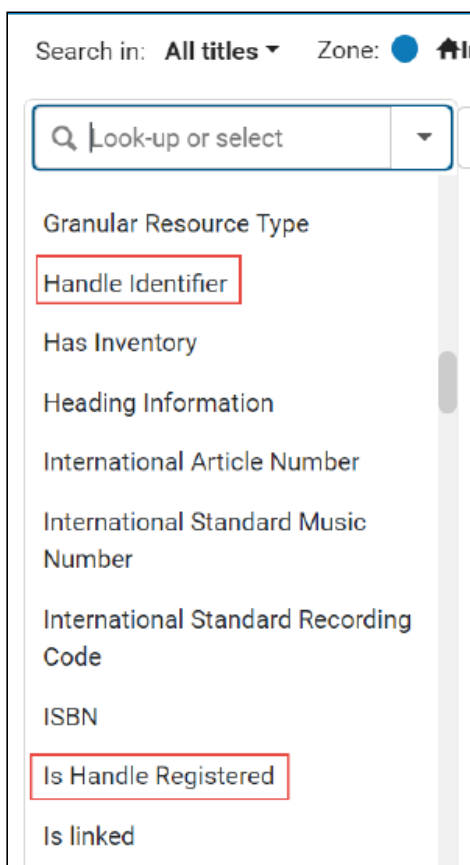
After scheduling the integration profile to run on a set of digital titles with the chosen control number, the invoked job creates the Handles for each digital title in the set and updates the Handle server with each Handle pointing to its respective record page in Primo VE.



### Handle Identifiers

In addition, the **Handles Migration Task** is now available for normalization processes when migrating bibliographic records. The task copies Handle from the bibliographic record's metadata to the record's Handle identifier field. Once this is done, the Handle integration profile needs to be run on the relevant records to update the hosted Handle server with the migrated Handles.

You can now also search for digital titles according to their Handle identifiers:



### Handle Search

Customers wishing to activate this new functionality are requested to open a support ticket with their Handle.Net prefix in order to register it with the hosted Handle server.

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## Repeatable Fields Available for Staff Deposit Forms

### November 2022 Digital Resource Management

You can now configure fields in digital forms for staff mediated deposits and when adding a representation to be repeatable. To do this, select the **Repeatable** checkbox for the field. Note that the repeatable fields appear at the end of the form and cannot be configured to be displayed higher up.

The screenshot shows a configuration panel for a 'Text Box' field. The 'Property' is set to 'dcterms:title', the 'Label' is 'Title', and the 'Field Size' is 'Long'. The 'Repeatable' checkbox is checked. A red box highlights the 'Repeatable' checkbox and the text: 'Repeatable fields in the add-representation or staff mediated forms will be displayed at the end of the form'.

### Repeatable Checkbox

For more information about forms, see [Working with Forms](#).

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## Captions Now Supported for Universal Viewer and IIF Manifest

### November 2022 Digital Resource Management

The Universal Viewer and IIF Manifest now support the display of captions for video files. To display captions, you must upload a captions file in `.vtt` format that contains the captions. For more information, see [Managing Digital Files from the Digital Representation Resource Editor](#).

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



### Universal Viewer with Captions

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## Single Claim Letter for Multiple Claims from a Vendor

### November 2022 Acquisitions

When the [PO Line – Claiming - Process Automation](#) job runs, it checks if there are multiple claims from a single vendor. If there are, and the claim notification is going to be sent by email, Alma combines the notifications for all of the claims from that vendor into a single claim letter. A new letter, the *PO Line Aggregated Claim Letter*, was created for this purpose. Both

physical and electronic items can be included in a single notification of this type. If your institution has customized the *PO Line Claim Letter*, it is recommended to also customize the *PO Line Aggregated Claim Letter* (see [Configuring Alma Letters](#)).

Note that claim notifications that are sent by EDI cannot be combined, and are always sent individually for each PO line, as before. In addition, in the Receive New Material page (**Acquisitions > Receive**), the **Claim missing items** action is continuing to use the existing *PO Line Claim Letter*.

Institutions can opt out of this feature by changing the value of the **claim\_aggregated\_letter** to FALSE (**Configuration menu > Acquisitions > Other settings (General)**). When this value is FALSE, separate claim letters are sent to vendors for each PO line, as before.

For additional information on this new feature, see [Processing Claims](#).

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## New Layout for PO-Line Task Lists

### November 2022 Acquisitions

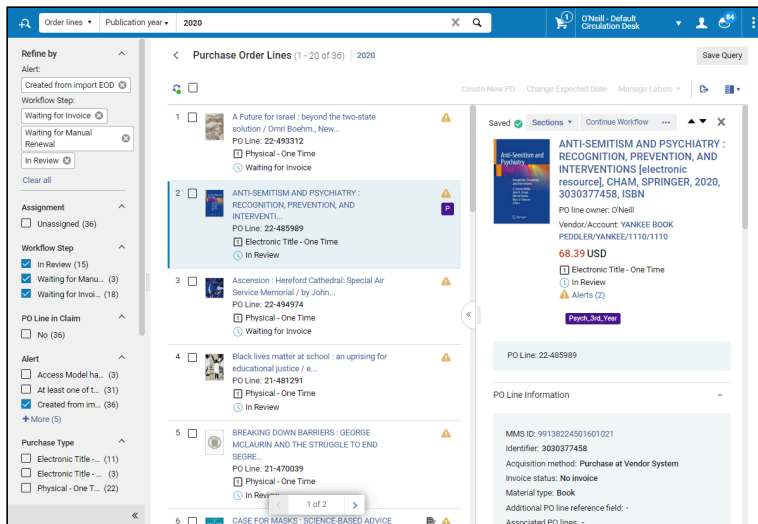
The new unified PO-line task list, built on Alma's New Layout, is now available **for institutions that would like to become early testers**. If your institution would like to test the new design in production, please email [earlytester.support@clarivate.com](mailto:earlytester.support@clarivate.com).

The layout is designed to facilitate an enhanced user experience across Alma navigation in general and specifically in the PO-line management area. This initiative is the outgrowth of cooperation with Alma working groups and a response to feedback from the wider community of Alma users.

See [this short video](#) for a preview of the new interface.

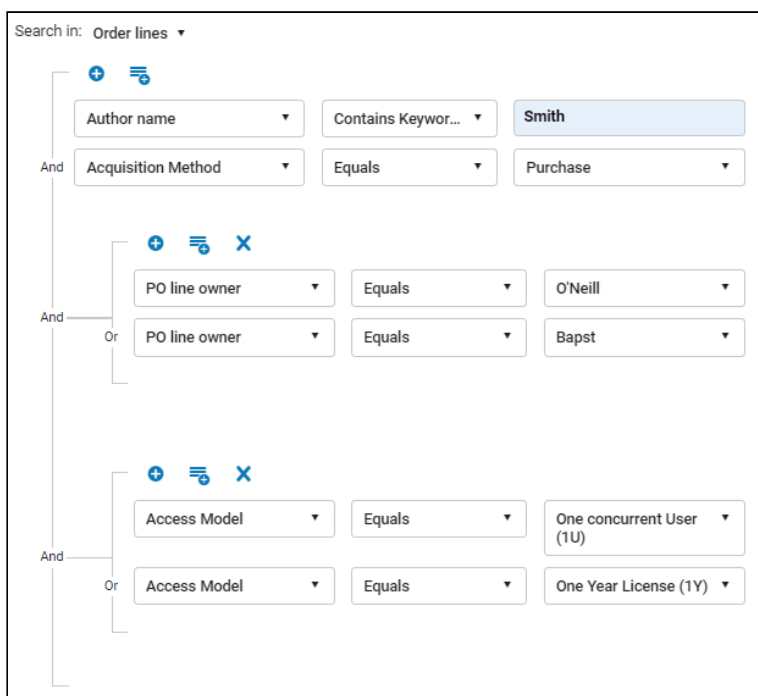
Features of the New Layout for PO lines include:

- Information about all PO lines is presented in a single task list that can include PO lines in all workflow stages and assigned to any users.
- Search results can be refined through facets in which multiple values can be selected simultaneously, such as three workflow stages or a number of specific vendors
- Assignment properties have been moved to the facets, where users can filter based on general categories of assignees (**Unassigned, Assigned to me, Assigned to others**) and/or specific assignees (e.g., "me, Bob, or Jane," but no one else)
- A new "side-by-side" layout option enables users to view a list of PO lines on one side of the window and detailed information regarding the currently selected PO line on the other side. The information in the **Details** pane is editable within the pane itself, so that users do not have to navigate to a special PO-line editing screen in order to perform basic tasks.
- Alma pages related to the currently selected PO line can be opened in a slide-out panel on top of the PO line page, enabling users to view and work on them while keeping the PO line in the background, so that they don't lose their place in the PO-line list. For example, a user working on a PO line can view and modify the information about the item itself in a sliding panel.



**Unified PO-line task list with multiple facets selected and details about the selected PO line in the Details pane on the right**

As part of the upgrade to the New Layout of the PO-line task list, the search options for PO lines have also been expanded. In particular, the advanced search options now support both AND and OR relationships between search conditions. The new search interface is based on a condition-writing concept that employs a query builder; this foundation made it possible to create a more convenient and user-friendly interface in which it is easy to compose complex queries. For additional information, see [Searching for PO Lines - New Layout](#).



**Advanced search conditions for PO lines using AND and OR**

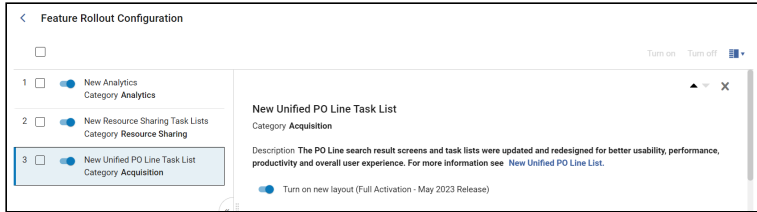
To activate the New Layout for PO lines, from the **User** menu, select **Feature Rollout Configuration (persistent menu >**



**> Feature Rollout Configuration**), and then, in the left panel, select the on-off switch (



**) beside **New Unified PO Line Task List Category Acquisition**.**



For a general overview of the New Layout, see [New Layout 2022](#). For additional information about turning the New Layout on and off, see [Opting In or Out of a New Feature](#).

For additional information about the new unified PO-line task list, see the overview in [New Unified PO Line Task List](#), and the online help at [Purchasing - New Layout](#).

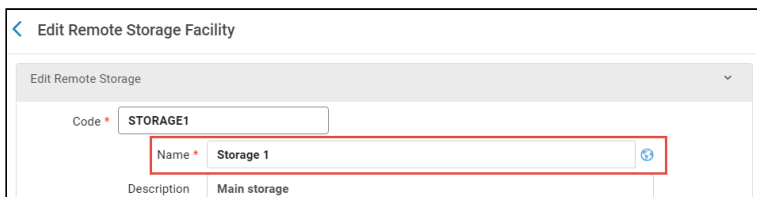
## Note

- The current user interface will remain available and easily accessible in order to allow gradual acclimation if needed.
- The New Unified PO line task list was covered in a webinar in May 2022, [click here to view it](#).
- If your institution would like to test the new design in production, please email Noam Fass at [noam.fass@clarivate.com](mailto:noam.fass@clarivate.com).

## Support for Remote Storage Name in Multiple Languages

### November 2022 Administration and Infrastructure

In Alma, the **Remote Storage Name** field now supports multiple languages. The field now displays in various languages depending on the current user-language selected in the interface.



### Remote Storage Name Field

## Letters Configuration with More Options

### November 2022 Administration and Infrastructure

It is now possible in Alma to use functions in XSL version 3 or lower for letters configuration. It enables creating letters that are more dynamic. For example, using regular expression to adjust the letter according to the type of the resource. Existing letters configured with XLST version 1 continue to work without changes.

## Clear Form Button Added to Next Generation "Advanced Search" as Included in

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## Physical Holdings

### November 2022 Administration and Infrastructure

Staff search areas that include the new advanced search such as **Physical Holdings** and now "**the new POLine**" have a "**Clear form**" button such as the one that exists in the existing advanced search enabling users to clear all the lines of the query created.

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Clear form button in Advanced Search

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## Hotkeys and Responsiveness to Voice Dictation Software Available

### November 2022 Administration and Infrastructure



#### Idea Exchange

Librarians can now select menus and commands by using hotkeys or voice dictation software rather than selecting icons in the top right Alma toolbar. This enhancement reduces the amount of mousing and makes Alma more accessible. For more information, see [Global Alma Hot Keys](#).

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## NLM Classifications Added to Alma Analytics

### November 2022 Analytics

The **NLM Classifications** sub-folder was added to the **Other Classifications** dimension in all subject areas in which it appears to support creating reports containing the classification codes of the National Library of Medicine.



#### NLM Classifications

The **NLM Classifications** dimension contains the NLM Classification Code, NLM Classification Number, and NLM Group 1-5 fields, taken from the 060 or 096 fields of the bibliographic record.



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## Oracle Analytics Server Updated to Latest Version

### November 2022 Analytics

From September to November, OAS (Oracle Analytics Server) will be gradually updated to its latest version (6.4) in our data centers. This version includes many long-standing OAS bug fixes allowing a more streamlined user experience for Analytics Designers using OAS, as well as some UI improvements and additional functionality.

For more information, see [New features in OAS 6.4 for Alma and Primo Data Visualization](#).

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## Option to Get Resource-Sharing Requests Per User

### November 2022 API

The option to use GET to retrieve all resource-sharing requests for a specific user has been added to the User API. Previously, it was only possible to retrieve information about user IDs and purchase-request IDs.

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## User GET API Expanded

### November 2022 API

The Alma User GET API now includes all libraries in the institution, user attachments, and both active and inactive user accounts. For additional information, see [Users and Fulfillment](#) in the Developer Network.

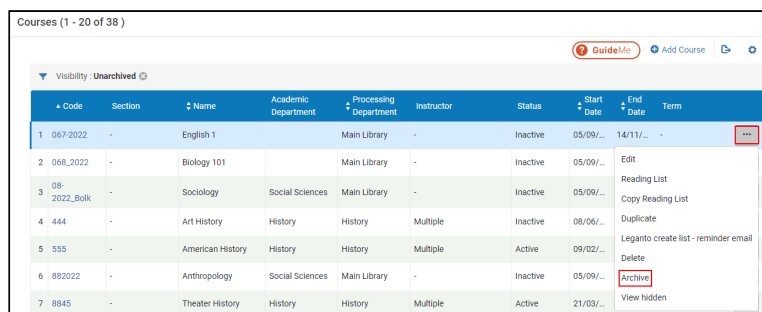
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## Simplify the Data Managed in Alma Using Course Archiving

### November 2022 Fulfillment - Course Reserves

You can now archive courses in Alma, enabling your library to reduce the amount of data you view in Alma without deleting historical information. Archived courses are still available for reference purposes, and you can view statistical data on archived courses via Alma Analytics. Courses can be archived and unarchived individually or in bulk.

An **Archive** action is now included in the course action list to easily archive a single course. Marking a course as archived immediately filters the course from the current course list visibility, removing it from view.



Courses (1 - 20 of 38)

Visibility: Unarchived

Code	Section	Name	Academic Department	Processing Department	Instructor	Status	Start Date	End Date	Term	Actions
1	067/2022	English 1		Main Library	-	Inactive	05/09/...	14/11/...	-	...
2	068_2022	Biology 101		Main Library	-	Inactive	05/09/...			Edit
3	09_2022_Bolk	Sociology	Social Sciences	Main Library	-	Inactive	05/09/...			Reading List Copy Reading List
4	444	Art History	History	History	Multiple	Inactive	08/06/...			Duplicate
5	555	American History	History	History	Multiple	Active	09/02/...			Leganto create list - reminder email
6	882022	Anthropology	Social Sciences	Main Library	-	Inactive	05/09/...			Delete Archive
7	8845	Theater History	History	History	Multiple	Active	21/03/...			View hidden

### Archive action

When marking a course as archived, any reading list associated with the course is also archived. Therefore, a confirmation message appears confirming that all reading lists associated with the course are archived as well.

**Confirmation Message**

Reading lists that are associated with this course will also be archived. Are you sure you want to archive English 1 and all its reading lists?

Cancel Confirm

**Confirmation Message explaining that all lists will be archived**

**Note**

Courses where the reading list is linked to additional unarchived courses cannot be archived. If you attempt to archive a course with a reading list that is linked to additional courses, you receive an error message:

This course cannot be archived because it has [number] unarchived reading lists that are linked to other courses. You should either archive the reading lists or remove the course association, then try again.

When viewing an **Archived** course, you can use the **Unarchive** action to unarchive the course. The course is then restored, but the associated reading lists remain archived, and you need to unarchive them separately.

The screenshot shows a table of courses with columns: Code, Section, Name, Academic Department, Processing Department, Instructor, Status, Start Date, End Date, and Term. The first row is highlighted in blue and has a dropdown menu open. The dropdown menu contains options: Edit, Reading List, Copy Reading List, Duplicate, Leganto create list - reminder email, Delete, Unarchive (highlighted with a red box), and View hidden.

**Unarchive action appears for archived courses**

You can also archive/unarchive courses in bulk using the **Course Bulk Update** job ([Admin > Manage Jobs and Sets > Run a Job](#)). When selecting the **Set course visibility** checkbox, you can select **Archived/Unarchived** from the adjacent dropdown list to archive/unarchive courses in bulk. By default, no option is selected.

Courses that are archived/unarchived successfully are counted in the **Total records processed** and **Total records updated**.

When courses fail to archive/unarchive, the job completes with a warning. You can select the warning to view which courses were not archived/unarchived and why.

Description	Count	
1 Course updated	1	...
2 Course deleted	0	...
3 Failed to update course dates	0	...
4 Create list - reminder email failed	0	...
5 Failed to remove list association	0	...
6 Failed to archive course	0	...
7 Job failed on course	0	...

**Completed successfully**

Description	Count	
1 Course updated	0	...
2 Course deleted	0	...
3 Failed to update course dates	0	...
4 Create list - reminder email failed	0	...
5 Failed to remove list association	0	...
6 Failed to archive course	1	...
7 Job failed on course	0	...

### Completed with warnings

Alma now includes a new **Visibility** facet, for **Archived** and **Unarchived** courses so that you can filter your course list according to current or archived courses. By default, the course list is filtered to **Unarchived** courses and the facet is hidden from the left panel.

Courses (1 - 20 of 38)

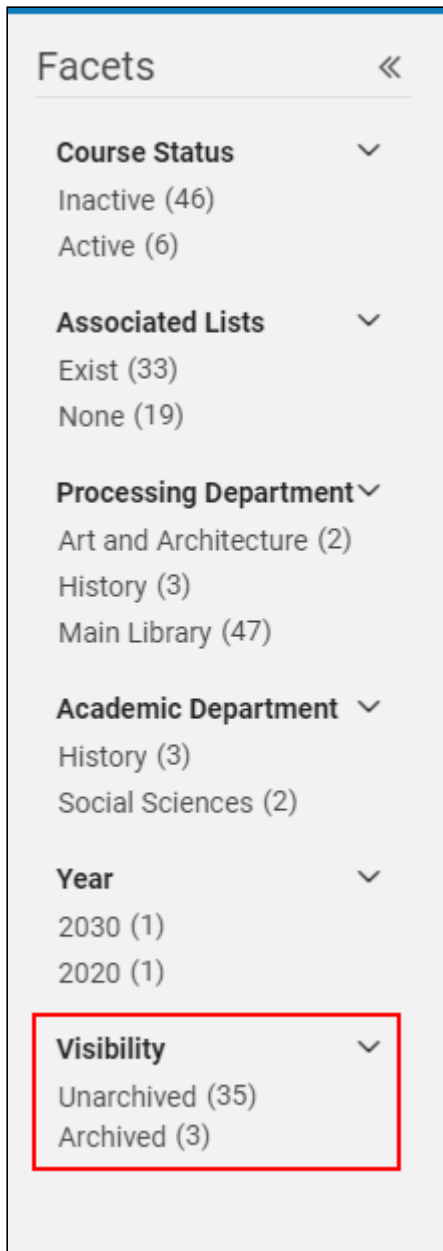
GuideMe Add Course

Visibility **Unarchived**

Code	Section	Name	Academic Department	Processing Department	Instructor	Status	Start Date	End Date	Term
067-2022	-	English 1		Main Library	-	Inactive	05/09/...	14/11/...	-
068-2022	-	Biology 101		Main Library	-	Inactive	05/09/...	14/11/...	-
08-2022_Bulk	-	Sociology	Social Sciences	Main Library	-	Inactive	05/09/...	14/11/...	-
444	-	Art History	History	History	Multiple	Inactive	08/06/...	08/07/...	-
555	-	American History	History	History	Multiple	Active	09/02/...	10/02/...	-

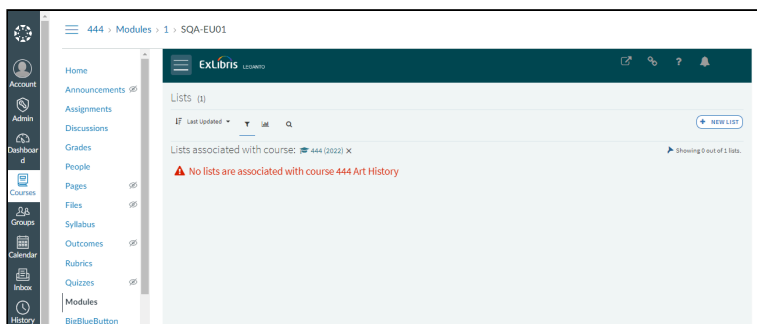
### Course List Visibility filtered to Unarchived by default

The default **Visibility** filter can be removed which displays all courses and displays the **Visibility** facet with the option to filter to either **Archived** or **Unarchived** courses.



### Archived/Unarchived Facets

Archived courses are hidden from view in Leganto. When attempting to access an archived course from the Learning Management System (LMS), you receive a message that no lists are associated with the course.



### LMS message when accessing archived lists

Archived courses are not included in the **Manage course association** and **Roll Over** lists in Leganto.

Manage course association

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**No course is associated to this list.**

Look up course:

No course found

---

**Manage course association**

For more information, see [Archiving Reading Lists](#).

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## Alma November 2022 Additional Enhancements

- **November 2022 Fulfillment**  
Requests that are sent to remote storage facilities as XML now include the Storage ID of the requested item as well as its barcode. This makes it possible for remote storage facilities that manage their stock by Storage IDs (rather than barcodes) to effectively integrate with Alma.
- **November 2022 Acquisitions**  
In the Set settings ([Admin > Manage Jobs and Sets > Manage Sets](#)), the **Set content type** that was previously called **PO lines** is now called **Order lines**. This was done in order to standardize the terminology throughout Alma.
- **November 2022 Analytics**  
The **Bibliographic Details** dimension, common to many subject areas, was added to the Digital Waitlist subject area to enable you to create reports with the fields of this dimension.
- **November 2022 Analytics**  
The **Service Auto-Activates Portfolios** field (Y/N) was added to E-Inventory > Portfolio. It indicates if the option to automatically activate new portfolios when they are added to a service is configured. For more information, see [Managing Electronic Resources](#).
- **November 2022 Analytics**  
The new **Primo Discovery** subject area allows you to track the number of titles indexed for Primo VE. For more details, see [Primo Discovery](#).
- **November 2022 Analytics**  
The name of the **Receiving Note** field was changed to **Receiving/Activation Note** to better describe the information displayed by this field in the **PO Line** dimension for every subject area for which it appears.
- **November 2022 Analytics**  
The **Additional Notes** field was added to Borrowing Requests > Borrowing Requests Details and Lending Requests > Lending Requests Details. It displays the notes added under the Notes tab for the borrowing request or the lending request.

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### Note

This field is separate from the **Notes** field that displays the notes added under the General Information tab.

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- **November 2022 Analytics**  
The following fields were added to the **Bibliographic Details** dimension for all subject areas for which it appears:
  - General Note
  - Local Note
  - Subject (Names)
  - Series Statement
  - Electronic location and access
- **November 2022 Analytics**  
The following out-of-the-box reports were added for the **Fulfillment** subject area:
  - Fulfillment Network - Loans by guest patrons per library
  - Fulfillment Network - Local items loaned at another institution
  - Fulfillment Network - Requests by source (AFN and Manual) and pickup location (Local and Remote)
- **November 2022 Analytics**

The **Library Code** and **Library Description** fields were added to the **Block** and **Notes** dimensions of the **Users** subject area. These fields enable you to filter reports according to the library.

- **November 2022 API**

A new parameter, **fail\_on\_invalid\_id** (default: TRUE), has been created for the Manage Members API (POST /conf/sets/{ID}?op=add\_members and op=replace\_members). If this parameter is TRUE, the current behavior, in which the API returns an error if any of the IDs in the set is invalid, is implemented. If this parameter is FALSE, a list of the rejected IDs is returned as part of the returned set object, but the API does not fail. This makes it possible to download a list of matched and non-matched IDs when creating an itemized set based on a file of identifiers. For additional information, see [Manage Members](#).

- **November 2022 Fulfillment - Resource Sharing**

You can now use Display Logic Rules to hide resources managed at the network zone level.

- **November 2022 Fulfillment - Resource Sharing**

Previously, the partners in the Ex Libris resource sharing directory did not present the lending terms available for the institution. This information is now available for view, enabling you to decide whether to establish a resource sharing relationship with an institution based on their terms. If the partner exists in the resource sharing directory (**Fulfillment > Resource Sharing > Partners > Community** tab), you can add members to your institution by selecting each member and selecting **Copy**. The members and their details are then added to your partner list.

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## Note

The column **Pods I'm Part Of** is only displayed if you select it in the Manage column display list



Name	Description	Lending Terms	Location Terms	ISO Symbol
University of Wisconsin - Madison - Wisconsin Historical Society Library-WISPOD (Community)	-	Delivered in 2 days Keep for 28 Cost 0.0 USD Additional lending terms are available	ALL	ISO_WHSLIBRARY
Renouveau - Sciences et Patrimoines - Haute Ecole de la Santé La Source (Community)	-	-	-	-
Flinders University - Flinders Resource Sharing Services (Community)	-	-	-	SFU
TCS Education System Library - TCSPW-Washington DC (Community)	-	-	-	-
Dickinson College - Waldee-Spahr Library (Community)	-	-	-	DWC
University of Wisconsin - Madison - Space Science Library (Schwendtger) (Community)	-	Delivered in 2 days Keep for 28 Cost 0.0 USD Additional lending terms are available	ALL	ISO_SPACE

### Resource Sharing Partner List

For more information, see [Downloading a Resource Sharing Partner from the Directory](#).

## Alma November 2022 Resolved Issues

- **November 2022 Fulfillment SF: 05302497**  
Previously, the block description in the **On Hold Shelf** letter was not translated into the user's preferred language. This was fixed, and the block description is now translated as expected.
- **November 2022 Fulfillment SF: 06301844**  
When Primo was opened in a Chrome browser, in the Primo Resource-Sharing Request **Get It** form, in the **Not Needed After** field, the date-picker icon was not properly aligned with the input field. This was fixed and the icon now aligns properly with the input field.
- **November 2022 Fulfillment SF: 06413223**  
Previously, when a work-order request or transit request was created by scanning an item, the description field was not included in the request details, despite this option being enabled. This was fixed; the description field is now filled in as it should be.
- **November 2022 Fulfillment SF: 06413220**  
When a digitization request was created for an item that was located in a remote storage, and the request needed approval, an approval request was not generated. This was fixed; Approval requests for digitization are now created as expected.
- **November 2022 Fulfillment SF: 05306473**  
In Primo VE, in the Booking Calendar of **GetIt**, the labels for **Day** and **Week** were not translated for some languages. This was fixed; the labels are translated as expected.
- **November 2022 Fulfillment SF: 06355378**  
When a patron renewed a resource-sharing loan from a non-Alma NCIP-P2P partner via Primo, the due date was not updated in the loan or in the borrowing request. The due dates are now updated correctly.
- **November 2022 Fulfillment SF: 06375564**  
In lending requests, when the **Level of Service** field was edited, the change was not implemented in the shipping-cost calculation if a default value was defined for this field in the code table. This was fixed; changes to the **Level of Service** are now implemented as they should be.
- **November 2022 Fulfillment SF: 06390716**  
Previously, when a digitization request was created for an item from institution A, and the item was scanned in institution B (e.g., when the item was being returned after a loan), in certain cases, the scan failed, and an error message appeared. This was fixed; the scan is now implemented successfully in these cases, and no error messages appear.
- **November 2022 Fulfillment SF: 06281404**  
Previously, when the requested format of a borrowing request was **digital**, internal notes that were added to the request at the time the item was received were not saved in the **Notes** tab. This was fixed; internal notes added to digital borrowing requests are saved as expected.
- **November 2022 Fulfillment SF: 06245785**  
When a completed lending request was reactivated and the item was shipped, the request was assigned the status **Rejected the borrower request** instead of **Shipped physically**. This was fixed, and the correct status is now assigned to lending requests that are reactivated and then shipped.
- **November 2022 Fulfillment SF: 06463177**  
In the New Layout of the resource-sharing task list, incorrect values were displayed in the **Event Name** facet. This issue will be fixed gradually when the `OUT_RES_SHR_REQUEST` system-maintenance job performs re-indexing, which will occur during the first week of the November release.
- **November 2022 Fulfillment SF: 06517122 06509709**  
In the New Layout of the task list of resource-sharing borrowing requests, selecting the requester's name did not provide additional information about the requester, such as contact information, as it should have. Selecting the requester's name now opens a box in which this information is displayed.
- **November 2022 Fulfillment SF: 06514259 06481682**



In the New Layout of the resource-sharing interface, renewing a borrowing request failed if the item had not been loaned yet. This was fixed; renewing a borrowing request is successful even if the item has not yet been loaned.

- **November 2022 Fulfillment SF: 06482991**

In a borrowing request that was found through a search, when **Receive** was selected from the row actions, the cursor was not placed in the **Received Items** page (in the 'Temporary barcode' field) as it should have been. This was fixed, and the cursor is now placed in the correct location.

- **November 2022 Fulfillment Resource Sharing**

In the New Layout, in the resource-sharing **Borrowing Requests** and **Lending Requests** task lists, the date facets did not show the correct number of requests per date range. This was fixed; the date facets now show the correct number of results per date range.

- **November 2022 Fulfillment Resource Sharing**

In the New Layout of the resource-sharing **Borrowing Requests** task list, when the **View network resources** row action was selected for an article, the search used the article title instead of the journal title. This was fixed; the search now uses the journal title as it should.

- **November 2022 Resource Management SF: 05318846**

The UNIMARC to MARC21 crosswalk did not handle the 856 field. The 856 field (all subfields) are now crosswalked from UNIMARC to MARC21 for both authority and bibliographic formats. (This functionality already exists in the MARC21 to UNIMARC crosswalk.)

- **November 2022 Resource Management SF: 06259957**

The publishing profile is publishing the incorrect time for the item creation and modification date. This was fixed and the item's creation and modification date include full date+time and the customer's timezone.

- **November 2022 Resource Management SF: 06209869**

**Physical Holdings** search - **Pattern 1st level of enumeration** index (and also 2nd and 3rd): these indexes are created from the holdings field 853, subfields a, b, and c. However, special 853 fields with 1st indicator 'X', that are created internally and not displayed in the UI, were also indexed; consequently, the search results were misleading. This has been fixed. That is, holdings 853 fields with 1st indicator 'X' are no longer indexed. For this fix to take effect, full inventory indexing is required.

- **November 2022 Resource Management SF: 06452271**

**Relation Type of Related Records** does not Appear in Network Search. This is fixed and **Relation Type** was added for related records displayed from the network search tab.

- **November 2022 Resource Management SF: 06345479**

List of Libraries not sorted Alphabetically in the **Library Scope** Facet of a Staff Search. This was fixed.

- **November 2022 Resource Management SF: 05313661**

The character ? (U+3005 IDEOGRAPHIC ITERATION MARK) is removed from the query text. This is done when the customer parameter solr\_searching\_language = hk (Chinese-Hongkong) or zh (Chinese), as both are affected by the defect, and the character is not indexed in either language. The fix will be applied gradually to existing data during the semiannual indexing, starting in November.

- **November 2022 Resource Management SF: 06356163 06350871**

Physical Items search when the sort\_library\_by\_relevance customer parameter is set to 'true': if a library scope is selected, and My Library (the library 'I am physically at') is not part of this scope, its special zero-results facet will not be displayed. This is fixed.

- **November 2022 Resource Management SF: 06356163 06350871**

My Library scope -In Physically Holding search not showing **Physically At** library in facets. This was fixed.

- **November 2022 Resource Management SF: 06371276**

Subfields of a field mapped to dc:coverage/dc:description were set without a delimiter between the different values. This was fixed for SRU and OAI publishing.

- **November 2022 Resource Management SF: 06423823**

The authentication/public notes would display incorrectly in View It when including numbers and words and UI language in Hebrew. This was fixed.

- **November 2022 Resource Management SF: 05314101**

Hebrew UI presents the record's subfields' delimiters and subfields disordered. This was fixed.

- **November 2022 Resource Management SF: 06352605 05321651 06236027**

BIB Redirection Configuration doesn't include **MMS ID** or **Control Number** as Identifier Type option. This was fixed and the BIB Redirection fields page was improved to display the list of **Identifier Type** without scrolling down.

- **November 2022 Resource Management SF: 05306730**  
When the Windows Language was defined as Hebrew in the Firefox browser, the shortcuts for Enhance the Record (Ctrl+Alt+W and Ctrl+Alt+E) added nikud symbols Kamatz and Holam. This was fixed. When the new parameter, available under Resources > Other settings - `alternative_mde_enhance_record_shortcut` is enabled, the user can use the Ctrl+Shift+E shortcut for the **Enhance the record** functionality.
- **November 2022 Resource Management SF: 06242561**  
In the New MetaData Editor, 1st indicator of fields 630 and 730 (non-filing characters) was not considered during auth control. This was fixed. The existing data will be fixed after the reindexing job of the November release will be completed.
- **November 2022 Resource Management SF: 05305162**  
UNIMARC Form editor: missing values and issues for non-book materials. This has been fixed by adding new values to the **form control** for fields 115 and 116 (only).
- **November 2022 Resource Management SF: 06468582**  
Dynamic form save failed if it had a field with label/tooltip longer than 255 characters. This was fixed and an error message was added to inform the user about the failure cause.
- **November 2022 Resource Management SF: 06376580**  
When creating a new record from an existing one or from a template with 001 field, the newly created record is created with originating system ID as the 001 field from the original record. This was fixed, from now the record will be created with originating system ID from his own 001 field.
- **November 2022 Physical Resource Management SF: 05300781**  
Item inventory date shows a different value in Analytics than in the **Item Editor**, caused by an unexpected date change upon saving the item. This was fixed, and the Item inventory date now displays the same value in Analytics as in the **Item Editor**.
- **November 2022 Physical Resource Management SF: 06317781**  
**Physical Item Editor**: The History tab content's indicator (earmark) was on, although there is no history to present. This was fixed.
- **November 2022 Electronic Resource Management SF: 06504508 06311081**  
Display logic rules having to do with DB services were not filtered correctly because the rule was saved using the IEPA PID, but the filter was based on the package public name. This was fixed and now the filter for DB services matches on IEPA PID.
- **November 2022 Electronic Resource Management SF: 06338937 06420679 06430314 05332677**  
When a portfolio was updated in the Community Zone, if this portfolio didn't exist in an institution where the collection belongs and is marked for auto-active, the portfolio wasn't created automatically in the institution. This has been fixed.
- **November 2022 Electronic Resource Management SF: 06319411**  
In some cases, the **Overlap and Collection Analysis Job** fails when Institution Zone attempts to compare two Network Zone Collections. This was fixed.
- **November 2022 Electronic Resource Management SF: 06422347**  
There was an error when trying to link an electronic collection with a long name to the Community Zone. This was fixed and no error is displayed.
- **November 2022 Electronic Resource Management SF: 06442369**  
Changes to the Access type in a Portfolio were not registered in the History tab. This was fixed.
- **November 2022 Digital SF: 06317505**  
Alma Viewer: Plain fulltext was not formatted correctly in Alma Viewer. This was fixed to show the line breaks as in the original file.
- **November 2022 Digital SF: 06418691**  
Publishing to OAI-QDC failed for updated records. This was fixed and now updated records are published.
- **November 2022 Digital SF: 06429342**  
After clicking on **push to MD editor**, the search entity type was changed from **digital titles** to **all titles**. This was fixed.
- **November 2022 Acquisitions SF: 06402444**  
In the **Acquisitions > Manage Import Profiles** page, rerunning files that failed previously caused an error when a filter pattern with a regular expression was defined on the profile. This was fixed and now the rerun action ignores the filter pattern.
- **November 2022 Acquisitions SF: 06396489 06443284**

In the code table, the **Code** and **Description** fields of both the fourth and fifth reporting codes were not editable. This was fixed, and now they are editable.

- **November 2022 Acquisitions SF: 06225941**  
The distribution of funding among funds in a PO line was sometimes incorrectly rearranged when the **Manual Renewal** checkbox was selected. This was fixed, and selecting the checkbox no longer affects the funding distribution.
- **November 2022 Acquisitions SF: 06280471**  
When receiving items, if the user received one item by selecting **Create and Receive**, and then another item by selecting **Receive and Set Barcodes**, the second item was assigned the same barcode as the first. This was fixed; Alma now creates a new barcode for every item created by means of **Receive and Set Barcodes**.
- **November 2022 Acquisitions SF: 05323936**  
When two instances of the EDI-Load Files job ran simultaneously, the jobs did not always import all of the invoices from the vendor's server. Now, multiple instances of the job will not be allowed to run at the same time - each new instance will wait until the previous one has finished. As a result, all invoices will be imported as they should be.
- **November 2022 Acquisitions SF: 06425507**  
Some **EDI – Load Files EBSCO** jobs fail, even though testing the FTP in the vendor record is successful. We are including additional information in the log, to help us identify the reason for the failure of the FTP connection, if the problem arises again.
- **November 2022 Administration and Infrastructure SF: 06415962 05959804**  
Previously, an operator who did not have the **User Identifier Update** privilege was incorrectly enabled to edit existing identifiers. This was fixed, and now only an operator with the **User Identifier Update** privilege is able to edit existing identifiers.
- **November 2022 Administration and Infrastructure SF: 06469079**  
Previously, in the **User Record > Statistics** tab, values with dots were not displayed correctly. This was fixed.
- **November 2022 Administration and Infrastructure SF: 06393168**  
UI overlaps when selecting multiple physical locations in an advanced search. This is fixed and the overlap no longer occurs.
- **November 2022 Administration and Infrastructure SF: 06426284**  
Import of an Excel file into the Loan Status code-table didn't work. This was fixed.
- **November 2022 Administration and Infrastructure SF: 06446921 05317352**  
Environment indication in the Alma menu is no longer visible, it only re-appears when the language of the UI is changed. This was fixed.
- **November 2022 Administration and Infrastructure SF: 06370175 06463028 06522816 06474557 06439540 06460287 06497526 06494028**  
Relinking an item to another bib radio button appears absent or is difficult to see. This is fixed
- **November 2022 Administration and Infrastructure SF: 05329927**  
The Analysis section of the Shelf Report was not translated. This was fixed.
- **November 2022 Analytics SF: 06263561 06232028**  
The Fund Code prompt in the Acquisitions - Fund Reports dashboard displayed options for the 2021 fiscal year. This was fixed, and the options are no longer limited to the 2021 fiscal year.
- **November 2022 Analytics SF: 06047995 06403531 06438753 06399493**  
The number of rows that were possible to export in formatted Excel format was limited. This was expanded to 1,000,000 rows.
- **November 2022 API SF: 06393609 06452135**  
The `calculated_suppress_from_publishing` information has been added to the `holding_data` section at `item info /almaws/v1/bibs/{bib_id}/holdings/{holding_id}/items/{item_id}` (same structure and logic as on `rest_holding.xsd`).