Alma April 2023

Release Notes

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Alma April 2023 Additional Enhancements

- **April 2023 Resource Management**
  Previously, edition information in the title search results was limited to the edition statement (250$$a).
  Now, the edition information also includes the remainder of the edition statement (250$$b), enabling librarians to fully and accurately identify the edition from the search results.
- **April 2023 Resource Management**
  The 070 is the standard NAL (National Agricultural Library) call number index per library of Congress Standards. Once the semi-annual reindexing is completed, it will be included in the NAL Type Call Number search index.
- **April 2023 Administration and Infrastructure**
  Alma's session timeout feature recognizes user activity in Analytics and extends the Alma session to prevent a timeout while the user is active in Analytics. This means that if the user is working in Analytics during an Alma session, their session remains active without interruption.
- **April 2023 Analytics SF: 06593328**
  The **Cost Usage Institution for Consortia** folder was added under E-Inventory > Cost Usage.
  It contains the **Cost Usage Institution Code** and **Cost Usage Institution Name** fields. They display the institution code and institution name of the network member.
- **April 2023 Analytics**
  The **Statistical Category Description** field was added to Users > Statistics. It displays the statistical category description and can be used with the Statistical Category field, which displays the statistical category code.
- **April 2023 Analytics**
  Out-of-the-box reports no longer appear in the drop-down list when creating analytics objects, since they cannot be used to create analytics objects. If you want to share or schedule an out-of-the-box report, save the report in your institution folder with a new name and create the analytics object with that copy.

  For more information on analytics objects, see Creating an Analytics Object.
- **April 2023 Analytics**
  You can now export the Analytics Object List to Excel format. You do this by selecting the export icon
  located above the list. The following fields are exported:
  - Type
  - Display Name
  - Report Name
  - Description
  - Subject Areas
  - Analytic Folder
  - Add as widget
  - Out of the Box Reports
  - Schedule Report
  - Add as dashboard
  - Source System
  - Object Creator
  - Object Creation Date

- **April 2023 Analytics**
  The Report Preview area of the Analytics Objects List now also displays Data Visualization reports. This enables you to view a preview of the report without having to open it in the analytics interface.
- **April 2023 Analytics**
  You can now schedule Data Visualization (DV) reports as you can for analytics dashboards and reports. Users subscribed to receive the DV reports receive a link to the DV report that they can select to display the report. Since sending DV reports as an attachment is not possible, the only option is to send a link to the live report. Note that opening the link requires the receiver having the appropriate role or permissions to view the report.

  For more information, see Scheduling and Subscribing to Reports and Dashboards.

Alma April 2023 Resolved Issues

- **April 2023 Analytics SF:06287214**
  Chinese characters within graphs in Analytics reports were disappearing from the reports. This was fixed by a quarterly fix of the OAS.
- **April 2023 Analytics SF:06620598**
  When filtering an analytics report in the Users subject area by email, an unexpected string of characters was displayed with the email address. This was fixed, and now the email address appears without the string of characters.
- **April 2023 Analytics SF:06643656**
  The AE100 LC classification code was missing from the the LC Classification codes list. It was added.
- **April 2023 Analytics SF:06580889**
  The KZ and KI schedules were missing from the the LC Classification codes list. They were added.
- **April 2023 Acquisitions SF:06512683 06561839 05313290**
  Duplicate entries of license terms appeared in Primo and Primo VE. These duplicate entries no longer appear.
- **April 2023 Acquisitions SF:06514976 06522573**
  Previously, when getting PO lines with interested users via the API, the PO line of the request was case sensitive. This was fixed. It is no longer case sensitive.
- **April 2023 Acquisitions SF:06378897 06522995**
  Previously, when a user attempted to link an item to a continuous PO line, which is not a supported action (Items can be linked to one-time PO lines, but not to continuous PO lines), no alert was shown. Now, an alert is shown.
- **April 2023 Acquisitions SF:06535404**
  Previously, approval details (approval_date, approved_by, and approved_by_id) were left blank in the XML of the Order List letter. They are now added to XML as they should be.
- **April 2023 Acquisitions SF:06566170 06597278**
  When a Claim letter was supposed to be sent to a vendor, if the acq_vendor_account_email customer parameter was set to true, but the vendor account had no email address associated with it, the letter was not sent, even if the there was an email address associated with the vendor itself. Now, if the acq_vendor_account_email parameter is set to true, and no email is associated with the vendor account, but there is an email associated with the vendor itself, the Claim letter is sent to the vendor email.
- **April 2023 Acquisitions SF:06493219 06548850**
  In the Electronic Resource Activation Task List, when a user selected **Done**, the system assumed a PO line was connected to the electronic resource. When this was not the case, an error was generated. An extra check has now been implemented when **Done** is selected, to ensure that a PO line is actually connected to the electronic resource before the Done action is implemented, and thus preventing this error from occurring.
- **April 2023 Acquisitions SF:05309931 06327064**
  When a Claim letter was sent for a PO line that had no item description and used the newSubject format, the word 'null' was appended to the end of the letter's subject line where the item description would normally be appended. This was fixed; if a PO line has no item description, nothing is appended to the subject line of the Claim letter in its place.
- **April 2023 Acquisitions SF:06542574 06544040**
  The Trial Survey Form did not work properly; participants in trials received multiple emails inviting them to take part, but the survey forms they accessed were blank. This was fixed; the survey forms contain the questions they should contain, and the email invitations are not sent more often than expected.
- **April 2023 Acquisitions SF:06519562 06583280 06628800 06631635**
  Previously, multiple import jobs could try to update the same fund at the same time, resulting in data that was not processed. Now, the number of times each job can update a fund is minimized reducing the chances of conflicts between two separate jobs.
- **April 2023 Acquisitions SF:06496144**
  Previously, in the Rollover Ledger report, the value of the From Year parameter was not presented in the report. Now, it appears in the report for both the Copy and the Delete actions.

- **April 2023 Acquisitions SF:06449316 05323936 06653402 06409322 06488312**
  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 are not allowed to run at the same time - each new instance waist until the previous one has finished. As a result, all invoices are imported as they should be.
- **April 2023 Acquisitions SF:06594183**
  Under certain conditions, the EDI - Loads Files RIALTO job completed with the error 'Error on creating entity from xml,' and invoices failed to import. This has been fixed; this error no longer occurs when this job runs.
- **April 2023 Acquisitions SF:06560370**
  When an FTP transfer was interrupted during the disconnect process, after the files were actually already successfully transferred to the target server, the transfer process was repeated, resulting in duplicate copies of the files being transferred to the target. This has been fixed; if an exception is thrown during the disconnect stage of an FTP transfer, the file transfer is not repeated.
- **April 2023 Acquisitions SF:06561445**
  Previously, when invoices were exported to external financial systems, the PO number of the PO lines included in the invoice was not exported. Now, a new po_number field was added to the po_line_info section in the exported XML. If the PO line is part of a PO, the PO number is extracted to this field.
- **April 2023 Acquisitions SF:06639221**
  In certain cases, selecting **Custom Harvest** for a vendor from the Usage Data tab of the Vendor Details page opened a blank page. This was fixed; Custom Harvest now opens correctly in these cases.
- **April 2023 Acquisitions SF:06643239**
  Previously, when an electronic PO line that was not linked to a resource was set to claim, the Claiming job failed. This was fixed; the Claiming job no longer fails in this case.
- **April 2023 APIs SF:06639092**
  Previously, authenticating a user via the Alma Users API required an API key with a write permissions. Now, an API key with read-only access is sufficient for authenticating a user via API. This differs from the authentication requirements of other POST APIs, which continue to require write permissions, because this API does not alter data.
- **April 2023 APIs SF:06484251**
  Previously, the full list of serial database names was not checked when determining if an imported record was a monograph or a serial. This has been fixed; the full list of serial database names is now checked during this process.
- **April 2023 Administration and Infrastructure SF:06360858**
  Previously, when a logical set of users based on user status was created, it produced an empty set of results. This was fixed; logical sets of this sort now return the correct results.
- **April 2023 Resource Management SF:06481305 06482799**
  Sets with a date-based field that are used in advanced search and saved during specific times of the day, the value shifts a day forward. This was fixed with a configuration adjustment to address timezone differences.
- **April 2023 Resource Management**
  Metadata Editor: Warning messages and "Record saved" messages that have interactive elements do not receive focus when tabbing through the Alma UI for screen readers. As a result, the elements cannot be operated with a keyboard. This was fixed.
- **April 2023 Resource Management**
  Metadata import created BIB version and distribution for unmodified BIB records. This was fixed by comparing the existing BIB in the database and if there are no differences, it is not saved.
- **April 2023 Resource Management SF:06455704 05310335 05310834**
  Moving an item to another permanent location via the Change Physical Items Information job: when both 'update_call_number_type_upon_item_move' and 'use_marc_record_holdings_template' customer parameters were set to 'true', the target holdings record was not assigned the call number type defined in the target physical location; instead, the first indicator of the default holdings record template was used (a space was converted to '#'). This was fixed.
- **April 2023 Resource Management SF:06602761**
  Previously, an issue existed in the 'Continuous Tab' (Acquisitions > Receives > Continuous Tab) where if a customer selected the **Duplicate** button to copy an item's details but then edited the description without updating it, the system would not display an alert for the item description. This issue has now been resolved and an alert is now shown in this scenario.
- **April 2023 Resource Management SF:05317929**

Community Zone update task list displayed the wrong name of the collection for a SERVICE change. This was fixed by changing 'updatePps' to take the package name from each IEPA individually, instead of taking it from the first one.

- **April 2023 Resource Management SF:05301384**
  When searching for titles in the Community Zone scope, the count of electronic portfolios for a title was sometimes incorrect. This was fixed by a performance improvement made when creating the 'Update in Community' pop-up for a contributed collection.
- **April 2023 Resource Management SF:06474399**
  MODS records deleted a space in the name of a collection. This was fixed.
- **April 2023 Resource Management SF:06657123 06658548 06651313**
  Print Preview for PDFs in the Alma viewer displayed an empty page. This was fixed and now the page to be printed is displayed.
- **April 2023 Resource Management SF:06536686 06568124**
  General Publishing: Previously, two jobs related to the same General Publishing profile could not run in parallel, where the second job was immediately aborted with the status **Skipped**. This is fixed, now the second job waits (status 'Pending') until the first job is completed and then continues running.
- **April 2023 Resource Management SF:06498260**
  Headers were not displayed while searching electronic titles in the Community Zone and selecting to view the portfolio list. This is fixed and Collection Headers are added to the display.
- **April 2023 Resource Management SF:05313754**
  The 'Catalog set' function does not work as expected for bibliographic records from the Community Zone, if the Metadata Editor is loaded for the first time. This was fixed and now the whole set is pushed to the Metadata Editor.
- **April 2023 Resource Management SF:06463158 06613730**
  Creating a Physical Title Set using an Excel file with empty lines caused an error. This was fixed and these lines are now skipped.
- **April 2023 Resource Management SF:06442585**
  In the link resolver, when calculating consolidated coverage for a title with multiple portfolios where one of the portfolios partially supplements the second portfolio's coverage, the consolidated coverage was not displayed correctly. This was fixed.
- **April 2023 Resource Management SF:06285033**
  Export errors occurred to Mendeley in cases where the field 'year' contains 'u' or '?'. This was fixed and errors are now prevented.
- **April 2023 Fulfillment SF:06538296 06639849 06563249 06663748 06677046**
  In some cases, a loan would be renewed when the policy did not allow it to be renewed. This was fixed; renewals in these cases are not implemented when the policy prohibits them.
- **April 2023 Fulfillment SF:06304763 05805276 06514221 05315449 06511156 05319076 05311705**
  Previously, when a loaned item was scanned via the Scan In Items option, and the user was 'Currently At' a work order department, the 'Desk name' of the Return action that appeared in the Physical Item Editor page, in the History tab, appeared as the internal ID of the work order department instead of its name. This was fixed; the name of the work order department now appears in this location, as expected.
- **April 2023 Fulfillment SF:06301714**
  When a borrowed item was loaned again after being returned, the borrowing request would not have the option to request a renewal. This was fixed by removing the return date from the borrowing request when the item was loaned again.
- **April 2023 Fulfillment SF:06482964 06560562 06493631 06618069**
  Previously, when a Resource Sharing task was assigned to a user from the New Layout of the Resource Sharing Task List, and a General Assign To letter was sent to the user to inform them of the assignment, if a note was added when the assignment action was initiated, the note was not included in the letter, and a number appeared in its place in the letter. This was fixed; any notes added to an assignment now appear in the letter sent to the assignee.
- **April 2023 Fulfillment SF:06390023 06631176**
  Creating a lending request coming from Rapid ILL would fail if the mms id sent from Rapid was an NZ mms id. This was fixed and now Alma allows creating the request also for NZ mms.
- **April 2023 Fulfillment SF:06436236**
  Previously, loaning an item from a different institution in a fulfillment network via RFID generated an error message, 'Security bit failed to be changed: RFID error - barcode not found,' even though the loan was processed correctly. This

was fixed; this message no longer appears in this case.

- **April 2023 Fulfillment SF:06442607 06504057**
  Previously, running two Resource Sharing Integration Profile jobs, from two different profiles, in parallel was not possible, because they blocked one another. This has been fixed, it is now possible to run two of these jobs simultaneously.
- **April 2023 Resource Management SF:06210999 05312626**
  The new feature: 'Metadata Editor Holdings 852 $b - Support for Libraries Sorting by User Location' was not working as expected. This was fixed. The 'Currency at' library is now displayed in the form's dropdown.
- **April 2023 Resource Management SF:06328275 06596178**
  SBN integration profile: The 'Merge routine' did not include the disabled merge rules. This is fixed and now the list contains both enabled and disabled rules.
- **April 2023 Resource Management SF:06509466**
  Alma normalizes 'Chinese Book Classification Call Number' headings for customers' special 'non-ASCII' sorting order. Alma also applies special normalization to the sequence number portion to sort them sequentially, rather than alphabetically. However, if there are multiple instances of a space or a forward slash followed by digits, Alma cannot identify the sequence number. This was fixed and now Alma can accurately normalize the call number.
- **April 2023 Resource Management SF:06517140 06524540**
  Templates contributed to the Community Zone disappeared after some time. This has been fixed.
- **April 2023 Resource Management SF:06463588**
  Authority heading lookup (F3) - When working with authority headings that contain both Hanja and Hangul in the same field, the authority was sometimes not displayed in the list of suggested headings. This has been corrected. Contact Exlibris support to activate this fix.
- **April 2023 Resource Management SF:06514525**
  Bibliographic Record Relations are not being updated by 'MMS - Build Record Relations' after being 'Merge and Combine' in the Metadata Editor. This was fixed with a configuration update.
- **April 2023 Resource Management SF:06358027**
  The jobs for some digital import profiles are completed with errors from time to time, but the job report shows no reason and the Events List is empty. This was fixed. Now, if a Metadata import job fails when importing records from OAI, an added event is displayed to notify users.
- **April 2023 Resource Management SF:06558869**
  The second indicator values of the 260 field in the Ex Libris Metadata Configuration List for Marc21 Bibliographic was incorrect according to the Library of Congress. This was fixed. The indicator may have values #, 0, or 1 instead of #.
- **April 2023 Resource Management SF:06223114**
  SBN contribution: The contribution of Uniform Titles sometimes failed due to a wrong SBN sequence number generated. This was fixed.
- **April 2023 Resource Management SF:06490811**
  Cloud App NACSIS-CAT: The linked record IDs from <BHNT>BHBID were not copied to $w of the resulting 780 or 785 fields. This was fixed.
- **April 2023 Resource Management SF:06484247**
  IDs from the first <AL>AID= element in a NACSIS record was erroneously reused in the subsequent <AL> group without an AID= element in the Alma records. This was fixed.
- **April 2023 Resource Management SF:06490667**
  Records from NACSIS sometimes contain OTHN= elements with prefixes that are not capitalized correctly. This was fixed. Alma now corrects the capitalization of these prefixes: (JP-ItNTS), (JP-ToTOH), (OCoLC).
- **April 2023 Resource Management SF:06492233**
  In some cases, when an Alma field 505 $t ended with a slash preceded by a space ' /', it duplicated the record. This was fixed by removing the slash before contributing the content for such particular fields.
- **April 2023 Resource Management SF:06490665**
  Alma contributing records to NACSIS: 084 subfield 2 caused errors, preventing the upload of the record to NACSIS. This was fixed with additional classification codes that have been implemented.
- **April 2023 Resource Management SF:06490827**
  Volume information was not correctly parsed from the NACSIS <CW>CWT element when the volume contained CJK characters. This has been fixed.

- **April 2023 Resource Management SF:06512606**
  When exporting a subject heading from Alma bibliographic field 651 (Subject Added Entry-Geographic Name) to NACSIS, the subject heading field was incorrect. This was fixed with the correct subject heading type code in NACSIS which is 'F'.
- **April 2023 Resource Management SF:06494872**
  Copy Cataloging NACSIS to Alma: The NCID numbers (uniform title record IDs) were not copied to the 130 or 730 field $0. This has been fixed.
- **April 2023 Resource Management SF:06499475**
  When importing records from NACSIS into Alma, the complete string OTHN was not mapped into tag 035 when OTHN contains one of the following values: GPON ISSN LCCN NBN NDLCN ISBN XISBN. This has been fixed by implementing these values.
- **April 2023 Resource Management SF:06542519**
  When tag 016 in Alma has the subfield $$2 JTNDL, the identifier from tag 016 $$a was not mapped to the NACSIS field NDLPN. This was fixed by implementing additional specifications indicating when Alma bibliographic field 016 should be exported to the NACSIS system.
- **April 2023 Administration and Infrastructure SF:06662865**
  In the Alma UI, a clickable 'X' for a secondary search box overlapped the Search button. This was fixed.
- **April 2023 Administration and Infrastructure SF:06627842 06641487**
  The Preferred Language drop-down included Hawaiian, even when the code table was customized to include only specific languages. This was fixed.
- **April 2023 Administration and Infrastructure SF:06410082 06337374**
  The digital images of a representation in a collection were not displayed when clicking the delivery link URL. This was fixed.
- **April 2023 Administration and Infrastructure**
  In the Alma UI, using the globe icon that displays the list of languages configured for the institution, it was possible to translate the relevant term for all languages, but only when using the UI in English. This was fixed and it is now enabled when the UI is in another language. To enable this, set the following feature flag to active: SPECIAL_ENT_GLOBE_TRANSLATE_IMPROVE.
- **April 2023 Fulfillment - Course Reserves SF: 06655246**
  In some cases, courses did not appear in Alma, but they did appear in Analytics. This was fixed.