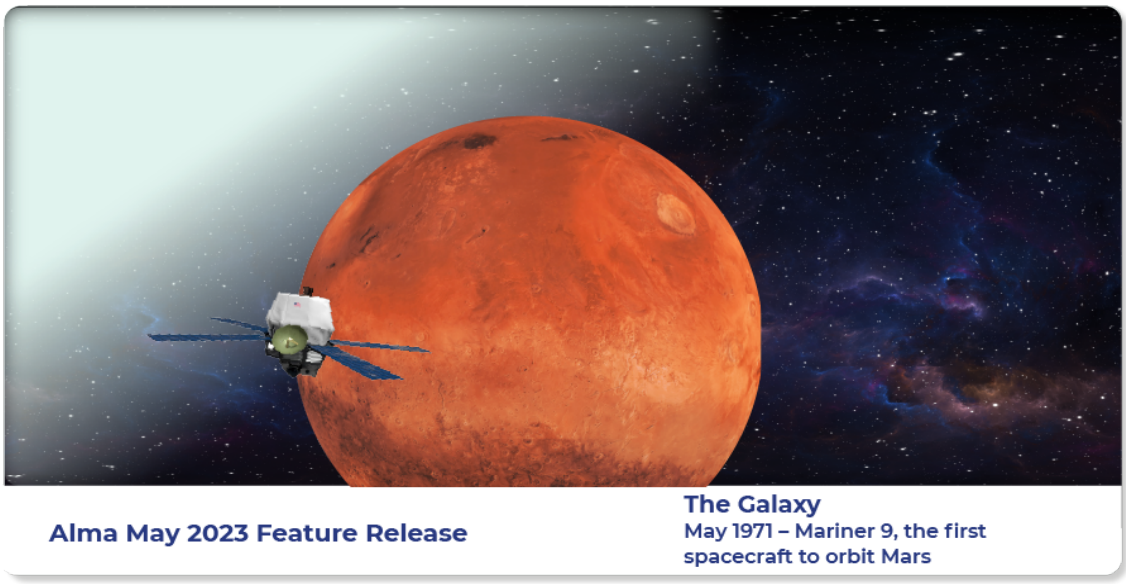

Alma May 2023

Release Notes

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Alma May 2023 Upcoming Issues to Note

New SAML Certificate

The current DigiCert SAML Certificate will expire on June 8th. If your institution uses this certificate, Ex Libris recommends that you consult with the IT dept. in your institution, and if required, replace the certificate for Alma and/or Primo VE. If replacing the certificate, this must be done in coordination with your IDP. For more information, see Replacing a Signed Certificate.

Note

If your institution uses ADFS, Ex Libris highly recommends that you replace the certificate to avoid any complications.

No immediate action is needed. Replacing the certificate can be done at any time until its expiry on June 8th.

Alma May 2023 Main Stories

Alma Support for Japanese Library Systems

May 2023 Fulfillment

As part of Ex Libris's commitment to the Japanese market, we have developed a range of Alma features that are specifically geared to the requirements of Japanese libraries. The primary developments in this sphere are described below.

Integration of Alma with the NACSIS Catalog

Alma can incorporate the NACSIS central catalog in its metadata management system, and supports the following NACSIS-catalog features:

- Holdings management (NACSIS Cloud App)
- Bibliographic and authorities management:
  - Copying of cataloging from NACSIS to Alma (NACSIS Cloud App)
  - Contributions from Alma to NACSIS
- NACSIS member-information management (NACSIS Cloud App)
- MARC21 to/from CAT-P crosswalk

For additional information, see Integration with NACSIS-CAT/ILL.

Integration of NACSIS-ILL Resource Sharing

The integration of the Japanese NACSIS-ILL Resource Sharing system with Alma makes it possible to create new NACSIS-ILL borrowing and lending requests in Alma, and to manage the entire workflow of borrowing and lending requests within Alma. It supports the following features and processes:

- Ability to create new NACSIS borrowing requests (NACSIS Cloud App)
- A sync job to retrieve NACSIS ILL request statuses into Alma
- Resource Sharing workflow is performed within Alma, and actions are pushed to NACSIS, including the following actions:
  - Borrowing-request actions: Receive, Return, Cancel, Renew Request, Accept, Callback
  - Lending-request actions: Ship, Check In, Reject, Renew Reply, Accept, Callback

For additional information, see Integration with NACSIS-ILL.

JP-KBART Support

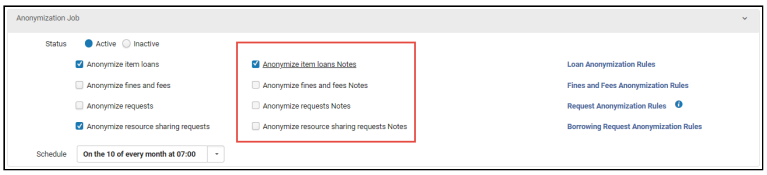
The Alma portfolio loader can import JP-KBART portfolios of electronic resources from vendors to the library's electronic collections. For additional information, see Managing Electronic Resources.

Watch the Load Portfolios to a Collection Using KBART Format video (2:00 minutes).

Anonymization of Notes in Requests and Other Records

May 2023 Fulfillment

At times, personal information is entered into the Notes attached to requests and other records related to patrons. Alma's anonymization feature has therefore been expanded to make it possible to delete Notes as well as other patron information from closed loans, fines and fees, requests, and resource-sharing requests. Institutions can configure the anonymization job (Fulfillment - Handle Historical Archiving) to remove Notes from any or all of these sources. For additional information, see Configuring Fulfillment Jobs.



New anonymization options

Option for Items Returned from Reading Rooms to Be Restored to Permanent Locations Immediately

May 2023 Fulfillment

A new option in the configuration of a reading-room circulation desk, **Restore from reading room at checkin**, makes it possible for items that have been temporarily moved to reading rooms to appear in Alma and in Primo as being restored to their permanent locations as soon as they are checked in for final return at the reading rooms. When this option is not selected, these items are only restored to their permanent locations when they are checked in at those destinations. The terms of use (TOU) of these items are set in accordance with their current locations, so this setting affects the time at which the TOU revert to their permanent settings, including the levels of fees and fines. For additional information, see Configuring Circulation Desks.

Watch the Reading Room Functionality in Alma video (54:45 minutes).

Additional Optional Fields Can Be Added to Resource-Sharing Task Lists

May 2023 Fulfillment - Resource Sharing

New optional fields are now available for inclusion in the rows of resource-sharing task lists in the New Layout.

The following optional fields can now be added:

Lending Request Task Lists		Borrowing Request Task Lists	
Column 1	**Column 2**	**Column 1**	**Column 2**
• OCLC Number • LCCN • Issue	• Internal Identifier • Additional Infor • Pickup Location	• OCLC Number • LCCN • Issue	• Internal Identifier • Additional Infor • Pickup Location

Lending Request Task Lists		Borrowing Request Task Lists	
• Volume (book) • Volume (article) • Pages • MMS ID	• Level of Service • Barcode • Request printed • Date for Reply • Update date	• Volume (book) • Volume (article) • Pages • Request Note • MMS ID	• Level of Service • Barcode • Update date

These fields are hidden by default. You can choose which fields to include in your task-list displays, and where in the record display they should appear, thereby improving the visibility of those fields that are most important to you. To do so, in the task-list page, open the **Customization menu** (

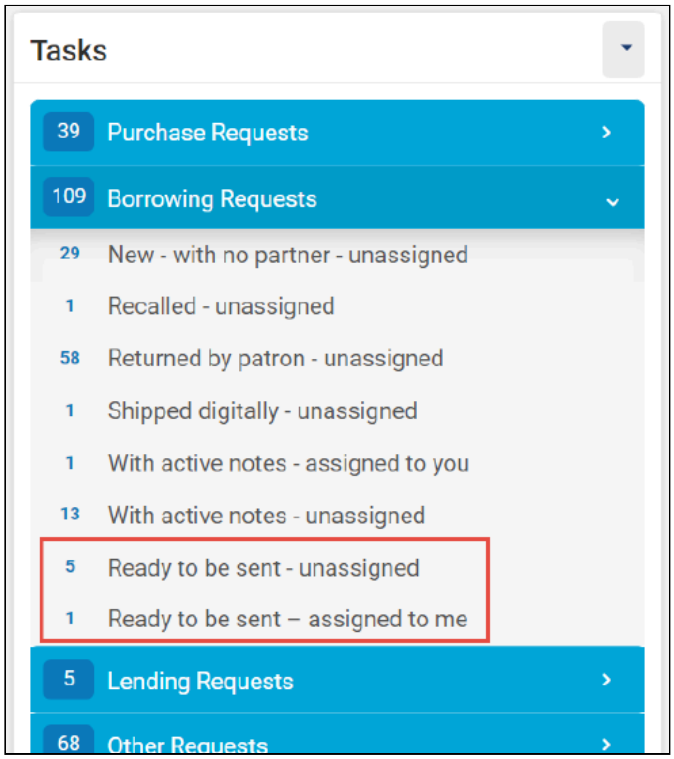
), and then select **User customization > Record customization**. For additional information, see New Layout 2022.

Borrowing Requests with "Ready to Be Sent" Status in Tasks List

May 2023 Fulfillment - Resource Sharing

NERS Enhancement (ID #7934)

The **Tasks** list of **Borrowing Requests** now includes links for borrowing requests that have the status **Ready to be sent** ("unassigned" and "assigned to me"). For additional information, see The Alma User Interface.



"Ready to be sent" borrowing requests in the Tasks list

New Layout for Resource-Sharing Task Lists Is Now the Exclusive Option

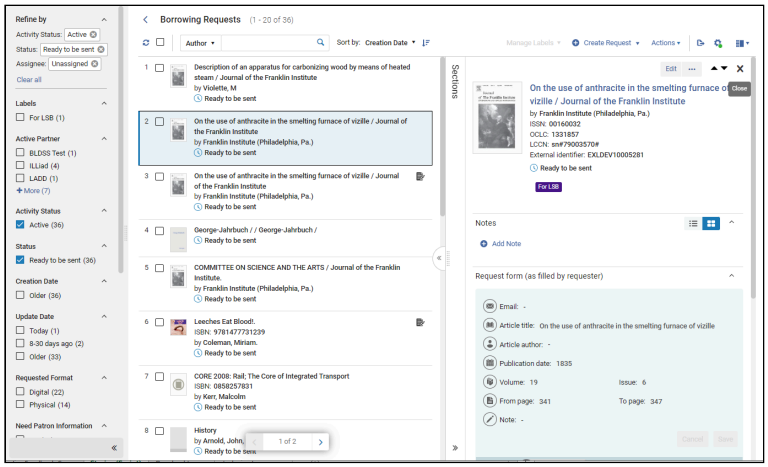
May 2023 Fulfillment - Resource Sharing

The New Layout of Alma task lists is now the only available interface for the Borrowing Requests and the Lending Requests task lists. Users can no longer opt-out of this layout and use the previous layout.

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.

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



Borrowing Requests task list - New Layout with Details pane open

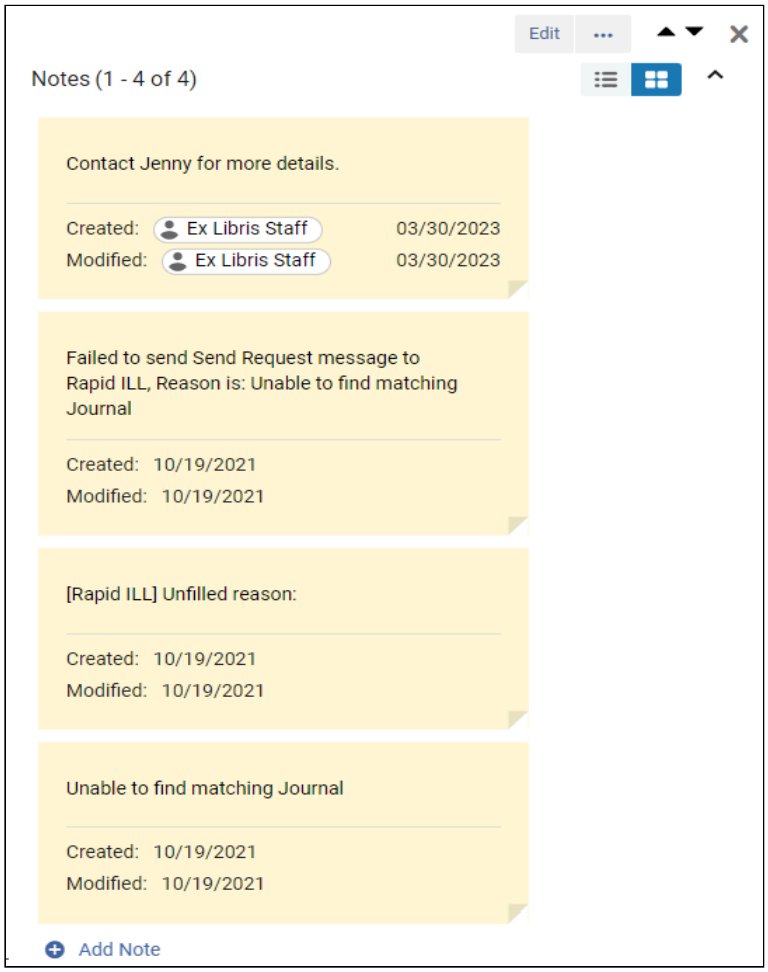
Enhanced *Notes* Section in Resource-Sharing Task Lists

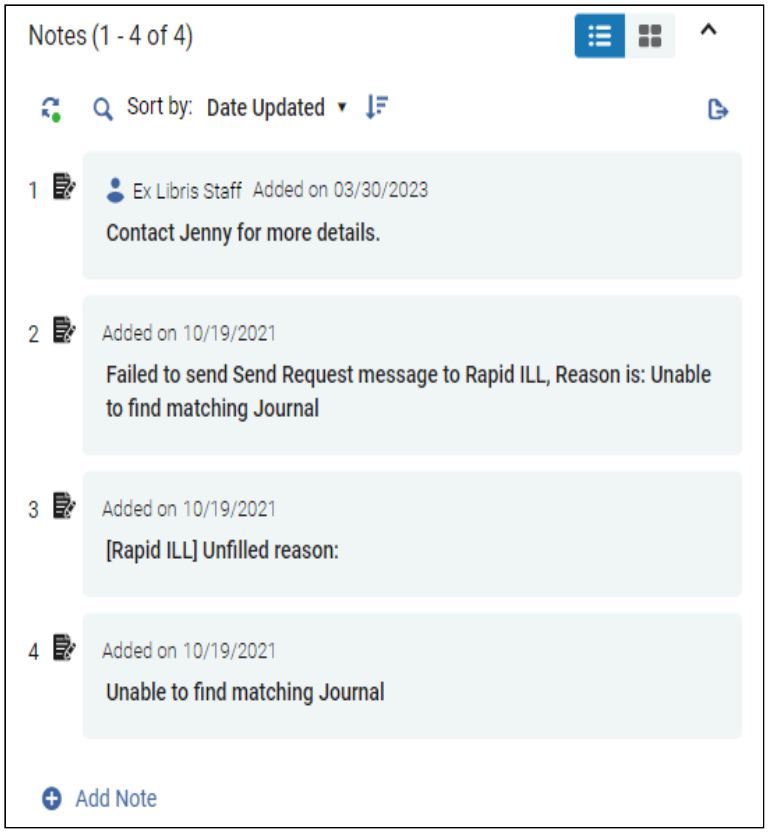
May 2023 Fulfillment - Resource Sharing

The **Notes** section that appears in the **Details** pane of the resource-sharing task lists has been enhanced. It now provides an additional display mode, **List layout** mode, in addition to the **Notes layout** mode, which was previously available. The new layout mode supports searching within and sorting of the existing notes, as well as an alternative view of the notes themselves. To switch between the modes, select an option at the top of the section (

). For additional information, see New Layout 2022.

Watch the Enhanced Notes Section in Resource Sharing Task Lists video (1:18 minutes).





Notes in Notes layout mode (left) and the new, List layout mode (right)

Unused Labels Automatically Removed from Resource-Sharing Task Lists

May 2023 Fulfillment - Resource Sharing

Idea Exchange

Labels in resource-sharing task lists that are not attached to any records are now automatically removed from the list of available labels. This clears unnecessary clutter, making it easier to work with the list of labels. For additional information, see New Layout 2022.

Ship Digitally Directly from Download Electronic Resource Screen

May 2023 Fulfillment - Resource Sharing

Alma now enables you to ship a digital request directly from the **Download Electronic Resource** screen. After downloading a digital request (**Lending Request > Download Electronic Resource** action), you can now use the **Ship item digitally** action to upload the electronic resource directly from the **Download Electronic Resource** screen. Additionally, more metadata is now available on this screen.

Ship item digitally

The borrower then receives the **Notification Item Letter** with the resource attached or a link to download the resource.

For more information, see Handling Requests for Digital Resources.

Sunset of the Classic Metadata Editor

May 2023 Resource Management

After many years of service, the Classic Metadata Editor is retired and all work now continues in the new and improved Metadata Editor.

For more information on the new Metadata Editor, see Navigating the Metadata Editor Page.

Personalized Quick Links to Favorite Actions in Metadata Editor

May 2023 Resource Management

It is now possible to create single-click shortcuts to your most commonly used actions in the Metadata Editor. The first actions also have a dedicated keyboard shortcut.
This enables each cataloger to customize the editor to suit their workflows and needs, increasing efficiency and ease of work in the Metadata Editor.

The Metadata Editor **Quick Links** menus are similar to the Alma menus. There are separate menus for records, templates, and rules (as the available actions differ). The **Quick Links** menu, opened at any given time, is according to the action menus displayed on screen. Each cataloger can add, remove or re-order their own quick links as they prefer.

For more information, see Personalized Quick Links to Favorite Actions.

Watch the Metadata Editor Quick Links video (1:17 minutes).

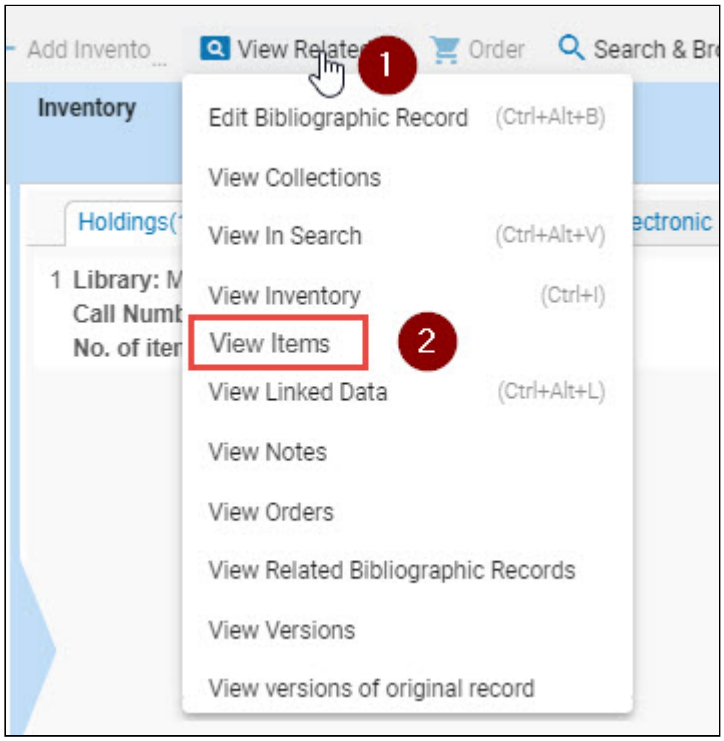
New View Items Workflow in the Metadata Editor

May 2023 Resource Management

The **View Related Data** menu now includes a new option called **View Items**, which enables quick access to the items list of the edited title or holdings record. This feature is particularly beneficial for cataloging physical resources and can enhance the efficiency of the process.

For more information, see Metadata Editor - View Related Data Menu.

Watch the View Items Action in the Metadata Editor video (1:02 minutes).



View Items option

Shortcut Customization UI Preference for Alt+Number Applied to Metadata Editor Menu Shortcuts

May 2023 Resource Management

Users that select to disable the Alt+Number shortcut in their UI preference customization will also disable it for the Metadata menus. For users who rely on the Alt+Number shortcuts, we suggest using the Numbers Row on the keyboard instead of the Numpad numbers. This is because Numpad numbers may trigger external keyboard shortcuts as well.

For more information, see Global Alma Hot Keys.

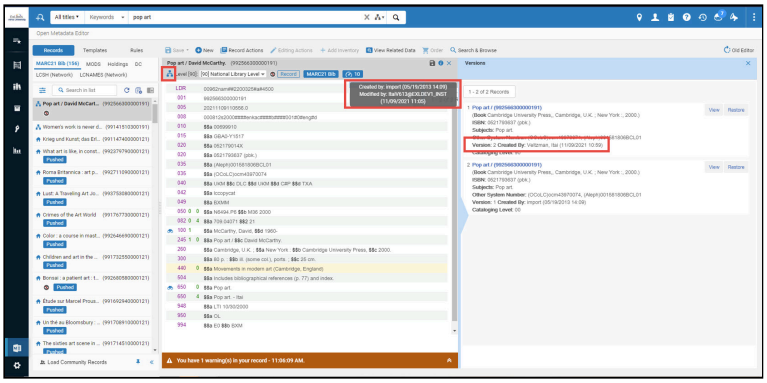
Adding Cataloger Information to Record Versions from Other Network Members in Metadata Editor

May 2023 Resource Management

When looking at the version information of a Network Zone record in the Metadata Editor that was created by another member institution, the cataloger could previously only see the member institution information. Networks can now enable seeing both the member institution and the name of the cataloger that created the version in it, by setting the customer parameter `show_version_cataloger_name_for_other_members` in their Network Zone institution (this will affect all members in the network).

For changes made by catalogers within the network, the version they create displays the network institution information.

This feature enables catalogers in consortia to easily identify the correct cataloger from the correct institution who updated the record, making cooperation and collaboration in the shared catalog more efficient.



Record versions in consortia

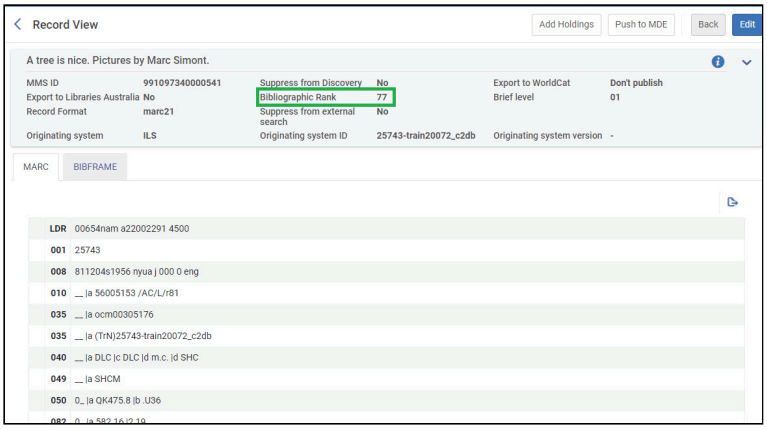
Bibliographic Ranking in Metadata Editor and Record View

May 2023 Resource Management

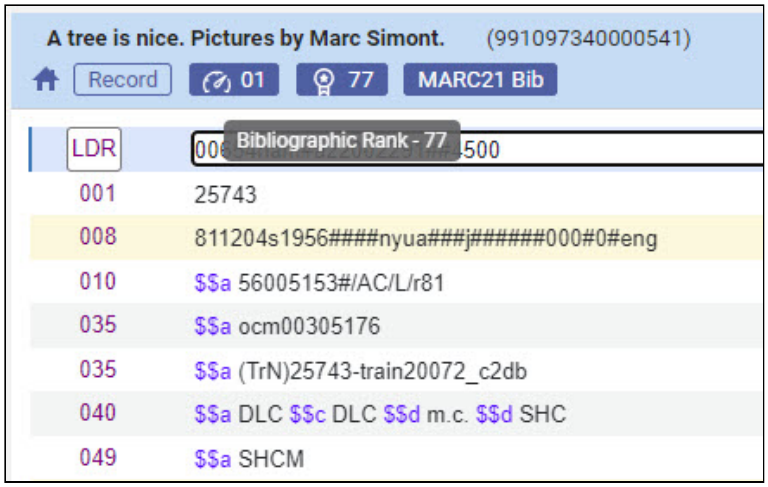
Alma now evaluates the completeness and richness of MARC 21 bibliographic records based on information that includes identifiers, names, subjects, informative LDR and 008 fields, publication details, etc. This is reflected in a new Bibliographic Rank, meant to provide a helpful tool for libraries to identify records that may need attention. The new bibliographic rank is displayed in the record view and in the Metadata Editor.

For more information on the bibliographic ranking, refer to:

- For Record View, see Record View Summary.
- For Metadata Editor, see Creating a MARC 21 Bibliographic Record.



Bibliographic Ranking in Record View



Bibliographic Ranking in Metadata Editor

Searching Records by Bibliographic Rank

May 2023 Resource Management

A new search option for titles is added to aid libraries in identifying records that require attention. This option enables librarians to search for titles within a specific range of the new Bibliographic Rank. The search option is available after the completion of the May indexing process.

Enhanced Support for Parallel Description in Another Language of Cataloging Related Records Using MARC21

May 2023 Resource Management

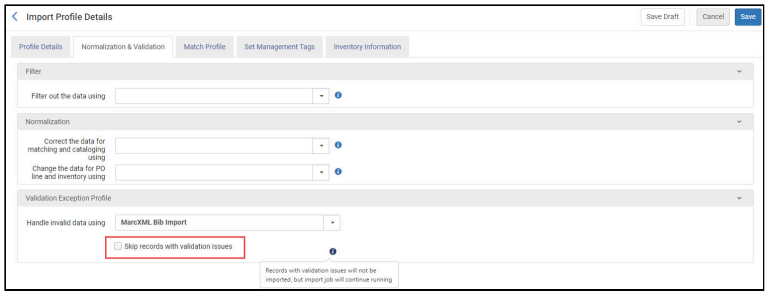
The MARC21 standard added a new type of analytical linking called "Parallel Description in Another Language of Cataloging" (788). Alma's workflows, such as publishing profile enrichment which considers analytical linking, now support this new type.

Skip Validations Option Added to the Import Mechanism

May 2023 Resource Management

Previously, users were required to manually resolve import validation errors that occurred during the import process. This caused the import process to stop from the point the validation process occurred. The remaining records to be imported were not processed as a result. Now, the import mechanism was enhanced to provide an option to skip validations and enable the process to complete automatically without requiring manual handling.

For more information on the import profile configuration, see Creating/Editing an Import Profile.



Skip records with validation issues option

Refine Related Records Enrichment as Part of the General Publishing Profile

May 2023 Resource Management

As part of the general publishing process, the process of enriching related records is more sophisticated. It now involves creating an inventory of related records based on the data provided in the bibliographic record.

Pointing to a specific item of a related record is cataloged as follows:

	Value in $g (MARC21 / KORMARC) $v (Unimarc / CNMARC)	Item field
Year	**yr:**	Chron I
Volume or barcode	**no:**	Enum A
Issue	**iss:**	Enum B
Part	**pt:**	Enum C
Pages	**p:**	pages

For more information, see Add holdings/items of related records.

Searching for Standard Number Source

May 2023 Resource Management

Once the semi-annual indexing is complete in your environment, a new advanced search index called **Standard Number Source** will be available. This index enables you to search for the standard number source indicated in the following fields:

- 015 $$2
- 016 $$2
- 022 $$2
- 024 $$2

Semi-Annual Re-indexing

May 2023 Resource Management

During May, 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 May semi-annual re-indexing. See the list below:

- Searching for Standard Number Source, see here.
- Searching Records by Bibliographic Rank, see here.
- Edition Information Display in Search Results Enhanced to Support ISBD Cataloging, see here.
- Field 070 Added to NAL Call Number Index, see here.
- Enhanced Support for Parallel Description in Another Language of Cataloging Related Records Using MARC21, see here.
- UNIMARC Bibliographic 7XX $4 Includes a Closed List of Values, see here.

New Authority Index: **Other Standard Identifier** (024)

May 2023 Resource Management

The staff search now includes a new identifier called **Other Standard Identifier (024)** as part of its authority index. For more information, see MARC 21 Authority Search Index Mapping.

Import Report Enhancement

May 2023 Resource Management

Enhancements have been made to the import reporting process, with the addition of separate reports for single matches and multi-matches. For more information, see Viewing an Import Profile Job Report.

New Authorized Field CNMARC 702

May 2023 Resource Management

An additional access point is incorporated into the CNMARC 702 field.

Add **Not Contains** or **Not Equals** to Alma Titles and Inventory Search Indexes Where **Contains** or **Equals** Currently Exist

May 2023 Physical Resource Management

NERS Enhancement (ID #7948)

It is now possible to run **Not Equals** and **Not Contains** searches in the titles, inventory & authority searches, enabling more powerful and detailed searches in the catalog. As part of the development:

1. **Not Contains** search operators were added to indexes where the index supported a "Contains" search.

2. **Not Equals** search operators were added to indexes where the index supported an "Equals" search.

Note

When searching with a lower-level index (an index that belongs to an entity contained in the searched entity, for instance, searching for physical holdings by item data, searching for electronic titles by portfolio data, etc.), a **not contains** or **not equals** search retrieves results where one or more entity matches the query. For example, when searching for physical titles where holdings' location "not equals" stacks - if a title has two holdings, one fulfilling the condition (location=reference) and another not meeting it (location=stacks) - the search finds this title since it has holdings that match the search criteria.

Due Date Added to Items List

May 2023 Physical Resource Management

Idea Exchange

Presently, operators cannot easily view the due date of items in the **Items List** and need to check each loan individually. A new column can now be added to the physical items table, containing the due date of items on loan.

For more information, see Working with the List of Items.

New and Generic Physical Items Material Types

May 2023 Physical Resource Management

Idea Exchange

Alma now offers an increased range of physical material types, including generic options that libraries can customize according to their requirements. This update is particularly advantageous for libraries with specialized materials, such as medical libraries that lend anatomical models, as they can now tailor the available type descriptions to their specific needs.

Institutions can activate several new material types in their Alma environment, including HathiTrust Material, Fascicule, Microphone, Locker, and Musical Instrument.

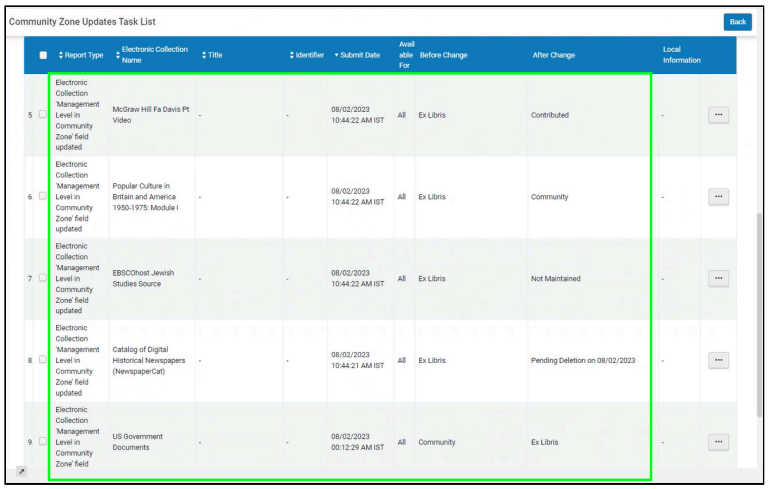
Community Zone Updates Task List to Include Indication Regarding Collection Level Management

May 2023 Electronic Resource Management

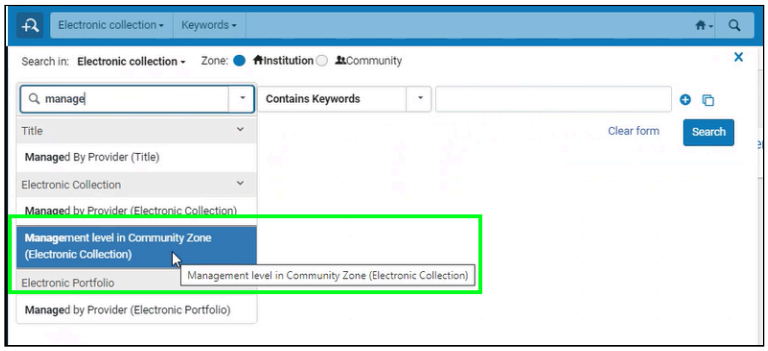
Currently, Community Zone (CZ) operation planned activity such as deletion of electronic collections are communicated in advance to Alma customers via Community Zone Release Notes. The existing **CZ Update Task List** now indicates to the institution the changes made to the CZ collection's management level, users can focus on these changes by selecting the "Electronic Collection **Management Level in Community Zone** field updated" option from the **Report Type** filter.

This is mostly relevant for institutions to see what the planned changes are to CZ content, by reviewing collections that are planned to be deleted in the near future. This enables institutions to prepare in advance for any potential change which have an impact on the institution's electronic CZ linked inventory.

Additionally, a new **Management Level in Community Zone** search index can be found under "E collection" and users can search under the Institution Zone (IZ), Community Zone (CZ), and the Network Zone (NZ).



Indication in the Community Zone Updates Task List for management level changes



New search index on the level of the collection

Note

This functionality of searching for the Management Level of an Electronic Collection is fully functional only after the semi-annual Alma re-indexing.

For more information, see Actions on a Collection Following a Community Zone Update.

Overlap Analysis Job Supports Physical as well as Electronic Titles

May 2023 Electronic Resource Management

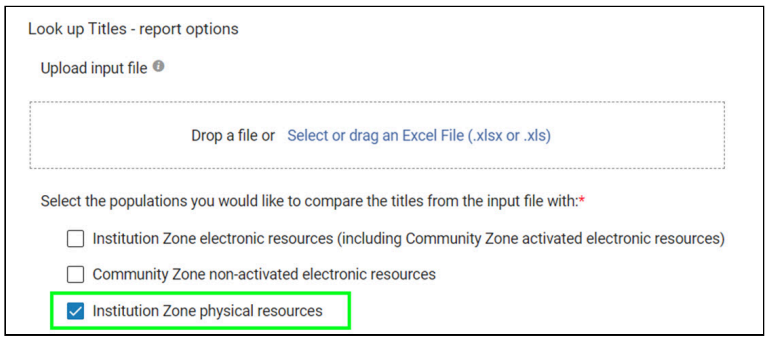
NERS Enhancement (ID #6947)

Idea Exchange

Customers have the ability to upload a list of titles and compare it with the institution's Electronic (supported) and Physical holdings (or both). This enables the institution to make informative decisions regarding titles/collections that they own or would like to purchase and as a result, potentially assist the institution to manage the financial budget expenses/savings.

For more information, see Enhanced Overlap and Collection Analysis Tool.

Watch the Overlap Analysis for Physical Titles video (2:19 minutes).



Overlap Analysis job supports physical titles

Public Access Model to Support Subscription Titles

May 2023 Electronic Resource Management

For the **Upload Electronic Holdings** of **ProQuest Ebook Central**, the only titles that were previously passed to Alma with the **Public Access Model** information are "**Owned**" titles. Now Alma facilitates the ability to attain the **Public Access Model** value also for "**Subscription**" titles. This enhancement automatically adds a "UA (Unlimited Access)" access model for all Subscription titles.

For more information, see Proquest Ebook Central Upload Electronic Holdings - Addition of Public Access Model Information.

Note

The data for existing portfolios in your institution is updated gradually.

Alma Integration with InCites

May 2023 Electronic Resource Management

The Alma Collection Report in InCites is intended to help institutions to get insights about their holdings regarding publication types, research areas, usage, and publication model trends. Data shared from Alma is used exclusively to generate this report for institutions using Alma and is not shared with other Clarivate products or services.

For more information on how to share your data with Web of Science, see the Developers Network blog regarding Journal Citation Reports (JCR) cloud app.

HAN Integration Enhancement

May 2023 Electronic Resource Management

Users of the HAN proxy who are utilizing HAN's multi-license functionality can now manage various licenses in Alma to accommodate the scenario where an electronic resource can have a distinct service per license, in the **View It** section. For example, this feature is intended to address situations where different levels of access to the E-Resource are required depending on the type of patron, such as researchers or external users. The option to enable this enhancement is controlled by the customer parameter: `han_proxy_multi_license` (located in **Alma Configuration > Resources > General > Other Settings**).

Note

Display logic rules handle these as one bulk.

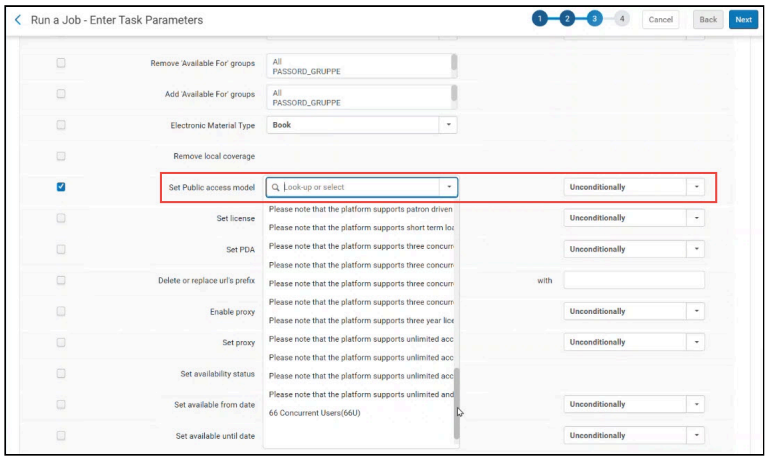
For more information, see Configuring Other Settings (Resource Management).

Change Electronic Portfolio Information Job Now Supports the Public Access Model Field

May 2023 Electronic Resource Management

The existing job **Change Electronic Portfolio Information** is enhanced by supporting the **Public Access Model** field. This enables updating the **Public Access Model** field on a predefined set of portfolios.

For more information, see Manual Jobs and Their Relevant Parameters.



Set Public Access Model field

Editable Lines in Closed Invoices

May 2023 Acquisitions

Idea Exchange

It is now possible to edit certain fields in the lines of closed invoices. This allows institutions to handle data corrections

caused by manual errors and/or in cases in which some data did not migrate to the invoice record as it should have (relevant mostly for subscription management).

The following fields of an invoice line can be edited when an invoice is closed:

- Subscription dates range (unless *Accrual mode* is enabled)
- Additional information
- Check subscription date overlap
- Price note
- Note
- Reporting Codes 1-5

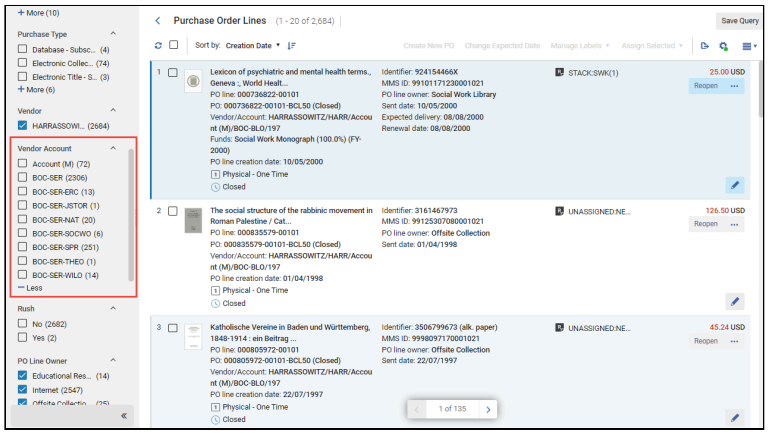
Editing of closed invoice lines can be performed manually in Alma or through the API (except for Reporting Codes 4 and 5). Institutions can block the option to edit closed invoice lines by changing the setting of the **allow_edit_closed_invoice_line** Customer Parameter to `false`. For additional information, see Creating Invoices.

Watch the Edit Closed Invoice Lines video (1:04 minutes).

New PO Line Facet: Vendor Account

May 2023 Acquisitions

A new facet has been added for PO lines: *Vendor Account*. This facet is now available in the **Order lines** search results and in the **PO Lines** tab of the Vendor details page (**Acquisitions > Acquisitions Infrastructure > Vendors > [select vendor] > PO Lines tab**). Institutions can now very easily and quickly filter a list of PO lines by vendor accounts, which can improve workflows when there is a need to focus on PO lines from a specific vendor account.

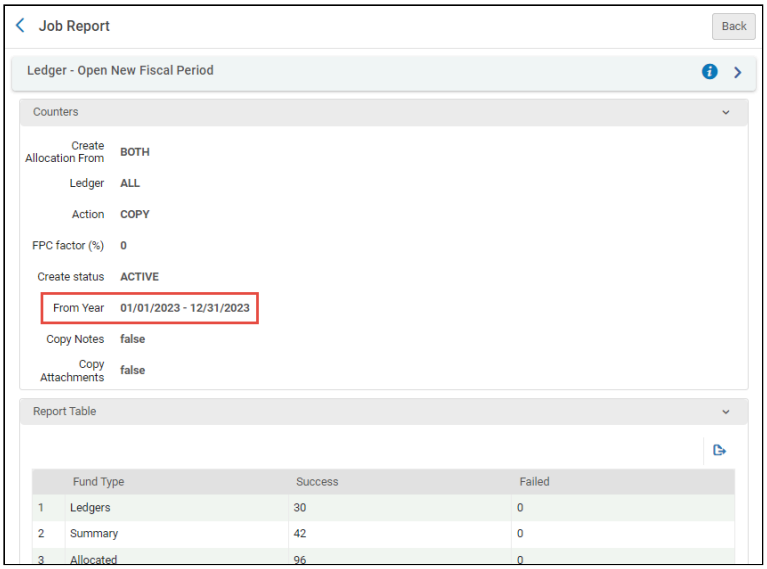


Vendor Account facet in Purchase Order Lines search results

From Year Now Included in Rollover Ledgers Report

May 2023 Acquisitions

The **From Year** of the Rollover Ledgers job report is now displayed in the report results. This can be helpful for analysis as well as for customer support.



From Year in Rollover Ledgers Job Report

New SAML Certificate

May 2023 Administration and Infrastructure

The current DigiCert SAML Certificate will expire on June 8th. If your institution uses this certificate, Ex Libris recommends that you consult with the IT dept. in your institution, and if required, replace the certificate for Alma and/or Primo VE. If replacing the certificate, this must be done in coordination with your IDP. For more information, see Replacing a Signed Certificate.

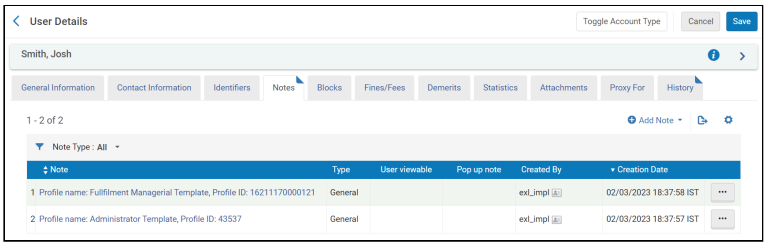
Note

If your institution uses ADFS, Ex Libris highly recommends that you replace the certificate to avoid any complications.

User's Role Profiles Now Recorded in Account Notes

May 2023 Administration and Infrastructure

Users' role profiles are now recorded in the user-account's **Notes** tab when they are applied. This makes it possible to find all users to which a particular role profile was applied in the past, by searching for the role profile's name or ID number. A logical set of these users can also be saved, and used as input for the Update/Notify Users job, which can update the roles assigned to the users in the set. For additional information, see Roles and Registration Configuration.



Notes recording the application of role profiles to a user account

Enhanced *Sections* Component for New Layout of Record Lists

May 2023 Administration and Infrastructure

In the New Layout of record lists, the **Sections** menu of the **Details** pane, which provides quick navigation between record sections, has been redesigned and enhanced. It is now located in the center of the page, and can be expanded and collapsed as desired, making it more flexible and easier to work with. In addition, it provides a variety of convenient features, including:

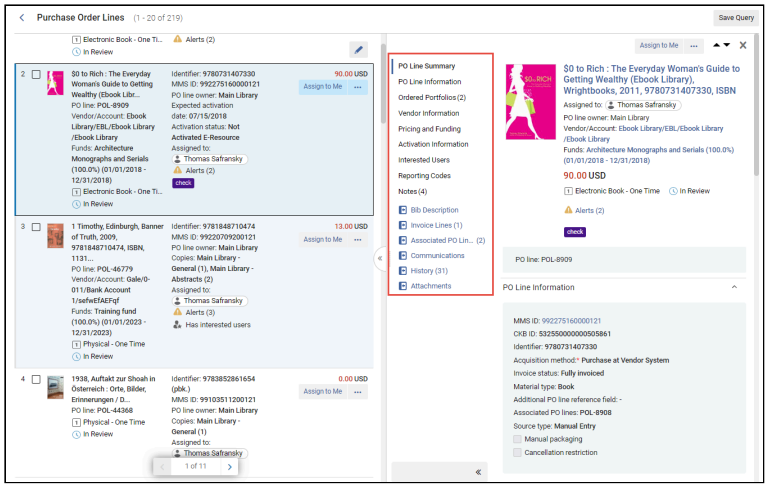
- Display in Split-view mode, with panes that can be resized
- Counters in parentheses indicating the number of entities currently defined in the section (for sections that may or may not contain any data - e.g., **Notes (2)** to indicate that two notes exist in the **Notes** section)
- Indicators (*) beside sections that contain mandatory fields (in Edit mode only)
- Links to sections that open in a sliding panel (in the old layout) rather than in the **Details** pane itself (below the sections list - identified by link icons

)

The new **Sections** menu has thus far been implemented in the following record lists:

- Resource-sharing task lists
- PO line lists (early testers only)
- Analytics object lists

For additional information, see New Layout 2022.



Enhanced Sections menu

Enhanced *Forms* Component for New Layout of Record Lists

May 2023 Administration and Infrastructure

In the New Layout of record lists, the form components - the sections of records in the **Details** pane that are used to view and edit information about the entity described in the record - have been redesigned and enhanced. They now provide a variety of convenient features, including:

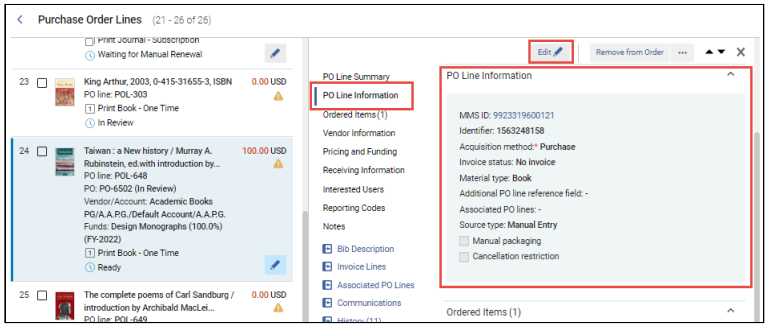
- Visual emphasis on field borders
- An **Edit** / **Save** button at the top of the **Details** pane that makes it possible to edit multiple forms in a record with a single **Edit** action and a single **Save** action
- Improved messaging system for displaying alerts about errors or missing information
- When hovering over an editable field, the border color changes (in Edit mode only)
- Visual differentiation between editable, read-only, and disabled fields
- Indicators (*) beside mandatory fields
- Display in Split-view mode, with panes that can be resized

Additional enhancements are planned for upcoming releases.

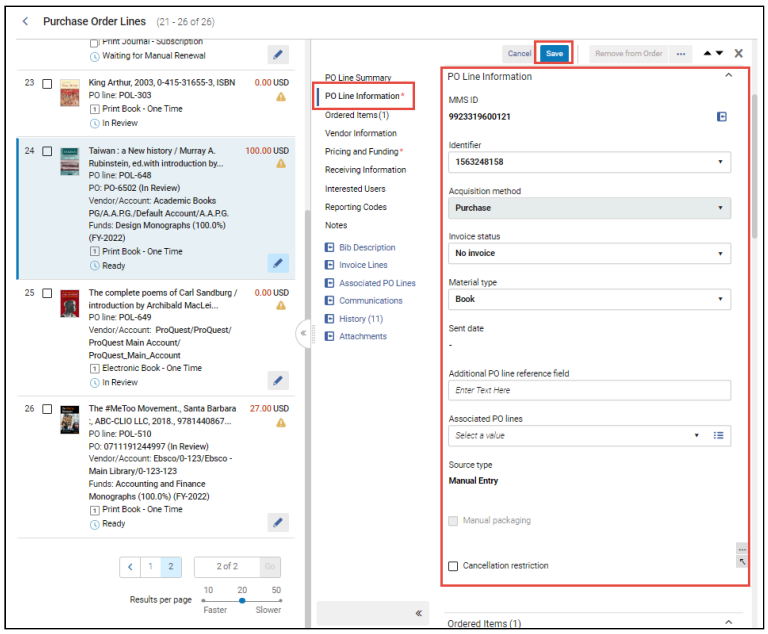
The new form components have thus far been implemented in the following record lists:

- PO line lists (early testers only)
- Analytics object lists

For additional information, see New Layout 2022.



PO Line Information Section and PO Line Information Form in View Mode (With Edit Option)



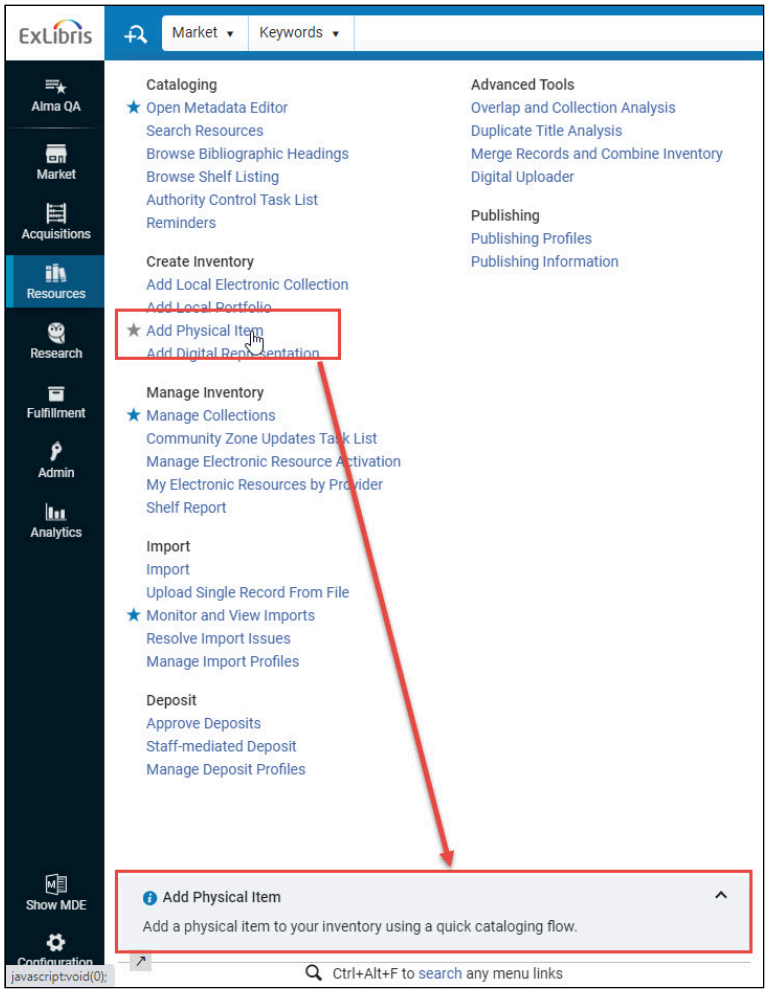
PO Line Information Section and PO Line Information Form in Edit Mode (With Save Option)

Detailed Description for Menu Items

May 2023 Administration and Infrastructure

In order to enhance ease of use and clarity in the Alma menu, a new feature has been implemented. Users can now hover over a link (before clicking it) to view a brief description in the "Additional Information" area, located at the bottom of the menu. To activate or deactivate this feature, simply click the arrow in the "description" box.

Watch the Detailed Description for Alma Menu Items video (0:49 minutes).



Additional Information for menu items

Enhanced Advanced Search Functionality with Fast Erasing Capability

May 2023 Administration and Infrastructure

The "fast erasing" new feature is implemented in Advanced search, enabling users to expedite their search process. The feature includes the ability to "erase" search fields by clicking an "X" rather than selecting the text and then deleting it.

Note

This functionality is currently only available in the updated Advanced search sections such as Physical Holdings.

Library Independence for Alma Analytics

May 2023 Analytics

The **Library Independence** feature allows you to restrict the data that appears in Analytics reports to include only data from a specific library. This prevents the users from viewing unauthorized data and enables librarians to focus only on the relevant data for their libraries.

For more information, see Working with Library Independence.

Analytics New Layout Developments

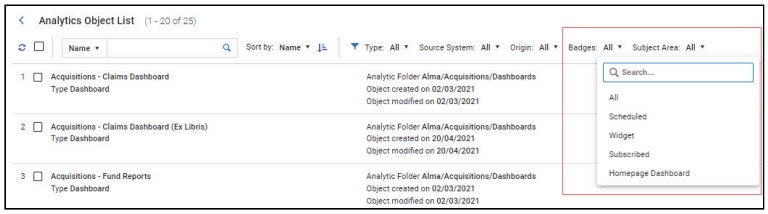
The following new features are released relating to the new Alma Analytics Layout:

Filter Analytics Object List by Badges

May 2023 Analytics

You can now filter the Analytics Object List by the following badges:

- Scheduled
- Widget
- Subscribed
- Homepage Dashboard



For more information on the Analytics Object List, see Working with Analytics Objects.

Change to New Analytics User Interface Rollout Schedule and Known Issues

May 2023 Analytics

The schedule of the phased rollout of the new analytics user interface was changed. The new schedule is as follows:

- May release – The previous version of the interface is displayed by default, but you can configure Alma Analytics to display the new version.
- August release – The new version of the interface is displayed by default, but you can configure Alma Analytics to display the previous version.
- November release – The new version of the interface is the only version available.

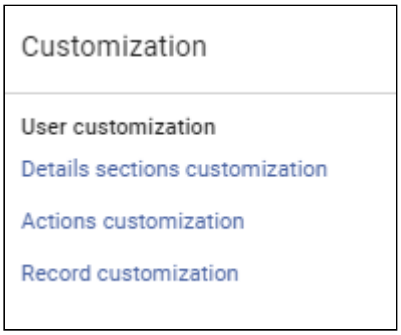
There are several known issues regarding scheduling reports when moving to the new analytics interface. For more information, see Transitioning to the New Analytics User Interface.

Analytics Object List Now Customizable

May 2023 Analytics

You can now customize many elements of the Analytics Object List and determine which section appear and in what order. To customize the Analytics Object List, select the customization icon

at the top right of the page. The following options are available that enable you to configure the sections of the edit view, the actions available for the records, and the elements displayed in the record view:



Analytics Object List Customization

For more information, see Customizing the Analytics Object List.

Out-of-the-Box Reports Removed from Analytics Objects List

May 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.

Exporting Analytics Object List to Excel

May 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

Report Preview Available for Data Visualization Reports

May 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.

Scheduling Data Visualization Reports

May 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 Menu Features Now Support Analytics

May 2023 Analytics

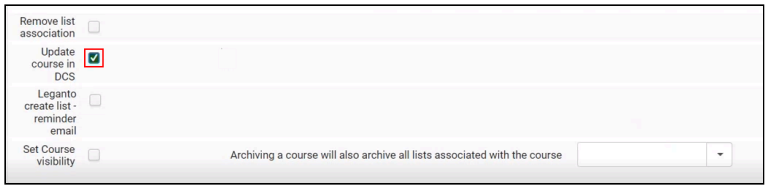
The following Alma menu features now support Alma Analytics:

- Quick Links
- Recent Pages
- Search for Any Link

For CLA Users (UK): Course Synchronization Between Leganto and the DCS

May 2023 Fulfillment - Course Reserves

Librarians who have courses in the DCS that do not match the Leganto courses can now override the course in the DCS with information from Leganto. When the integration profile Digital content store is active, the option to update DCS courses is now available from the **Course Bulk Update** job (**Admin > Manage Jobs and Sets > Run a Job**). When **Update course in DCS** is checked in the **Course Bulk Update** job, librarians can now update their DCS courses in bulk to match their Alma courses.



Update course in DCS

The following parameters are all automatically updated in the DCS course based on the values in Alma:

- Course code
- Course name
- Number of weeks
- Number of participants
- Processing department
- Instructor name
- Instructor email
- Course status
  - Active - sets the DCS course to Active
  - Archived - sets the DCS course to Archived
  - Inactive - sets the DCS course to Archived

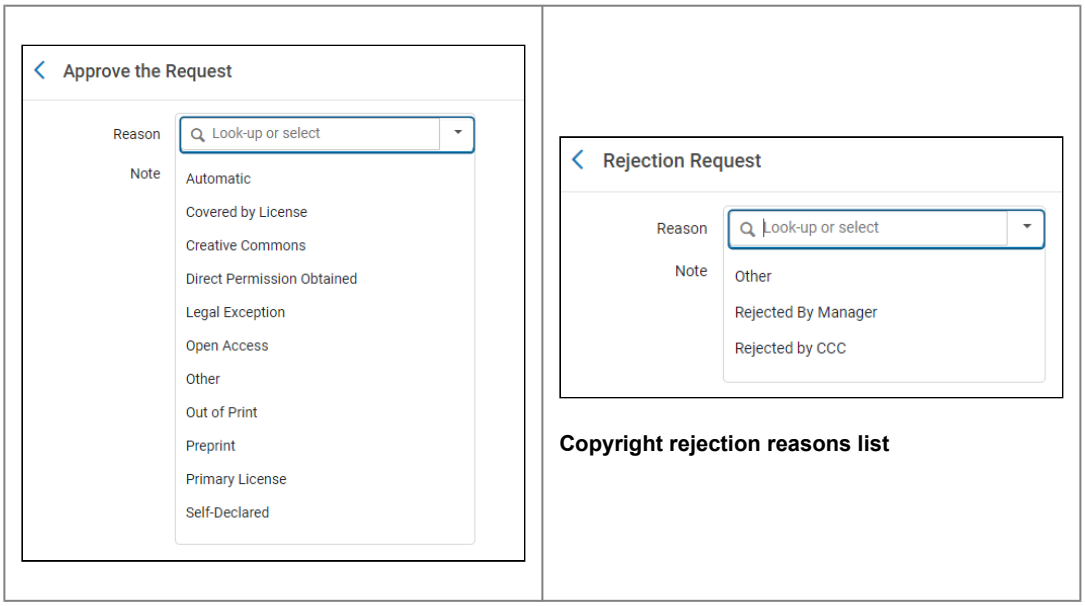
The job event now includes a **Failed to update DCS** event.

For more information, see Course Synchronization Between Leganto and the DCS.

Customize Copyright Approval and Reject Reasons

May 2023 Fulfillment - Course Reserves

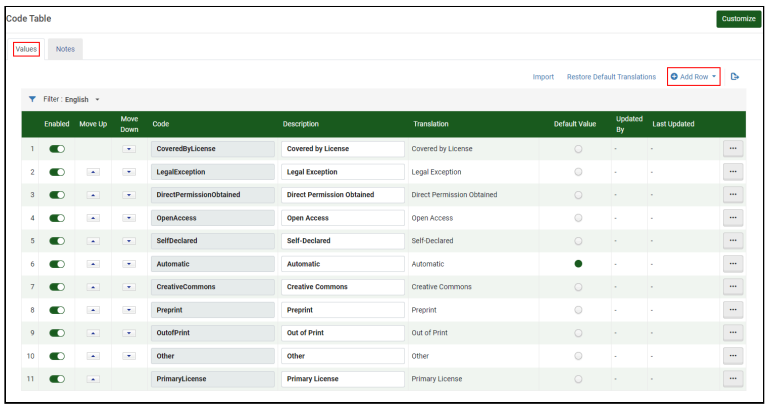
You can now customize the copyright approval and reject reasons (**Fulfillment > Resource Requests > Approval Requests List**).



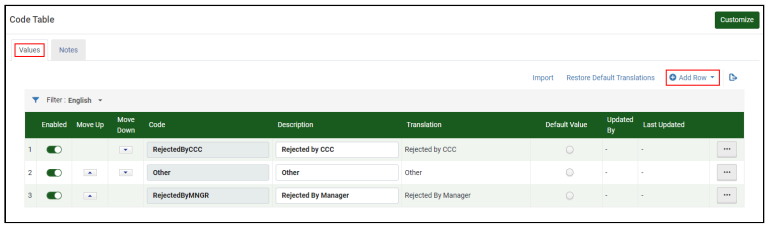
Copyright rejection reasons list

Copyright approval reasons list	

You can customize the approval and reject reasons using the **Configuration > Fulfillment > Copyright Management > Copyright approval reasons** and **Configuration > Fulfillment Copyright Management > Copyright reject reasons** tables. You can edit any of the existing reasons or use the **Add Row** button to add new reasons. The reasons can now be translated to the Alma display language.



Copyright approval reasons configuration



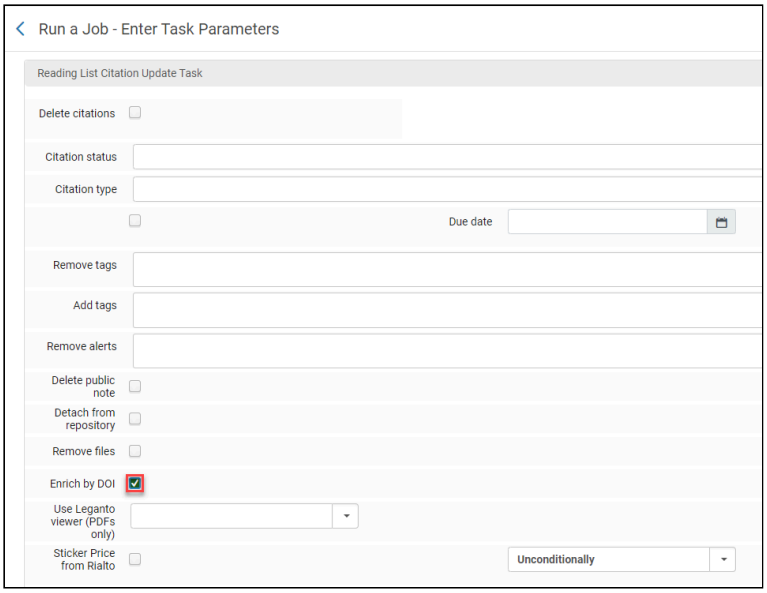
Copyright rejection reasons configuration

For more information, see Customizing Copyright Approval and Reject Reasons.

Enrich Multiple Citations Using DOI

May 2023 Fulfillment - Course Reserves

Leganto can now automatically enrich citations containing a DOI with additional metadata in bulk by checking **Enrich by DOI** in the **Reading List Citation Update Task** job (**Admin > Manage Jobs and Sets > Run a Job**). The default setting for this checkbox is unchecked.



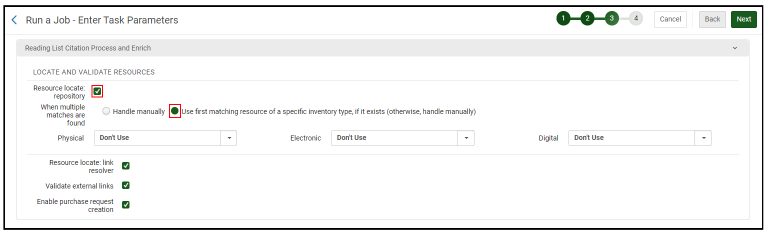
Option to Enrich by DOI

For more information, see Enriching Citation Metadata.

Find Matching Bibliographic Records for Multiple Citations - Run Resource Locate on Citation Sets

May 2023 Fulfillment - Course Reserves

It is now possible to locate a set of citations by using the new **Reading List Citation Process and Enrich** job (**Admin > Manage Jobs and Sets > Run a Job**). **Perform locate on type** is not included in this new version of the Process and Enrich Citations job (**Fulfillment > Advanced Tools - Reading Lists > Process and Enrich Citations**). When **Resource locate repository** is checked (this checkbox is unchecked by default), you can choose to either manually handle citations when multiple matches are found or use the first matching resource for a specific inventory type. When **Use first matching resource of a specific inventory type, if exists (otherwise handle manually)** is selected, drop-down lists for **Physical**, **Electronic**, and **Digital** are displayed. The default priority selections for these drop-down lists are set according to your priority settings in **resource_locate_multiple_matches_priority** (**Configuration Menu > Fulfillment > General > Other Settings**).



Reading List Citation Process and Enrich job

Note

The Process and Enrich Citations job (**Fulfillment > Advanced Tools - Reading Lists > Process and Enrich Citations**) is still available for use.

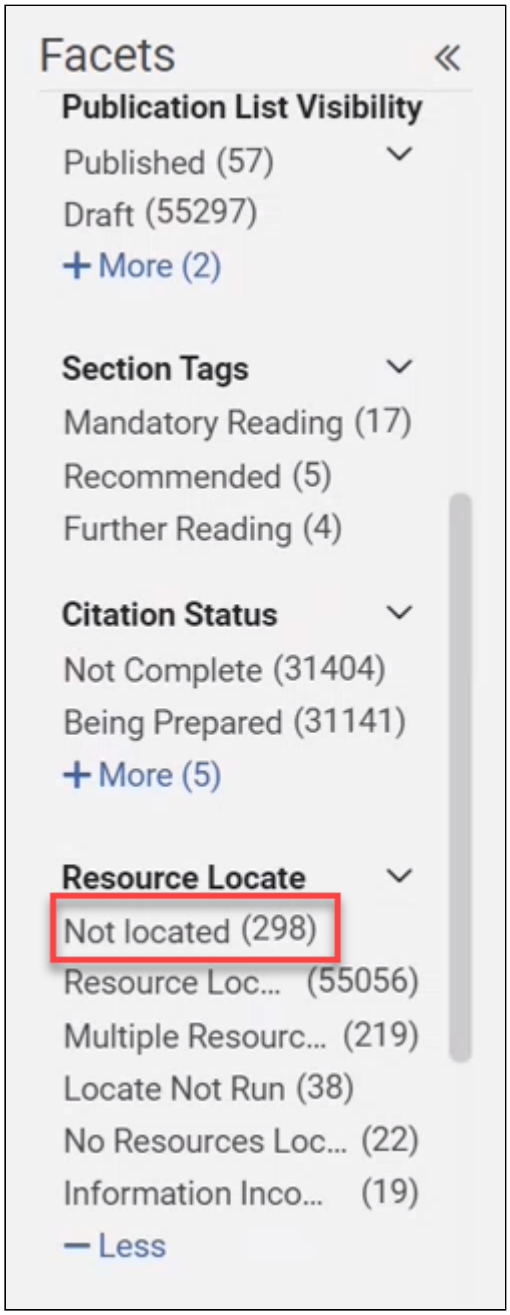
You can use the **Reading List Citation Process and Enrich** job to perform a resource locate on a specific set by selecting

a specific facet, such as the new **Not located** facet, which returns all citations that do not have a **Resource located** status.

Easily Identify Citations that are Not Located

May 2023 Fulfillment - Course Reserves

The **Resource Locate** facet (**Fulfillment > Course Reserves > Citations**) now includes a **Not Located** facet which accounts for all resources with the statuses **Multiple Resources Located**, **Locate Not Run**, **No Resources Located**, **Locate Failed**, and **Information Incomplete**.



Not located

For more information, see Reading List Citation Process and Enrich and Manual Jobs on Defined Sets.

Alma May 2023 Additional Enhancements

- **May 2023 Resource Management SF: 05320435**
  The UNIMARC Bibliographic profile now includes a closed list of values for 7XX fields in the subfield $4. For more information, see Working with Bibliographic Records. The **UNIMARC Bibliographic 7XX $4** enhancement is in continuation of the enhancements included in the February 2023 Release. For a list of the enhancements in the February 2023 release, click here.
- **May 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.
- **May 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.
- **May 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.
- **May 2023 Digital Resource Management**
  The Universal Viewer now supports the 3D formats .glb and .gltf. Note that for .gltf, files that include pointers to additional external files are not supported.
- **May 2023 Analytics**
  The **Item Receiving Date** dimension was added to Physical Items subject area. It includes fields that enable you to create reports on how many items were received by the library per period of time.

  For more information on the Physical Items subject area, see Physical Items.

- **May 2023 Analytics SF: 06447308 06683567**
  The **DC Description** field was added to the Bibliographic Details dimension in all subject areas in which it appears. It displays the description of the DC record.

  For more information on the Bibliographic Details dimension, see Bibliographic Details.

- **May 2023 Analytics SF: 06577926**
  The **Item Issue Date (Calendar)** field was added to Physical Items > Physical Item Details. It displays the issue date of the physical item.

  For more information on the Physical Items subject area, see Physical Items.

- **May 2023 Fulfillment - Resource Sharing**
  The following fields are now available in the following letters (**Configuration > General > Letters > Letters Configuration**):

Field Label	XML Field
Ful Incoming Slip Letter	
Group Qualifier	group_qualifier

Field Label	XML Field
Renewals Allowed	renewals_allowed
Borrowing Library Address Information	borrowing_library_address
Partner Code	partner_code
Resource Sharing Shipping Slip Letter	
Renewals Allowed	renewals_allowed
Ful Resource Request Slip Letter	
Group Qualifier	group_qualifier
Renewals Allowed	renewals_allowed
Borrowing Library Address Information	borrowing_library_address
Partner Code	partner_code
Resource Sharing Receive Slip Letter	
Group Qualifier	group_qualifier
Library Location for Institutions with Multiple Libraries	pickupLibraryName
Renewals Allowed	renewals_allowed
Borrowing Library Address Information	borrowing_library_address
Partner Code	partner_code
Resource Sharing Return Slip Letter	

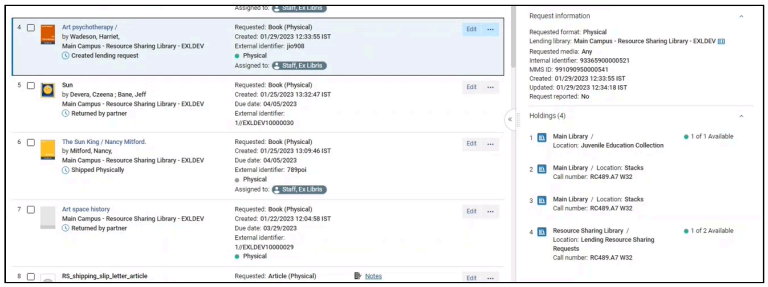
Field Label	XML Field
Group Qualifier	group_qualifier
Library Location for Institutions with Multiple Libraries	pickupLibraryName
Renewals Allowed	renewals_allowed
Borrowing Library Address Information	borrowing_library_address
Borrower Overdue Email Letter	
Partner Code	partner_code

For more information, see Configuring Alma Letters.

- **May 2023 Fulfillment - Resource Sharing**
  Titles with physical holdings now display the **Holdings** information (name, shelving location, call number, and availability) in the right pane.

Note

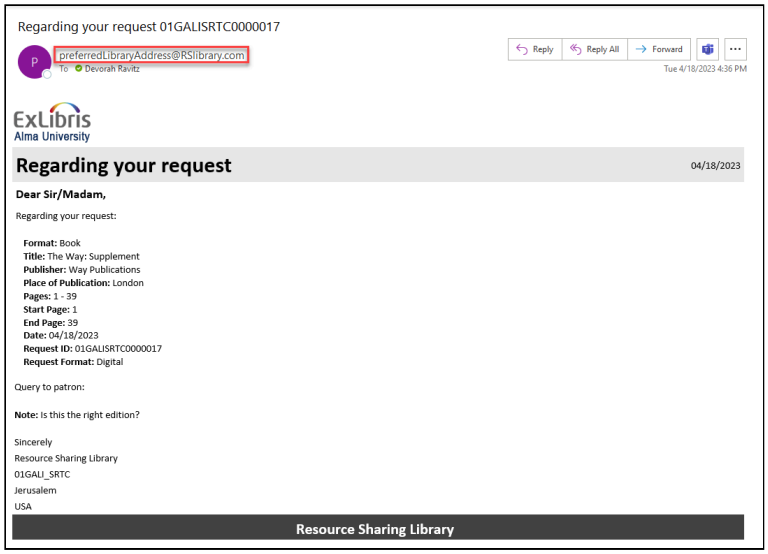
The **Holdings** information displays whatever information is available. When some of the **Holdings** information is not available, the field for the unavailable information does not appear.



Holdings

- **May 2023 Fulfillment - Resource Sharing SF: 06618079 06664331**
  You can now set the default sent from email address to be different from the main library email address. When **rs_use_addressfrom_letter_param** (**Fulfillment Configuration Menu > General > Other Settings**) is set to `true` (default `false`), instead of letters being sent from the **Preferred Email Address** set in **Fulfillment > Library Management > Contact Information**, the email is sent from the letter configuration **addressFrom** (**Configuration > General > Letters > Letters Configuration**) on the following letters:
  - Externally Obtained Letter
  - Lending Recall Email Letter
  - Borrower Claim Email Letter
  - Ful Cancel Email Letter

- Ful Renew Email Letter
- Ful Incoming Slip Letter
- Ful Damaged Email Letter
- Ful Lost Email Letter
- Borrower Overdue Email Letter
- Ful Outgoing Email Letter
- Borrower Receive Email Letter
- Borrower Return Email Letter
- Lender Checked-in Email Letter
- Lender Reject Email Letter
- Lender Response Email Letter
- Lender Ship Email Letter
- Lender Will Supply Email Letter
- Query To Patron Letter
- Resource Sharing Request Confirmation Letter
- Resource Sharing Return Slip Letter
- Resource Sharing Shipping Slip Letter


Regarding your request 01GALISRTC0000017

preferredLibraryAddress@RSlibrary.com
To Devorah Ravitz

Reply | Reply All | Forward

Tue 4/18/2023 4:36 PM

ExLibris
Alma University

Regarding your request 04/18/2023

Dear Sir/Madam,

Regarding your request:

Format: Book
Title: The Way: Supplement
Publisher: Way Publications
Place of Publication: London
Pages: 1 - 39
Start Page: 1
End Page: 39
Date: 04/18/2023
Request ID: 01GALISRTC0000017
Request Format: Digital

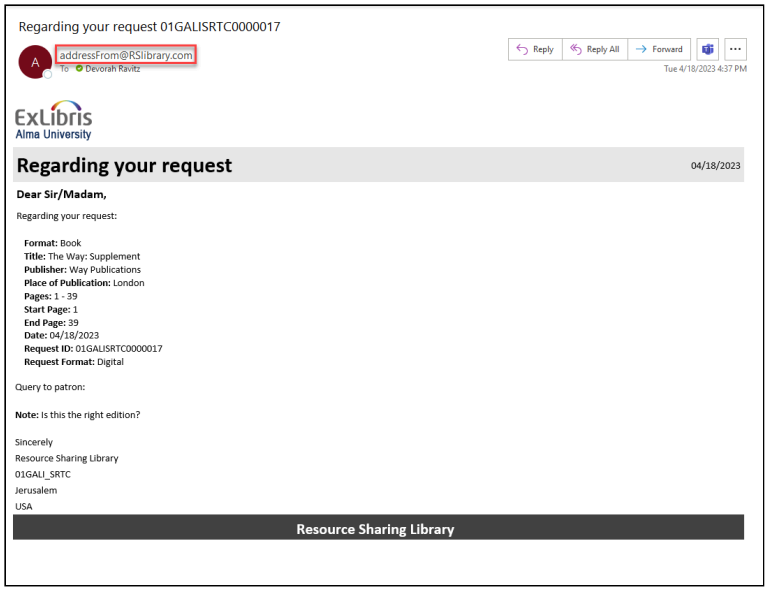
Query to patron:

Note: Is this the right edition?

Sincerely
Resource Sharing Library
01GALI_SRTC
Jerusalem
USA

Resource Sharing Library

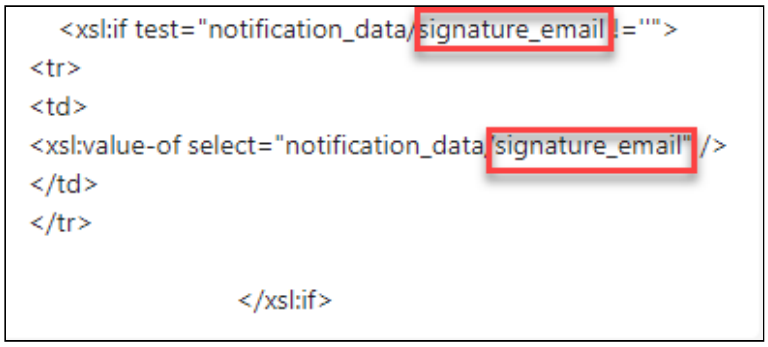
Preferred email address



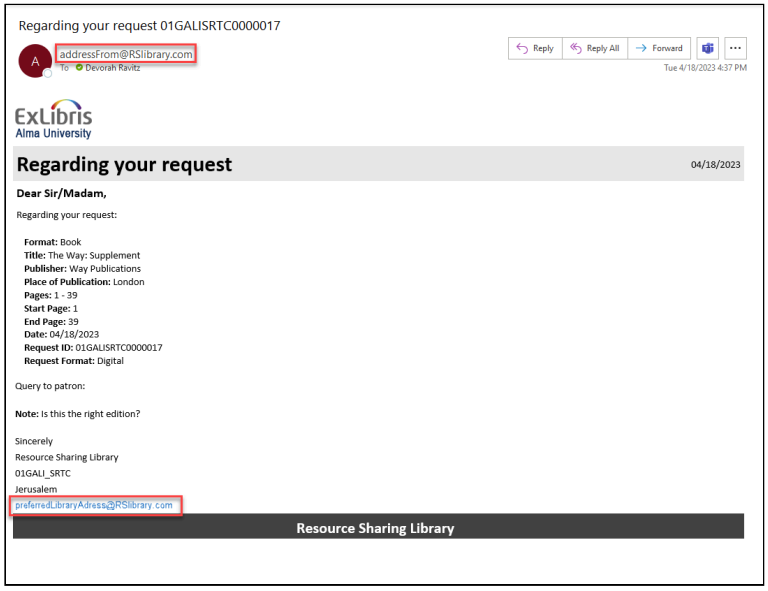
addressFrom email address

In addition, for the following letters, `signature_email` needs to be replaced in the XSL with `address_from` in order to prevent the preferred email address from appearing at the bottom of the email:

- Externally Obtained Letter
- Query To Patron Letter



XSL



Preferred email address on three letters

For more information, see Configuring Alma Letters.

- **May 2023 Fulfillment - Course Reserves SF: 06572598**

Idea Exchange

You can now use the Leganto API to update citation tags. Use the following PUT method, containing a URL with the course ID, reading list, reading list ID, citation, citation ID, and the word **tags**. The body must include the tags you want the citation to include. For example:

Method: PUT
URL: http://il-exlibrisgroup.com/almaws/v1/courses/12263704580001021/reading-lists/18240275460001021/citations/18464524340001021/tags
Body:

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<citation_tags total_record_count="2" link="/almaws/v1/courses/12263704580001021/reading-lists/18240275460001021/citations/18464524340001021/tags">
  <citation_tag>
        <type desc="Public">PUBLIC</type>
        <value desc="Essential">ESN</value>
    </citation_tag>
    <citation_tag>
        <type desc="Public">PUBLIC</type>
        <value desc="Mandatory">MND</value>
    </citation_tag>
</citation_tags>
```

If the body `<citation_tag>` is empty, all tags are removed from the citation.

For more information, see Developer Network - Courses.

Alma May 2023 Resolved Issues

- **May 2023 Acquisitions SF:06588107 06395228**
  Previously, the **PO Line - Renewal** job only handled a maximum of 100 PO lines each time it ran. This was fixed. It now handles all the PO lines that are due for renewal when it runs.
- **May 2023 Acquisitions SF:06426289**
  Previously, a user whose account was expired in Alma could create a purchase request in Primo. This has been corrected. Now, if a user whose account is expired tries to create a purchase request in Primo, an error is returned.
- **May 2023 Acquisitions SF:06563020**
  Previously, the **PO Line-Packaging** job caused duplicate order-emails to be sent to vendors. This was fixed. Alma now checks whether a PO was already sent to a vendor before it sends the PO, and if it was, it does not attempt to send it again.
- **May 2023 Acquisitions SF:06414361**
  Previously, when a PO line was migrated from a different system into Alma, a creation date was not always defined for the PO line in Alma. In addition, if the PO line also had a hold request from an interested user attached to it before the migration process, and the migration process could not identify the request date of the hold request, it was programmed to use the creation date of the PO line instead. If this date was also not defined, an error occurred when a user attempted to mark the PO line as **Done**. This has been fixed. When a hold request for an interested user exists prior to migration, if Alma cannot identify the creation date of the PO line or of the hold request, it uses the current system date as the hold-request date. (This may impact the request's place in the queue.)
- **May 2023 Acquisitions SF:06388047**
  Previously, if a PO line was not part of any PO, and it was included in the list of PO lines to be processed by the PO Line - Receive All job (i.e., when **Receive all** was selected in the the Receive New Material page - Acquisitions > Receiving and Invoicing > Receive), the job would get stuck when it attempted to retrieve the PO data and would finish very slowly. This was fixed. The job now correctly handles receiving of PO lines that are not part of POs.
- **May 2023 Acquisitions SF:06554296**
  Under very specific conditions, the **PO Line - Claiming** job failed and the claim email was not sent as it should have been. The code has been changed so that, if a similar situation arises in the future, the job will not fail, but rather will be completed with errors and/or warnings.
- **May 2023 Acquisitions SF:06606299**
  Previously, attempting to open the Analysis tab of a trial that had no questions defined caused an error. This was fixed. It is now possible to open the Analysis tab of a trial even if it does not have any questions defined.
- **May 2023 Acquisitions SF:06684128 06687053**
  Previously, when the Rollover PO Lines (PA) job was run, it was not added to the Rollover job list in Acquisitions > Advanced Tools > Rollover PO Lines list, (although it did appear in the list in Monitor Jobs > History tab). This was fixed. Now, when the Rollover PO Lines (PA) job runs, it is added to Rollover PO Lines job list as it should be.
- **May 2023 Acquisitions SF:06246806 06238120**
  In a particular case, SUSHI harvesting of usage reports was not working as expected. The problem could not be reproduced, but additional data will from now on be added to the log files of the harvesting process, making it possible to identify the problem in the future, if the issue arises again.
- **May 2023 Acquisitions SF:06354790 06243225 06369503 06637765**
  Previously, when a SUSHI account name contained special characters that could not be included in a file name, the harvesting job for the account failed when the system attempted to save the response file in the file system. This was fixed. All such special characters in SUSHI account names are replaced with "_" before the system attempts to save the response file.
- **May 2023 Acquisitions SF:05300946**
  Previously, monthly COUNTER5 data was not overridden by the Custom Harvest action when the Year of Publication field contained an empty string, resulting in duplicate SUSHI data. This was fixed. Monthly SUSHI data is overridden by the Custom Harvest action even when the Year of Publication field is empty.
- **May 2023 Acquisitions SF:06557556**

Previously, when the Change PO Line Status job was used to close PO lines for electronic resources, the PO lines were closed, but the job report said that they were skipped and could not be closed. This was fixed. Now the job report correctly states that these PO lines are closed.

- **May 2023 Acquisitions SF:06633687**
  The Data Correction job was failing in the production environment. This was fixed. The job now runs properly in all environments.
- **May 2023 Administration and Infrastructure SF:06311179 06572935**
  In a specific case, when a logical set was used as input for an Update/Notify Users job, the number of users in the set was not calculated accurately. As a result, some of the users in the set were not processed by the job. This was fixed. The number of users in the set is now calculated accurately, and all of the users are processed correctly by the job.
- **May 2023 Administration and Infrastructure SF:06443966**
  In the UPLOAD ELECTRONIC HOLDINGS Integration Profile, scheduling cannot be disabled. This was fixed.
- **May 2023 Administration and Infrastructure SF:06394806**
  Alma UI Location selector dropdown and library configuration lists are not sorted according to Icelandic Alphabet. This was fixed and now when selecting a circulation desk, these libraries/circulation desks are displayed after the letter 'A'.
- **May 2023 Administration and Infrastructure SF:06562717**
  The Hebrew interface of the Metadata Editor experienced problems with the menus and with the list of templates/rules. This was fixed.
- **May 2023 Administration and Infrastructure SF:06680350**
  Resources > Manage Inventory > Manage Collections - the sorting options for Managing Collections list were not translated. This was fixed.
- **May 2023 Administration and Infrastructure SF:06543512**
  Buttons are not visible in Pick from Shelf screen for items with a long request note. This was fixed and the buttons are now displayed.
- **May 2023 Administration and Infrastructure SF:06488452**
  Scan-In Page, Item Policy dropdown is not translated. This was fixed and now the language of the Item Policy matches the language of the UI.
- **May 2023 Administration and Infrastructure SF:06467137**
  An email that is sent to report the status of the Change Physical Items job was displaying HTML tags in the counters. This was fixed and the tags are no longer displayed.
- **May 2023 Administration and Infrastructure SF:06558134**
  The SAML profile via the idpCode parameter was not considered for deposit and resorted to the default profile. This was fixed.
- **May 2023 Analytics SF:06318005**
  The Classification Code field in Analytics displayed **Unknown** for codes that are Library of Congress classifications. This was fixed and the missing LC classification codes were added.
- **May 2023 Analytics SF:06478805 06591684**
  The **Available for My Institution** field only worked properly when the **Available for Group Members** field was included in the report. This was fixed, and now the **Available for My Institution** field works independently.
- **May 2023 Analytics SF:06668908 06652110**
  Reports using the **Receiving Operator** field erroneously displayed many null values. This was fixed, and now the **Receiving Operator** field displays the correct values.
- **May 2023 Analytics SF:06576065 05317614**
  The user expiration date in Analytics is not the same as in the Alma interface. This was fixed.
- **May 2023 Analytics SF:06691826 06690483**
  If a scheduled object in the new UI was deleted, the job was not deleted and continued to send emails with the reports to users. This was fixed.
- **May 2023 Analytics**
  The default scheduling in the new Analytics UI was set to every 6 hours. This was too frequent, so it was changed to every Monday at 9:00.
- **May 2023 Analytics SF:6651527 06682886**
  The value for Fines and Fees > User Details > Statistical Categories 1 - 10 was the code and not the description. This was fixed.

- **May 2023 Analytics SF:06648562**
  It was not possible to subscribe to old reports with the new Analytics UI. This was fixed by adding the **Subscribe to the analytics objects** toggle even when reports were scheduled in the old UI.
- **May 2023 APIs SF:06637439**
  Previously, when a user updated user information in the Quick User Management page (Fulfillment > Checkout/Checkin > Manage Patron Services > [select user] > Edit User Info), when the changes were saved, old data would sometimes be inserted into the updated field instead of the newly updated information. This was fixed. Updated user information that is input in this way is now saved correctly in the user record.
- **May 2023 Digital Resource Management SF:06630726**
  Data retrieved by SRU was incorrect. This was fixed by updating the MARC to MODS xsl to MODS 3.7.
- **May 2023 Electronic Resource Management SF:06583306 05300554**
  Consortia Topology: Activating the same Community Zone (CZ) records for different members in parallel resulted in multiple Network Zone (NZ) bibliographic records pointing to the same CZ record. This was fixed and now parallel activation of the members triggers creating a single NZ record for each CZ linked record.
- **May 2023 Electronic Resource Management SF:06637453 06358908**
  Local portfolios are created with Global Date Information instead of Local Date Information. This was fixed by changing the global coverage section to be editable according to the portfolio's linkage.
- **May 2023 Electronic Resource Management SF:06625408**
  The Upload Electronics Holding job didn't find a match on a few specific portfolios even though they existed. This was fixed.
- **May 2023 Electronic Resource Management SF:06663392**
  Electronic Collection History log failed to record change from Static URL to Dynamic URL. This was fixed and now the field called parser parameters in the history log are the URL type of the new content.
  For example: The user changes the URL content from X to Y and the URL type from static to dynamic.
  History after saving: Field Name: URL Type, Old Value: Static URL, New Value: Dynamic URL.
  Field name: Dynamic URL, old value: X , new value: Y.
- **May 2023 Electronic Resource Management SF:06640122**
  Alma service icons are not appearing under the Additional tab and under Availability in the Portfolio list of a service. This was fixed and icons are now displayed.
- **May 2023 Fulfillment SF:06557788**
  Previously, if an item was requested at one location for pickup at a different location, the pickup location was configured for automatic printing, and quick printing was enabled there, quick print was triggered as soon as the request was submitted. At that time, the quick-print pop-up appeared in Alma at the requesting location, and, regardless of whether the letter was actually printed or not, it was marked as printed in the Printouts queue. As a result, batch printing jobs run by API that should have printed the letter did not print it, because it was no longer in the printing queue. This behavior has been changed. When quick printing is configured for a pickup location, it is not triggered when a request is submitted at another location. Instead, the printing status of the letter is set to **Pending**. With this status, the letter is included in batch printing initiated by API.
- **May 2023 Fulfillment SF:06476446**
  Previously, when returning items via RFID from the Patron Services page (Fulfillment > Checkout/Checkin > Manage Patron Services > [select user] > Returns tab), the last setting of the **Place directly on hold shelf** option was not saved. Instead, it automatically reverted to being turned on. This was fixed. The last setting of the option now becomes the default setting for the next RFID return.
- **May 2023 Fulfillment SF:06438780**
  Previously, the Loan Status Notice Letter was not sent to the borrower of an item when its due date was changed via API. Now an optional parameter, `notify_user`, has been added to the API. This parameter is a Boolean flag for choosing whether to notify the borrower of changes in the loan due date. By default, the parameter is set to **false**, and no notification is sent to the borrower.
- **May 2023 Fulfillment SF:06503471**
  Previously, in certain cases, it was not possible to loan certain items, or to delete requests attached to those items. When a user attempted to perform one of these actions for these items, an error message appeared. This was fixed. These items can be loaned, and requests for them can be deleted, as expected.
- **May 2023 Fulfillment SF:06369672**
  In some cases, the Journal Services Page displayed an incorrect coverage summary that included a filtered portfolio when it should not have. This has been fixed. The correct coverage summary is now displayed.

- **May 2023 Fulfillment SF:06299336 05301549**
  In a fulfillment network, when a loaned item was returned to an institution in the network to which the item did not belong, if the return was performed in the Return Items page, a loan receipt was not sent to the patron. This has been fixed. When a loan is returned to any institution in the fulfillment network, a loan receipt is sent to the patron.
- **May 2023 Fulfillment – Resource Sharing SF:06483037 06557742**
  In the new UI, dropdown lists did not 'remember' the last selection, and make it the first option in the list, as they did in the previous layout. These drop-down lists now 'remember' the last selection and place it at the top of the list.
- **May 2023 Fulfillment – Resource Sharing SF:06305981**
  Previously, in certain cases, when a user attempted to create a Resource Sharing borrowing request for a non-book resource from an External Resource search, the request could not be created, and an error message appeared. This has been fixed and is working correctly now.
- **May 2023 Fulfillment – Resource Sharing SF:06473938 06681485**
  Previously, searching for borrowing requests by Remote Record ID in the New Layout of the RS task list did not return any results. This occurred because the Remote Record ID was not indexed in the New Layout. This has been corrected. This field is now indexed and searchable.
- **May 2023 Fulfillment – Resource Sharing SF:06487127**
  In the New Layout of RS borrowing requests, it was not possible to override blocks on renewals and renewal requests. This has been fixed. It is now possible to override blocks in these cases.
- **May 2023 Fulfillment – Resource Sharing SF:06599733 06580668**
  Digital files were unavailable after being fulfilled, even though the days set in the `document_delivery_cleanup_days` parameter (Configuration Menu > Fulfillment > General > Other Settings) had not passed. This was fixed.
- **May 2023 Fulfillment – Resource Sharing SF:06639438**
  In some cases, expired files appeared as available in patron accounts even though the files were no longer accessible. This was fixed.
- **May 2023 Physical Resource Management SF:06453038**
  The **Review and Confirm page for the Change Holdings Information** job was not displaying the names of the task parameters. This is fixed and task parameters are now displayed.
- **May 2023 Physical Resource Management SF:06602528**
  Change Holdings Information Job > Failed Records List: An internal identifier was displayed instead of the holdings' MMS ID. This was fixed.
- **May 2023 Resource Management SF:06337301**
  General Publishing > Related Records enrichment: Only partial relations of processed records were added to the published file for big sets (>50K). This was fixed, and all the relations are now published.
- **May 2023 Resource Management SF:06680350**
  The sorting options for Managing Collections list were not translated. This was fixed and the translations are displayed correctly.
- **May 2023 Resource Management SF:06685491**
  Removing a collection title does not update the database table's: collection_members, modification_date and modified_by columns. This was fixed and the table is now updated correctly.
- **May 2023 Resource Management SF:06640878**
  Selecting **Add to collection** results in an internal error where rows with `collectionPid=null` were added in the collection_members table. This was fixed .
- **May 2023 Resource Management SF:06557327**
  Metadata Editor: Using the **Show all items** button in an empty Network Zone holdings record displays items from a previously opened holding. This was fixed.
- **May 2023 Resource Management SF:06645618**
  Special characters (such as apostrophe or ampersand) in the **Additional Staff Search Fields** were not displayed properly. This was fixed
- **May 2023 Resource Management SF:06652465**
  When trying to delete a specific Physical titles set, the following message was displayed: `An error occurred while deleting the set`. This is fixed and sets are now deleted without errors.
- **May 2023 Resource Management SF:05315148**

Non-sorting characters like <<>> are used to remove articles from titles - and therefore they are not considered in the browse bib headings for titles. But this was not working for titles saved in 7xx fields. This is fixed and now these headings can be found only using the title without the leading article in the browsing.

- **May 2023 Resource Management SF:06597295**
  Direct full display or permalink of search webhook records does not display all full text availability link for some records. This was fixed.
- **May 2023 Resource Management SF:06340952 06612887**
  In MODS records, the language information wasn't always presented in Alma and Primo. This has been fixed.
- **May 2023 Resource Management SF:06533440**
  When importing authority records from SBN, the LDR has only a few positions filled, most of them are empty. This was fixed and the LDR is now maintained as in the central catalog.
- **May 2023 Resource Management SF:06533571**
  SBN integration - automated localization process was needed after merge. This was resolved by adding functionality to the 'merge' portion of the SBN authority and bibliographic alignment jobs. This new functionality looks for any localizations in the non-preferred record that belong to the institution (based on the Library code in the SBN central catalog configuration) and if any exist, a localization request is performed to add them to the preferred record.