



Alma August 2023 Feature Release

The Galaxy
August 2017 – Perseid Meteor Shower

Alma August 2023

Release Notes

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Alma August 2023 Upcoming Issues to Note

New Cookie Banner

As part of our commitment to transparency and privacy protection, we are gradually introducing a new feature in Alma and all our higher-education back-office products that requests user consent for the use of cookies. Your daily activities and Alma functionality will remain unaffected regardless of your cookie preferences.

Why is this change being made?

As part of Clarivate's policy, we prioritize user privacy and aim to provide a secure and transparent user experience. By implementing this change, we align our products with company-wide policies and comply with regulations such as the General Data Protection Regulation (GDPR) and regional requirements. This ensures that your personal information is handled carefully and respectfully.

When will the change be implemented?

The new cookie banner will be rolled out gradually during August Release and will take a few weeks to complete.

How will the change be implemented?

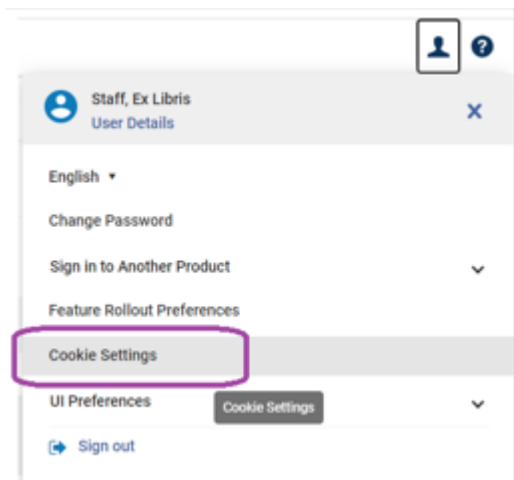
Over the next few weeks, a OneTrust banner will be gradually rolled out and displayed at the beginning of each session when using Alma and other back-office solutions. This banner will request your consent to use cookies in our products.



Once you consent, the OneTrust banner will no longer be displayed during subsequent sessions, offering a streamlined user experience. We believe that by allowing you to control your cookie preferences, we enhance transparency and enable you to make choices that align with your privacy preferences.

What actions do you need to take?

During your initial login, after the feature is deployed, you will have the option to either accept or reject cookies. Should you wish to update your preferences at any time, you can do so on the new **Cookies Settings** page within the user preferences area.



We value your privacy and strive to provide a secure environment for your data. Should you have any questions or concerns regarding this update, contact our [support](#) team.

Sandbox Refresh

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

Alma August 2023 Main Stories

Rollout of the New Layout for the PO Lines Task List

August 2023 Acquisitions

The next-generation Alma UI design is now available for the PO Lines task list (**Acquisitions > Purchase Order Lines > All PO Lines**, when the user opts in). In this release, individual users can opt-in to try out the new task-list layout, or continue using the classic version of the layout.

The new layout is designed to provide users who manage PO lines with a more streamlined experience, in which more information is available at a glance and new search and facet options make it easier to locate PO lines with certain characteristics.

The main new features of the new UI are:

- **Details pane:** A work area, called the **Details** pane, can be opened on the right side of the PO-line list. Most aspects of a PO line can be edited in the **Details** pane without losing sight of the task list, and the new arrangement speeds up the editing process.
- **Sections menu in the Details pane:** The fields of the **Details** pane are divided into sections, and a collapsible **Sections** menu enables users to quickly navigate between the sections.
- **Multiple-facet selection:** Multiple criteria can be selected in each facet category, providing more flexibility in the creation of a filtered PO-line list.
- **Workflow Step and assignee information as facets:** Workflow Step (status) and assignee information are facet categories, enabling searching for PO lines by specifying multiple Workflow Steps and a number of specific assignees.
- **Enhanced Advanced search interface:** Multiple search criteria can be grouped and nested, and the relationships between them can be defined as either AND or OR.
- **Sliding panel:** When access to other pages is required, the pages open in a panel that "slides" out from the right side of the window, only partially covering the task list. This enables work on all aspects of the PO line without losing sight of the PO-list context.
- **Streamlined access to notes:** Notes can be seen, added, searched, sorted, and managed in the new **Details** pane. This makes these important elements more noticeable and easier to manage when reviewing the PO-line list or processing PO lines.

For a general overview of the new PO Lines task list, see [New Unified PO Line Task List](#). See also [Searching for PO Lines - New Layout](#); [Managing PO Lines - New Layout](#).

For an overview of the new UI, watch the [New PO Line Task List](#) video (4:57 mins).

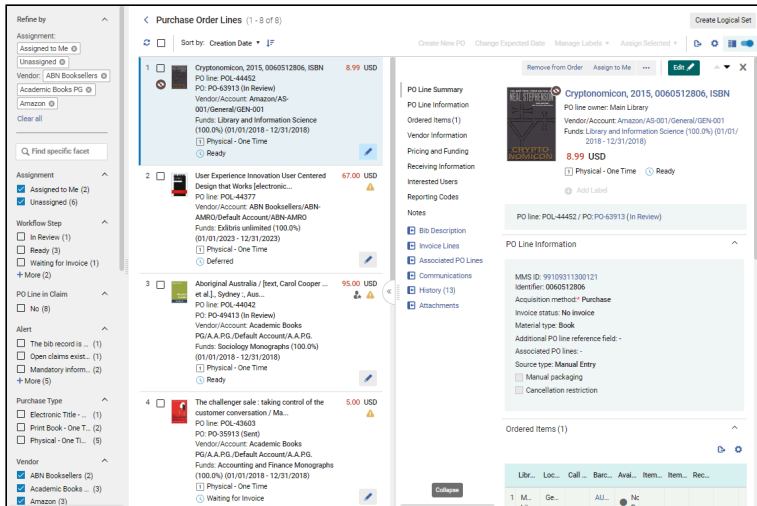
By default, in this release the PO-line task list continues to be opened in the classic UI. However, we encourage users to opt-in to the new layout and take advantage of its many new features and benefits. To opt into the new layout of the PO Lines task list, from the **User** menu, select **Feature Rollout Configuration (persistent menu >**



> Feature Rollout Configuration), and then activate the **New Unified PO Line Task List**. As part of the November 2023 release, the new layout will be turned on by default, although users will still have the option to opt out at that time. Finally,

beginning with the February 2024 release, only the new layout will be supported. This schedule is tentative and subject to change, based on customer feedback. For more information about opting into using the new UI for features for which it is available, see [Opting In or Out of a New Feature](#).

A webinar on “The New Unified PO Line Task List” will be delivered in two separate time zones on August 08, 2023. For further information and registration see the [Alma 2023 Roadmap Webinar Series](#) page.



PO Lines Task List - New Layout

New Layout for Manage Sets Page

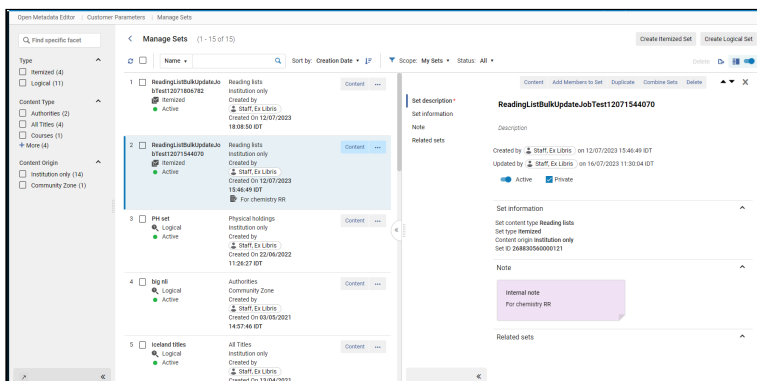
August 2023 Resource Management

The next-generation Alma UI design is now available for the Manage Sets page ([Admin > Manage Jobs and Set > Manage Sets](#)).

Note

The updated design is applied for all users. There will be no gradual roll-out for users to opt in/out.

The New Layout is designed to provide users who manage sets with a more streamlined experience, in which more information is available at a glance and new facet options make it easier to locate sets with certain characteristics.



Manage Sets New UI page

This release introduces a range of enhancements aimed at improving the creation and usage of sets in Alma. The enhancements focus on providing a quick and intuitive experience for users, streamlining workflows, and increase overall efficiency.

- **Key updates:**
 - **Streamlined set creation:** We have implemented a more straightforward and user-friendly approach to creating sets. Users will now find it easier than ever to generate sets, with simplified processes and fewer steps.
 - **Improved set utilization:** Recognizing the value of utilizing existing sets efficiently, we have introduced a quick and intuitive method for leveraging pre-existing sets. This enhancement enables users to access and utilize sets seamlessly in various tasks and searches.

- Creating Itemized Physical Holdings Sets

The physical holdings sets management was enhanced as part of the improved sets management enabling operators to easily create and manage itemized as well as logical sets of physical holdings records. This is especially useful when you want your set to include specific holdings, or to create an itemized set from a logical set of all holdings that fulfill a condition at a specific point in time.

For more information, see [Managing Search Queries and Sets](#).

A webinar on "Search and Sets Functionality in Alma using the New UI for Managing Sets" will be delivered in two separate time zones on November 13 and 14. For further information and registration see the [Alma 2023 Roadmap Webinar Series](#) page.

Watch the [New Manage Sets Layout](#) video (4:29 mins).

Accrued Fees Now Appear in User Details

August 2023 Fulfillment



Idea Exchange

The **Fines/Fees** tab of the User Details page (**Admin > Find and manage Users > [select user]**) now includes information about fees that patrons are currently accruing for overdue loans that they have not yet returned. Previously, this tab included overdue fines information only for loans that were already returned, which were included in the sum that appears under **Active balance**. The **Accrued fines** field shows additional fines that may still be increasing, because the patron has not yet returned the loan. Note that the accrued fines are not included in the calculation of the debt limit that, if reached, would prevent the patron from borrowing additional items. For additional information, see [Managing Users](#).

Creation Date	Fine/Fee types	Status	Status Date	Comment	Fee Owner	Title	Item Barcode	Original Amount	Remaining Balance
04/19/2023	Overdue fine	Active	04/27/2023	Date generated: 04/19/2023, Due: 04/18/2023, Fine policy: Overdue fine policy: Overdue Fine for Open hours , Action: Automatic renewal, waive comment 1	Main Library	America, Russia, and the Cold War, 1945-2000 / Walter LaFeber.	AU44256	10.00 USD	8.00 USD
04/18/2023	Overdue fine	Active	04/18/2023	Date generated: 04/18/2023, Due: 04/17/2023, Fine Policy: Overdue fine policy: Overdue Fine for Open hours , Action: Automatic renewal, waive comment 1	Main Library	America, Russia, and the Cold War, 1945-2000 / Walter LaFeber.	AU44256	11.00 USD	11.00 USD

Accrued Fines Field in the Fines/Fees Tab of the User Details page

Additional Fields Added to Resource Sharing Record Display

August 2023 Fulfillment - Resource Sharing

Additional information about resource-sharing requests has been added to the resource-sharing task lists, as follows:

Optional Fields

The following optional fields can now be added to the record information displayed in the task list:

- Lending Requests:
 - ISBN
 - ISSN
 - Publication date
 - Publisher
 - Place of publication
- Borrowing Requests:
 - Publication date

Water / Open University Created lending request ISBN: 9780737745467 (hardcover) Publication date: c2010. Publisher: Greenhaven Press, Place of publication: Detroit [Mich.].	Requested: Book (Physical) Created: 11/15/2022 06:05 External identifier: EXL:DEM03_1/EXLDEV1000 5200 Assigned to: Ex Libris Staff
--	--

Additional Information in a Lending Request Record

By default, these fields are not displayed. To add them to your display, select





) > **Records Customization** to open the **Records Customization** pane, and then select the fields you want to add to the record display. For additional information, see [New Layout 2022](#).

Records Customization Pane

Call Number

When available, the request **Call number** is now shown in the **Request Information** section of the **Details** pane for both borrowing and lending requests. For additional information about working with the Details pane, see [New Layout 2022](#).

Call Number in the Details Pane of a Resource-Sharing Request

Copyright Information on the Right Pane

August 2023 Fulfillment - Resource Sharing

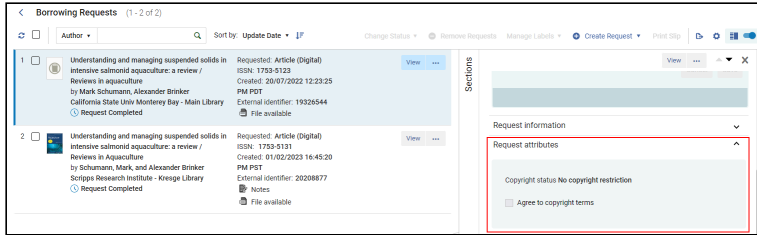
To enable librarians to work more efficiently, when the parameter **rs_borrower_copyright_management** ([Ex Menu links](#)



> **Admin > Customer Parameters**) is set to **true** (default **false**), copyright information for requests is now available and manageable from the right pane in addition to the **Edit** pane of a request.

Note

The copyright information can only be edited for requests that have not yet been sent.



Copyright status on the right pane

Linked Open Data Enrichment for EuroVoc Authorities

August 2023 Linked Data

The Linked Data enrichment process for bibliographic records that are linked to EuroVoc authorities now also generate URIs to the EuroVoc authority records, so that libraries that work with EuroVoc authorities can benefit from their Linked Open Data capabilities.

For more information, see [Working with Authority Records](#).

New Search Indexes for URI Cataloged in \$\$1

August 2023 Linked Data

To enhance search capabilities, we have introduced new search indexes for cataloged URIs in \$\$1. These indexes allow for more efficient searching based on associated URIs.

These new indexes are:

1. Real World Object URI: indexing \$\$1 from supporting fields
2. ORCID - Real World Object URI: indexing \$\$1 from supporting fields that contain ORCID URI
3. ISNI - Real World Object URI: indexing \$\$1 from supporting fields that contain ISNI URI

This is useful for libraries that catalog URIs, and enables them to use these identifiers in their searches.

For more information, see [MARC 21 Keyword Search Indexes](#).

ORCID URI Enrichment for Bib Records Using the **Alma Refine** Cloud App

August 2023 Linked Data

Configuring an integration profile for ORCID in Alma is now possible, enabling you to use your ORCID credentials to add ORCID URIs to your Bib records using the **Alma Refine** cloud app.

To configure this, add an integration profile with Integration Type **ORCID** and enter your client ID and secret for connecting to ORCID (only a single ORCID integration profile can be added per institution). Once the integration profile is complete, you can select **ORCID** from the list of Refine services in the **Alma Refine** cloud app. This feature benefits research libraries managing numerous records by researchers with ORCID IDs, enabling inclusion of these IDs in the catalog.

For more information, see [Alma Refine in the Developers Network](#).

For more information on configuring an ORCID integration profile, see [ORCID URI Enrichment for Bib Records Using Alma](#)

[Refine.](#)

Only Generate URIs for Authority Records That Fully Match the Subject Heading

August 2023 Linked Data

The authority control process in Alma sometimes generates partial matches between subject headings and authority records without the subdivisions. In such cases, the Linked Data enrichment process for bibliographic records that are linked to authorities generates a URI that only partially corresponds with the full subject. Libraries can now choose to prevent URI enrichment for partially linked authority records and add URIs only for full matches. To do this, set the `lod_uri_enrichment_for_partial_match` to `false`.

For more information, see [Authority Control](#).

Adding Support for UNIMARC Authority Subfield 250 \$v

August 2023 Resource Management

UNIMARC classification version stored in subfield 250 \$z is now mapped to Bibliographic field 676 \$v for various related workflows across the system.

For example, when searching for a Bibliographic record from an Authority record using the “Search bibliographic records matching this value” option, the version is used. In addition, the version is now part of the Authority record display as part of the F3 browsing, as well as, part of the browse Bibliographic headings functionality. For more information, see [Searching in Alma](#).

Browse Shelf Listing Context Display

August 2023 Resource Management



Idea Exchange

Browsing call numbers on the **Browse Shelf Listing** page ([Metadata Editor](#), > [Search and Browse](#) > [Shelf Listing](#)) was enhanced. Now, when browsing for a call number, the call number searched is the third one that is displayed. This provides users with the context of some previous call number results on the page, similar to the display in **Browse Bib Headings**.

Bibliographic Record Retention

August 2023 Resource Management

A new feature has been introduced that allows libraries to prevent the deletion of a bibliographic record. To implement this, the **Bibliographic Collection Retention Definition** table can be configured. Administrators can specify conditions for record retention. Add a field and subfield in order for the record to be protected from deletion if the subfield contains any value. Alternatively, specify a specific value, and only records with that value in the subfield will be retained.

After configuring the table, Alma performs verifications when attempting to delete a bibliographic record. It verifies if the record contains the specified content from the table. If the content is present, the bib record is protected from deletion. Furthermore, after the table is updated, any record that matches the defined criteria will be marked as committed to retain the next time it is indexed (when changed and saved, or during the semi-annual re-indexing). This allows for the retained

records to be searchable within the system.

The institution's table is consulted when deleting local records, and when attempting to delete a bibliographic record that is linked to the Community Zone (the removal of the linked record from the local institution is restricted based on the institution's configuration).

For collaborative networks, network zone records' retention is determined based on the configuration specified in the Network Zone's table.

This feature is particularly beneficial for libraries with collaborative collections, that aim to safeguard specific records from deletion, as well as for libraries that want to make sure important records, for example; rare materials, donations, and so forth, are not accidentally removed from the catalog.

For more information, see [Bibliographic Record Retention](#).

Watch the [Prevent Deletion of Records Committed to Retain](#) video (1:49 mins).

Metadata Editor Enhancements: **Undo Remove, Cut and Paste Field Actions**

August 2023 Resource Management



Idea Exchange

Previously, the removal of fields from a bibliographic record could not be undone. A new functionality called "**Undo Remove, Cut, Paste Field**" (Ctrl+Shift+Z) is introduced, that enables catalogers to undo such actions, providing a convenient way to restore accidentally removed fields without having to revert to a previous version of the record. This enhancement saves time and effort while ensuring accurate cataloging.

Browse Authority Headings

August 2023 Resource Management



Idea Exchange

A new feature called **Browse Authority Headings** is now available, enabling users to browse authority files for name and subject authority records. This browsing functionality displays both the preferred and non-preferred terms in the authority record, clearly indicating which terms are preferred. Libraries can now easily explore the authority files used in their cataloging workflows, access authority records, and view any linked bibliographic records.

This enhancement is particularly beneficial for librarians who want to browse the authority vocabulary using a specific name or subject, even if they are unsure whether it is the preferred term or not. For librarians without cataloging privileges, the authority record browsing is a read-only capability. It is automatically enabled in all Alma roles, similar to the repository and authority searches.

Match on Title Type Option Added to the Import Mechanism

August 2023 Resource Management

Alma's import mechanism was enhanced to include the option to match on the title type, electronic or physical. When

importing records to Alma, a matching option that considers the title type (print or electronic) is now available. Incoming print titles are matched to print titles in the repository, and incoming electronic titles are matched to electronic titles in the repository.

In addition, a new option to disregard matches for bibliographic Community Zone linked records was added to the Import profile configuration.

For more information, see [Creating/Editing an Import Profile: Match Profile](#).

Control the Ability to Ignore Title Based Link Resolving

August 2023 Resource Management

Currently, when Alma gets an open URL from Primo, it tries to find resources according to three main methods:

1. Match by identifier

If no identifier exists/no match was found:

2. Match by title and author

If no title+author exists/no match was found:

3. Search by title only ("Fuzzy Match")

A new option controlled by a customer parameter, **avoid_fuzzy_search_resolving** ([Configuration -> Resources -> Other settings](#)), enables the institution to indicate to Alma to avoid "Fuzzy matches" ("title only" matches) attempts. By default, the new customer parameter is set to "False" and Alma continues behaving as it does currently. The new functionality is only active when the customer parameter is set to "True".

10	avoid_fuzzy_search_resolving	repository	true	When set to true the Link Resolver will search matching records based on Title alone only in case the OpenURL not contains Author or other identifiers. If it contains Author the Link Resolver will try to match based on Title+Author but not on Title alone. If it contains identifier the Link Resolver will try to match based on it but not on Title alone. When set to false the Link Resolver will search matching records based on Title alone otherwise: More info in Alma Link Resolver Workflow (Online Help)
11	brief_level	repository	03	Set the brief level

Enabling Fuzzy search by setting the customer parameter: **avoid_fuzzy_search_resolving** to "True"

Note

If the open URL contains only a title, Alma attempts to find a match, since there are no other elements by which to search.

This logic applies to electronic resources (View it) and physical resources (Get it).

If enabled, the existing CP: **find_get_it_based_on_standard_identifiers_only**, continues functioning as is and takes precedence over the new logic and is relevant only for physical inventory (Get it).

For more information, see [Control Ability to Ignore Title Based Link Resolving](#).

For more information on the customer parameter, see [Configuring Other Settings \(Resource Management\)](#).

Applying the Library Scope to the Physical Titles Search

August 2023 Resource Management



Idea Exchange

The library scope available for the physical items and holdings search now affects also the physical titles search, so that librarians that define a preferred library's scope see in the search results only physical titles that have holdings in the defined libraries. The library scope set by the librarian is remembered by the system and applied across sessions and search types until the librarian chooses to change it.

This is helpful for librarians who are interested only in titles held by specific libraries and saves the need to add a library search condition for every physical title search.

For more information, see [Searching in Alma](#).

Watch the [Search for Physical Titles in the Library Scope](#) video (1:16 mins).

Support for MARC 21 Parallel Description in Another Language of Cataloging Related Records

August 2023 Resource Management

A new type of analytical linking was added to the MARC21 standard, **Parallel Description in Another Language of Cataloging** (788). This type is now supported in Alma's workflows that consider analytical linking, for example, publishing profiles enrichment.

Related Records Update as Part of an Import Redirection

August 2023 Resource Management

The import redirection mechanism now updates the related record fields where the 'secondary record' ID is replaced with the new 'primary record' ID either by 035 or MMS ID.

Automated Upload of Electronic Holdings Now Supported for PROJECT MUSE Titles

August 2023 Electronic Resource Management

Alma has expanded its integration capabilities to include PROJECT MUSE titles, in addition to the publishers/vendors it already works with. As a result, customers now have the option to create an integration profile with PROJECT MUSE, enabling them to automate the updating of their holdings.

The Automated Upload of Electronic holdings process has been instrumental in saving the library considerable manual effort and time. Furthermore, it has enhanced the accuracy and efficiency of the overall workflow.

For more information, see [Automatic Upload of Electronic Holdings](#).

For more information on creating the Project MUSE integration profile, see [Upload Electronic Holdings from Project MUSE](#).

Overlap Analysis - Include Related Physical Titles in Electronic Reports

August 2023 Electronic Resource Management



NERS Enhancement (ID #6947)



Idea Exchange

In addition to the "Include Physical title matching indication in the electronic reports" that was released in [May](#), a new checkbox enables users to also lookup **Related** physical titles and display a hint indication in the electronic reports. The Overlap Analysis tool, through Look Up Titles analysis type, now supports Physical Titles matches and Related Physical Titles matches.

While executing the existing analysis of **Look Up Titles** or **Compare Collections**, users receive a **hint indication** in the results Excel files regarding the availability/existence of a matching Physical inventory (a physical title that has one or more physical items). Once this type of match which has a related physical title with physical inventory is found, the job marks the related physical indication. This physical hint indication is included as 4 new columns in the Excel report:

- **Has Physical Matching** (Yes / No)
- **Physical Holdings Library: Location (count)**
- **Has Related Physical Matching** (Yes / No)
- **Related Physical Holdings Library: Location (count)**

The "Related" report incorporates a new column, **Relation type** that has the following values:

- Contains
- Empty

Note

When the "Contains" indication is displayed in the new column, an additional indication (**Related title**) is displayed next to the MMS ID.

For more information, see [Enhanced Overlap and Collection Analysis Tool](#).

A webinar on "New and Improved Alma Overlap Analysis Tool" will be delivered in two separate time zones on September 05, 2023. For further information and registration see the [Alma 2023 Roadmap Webinar Series](#) page.

Control Relinking a Portfolio to Different Bibliographic Record

August 2023 Electronic Resource Management

Alma now supports the ability to control who can relink a portfolio to a different bibliographic record. To maintain the ability of existing users with the **Electronic Inventory Operator** role to relink portfolios to another bibliographic record, we have implemented two measures. Firstly, a new privilege has been created to manage the visibility of the "Relink to another Bibliographic record" function. Secondly, a new role called "Electronic Inventory Operator - Limited" has been introduced. This new role is identical to the existing "Electronic Inventory Operator" role, except that the privilege to perform the "Relink to another bibliographic record" function is disabled by default.

Note

If institutions have added the new **Electronic Inventory Operator - Limited** role and the "Relink" action on the portfolio is still displayed to users, it is possible that another role has been granted this privilege. In such cases, institutions should contact [Ex Libris support](#) to have the privilege removed from the relevant role.

Logical Collections

August 2023 Digital Resource Management



NERS Enhancement (ID #7880)

You can now assign titles to collections automatically based on a logical query instead of assigning them manually. To support this feature, a new **Logical Collection** checkbox was added to the Add New Collection page when creating a collection ([Resources > Manage Inventory > Manage Collections](#)).

For more information, see [Relinking Items to Another Bibliographic Record](#).

The screenshot shows a form titled "General Information" with the following fields:

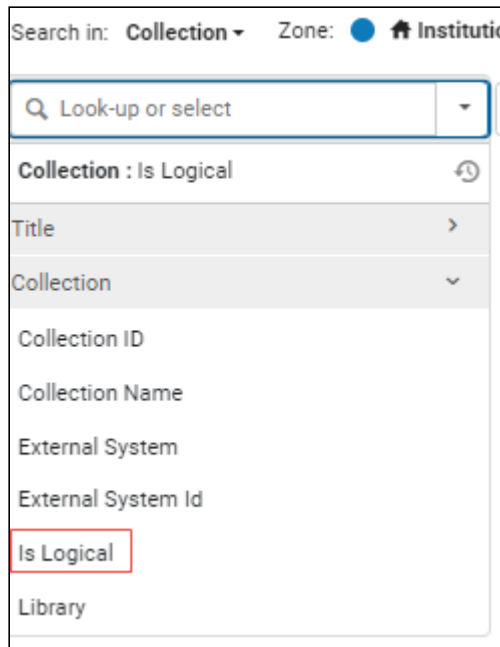
- Name *
- Description
- Library *
- Logical Collection

The "Logical Collection" checkbox is highlighted with a red rectangular box.

Logical Collections

For more information on adding logical collections, see [Adding a Logical Collection](#).

In addition, you can now search for logical collections with the advanced search:



Collection: Is Logical

To support this development two new jobs are now available:

- Synchronize All Logical Collections – this scheduled job updates all logical collections according to their set queries.
For more information, see [Synchronize All Logical Collections Job](#).
- Update Logical Collections from Set - this manual job updates the collection sets that you select according to their set queries.
For more information, see [Update Logical Collection from Set](#).

Long Term Digital Loans

August 2023 Digital Resource Management

Long term digital loans is a process by which libraries can lend out digital copies (representations) of physical materials to patrons for periods of a day or more. The system imitates the experience of lending physical items by enabling you to limit the number of digital copies being lent concurrently and configuring the time period of the loan. Like with physical items, the requester enters a waitlist if the digital copy is on loan. Alma keeps track of the patrons who requested the digital representation and notifies the next person in the waitlist when it is available. Users can also indicate the list of physical items that are represented by each digital resource.

Long term digital loans introduces a rich set of policies, is fully integrated into the Alma requests workflow, and is accessible from the patron Library Card in Primo. For more information, see [Long Term Digital Loans](#).

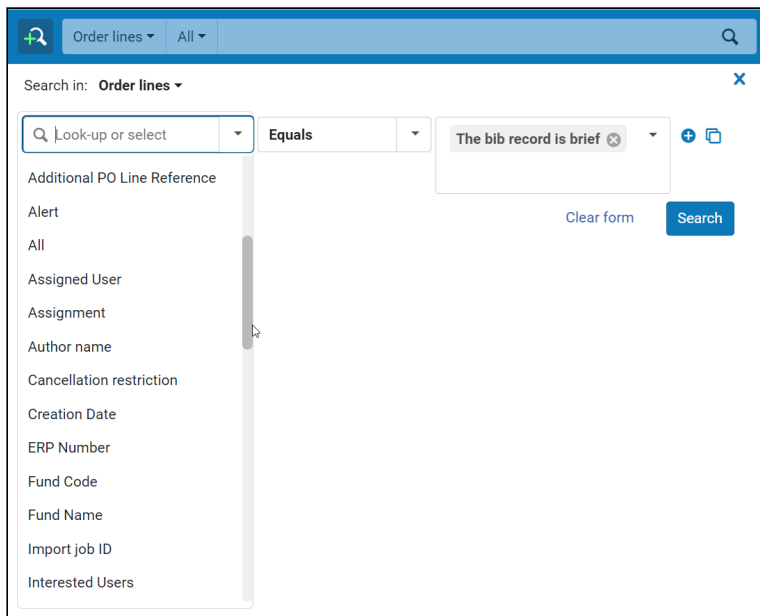
To activate this functionality, contact [Ex Libris Support](#).

Additional Advanced Search Options for Order Lines

August 2023 Acquisitions

New advanced search options have been added for Order lines:

- Alert
- Assigned User
- Assignment
- Creation Date
- PO Line in Claim
- Renewal Date
- Sent Date



Search Options for Advanced Order Lines Search

For additional information, see [Searching in Alma](#).

Additional EDI Responses Added to the Review Tab

August 2023 Acquisitions

Certain types of vendor responses to EDI orders, such as those that indicate the ordered item is out of print or not available from the vendor, are likely to lead to the cancellation of those orders by library staff. Alma automatically places PO lines that received such responses in the **Review** tab of the Manage EDI Tasks page ([Acquisitions > Purchase Order Lines > Manage EDI Tasks](#)). This makes it easier for staff to find these orders quickly, and also provides them with the option of cancelling these orders from within the **Review** tab.

Five new EDI order-response codes have been added to the list of those that are placed in the **Review** tab of the Manage EDI Tasks page:

- AU – Publisher's address unknown
- CS – Status uncertain: check with customer service
- HK – Paperback out of print: hardback available
- OP – Out of print
- PK – Hardback out of print: paperback available

For additional information about the **Review** tab of the Manage EDI Tasks page, see [Electronic Data Interchange \(EDI\)](#).

Restrict Editing of Bibliographic 035 Fields With a Particular Prefix

August 2023 Collaborative Networks

Consortia central office is able to control which 035 fields of the Network Zone Bibliographic records are protected, enabling the consortia office to maintain the quality of Network Zone Bibliographic records by preventing unwanted edits of specific fields.

Example use case:

Consortia Central Office can protect Network Zone bibliographic records 035 fields with particular prefixes from any edits or deletion by the consortia members.

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

Network-Zone Translations of Policy Names and Descriptions Are Now Distributed to Institutions

August 2023 Collaborative Networks

In an Alma system that supports multiple interface languages, some fields support translation of their values into the supported languages. (These fields are identified by the **Translate Information** icon

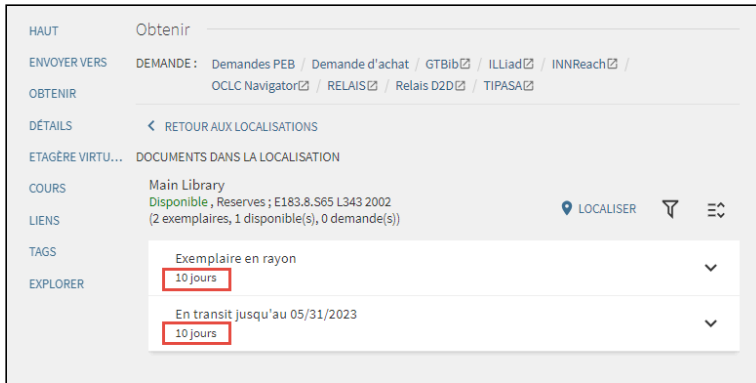


- see [The Alma User Interface](#).) When the environment is a Network Zone, these values are *distributed* from the Network Zone to the member institutions, so that users in the various institutions that belong to the Network Zone see these values in their current interface language. The Distribute Fulfillment Network Configuration job performs the distribution process for policies, Terms of Use, and fulfillment units configured in the Network Zone. (This job can be scheduled to run automatically - see [Scheduled Jobs](#) - or it can be run manually from **Fulfillment > Advanced Tools - General > Distribute Fulfillment Network Configuration**.)

The names and descriptions of some policies now support translation in multi-language environments, and are now distributed from the Network Zone to its member institutions by the Distribute Fulfillment Network Configuration job. Where relevant, they are also distributed to the Primo applications of those institutions. For example, the **Policy Description** of **Due Date** policies would appear in Primo in their translated form when Primo is opened in a supported language and translations into that language are defined for them.

Language	Value
Portuguese (Brazil)	
French	10 jours

Dialog Box for Adding Translations of the Policy Description of a Due Date Policy



Policy Description in Primo in French

For additional information, see [Centrally Managing Configurations in a Network Zone](#); [Configuring Fulfillment Information in the Network Zone](#).

Publishing Network Bib Records to OCLC Using the Network Zone MMSID

August 2023 Collaborative Networks

A new option for network members is added to the Publish Bibliographic Record to OCLC profile. This new option enables a member the choice of using the Network Zone (NZ) MMS ID for the NZ records being published.

This is helpful for network members that import records from OCLC to their network zone and need OCLC to have their network's system number.

Restrict Editing Bibliographic Metadata Fields

August 2023 Collaborative Networks

The Consortia central office can control which bibliographic metadata fields can be edited by its members, enabling it to maintain the quality of the Network Zone bibliographic records by preventing unwanted edits/deletion of specific fields.

Note

This is applied only to the consortia members. The Network Zone institution is exempt from the restrictions policy that it implements.

Separating User Search by Library Affiliation

August 2023 Administration and Infrastructure

Libraries that implement library independence can now be set up to separate also their users search by library scope. This way, operators from one library cannot search for patrons of another library. Setting this option is done by using the **Configuration menu > User Management > General > Other Settings** menu to set the `limit_user_search_by_library_scope` parameter to **true**.

This addition to the library independence theme creates an option for improved privacy of user records in the Alma institution.

See [Library Independence](#) and [Fulfillment Library Independence](#).

Option to Hide User Contact Card

August 2023 Administration and Infrastructure

Removing the privilege to view user pop-up cards from user roles is now possible. To remove the privilege, please contact [Ex Libris support](#).

Sign SAML AuthnRequest

August 2023 Administration and Infrastructure

Some institutions require that SAML authentication requests must be signed to be accepted by the system. Until now, there was only the option to sign the logout requests. Alma now supports the SAML authentication requests that are signed.

For more information, see [Gathering Information from Your Identity Provider](#) in the Developers Network.

Mail Handling Integration Profile - Test Email Button

August 2023 Administration and Infrastructure

Alma's Mail Handling integration profile now includes testing the email configuration. When executed, an email is sent to the preferred email of the logged-in user. Testing the configuration is accessed by: **Configuration > General > External Systems > Integration Profiles**. Locate the **Mail Handling** profile and select **Edit** from the row actions. Select the **Actions** tab.

For more information, see [Configuring Outgoing Email](#).

Integration Profile

Save and Test Cancel Save

Name	Mail Handling
Code	MAIL_HANDLING
Integration Type	Mail Handling

General Information Actions

MAIL HANDLING DEFINITIONS

Active

Send directly from Ex Libris Send using institution mail relay

SMTP EnvelopeFrom address *

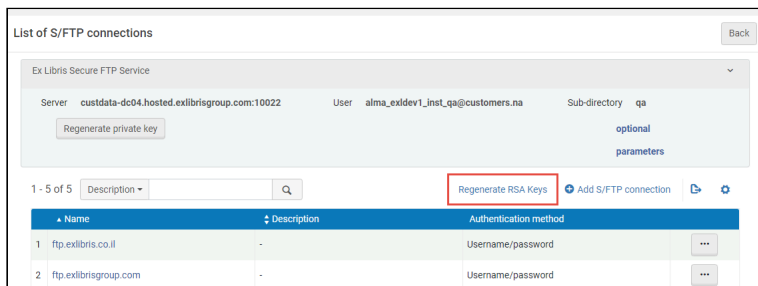
Mail Handling Integration Profile

Regenerate Public Key in S/FTP Profile

August 2023 Administration and Infrastructure

Previously, the Public Key associated with an S/FTP profile remained static and could not be updated or refreshed. However, this constraint has now been rectified, and users can now refresh the Public Key by following these steps: Go to

Alma configuration > General > S/FTP definitions and click the **Regenerate RSA Keys**.



S/FTP Connections

For more information, see [Configuring S/FTP Connections](#).

Code Tables Enhancements

August 2023 Administration and Infrastructure

The following improvements aim to enhance the functionality and usability of code tables, providing users with a more intuitive and efficient experience.

1. **Inner Search:** An inner search functionality has been added to enhance the code table experience. Users can now search within the code table to quickly locate specific entries.
2. **Drag and Drop:** A new drag and drop feature has been implemented, allowing users to easily rearrange and reorganize code table entries by dragging and dropping them into desired positions.
3. **Responsive Columns with Text:** To improve readability and user experience, code table columns now display text instead of fields, making navigating and understanding the content simpler and more intuitive.
4. **Page Titles:** Page titles have been incorporated as headers for code tables, providing clearer context and easier identification of code table content.
5. **Pagination:** A pagination feature has been introduced to effectively manage large code tables. Users can now navigate through code table entries using page numbers, creating a more efficient and user-friendly experience.

Enable Removal of Global Embargo from Community Zone Portfolios in Community-Managed Collections

August 2023 Administration and Infrastructure

Previously, users had the ability to edit Community Zone data for titles in Community-Managed Collections. However, they could not remove the global embargo from portfolios within these collections. Now, the community-managed collections in the Community Zone enable Alma users to utilize all editing options for both Collections and Portfolios.

For more information, see [Contributing to the Community Zone – Portfolios](#).

Add SAML Metadata URL By Institution Code and Integration Profile

August 2023 Administration and Infrastructure

Alma enables users to add or use a SAML Metadata URL link by providing an institution code and the integration profile code. You can link to the metadata file (that is configured at a specific integration profile) by:

[Example:] <https://your.lib.alma.exlibrisgroup.com/view/saml/metadata?institution={institution-code}&idpCode={code you gave the integration profile}>

For more information, see the [SAML](#) documentation in the Developers Network.

New and Improved Letters Configuration Interface

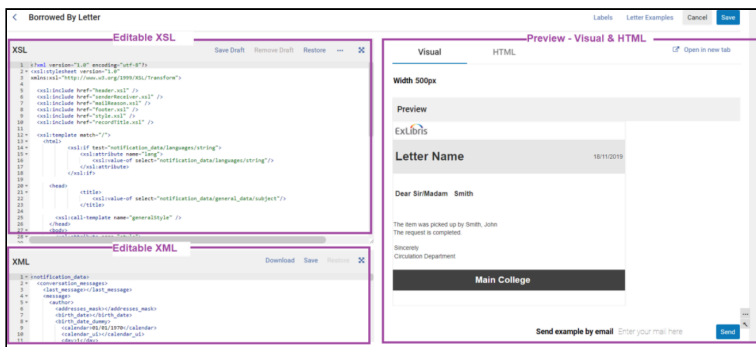
August 2023 Administration and Infrastructure



NERS Enhancement (ID #7876)

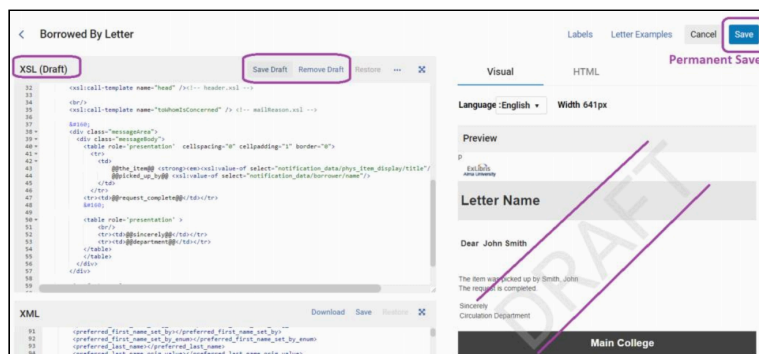
A new letters configuration interface was implemented, to create an improved and more intuitive user experience. This includes:

- XSL/XML and preview of the output, now all in one window.



Letters Preview Window

- Error detection and reporting while editing.
- Enhanced preview pane with easy navigation between visual and html view.
- Quicker access to configuration of labels and letter examples.
- New save draft feature.



Save Draft

For more information see [Configuring Alma Letters](#).

A webinar on “The New User Interface for Customizing Letters in Alma” will be delivered in two separate time zones on August 09, 2023. For further information and registration see the [Alma 2023 Roadmap Webinar Series](#) page.

Watch the [New Letters Configuration](#) video (6:12 mins).

Enable Easy Rollover of Alma Signed Certificate for SAML Authentication

August 2023 Administration and Infrastructure

When the expiration of an Alma SAML certificate is imminent, customers are required to make two necessary adjustments. Firstly, they need to modify the integration profile in Alma, ensuring that the new certificate is incorporated. Secondly, they must update the Identity Provider (IDP) settings to utilize the recently generated certificate for authentication purposes. These 2 steps needed to be done simultaneously in order avoid a period of time when the SAML authentication is down for maintenance.

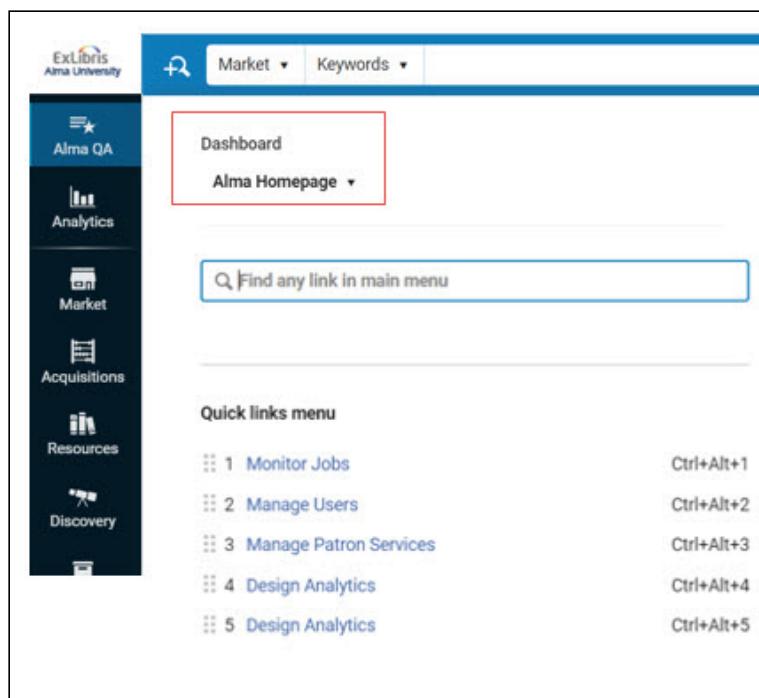
Customers now have the capability to configure an additional certificate in Alma, and then update the IDP at a later time. When a request for authentication is made to Alma, the system attempts to use both certificates, ensuring compatibility with both the old and new certificates.

For more information, [Replacing a Signed Certificate](#).

Customize Alma Homepage to Display Data Visualization Workbook

August 2023 Administration and Infrastructure

Alma enhances its main menu functionality by enabling users to customize their homepage to display a Data Visualization Workbook. The dashboard drop-down menu is moved from the Analytics menu to the Main menu above the search bar.



Update SAML Self-Signed Certificate to Use SHA2

August 2023 Administration and Infrastructure



Idea Exchange

The current Self-Signed SAML Certificate (expiring on December 31, 2025) uses the SHA1 hash function. If your institution uses this certificate you can replace it now with a new certificate that uses the SHA2 hash which expires on December 31, 2030. This must be done in coordination with your IDP. For more information, see [Replacing a Signed Certificate](#).

No immediate action is needed. Replacing the certificate can be done at any time until its expiry, on December 31, 2025.

"Fuzzy Search" Added to Alma Menu Search Bar

August 2023 Administration and Infrastructure

Enhancements have been made to the Alma internal search menu functionality, incorporating "smart" search capabilities. As a result, the search feature now provides suggestions for synonyms, interchangeable terms, and even support for spelling mistakes. This enhancement facilitates users' navigation making it easier to find links in the Alma search menu.

Note

Starting in August 2023, similar terms functionality will be supported only for English. Spelling is supported in the following languages: English, German, Spanish, Danish, Finnish, French, Hungarian, Italian, Japanese, Dutch, Norwegian, Portuguese, Romanian, Russian, and Thai.

Similar terms will be gradually enriched with additional languages in later releases.

Watch the [Improved Menu Search](#) video (1:39 mins).

Report Successful Primo Patron Logins

August 2023 Administration and Infrastructure

Before the May release, the "System Events" subject area reported successful sign-in events and included both Alma and Primo VE. After the May release, the login event no longer recorded for Primo logins and now reports only on Alma logins. As part of the August release, the System Events subject area includes two separate event types:

- Alma logins: **Successful login**
- Primo logins: **Successful login - Primo**

Institutions can opt out of the Primo events being reported by using the new customer parameter, **enable_login_event** (default is true), in the Discovery Customer Settings.

parameter key	parameter module	parameter value	free text description	Updated By	Last Updated
editions_en_linking	system	%SITE_CLIENT%/%Host	Authentication template		
enable_guest_user_for_dfr	system	false	Enable 'GUEST' user to I		
enable_login_event	system	true	'Successful Login - Print		
exclude_author_from_fullstop	system	false	Exclude author from full		

Discovery Customer Settings: enable_login_event customer parameter

For more information, see the [Discovery Customer Settings](#).

Analytics New Layout Now Available by Default

August 2023 Analytics

The Analytics New Layout that was made available as an opt-in option for the May release is now available by default for all customers. You can still choose to revert to the old layout (from



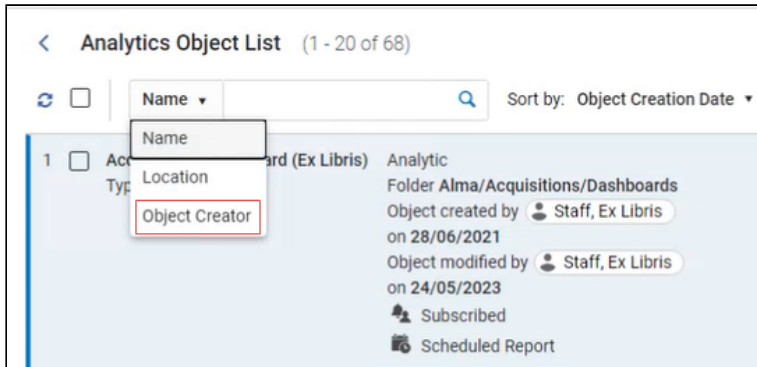
> **Feature Rollout Preferences**). From the November release, the Analytics New Layout will be the only layout available.

For a Webinar describing the capabilities and functionality of the new Analytics user interface, see [New Alma Analytics User Interface](#).

Search Analytics Object List by Object Creator

August 2023 Analytics

You can now search for Analytics Objects by object creator. To support this feature, **Object Creator** was added as an option from the Find drop-down list.



Search by Object Creator

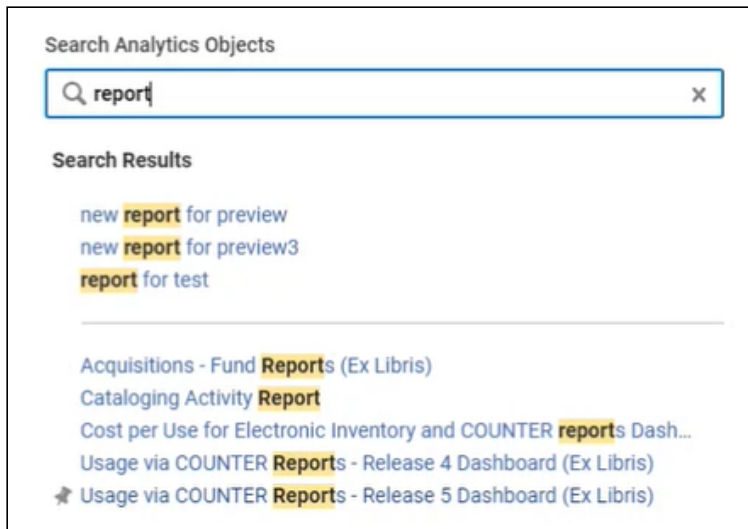
Searching by a partial search term is also supported.

Watch the [Search Analytics Objects by Creator](#) video (0:49 mins).

Separate Sections for Analytics Menu Search Results

August 2023 Analytics

The search results that appear when searching from the Analytics Menu are now separated into two sections.



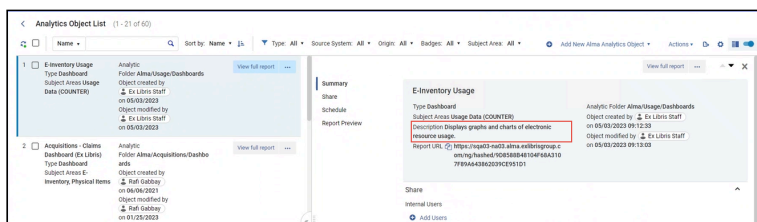
Separate Sections for Search Results

The upper section contains the objects created by your institution while the lower section contains objects that are available out-of-the-box.

Report Description from Analytics Displayed in Analytics Object List

August 2023 Analytics

You can add a description to reports in analytics (More > Description). These descriptions are now displayed for objects in the Analytics Objects List.



Report Description

Note

You can edit the description in the object; however, the description in analytics is not changed. Similarly, if the description is changed in analytics after the object is created, the description in the object is not changed.

Displaying Labels for Local Parameters

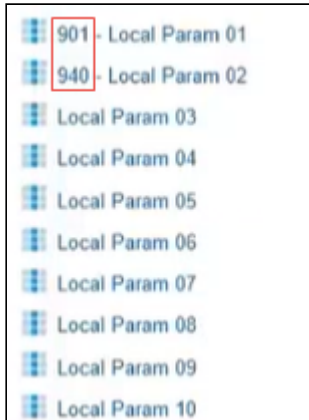
August 2023 Analytics



Idea Exchange

It is now possible to display labels for local parameters in analytics reports. This is possible for the local parameters in the Physical Items > Holdings Details dimension and the shared Bibliographic Details dimension for all subject areas in which it

appears. Now, not only the text `Local Param` appears but also the field assigned to the local parameter. The local parameter appears as a prefix before the current local parameter field name:



Local Parameters with Labels

To display labels for local parameters, configure the new `analytics_display_local_params` parameter ([Configuration > Analytics > General Configuration > Other Settings](#)) to `true`.

New DV Button on Alma Analytics Menu Bar

August 2023 Analytics

A new DV button was added to the top menu bar of the classic Alma Analytics page.



DV Button

Click the button to open the DV homepage in a new browser tab.

Expanded API Options

August 2023 API

The Alma API has been expanded to include the following new options:

- **Location management** – The Location API now includes the options to create or delete a library location. For additional information, see [Configuration and Administration](#) in the Developer Network.
- **Library relations** – A new Library Relations API is now available. This API can be used to retrieve, create, update, and delete library relations. For additional information, see [Configuration and Administration](#) in the Developer Network.
- **Set management** – A new API is now available for updating logical sets; see [Sets](#) in the Developer Network.
- **Calendar management**



Idea Exchange – The Calendar API now supports the actions create, update and delete calendar, in addition to the previously supported action to retrieve a calendar. For additional information, see [Retrieve Library Open Hours](#).

- **Resource management** – A new API for retrieving Import profile reports, for both Single matches and Multi matches, is now available. For more information: In the Developers Network, see [Configuration and Administration > Jobs](#); in the Alma Online Help, see [Viewing an Import Job Report](#).

UK Digital Content Store (DCS) Support for Lists Linked to Multiple Courses

August 2023 Fulfillment - Course Reserves

The integration between Leganto and the UK CLA Digital Content Store (DCS) now supports lists that are linked to multiple courses. Items submitted to the DCS that are associated with multiple courses are sent to the DCS as individual requests, one for each course. If a new course is associated with an existing request, the requests are associated. When an item is linked to multiple courses, the **DCS Status** in Alma remains **Request in progress** until Alma receives a collective approval/rejection for all requests submitted for the item. The synchronization job between the DCS and Alma can be scheduled to run up to four times a day to update DCS request statuses. The DCS request statuses are updated using the current synchronization job between the DCS and Alma, which can be scheduled to run.

Note

Currently, when a list is associated with one or more courses and one of the citations has DCS request, users cannot add/remove the course. The option to add/remove a course will be available in a future release.

The screenshot shows a citation record in Alma. The citation title is "Agent Intelligence Through Data Mining". Key fields include:

- MMS ID:** 991101030000121
- Book By:** Symeonidis, Andreas L. (Springer / 2005.)
- ISBN:** 0387257578 (electronic bk.); 9780387257570 (electronic bk.)
- Series:** Multiagent systems, artificial societies, and simulated organizations ;
- Subject:** Data mining -- Intelligent agents (Computer software)
- Citation ID:** 269989070000121
- Citation Status:** Complete
- Resource Locate Status:** Resource Located
- Copyright Status:** Waiting for Approval / DCS Rule
- License Type:** CLA
- DCS Status:** Approved (highlighted with a red box)
- Section Name:** Resources
- Tags:** Digitisation Approved
- Course Name:** Data mining - I, Data mining - II
- Course Code:** 1503160459TC, 1603161647TC
- Reading List:** Data mining
- Created By:** Staff, Ex Libris 10/07/2023 11:30:15 IDT
- Modified By:** Staff, Ex Libris 10/07/2023 13:16:16 IDT

 At the bottom, there are tabs for Physical (1), Electronic, Digital, Other, Citation Details, Alerts(1), and More Info.

DCS Status

Note

If there is a DCS failure when extracting a citation, the Citation **Alerts** tab contains a **Details** column that includes the course code.

If multiple notes are received for the request, the value assigned to the **Note** field is `multiple`. You may need to check the DCS for more information.

For more information, see [Integrating with the UKs Digital Content Store \(DCS\)](#).

Search for Citations Within a Reading List

August 2023 Fulfillment - Course Reserves

You can now search for a citation within a reading list in Alma. You can search by the following criteria (for descriptions, see [Managing Citations](#)):

- **Keyword** (default selection) — When selected, this option searches the following citations' metadata fields for a match:

- Additional Person Name, Author, Book Author, Book Title, Chapter Author
- Chapter Title, Citation ID, DOI, Edition, Editor
- ISBN, ISSN, Issue, Journal Title, LCCN
- MMS ID, OCLC Number, Pages, Place of Publication, Publication Date
- Publisher, Resource Note, Source, Title, and Volume

Note

- Keyword searches for citations do not support the use of Boolean operators (such as **AND** or **OR**), and if these operators are specified, they are treated as keywords.
- When special characters (such as hyphen, dash, slash, and so forth) are specified as search terms, the search will return results that both include and exclude the special characters.

- Citation ID
- Creator — The citation author's name. Note: Additional person names are not included in the search.
- ISBN
- ISSN
- MMS Id
- Title — Citation title

The screenshot shows the 'Edit Reading List' interface. At the top, there is a 'Reading List Information' section with fields for Code (0.8626985012725439), Name (ACCT 4501-001), and Due Back Date (09/08/2021). Below this are sections for 'Current Request for Review', 'Review Requester', 'Creative Commons License', 'Covered by the Library', 'Mark as parent', 'Owners', and 'Pages'. A navigation bar at the bottom of the form includes 'Citations', 'Courses', 'Owners', 'Notes', and 'Recent Changes'. The 'Citations' tab is active, showing a search bar with 'Keyword' and a search icon. Below the search bar are filters for 'Resource Locate', 'Material Type', 'Tags', and 'Copyright'. A list of citations is displayed, with the first entry being 'ChildArt : the magazine of the MMS ID: 9930541500521 Article (International Child Art Fou ChildArt : the magazine of the Intel'. A dropdown menu is open over the search bar, listing search criteria: Citation ID, Creator, ISBN, ISSN, Keyword, MMS id, and Title. The citation details for the first entry are: 'Art Foundation. Citation Status: Ready For Processing Resource Locate Status: Resource Located Copyright Status: Not Determined'.

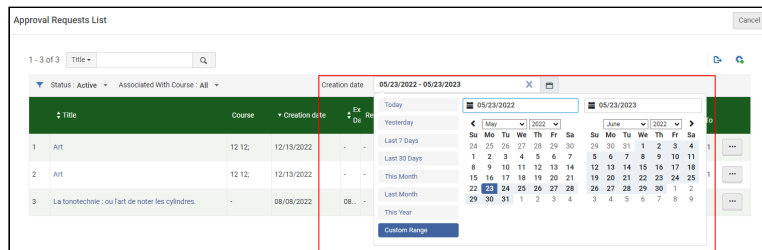
Citation search list

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

Filter Approval Requests by Date Range

August 2023 Fulfillment - Course Reserves SF: 06676661

To filter approval requests by relevance, the Approval Requests List ([Fulfillment > Resource Requests > Approval Requests List](#)) now includes a **Creation date** filter. The default date range displayed is for requests from the most recent year.



Citation Creation date filter

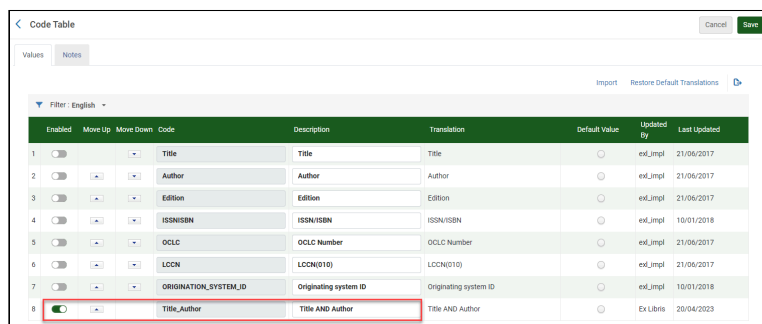
For more information, see [Digitization Approval Requests](#).

Option to Connect Citations to Library Resources by Title and Author Combination

August 2023 Fulfillment - Course Reserves

Using the Resource Locate process, Leganto now provides more flexibility for matching citations to library inventory. The Resource Locate process runs automatically as citations are added to reading lists, manually on demand, or in bulk using a job. It is now possible to specify that a combination of the title and author fields can be used to identify matching resources in the library collection. The library can now configure, for example, that Leganto checks for a match using first ISBN/ISSN, and if a match is not found, check for a match using title AND author. The title and author must match the repository record for the citation to link to the bibliographic record.

To configure, enable the new parameter **Title_Author** in the Locate Citation by Fields table ([Configuration > Fulfillment > Courses > Locate Citation by Fields](#)). When the parameter **resource_locate_mode** ([Configuration > Fulfillment > General > Other Settings](#)) is set to OR, Leganto checks against all enabled fields in the order configured in the table.



Title AND Author parameter

For more information, see [Match by Fields](#).

Alma August 2023 Additional Enhancements

- **August 2023 Resource Management SF: 06290848**



Idea Exchange

When viewing a bib record's related records in [search results > other details](#), the number of results displayed was raised from 500 to 1,000. For more information, see [Search Results tab > Other Details](#).

- **August 2023 Resource Management**

NACSIS Cloud App Enhancements:

- The holdings results page as part of the creation of a NACSIS borrowing request now allows the option to select which table columns to display. For more information, see [Integration with NACSIS-ILL](#).
- The holdings search filter section as part of the creation of a NACSIS borrowing request now incorporates a sticky selection (the UI remembers the last selection of the user) for various filters. For more information, see [Integration with NACSIS-ILL](#).

- **August 2023 Resource Management**

GND Profile Updates: Ongoing GND profile updates.

- **August 2023 Analytics**

The **Title Committed to Retain** field was added to the Bibliographic Details dimension of all subject areas in which it appears. It indicates (Y/N) if the bibliographic record is marked as Committed to Retain in the MARC 960 field.

- **August 2023 Analytics**

A **Year-Month** field in format YYYY-MM was added to all date dimensions for all subject areas. It allows you to sort reports by year and month.

- **August 2023 Analytics**

The Analytics Object subject area was enhanced to support the new Analytics Object Layout including support for data visualization dashboards. To support this enhancement, many new fields were added to the Analytics Objects Measures and Analytics Objects Details dimensions.

For more information, see [Analytics Objects](#).

- For Analytics Objects Measures, the following fields were added:

In addition, the following field names were changed:

The following fields were marked as to be deprecated and will be removed in a future release:

- Num of Objects of Type DV
- Num of DV Objects Marked for Homepage
- Num of Objects Delivered by Attachment
- Num of Objects Delivered by Link
- Num of Objects Delivered by FTP
- Num of Users Who Pinned Object
- Num of Shared Internal Users
- Num of Shared Users by Role
- **Num of Objects of Type Scheduled Report** was renamed to **Num of Scheduled Objects**.
- **Num of Objects of Type Widget** was renamed to **Num of Objects Added as Widget**.
- **Num of Used Subscriptions** was renamed to **Num of Subscribed Users**.

- **Num of Used Widgets** was renamed to **Number of Widget Instances Displayed**.
- Num of Objects of Type Dashboard - Active
- Num of Objects of Type Dashboard - Not Active
- Num of Objects of Type Scheduled Report - Active
- Num of Objects of Type Scheduled Report - Not Active
- For Analytics Objects Details, the following fields were added:

In addition, the following field names were changed:

- Subject Area
 - Is Out of Box
 - Is Widget
 - Is DV Homepage
 - Is Scheduled
 - Scheduled by Link/ Attachment
 - Shared Internal Users
 - Shared Roles
 - **Object Name** was renamed to **Report Name**.
 - **Scheduled Report Format** was renamed to **Scheduled Report Delivery Format**.
- **August 2023 Digital Resource Management**
The **Alma Viewer** was renamed to the **Digital Viewer** to better conform with its usage across products.
 - **August 2023 Fulfillment - Course Reserves**
It is now possible to use the customization wheel to add the Course **ID** to the Alma courses table display. Additionally, this column is included in the Excel file export. The **ID** column is hidden by default.

Code	ID	Section	Name	Academic Department	Processing Department	Instructor	Status	Start Date
1 83608	27049155000...	-	History of Time	-	Main Library	-	Active	15/06/...
2 444	24944227000...	-	Human Interactions	Social Sciences	Main Library	Multiple	Active	09/02/...

Course ID

Alma August 2023 Resolved Issues

- **August 2023 Acquisitions SF: 06631718 06760660**
Previously, it was possible for a PO line to be deleted even if it had an invoice. This was fixed. Now, if a PO line has an invoice, it cannot be deleted.
- **August 2023 Acquisitions SF: 06672543 06725154**
Previously, searches for PO lines in the Receiving Workbench included deleted PO lines. This has been fixed. Alma ignores deleted records when searching for PO lines in the Receiving Workbench.
- **August 2023 Acquisitions SF: 06729988 06411162**
Previously, if a PO line for a subscription was in the claims list because some of the issues in the subscription were not received by their expected dates, although other issues were already received, changing the expected dates of the issues that were not yet received to dates in the future did not remove the PO line from the claims list. This was fixed. When the expected dates of issues that were not yet received are all changed to be in the future, the PO line is removed from the claims list.
- **August 2023 Acquisitions SF: 06590940**
Previously, when a PO line whose acquisition method was Legal Deposit - No Letter went into claim, Alma sent the vendor the regular Claim letter. This was fixed. Alma now sends the Legal Deposit claim letter in this case.
- **August 2023 Acquisitions SF: 06693587**
Previously, when the vendor of a PO line was replaced after the resource was received, the expected receiving date of the PO line was automatically modified, which in some cases caused the PO line to go into claim. This was fixed. Replacing the vendor of a PO line does not affect the expected receiving date.
- **August 2023 Acquisitions SF: 06694704**
Previously, when a Legal Deposit Claim Letter was sent to a vendor, it gave the total number of items ordered as the total number of missing items, even if some of the ordered items were already received. This was fixed. The Legal Deposit Claim Letter now specifies the correct number of items that were not yet received.
- **August 2023 Acquisitions SF: 06701140**
Two issues involving the EAN Account code list were corrected: (1) Previously, the sort mechanism of the list did not work. This was fixed. The account codes are now sorted alpha-numerically. (2) Previously, deleted and inactive account codes could be added to EAN list. They can no longer be added.
- **August 2023 Administration and Infrastructure SF: 06765370**
Previously, patron fines with the status In Dispute were shown with a remaining amount of 0. This was fixed; the correct amount in dispute is now displayed.
- **August 2023 Administration and Infrastructure SF: 06636532 06551883 06572893 06551931**
Previously, an error message was mistakenly displayed when a user working in the User Roles Profiles list tried to save a profile after deleting another profile. This was fixed. Saving a profile after deleting another profile no longer causes an error message to appear.
- **August 2023 Administration and Infrastructure SF: 06653508**
Previously, any user with a Circulation Desk role could send a Personal Information Letter to a patron. Access to this letter for Circulation Desk roles is now controlled by the privilege "Send Patron Information Letter." By default, this privilege is activated for users with a Circulation Desk role, but the institution can deactivate it if they wish, so users with Circulation Desk roles will not be able to send these letters anymore.
- **August 2023 Administration and Infrastructure SF: 06572893 06650604**
Previously, user blocks were only added to the user history after "Save" was selected in the user's record. This was fixed, and now every block that is added to a user (either manually or following an overdue item return) is immediately added to the user's history.
- **August 2023 Administration and Infrastructure SF: 06667582**
Previously, in a specific case, there was a difficulty when a library card was scanned for the "Requester" field during the creation of a Patron Physical Item Request from an Alma repository search. This was fixed. When a library card is scanned in this situation, it now quickly and seamlessly.

- **August 2023 Administration and Infrastructure SF: 06689349**
In a specific case, a user with Administrator roles was unable to see the Tasks list. This was fixed. The user can now see the Tasks list.
- **August 2023 Administration and Infrastructure SF: 06800703 06805939**
Secure FTP Service: Generating keys for the Secure FTP Service failed for some customers. This was fixed and private keys can now be generated.
- **August 2023 Administration and Infrastructure SF: 06255631 06720158**
Ellipsis buttons in the Alma UI/Searches are not compatible with voice dictation software. This was fixed and now the Ellipsis button in the action list is now also recognized by voice dictation (using the phrase: "More Actions").
- **August 2023 Administration and Infrastructure SF: 06623904**
Previously, there were missing translations for the word "All" in the User Details Fees tab. However, this issue has been successfully resolved and the missing translations were fixed.
- **August 2023 Administration and Infrastructure SF: 06715081**
On the Pick-from-Shelf task-list, the Destination facet was not displaying translated library names. This was fixed.
- **August 2023 Administration and Infrastructure SF: 06638141**
The 'resource_sharing_request_id.png' image is now available on the Resource Sharing Shipping Slip letter.
- **August 2023 Analytics SF: 06589415**
The pickup location was displayed in Alma, but in analytics, for the pickup location, it displayed 'None'. This was fixed.
- **August 2023 Analytics SF: 06671408**
Usage data for TR_J1 Usage in the E-inventory subject area does not match with the usage in the Usage Data (Counter) subject area. This was fixed.
- **August 2023 Analytics SF: 06779138**
When creating an analytics object with the "ACRL & IPEDS Dashboard", an error message "Path not Found" was displayed. This was fixed.
- **August 2023 Analytics SF: 06700562**
The default data format for the Object ID in the Analytics Objects subject area inserts a comma as a thousand separator. This was fixed, and now the separator does not appear.
- **August 2023 Analytics SF: 06768315**
Historical events were not reported by the Physical Items Historical Events subject area. This was fixed.
- **August 2023 Analytics SF: 06698941**
When confirming the deletion of analytics objects in the new Analytics Objects List, the checkboxes were cleared, causing the user to be uncertain if the correct objects were being deleted. This was fixed, and now the checkboxes appear selected.
- **August 2023 Analytics**
The default text in a search box was confusing. It was changed to "Start typing to search."
- **August 2023 API SF: 06684071**
Previously, the Update Purchase Request API did not update the currency value. This was fixed and now the currency value is correctly updated.
- **August 2023 API SF: 06722149**
A change that was made to the XML of invoice exports was not reflected in the Developer Network documentation. The documentation has now been updated.
- **August 2023 Digital Resource Management SF: 06751212 06702271**
The Alma viewer does not display PDFs when they are opened. This was fixed.
- **August 2023 Digital Resource Management SF: 06682322**
Alma open remote representations in the Default View instead of the Current View. This is fixed.
- **August 2023 Digital Resource Management SF: 06722477**
In Primo VE, Quick Access did not display digital resources with the IIF viewer. This was fixed.
- **August 2023 Digital Resource Management SF: 06803753**
In the FireFox browser, the file label in Quick Access was not updated correctly when moving back and forth between files. This was fixed.
- **August 2023 Electronic Resource Management SF: 06566356**
In some cases, a user with Electronic Inventory Operator role could not activate a Community Zone Portfolio via the

service. This was fixed and an operator is now able to add portfolios from the Community Zone to a collection.

- **August 2023 Electronic Resource Management SF: 06577001**
The activation report summary was displaying incorrect information for portfolios not in the Community Zone collection. The "Localize and activate" option was mistakenly appearing for these portfolios. This was fixed and the activation report now shows accurate information for all portfolios.
- **August 2023 Electronic Resource Management SF: 06717551 06800972**
Activating New Schedule for 'Upload Electronic Holdings' Job does not "Delete" the previous schedule. This was fixed, when saving the integration profile the previous schedule is deleted.
- **August 2023 Fulfillment SF: 06264721**
In some cases, when an item whose bibliographic record had a large total number of items (such as 2,000), scanning its barcode took a very long time to complete. This has been fixed. Now, when the barcode of such an item is scanned, it is processed at the expected rate.
- **August 2023 Fulfillment SF: 06555418**
Previously, the XML of the following letters did not contain the name of the loan circulation desk: Ful Overdue And Lost Loan Notification Letter, Ful Overdue And Lost Loan Letter, Ful Lost Loan Notification Letter, and Ful Lost Loan Letter. This was fixed. The name of the loan circulation desk has been added to all of these letters.
- **August 2023 Fulfillment SF: 06777511**
Previously, in the "Patron Services" page, when the user switched between "All loans" and "Loans of this session," the cursor was not placed in the "Scan item barcode" field as it should have been. This was fixed. The cursor is now placed in the "Scan item barcode" field after these options are selected.
- **August 2023 Fulfillment SF: 06640489**
Previously, in a specific case, when two distinct personal delivery requests existed for different copies of the same item, and one of the copies was scanned in on the Scan In Items page, incorrect information was displayed about the loan. This was fixed. The information that is displayed now is correct.
- **August 2023 Fulfillment SF: 06550721**
Previously, if a patron came to pick up a booked item after the release time of his booking request had passed, the item's due date was not shortened even if it conflicted with a different booking. This was fixed. Now if the booking release time passes and the booking can no longer be fulfilled due to a conflict with a different booking, the booking request is cancelled, and the due date is shortened.
- **August 2023 Fulfillment SF: 06731901**
Previously, DOI enrichment was causing problems in cases where the print ISSN from Crossref incorrectly contained "00000000." This was fixed. In cases where the print (or electronic) ISSN from Crossref returns "00000000," the original ISSN/eISSN is not overwritten.
- **August 2023 Fulfillment SF: 06378996 06659565 06422495 06644211 06354571**
Previously, some Inventory Remote Storage Update - Automated Retrieval System (ARS) jobs were completed with the warning, "Failed to send Inventory Add Message." The problem was traced to a timeout issue. To fix the problem, a new customer parameter, `asrs_job_message_delay`, has been added (in **Configuration Menu > Resources > Other Settings**). This CP makes it possible to set a delay, in milliseconds, between each message. By default, no delay is set. If this warning appears, this CP can be used to configure a delay.
- **August 2023 Fulfillment – Resource Sharing SF: 06493894 06706084 06661180 06723618 06762904 06468567**
In some cases, selecting "Show file" on a borrowing request did not open the associated file. This was fixed. Now, selecting "Show file" in these cases opens the associated file as it should.
- **August 2023 Fulfillment – Resource Sharing SF: 06710337 06596490 06695832 06502911 06568229**
Previously, the "Alma Network" checkbox was automatically selected in locate profiles that were copied from the CZ. In addition, the "Holdings code" field was hidden in the Partner Configuration page when the partner record was copied from the CZ. These problems were fixed. The "Alma Network" checkbox is no longer pre-selected in locate profiles that are copied from the CZ, and the "Holdings code" field is no longer hidden in the Partner Configuration page of partners that were copied from the CZ.
- **August 2023 Fulfillment – Resource Sharing SF: 06620641 06550689**
In some cases, changing the order of a resource-sharing request's rota generated an error. This was fixed. An error is no longer generated in these cases.
- **August 2023 Fulfillment – Resource Sharing SF: 06434853**
In the FulPlaceOnHoldShelfLetter that is sent to the requesting patron when a physical, non-returnable item is received by the library from a resource-sharing partner, the `organization_unit` that appeared was the institution when it should have been the resource-sharing library. This was corrected. The `organizational_unit` that now appears in the letter is

the resource-sharing library.

- **August 2023 Fulfillment – Resource Sharing SF: 06575145 06567914 06595539**
When using Patron Query Templates, Firefox was incorrectly configured to use a single-line text box for the body of the patron query. This was fixed. Firefox now provides a multi-line text box for this field.
- **August 2023 Fulfillment – Resource Sharing SF: 06592213**
Previously, in the Resource Sharing Lending Requests task list, in Firefox, it was not possible to copy the title of a resource when it was displayed as a link. This was fixed. The title can now be copied in Firefox, although it must be selected by dragging the mouse from left to right.
- **August 2023 Fulfillment – Resource Sharing SF: 06581513**
Previously, Publication Date, Publisher, and Place of Publication were not shown in Resource Sharing Lending Requests task lists. They have now been added to the optional row details, and users can turn their display on in the Records Customization settings.
- **August 2023 Fulfillment – Resource Sharing SF: 06575763**
In some cases, when performing a return for a Borrowing Request, the setting for Automatically print slip defaulted to "No." This was fixed. It now retains the last setting that was chosen by the user, as it should.
- **August 2023 Fulfillment – Resource Sharing SF: 06561704**
In some cases, Borrowing Requests were not showing the pickup location. This was fixed. The pickup locations are now shown in these Borrowing Requests.
- **August 2023 Fulfillment – Resource Sharing SF: 06764361 06664826 06773090**
In some cases, modifications made to the list of Reject Reasons available for Resource Sharing requests were not saved, and were therefore not implemented. This was fixed. They are now saved and implemented as they should be.
- **August 2023 Fulfillment – Resource Sharing SF: 06390023 06631176**
Previously, when a lending request with an MMS_ID from the Network Zone was sent from RapidILL, Alma rejected the request. This was fixed. Now Alma correctly creates lending requests with Network Zone MMS_IDs.
- **August 2023 Physical Resource Management SF: 06568799**
Browse bibliographic records - heading_info index: browsing by LC call number (cataloged in the bib field 050) did not show any results on the right-hand side to match the number of results on the list on the left-hand side. This has been fixed and will be deployed gradually with the next semi-annual indexing.
- **August 2023 Physical Resource Management SF: 06556188**
Change Physical Items Information job: when the input set includes two items of the same bibliographic record (each in a separate holdings record), and the job is configured to move the items to a different permanent location, two duplicate holdings records are created with the same library and location (which is not allowed), and the items are moved to these holdings. This has been fixed. That is, a single holdings record is created with the designated library and location, and the two items are moved to it.
- **August 2023 Resource Management SF: 06654430 05314131 06660967 06058017 06230664**
OAI publishing profiles using an Indication Rule to filter out specific records still published the records. This was fixed and the records are filtered accordingly.
- **August 2023 Resource Management SF: 06394703**
In the report for Change Physical Items Information job, "success" and "failure" titles appeared in the email as "Success" and "Failure". This was fixed by removing the bold formatting from the titles.
- **August 2023 Resource Management SF: 06386298**
Incorrect Number of Bib Records showing as linked to an authority record in the Community Zone. This was fixed by changing the CP: "temp_enable_use_solr_in_f3_count" to false.
- **August 2023 Resource Management SF: 06748611 06779742**
The incorrect "Serial/Integrating Resource" option has been removed from the list of options of the "Bibliographic Format" index in advanced search. At the same time, this option has been re-instated to the values list for creating a new 006 field in the MD Editor. In addition, the text for the "m" code entry of the values for field 006 was incorrect; "Computer file". This has been fixed to "Computer file/Electronic resource".
- **August 2023 Resource Management SF: 06631655**
Browse bibliographic records: In some cases, the records indicated on the left side (by a number beside the heading) were not shown on the right side for viewing. This has been fixed and will be deployed gradually with the next semi-annual indexing.
- **August 2023 Resource Management SF: 06678231**
In some cases, when browsing bib headings by title, the same bibliographic record was displayed twice in the results

on the right-hand side. This has been fixed and will be deployed gradually with the next semi-annual indexing.

- **August 2023 Resource Management SF: 06738568 06630135 06585716**
Browse Bib Headings shows no results in View. This was fixed and at least 1 bib record is displayed.
- **August 2023 Resource Management SF: 06672615**
The following issues concerning Browse Bib Headings have been resolved:
 - 1) In some cases, when browsing bib headings by title, the same bibliographic record was displayed twice in the results on the right-hand side.
 - 2) Browse bibliographic records - heading_info index: browsing by LC call number (cataloged in the bib field 050) did not show any results on the right-hand side to match the number of results on the list on the left-hand side.
 - 3) In some cases, the records indicated on the left side (by a number beside the heading) were not shown on the right side for viewing. Full inventory indexing is required for this fix to take effect.
 - 4) Browse Title headings in institutions using only Unimarc as the active format: CZ-linked MARC21 records having the browsed title were not displayed on the right-hand side.These have been fixed and will be deployed gradually with the next semi-annual indexing
- **August 2023 Resource Management SF: 06461546 05319674**
Metadata Editor: LDR's German field information was not opened. This was fixed and now the "field information" action supplies the right information page.
- **August 2023 Resource Management SF: 06055728**
Metadata Editor: suppression indication of a holdings record located in a suppressed location disappeared when clicking the holding. This was fixed.
- **August 2023 Resource Management SF: 06259059 06452859 06254000 06450042 06395892**
Browse bibliographic records: In some cases, the records indicated on the left side (by a number beside the heading) were not shown on the right side for viewing. This has been fixed and will be deployed gradually with the next semi-annual indexing.
- **August 2023 Resource Management SF: 06672615**
Browse Bibliographic Headings shows a total results number, but the titles do not show when you click "View". This was fixed.
- **August 2023 Resource Management SF: 06732331 06669056 06656167 06744041**
When you customize the shortcuts menu and disable Alt+number, you can't add special characters in the Metadata Editor using Alt+number in Firefox. This was fixed and now, if the configuration allows, the special characters are added in all browsers.
- **August 2023 Resource Management SF: 06672012 05321685**
When a local extension is added to a network record already opened in the member Metadata Editor using a process, after pushing this record again to the Metadata Editor, the added local extension is not displayed. This is fixed. A pop up is now displayed to inform that the record has been updated by an external process.
- **August 2023 Resource Management SF: 06271143**
Metadata Editor > Create Holdings failed in specific cases. The default library was not displayed (\$\$b) before opening the Form Editor. This was fixed.
- **August 2023 Resource Management SF: 06533339**
Metadata Editor > A wrong validation warning message is displayed when editing the control field 007 (for "c" = Electronic resource, the positions 06-08 indicate the image bit depth; possible values are 001-999): "0 is not a valid code for position 6 and 7 for field 007". This was fixed
- **August 2023 Resource Management SF: 06747979**
Metadata Editor > Holdings record > Field 853 > Row Actions > Redundant "Open form editor (Ctrl+F)" label. This label was removed since it is not supported for field 853.
- **August 2023 Resource Management SF: 05320510**
For fields 111 and 711, the subfield \$j is no longer preventing full linking and is not stripped from the field when linking the authority. This was fixed.
- **August 2023 Resource Management SF: 06730118 06494929**
The match methods 'ISBN/ISSN (exact subfield match)' and 'ISBN/ISSN (exact subfield match)/024/035' not working as expected. In some cases, the import job found a match when the import record has the ISBN in 020 \$\$a and the record in Alma has the ISBN in 020 \$\$z. This was fixed and now no match will be found between 020 \$\$a and \$\$z. Note that full indexing is required for the fix to take effect.
- **August 2023 Resource Management SF: 06653325**

Metadata Editor Import: a discovery profile with OAI import protocol saved as a draft was not created properly. This was fixed.

- **August 2023 Resource Management SF: 06543418**
MODS record was saved and indexed as OTHER type in Primo, although it should be saved as Image. This was fixed.
- **August 2023 Resource Management SF: 06484277**
There were issues with mapping MARC fields to OTHN fields in CAT-P. This was fixed by adding OTHN numbers to the Alma CAT-P crosswalk.
- **August 2023 Resource Management SF: 06641891**
The "Import" functionality, when working with records from the SBN central catalog was importing the truncated SBN record from the search results. This resulted in missing fields in the Alma record (Most "Search Resources" targets return full records, but not SBN.) This was fixed by retrieving the full record from SBN when doing "Import" from the SBN central catalog.