



**Alma September 2023 Release**

**The Galaxy**  
August 2017 – Perseid Meteor Shower

# Alma September 2023

## Release Notes

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## Alma September 2023 Upcoming Issues to Note

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### Change to Monthly Release Notes Distribution

Beginning in November, we will discontinue creating and distributing PDF versions of our release notes. This decision reflects our ongoing efforts to streamline our processes and focus on more efficient information sharing. While we will no longer provide PDFs, you can still access all the latest updates, enhancements, and resolved issues through our online platform.

We understand the significance of staying informed about our product developments. We are committed to ensuring that this transition does not impact the quality and accessibility of our information.

We appreciate your understanding and continued support as we improve our release notes distribution. If you have any questions or concerns, please don't hesitate to contact our dedicated support team.

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### Rollout of the New Layout for the PO Lines Task List

As of August 2023, the next-generation Alma UI design is available for the PO Lines task list. Individual users can opt-in to the new task-list layout to experience the functional enhancements and the new User Experience.

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 more information about the rollout plan, see [Rollout Plan](#).

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## Alma September 2023 Main Stories

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### New Analytics Usage Tracking Data Visualization Dashboard

#### September 2023 Analytics

A new out-of-the-box Analytics Usage Tracking dashboard is now accessible. It offers reports for tracking analytics queries and responses, giving clear insights into how analytics are used and how well they perform, including identifying errors and timeouts.

You can find it in the Alma catalog at **Alma > Analytics Usage Tracking > Data Visualization > Usage Tracking**.

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### Item Creation Date Filter Added to ACRL and IPEDS Dashboard

#### September 2023 Analytics

The **Item Creation Date** filter was added to the ACRL and IPEDS dashboard reports. This filter lets you sort the reports based on when the item was created.

You can use this filter in the following reports under the Library Collection Number of Titles (Physical) tab:

- ACRL Physical Books Title Count
- ACRL Physical Media Title Count
- ACRL Physical Serials Title Count

And also, in the reports under the Library Collections Number of Titles (Electronic) tab:

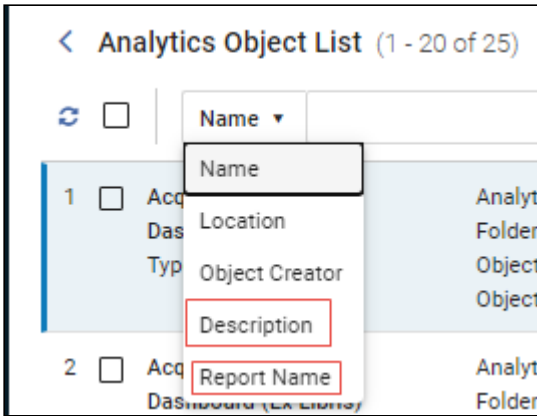
- ACRL Digital/Electronic Books Title Count
- ACRL Digital/Electronic Media Title Count
- ACRL Digital/Electronic Serials Title Count

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### Search Analytics Object List by Description and Report Name

#### September 2023 Analytics

You can now search for Analytics Objects by object Description and Report Name. To support this feature, **Description** and **Report Name** were added as options from the Find drop-down list.



**Search by Description and Report Name**

## Alma September 2023 Additional Enhancements

- **September 2023 Analytics**

The following fields were added to E-Inventory > Electronic Collection:

- Electronic Collection Management Level in CZ – who maintains the community managed collection. For more information, see [Managing Electronic Collections](#).
- Electronic Collection Pending Deletion Date – the date on which the electronic collection will be deleted

- **September 2023 Fulfillment**

It is now possible to disable automatically adding a note to users with role profile information. This disables adding the note for future user updates. For more information, see "Add roles using a profile" in [Adding Roles to Users](#).

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## Alma September 2023 Resolved Issues

- **September 2023 Acquisitions SF: 06715538 06688912**  
When a purchase request was created from Primo/VE, Alma did not populate the default value for the Interested user. The default value would only be populated when editing and saving the purchase request. This was fixed.
- **September 2023 Acquisitions SF: 06734935**  
In some cases, when editing a PO Line to add an Associated order, the information did not display properly in the Summary tab. This was fixed.
- **September 2023 Acquisitions SF: 06819403 06796008 06789480**  
When trying to change the acquisition method for two migrated PO lines, the "Update PO Lines Information - Advanced" job completed with errors. This was fixed.
- **September 2023 Acquisitions SF: 06621972**  
A user with only the invoice operator role was able to approve invoices. This was fixed.
- **September 2023 Acquisitions SF: 06636125**  
The new UI/Discoverability of the License Terms Translatable Text Area feature did not work with Amendment type licenses. This was fixed.
- **September 2023 Acquisitions SF: 06654839 06630153 06053479**  
Trials did not get the most updated URL from the collection. This was fixed.
- **September 2023 Acquisitions SF: 06705518**  
When selecting Transfer Funds, if previous FY funds were in the Recent drop down, then funds could be transferred to that old fund. This was fixed. Note that a similar issue was fixed in the past in the Transfer Fund form.
- **September 2023 Acquisitions SF: 06737831**  
When a Vendor was changed on an invoice that had the vendor account populated, the change did not remove the vendor account from the invoice. This caused incorrect 'Vendor Account' information in re-exported invoice files for the ERP. This was fixed. Now, when the vendor is changed and the invoice is saved, Alma verifies that the vendor account is valid.
- **September 2023 Acquisitions SF: 06572487**  
The item parent fields were not loaded in IR\_A1 reports for Proquest. This was fixed.
- **September 2023 Acquisitions SF: 06710685 06725092**  
The ERP export job would run for 24 hours and create duplicate XML output files. This was fixed.
- **September 2023 Acquisitions SF: 06523609**  
The "Create inventory only for new bibliographic records" field was removed from New Order and Update inventory profiles, as this functionality is only supported in Import Repository.
- **September 2023 Administration and Infrastructure SF: 06618247 06629929**  
Previously, A 'PIN Number Generation Letter' is sent every time the user account type was toggled, from Internal to External and vice versa. This was fixed and now the letter is not sent when toggling the user account type.
- **September 2023 Administration and Infrastructure SF: 06661903 06491578**  
Large number of rows in mapping table appears to cause "Statistical Categories/Types" configuration page to crash. This is fixed. Solution: if there are more than 1000 options in combobox it becomes read only and user can add and remove but not edit.
- **September 2023 Administration and Infrastructure SF: 06848637**  
Within the "New Letters XSL Editor", the function 'Save and distribute' was not triggering the network letters distribution job. This was fixed.
- **September 2023 Administration and Infrastructure SF: 06801585**  
Previously, an error occurred when deleting a newly created remote storage location. This was fixed.
- **September 2023 Analytics SF: 06725222**  
When the Material Type field from the Physical Items dimension was added to reports, the values of the measure fields

were doubled. This was fixed and now the data is correct.

- **September 2023 Analytics SF: 06753573**  
When creating an analytics report for courses without citations, the report displayed that there were citations for the course. This was fixed, and now reports for courses without citations display that the courses have no citations.
- **September 2023 Analytics SF: 06701845**  
When a holdings record was deleted, the modification date was not updated in Analytics. This was fixed.
- **September 2023 API SF: 06718186**  
An error occurred when trying to update the fund for some orders via API ("The funding list contains invalid values"). This was fixed.
- **September 2023 Digital Resource Management SF: 06444002**  
Changing the label of a representation was not saved. This was fixed.
- **September 2023 Digital Resource Management SF: 06675310**  
The Universal Viewer failed to display PDF files and instead displayed an error message. This was fixed.
- **September 2023 Digital Resource Management SF: 06562231**  
Digital titles with access rights of an embargo by publication year were not available even after the specified time period after the publication year passed. This was fixed.
- **September 2023 Digital Resource Management SF: 06792130**  
In the Digital Deposit Form, labels with periods were not displayed properly in the form. This was fixed.
- **September 2023 Digital Resource Management SF: 06847179**  
Changes to file labels in the Digital File Editor could not be saved. This was fixed.
- **September 2023 Electronic Resource Management SF: 06692362 06758368 06533449 06676292 06432269**  
The material type value is not displayed in the portfolio list view of the service if the value is stored in the electronic material type. This was fixed and now the material type in the electronic pages displays the value of the electronic material type if it exists, otherwise the bib material type.
- **September 2023 Electronic Resource Management SF: 06676452**  
Collection Group was deleted when a new one is added, overwriting the previously edited group. This happened after editing a collection/service/portfolio group settings, and then clicking the 'Cancel' button. This was fixed, and saving a new group is created successfully.
- **September 2023 Electronic Resource Management SF: 06765560 06781159**  
Not all portfolios were activated by the portfolio loader. This was fixed, the portfolio loader now activates the portfolios from the input file.
- **September 2023 Electronic Resource Management SF: 06792165**  
The library field under the Electronic Collection history tab appeared incorrectly when clearing the library from the collection's library field. This was fixed, the library field in the history now shows the correct information.
- **September 2023 Fulfillment SF: 06734542**  
Previously, in some cases, an error occurred when trying to import the "RequestCancellationReasons" table without the "RemoteStorageCannotFulfill" cancellation reason. This was fixed.
- **September 2023 Fulfillment SF: 06619983 05330734**  
For RFID Integration with the 3M system, when writing data to a new RFID tag, Alma did not set the security status correctly. This was fixed.
- **September 2023 Fulfillment SF: 06684433 06730805 06708573 06847405 06681627 06731941**  
The Quick print dialogue window for the Resource Sharing Shipping Slip Letter was not displayed as expected. This was fixed.
- **September 2023 Fulfillment SF: 06755629 06728939 06802161 06812791**  
The Shortened Due Date letter was sent twice each time. This was fixed.
- **September 2023 Fulfillment SF: 06340072 06638824**  
Previously, when using the Deliver Digital Documents screen, if Automatic Printing was configured and the request being handled was not active, a Resource Request Slip was incorrectly printed when selecting the Done button. This was fixed, and the slip is no longer printed in this scenario.
- **September 2023 Fulfillment SF: 06644774**  
When cancelling a physical item request for an item on the hold shelf, the item is placed on the expired hold shelf. With two other requests in the queue, where the first has personal delivery as the pickup location, activating the next step in



- languages other than English, caused the item to fulfill both requests at once. This was fixed.
- **September 2023 Fulfillment SF: 06816361 06731958 06786521 06823437 06791762 06792465 06796291**  
Course names could not be edited in a non-English UI. This was fixed.
  - **September 2023 Fulfillment SF: 05331127**  
Leganto sources were excluded from the Alma Link Resolver Usage report. This was fixed.
  - **September 2023 Fulfillment – Resource Sharing SF: 06373220**  
The Manual Locate job would find resources in the partners catalogue, even though the partner didn't have the year when the requested article was published. This was fixed.
  - **September 2023 Fulfillment – Resource Sharing SF: 06578293**  
When an item was requested for personal delivery, but the library staff marked it as reading room only, the request was still sent as a personal delivery rather than being sent to the reading room. This was fixed.
  - **September 2023 Fulfillment – Resource Sharing SF: 06755495 06746375**  
The Record Customization option to display the Requested Media in the task lists, was not available in the borrowing requests task list and the lending task list. This was fixed.
  - **September 2023 Fulfillment – Resource Sharing SF: 06614933 06571619**  
The partner listed on the Lending Request right pane was mistakenly listed as Lending Library rather than Borrowing Library. This was fixed.
  - **September 2023 Fulfillment – Resource Sharing SF: 06680840 06708573 06681627 06690682**  
The print slip did not open even when a success message was displayed, and the slip was sent by email. This was fixed.
  - **September 2023 Fulfillment – Resource Sharing SF: 06760744 06734687 06728285**  
Previously, when submitting an article request from a journal created an incorrect record. This was fixed.
  - **September 2023 Fulfillment – Resource Sharing SF: 06649501 06589810**  
When sending files using the Fill locally action, the Upload file page did not open correctly. This was fixed.
  - **September 2023 Resource Management SF: 06502462**  
Item Call Number: Occasionally, the same item call number was generated twice, so two different items were saved with the same call number value. This was fixed by blocking the item call number sequence (AKA "accession configuration") upon saving an item. Now, when two users try to generate and save new sequences of the same prefix, the table is blocked until the first item is saved and only then a new sequence is generated for the second item.
  - **September 2023 Resource Management SF: 06843546**  
Campus Level Publishing: If the last copy is deleted on a symbol but exists on another, a record is published in the "deletes" file with the correct symbol in the symbol field, but the LDR/05 is showing "c" rather than "d" to indicate these holdings should be deleted from OCLC. This was fixed and now the deleted holdings are published with "d" in position 05 of the LDR field.
  - **September 2023 Resource Management SF: 06836336**  
Could not create Physical Holdings sets filtered for Permanent Physical Location. This was fixed and now the advanced search retrieves results.
  - **September 2023 Resource Management SF: 06761098**  
When the customer parameter "use\_holdings\_form" is activated, the Metadata Editor froze after trying to edit a holding that had already been opened a first time using the "View Inventory" > "Edit". This is fixed.
  - **September 2023 Resource Management SF: 06704291 05310288 06655194**  
An error message was displayed when opening the mapping table for New Order Import Profile. This was fixed.
  - **September 2023 Resource Management SF: 06794814**  
CNMARC - In the Metadata Editor, "Author Code" cannot be generated via "Enhance the Record" when there is a character "?" "zha" in 090. This was fixed.
  - **September 2023 Resource Management SF: 05328281**  
SBN Contribution - The update of relator terms in tag 7XX subfield 4 was not updating the SBN. This was fixed and now the terms in tag 7XX subfield 4 are updated.