As many of you already know, Alma development periodically needs to take a "back seat," and maintenance, cloud infrastructure, and other important tasks need to be handled in order to ensure that Alma meets the highest standards of performance and high availability. The October 2020 release is devoted to such tasks.

We would also like to take this opportunity to update you on the following:

NERS Enhancements Update

The following NERS 2019 enhancements were developed and delivered:

- Enhancing security and management of API keys
- User profile - Add field for last active date
- Automate Borrowing Request Processes
- Option to not show related holdings locations
- Add Pop-Up Notice at Scan in Items
- Link resolver delivers physical holdings for wrong titles for PCI records
- Administration: Expand Repository Advanced Search Options
- Split role user manager in 2: the user manager and the patron manager
- Add ability to customize Purchase Request online form
- Portfolios in an electronic collection/package should inherit data displays from the collection's service

NERS 2020 - Final NERS Enhancement Requests for 2020 are:

- Provide the ability to identify broken links to electronic and digital resources
- Improve Repository Search functionality with free text options for MARC tags and subfields in Advanced Search
- Resource sharing: updates to due dates of borrowing request loans to be reflected in resource sharing and fulfillment

Idea Exchange Statistics

- 292 Ideas have already been Completed
- 69 Ideas have the status Planned
- 20~ Ideas are being considered and have the status Under Review.
- 700~ voters interacted with Alma on Idea Exchange in the last 30 days
Cloud Apps

Can you guess the most popular Cloud App – i.e. the Cloud App with the highest number of downloads?

The HathiTrust Availability Cloud App wins hands down! This Cloud App queries the HathiTrust API to look for availability for each displayed BIB record. A match is based on OCLC, ISBN, and ISSN numbers as cataloged in the record.

Want to know more about Cloud Apps? Check out the Cloud App release blog and the Cloud App documentation.

Alma Education

Alma Webinars

Attendance Statistics for Alma webinars:

- Alma Product Webinars: 3966
- Best of Knowledge Days: 7925
- Best Practices for the Ex Libris Community During COVID-19: 1823

The top Three Most Attended:

- Alma & Primo Best Practices and Q&A in Light of COVID-19 – 911
- Using Alma Analytics to Perform Overlap Analysis & Deselection – 805
- Optimize and Streamline Alma Workflows – 754

Alma What's New Videos

There are now more than 1.65K subscribers to Alma's What's New Videos

19 new videos were posted in the first 8 months of 2020, with a total of 23,000 views

And, the top 3 most viewed are:

- New Alma Metadata Editor – 6,984 views
- Alma New Layout – 3,772 views
- Cloud Apps – 1,236 views

GuideMe

Ex Libris’ GuideMe has given additional support to Alma users in this time of increased need wherever they may be located, bringing just-in-time, step-by-step guidance on important workflows in Alma.

More than 20 GuideMe walkthroughs are currently available (depending on role and permissions) covering topics such as fiscal period management, normalizing bib records, and exporting and importing records for cleanup.

The top three walkthroughs, based on usage data are:

- Rollover Ledgers – the first step in the fiscal-period close process
- Rollover PO Lines – the second step in the fiscal-period close process
• **Rollover Resource Sharing Requests** – the final step in the fiscal-period close process

Read more about GuideMe on our [GuideMe blog here](#).

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**Community Zone Update**

In collaboration with the Community Zone Management Group, it will not be possible to add or edit the following fields in the Community Zone by members of the community:

• 856 subfield u
• All 9xx fields excluding 906, 999 and 920

These fields will NOT be saved even if edited/addded, as a new Normalization Rule, applicable only in the CZ, will prevent this.

A cleanup of these fields from Community Zone records will follow.

---

**DARA**

• DARA continues to grow and is widely used across all regions.
• 6628 recommendations have been implemented by 714 institutions
• The top 3 most popular recommendations are:
  ◦ 50,000~ link local electronic collection to CZ
  ◦ 45,000~ unavailable portfolios
  ◦ 25,000~ link standalone portfolio to CZ

---

**Statistical Trends Across All Institutions**

**Physical Loans – across all institutions**

• 2020 started very strongly in regard to physical loans
  ◦ with close to 5M transactions in January
  ◦ dropping significantly from April to June with an average of 500,000 loans per month.
  ◦ happily, we can now see a rising trend with 1.5M+ transactions for August

**Digital Files – across all institutions**

• Stats show a very sharp increase in the number of digital files
• We can see a significant jump from
  ◦ 2.6M files in February
  ◦ to 4.7M+ in March,
  ◦ and 5.3M in August

**Electronic Portfolios – across all institutions**

• A very steady increase in the 1st 8 months of the year in the growth of electronic portfolios
  ◦ Growing from 900,000~ in March,
  ◦ To more than 1B in August
Electronic Collections – across all institutions

- A huge increase in the number of electronic collections
  - 340,000~ in March
  - 1.1M+ in June
  - 1.2M+ in August

Patron Requests – across all institutions

- Patron requests decreased sharply
  - from 1M+ in February to 150,000~ in April.
  - however, the situation has improved; August sees more than 600,000~ requests

Upcoming Issues to Note

OAS (Oracle Analytics Server) and DV (Data Visualization)

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New Metadata Editor
- Ex Libris announces the rollout of the new Metadata Editor. In the current release, the new Metadata Editor contains the Records Management core functionality (the functionality available in the original Metadata Editor plus new features). Template and Rule management will be rolled out in the upcoming releases, giving users enough time to adjust to the changes. Starting from the September release, Alma users can switch back and forth between the new and the original Metadata Editors.

New Layout Enhancements
- Continuing the rollout of the new Alma layout, the new layout is now available for Alma users. Starting from the August release, Alma Administrators can turn the new functionality on (Opt-in). In September release, users who were opted in can switch between the current and the new layout as required.

New Auxiliary Digital Usage Type
- A new Auxiliary Digital Usage Type enables institutions to differentiate between full online availability and files which are auxiliary to other resource types, such as a digital table-of-contents for a physical resource. This content is available in Primo but not indexed as online availability.

Upcoming Issues to Note

RapidILL Integration
Alma and RapidILL now support a fully integrated end to end process on both the borrower and lender side. A library that is using Alma and RapidILL can experience the full workflow of requesting and receiving as a borrower, or shipping as a lender, using only Alma screens.

As borrower:
The patron can submit a request through Primo, or the library can place a request via Alma.

- The request is automatically forwarded to RapidILL for processing the borrower's request and for finding a lending request. Rapid will automatically reject this action if there is no available resource in Rapid that can fulfill the request.
- When the resource is received in Rapid, the Alma request is automatically completed, and an email to the patron with a link to the resource is automatically sent by Alma.
  - Alma can be configured to require manual forwarding of the email to the patron.
  - The received resource remains available to the staff use to view or forward again to the patron.

As lender:

- When a lending request is created in Rapid it is automatically created in Alma as well.
- The staff can use the Alma Manage Fulfillment Options action to access the requested electronic resource or to request digitization of the physical resource.
- The Ship Digitally action can be used to upload the digital file to Alma. Alma will automatically forward the document to RapidX, resulting in the request being fulfilled in Rapid and in Alma.

For more information, see RapidILL Based Resource Sharing Workflow.

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**Note**

Contact Ex Libris support for this activation.

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Ex Libris, a ProQuest Company
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Click to download the PDF of the [Alma August 2020 Release Notes and Resolved Issues](#).

Cliquez ici pour consulter la version française de la section "Profitez au maximum de cette version".

### Make the Most of August’s Release

#### Action Items

- **Cloud Apps** - Cloud Apps is an open framework that enables developers to write apps that run inside Ex Libris higher education products such as Alma, Primo VE back-office, Esploro, Leganto and Rapido. It adds new features beyond core Ex Libris functionality, which can integrate with other systems, or can provide shortcuts and efficiencies for institution-specific workflows.

- **New Layout** - Additional improvements related to the New Layout have been made available that include changes to the Configuration menu, Action icons customization and Summary section.

#### Upcoming Issues to Note

**Sandbox Refresh**

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

**Security update - Removing HTTP allowed exceptions for Alma**

To align with industry standards and avoid security vulnerabilities, Ex Libris is removing its remaining HTTP allowed exception. Alma will require working with HTTPS for all incoming traffic and as result, will redirect all HTTP traffic to HTTPS.
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Next Release Sneak Preview

Select September 2020 Sneak Preview to view the next release sneak preview.

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Cliquez ici pour consulter la version française de la section "Profitez au maximum de cette version"

Make the Most of July's Release

### Action Items

- **User Sets and Advanced Search for Users** - The new options to search users in advanced mode allows creating sets based on multiple search attributes. This way, you can use complex conditions to save a list of users as a set for various purposes, such as for sending a notice, running an update etc.

- **Push user records from NZ not via SIS** - Networks that share user records in the Network Zone can now manage the Network Zone users not only via SIS updates but also by manual or API updates, as well as by running batch user updates in the network using the Update/Notify Users job.

- **Scan In Interface - Allow check in of shipped items** - You can now set the system to issue a warning if an item that is scanned in is expected to be shipped for resource sharing and not expected to be scanned in.

- **Enhancements to Forms** - Institutions now have advanced control over the configuration of deposit forms, both staff and patron, including repeatable fields and additional filed types such as check-boxes and many more.

- **Enhanced Sorting Support for Collections** - Patrons are provided with a rich set of new sort routines for titles under a collection, and Alma staff can configure the default sort routine both for sub-collections and for titles under each collection level.

- **Provide the ability to share and contribute GES templates in the CZ - Part II** - Do you have a useful general electronic service you created? You can now share it with the community by contributing it to the Community Zone.

- **CZ Contribution - Update contributed collections - Part II** - Do you have a local electronic collection that will be useful to wider Alma community? You can now contribute additional information associated with your local electronic collection.
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### Action Items

- **Limit User Managers to Non Restricted Accounts** - It is possible to restrict users that have access to user accounts so that they cannot update restricted users accounts. For example, it is possible to set that some users that have a User Manager or Circ Desk Operator role will still not be able to update accounts of library staff. Restricted accounts can be defined as accounts with given user groups or with given user roles.

- **Bulk changes to Physical Items using existing jobs** - Alma users are able to perform bulk changes on Physical Items directly through the Physical Items search and Items list. The changes will be done for selected records by the user using existing jobs. In addition, the user is able to create an itemized set for those records.
Action Items

- Ability to change all temporary fields for Physical Items - The Change Physical Items job has been enhanced to enable the user better coverage of temporary location changes, Statistics Notes, Sequences and an improved usability of the parameters screen.

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All other instances already support HTTPS only. We are also working to identify non browser calls coming from specific IPs and are contacting several customers directly asking to change their calls to HTTPS.

For further assistance, open a Salesforce case and reply with the case number.

Analytics Infrastructure Performance Upgrades

Ex Libris is currently implementing performance upgrades to the Alma Analytics infrastructure. These upgrades will greatly improve performance when running analytics reports and are being rolled out gradually. The table below describes the rollout plan. For more information, see the Analytics - Infrastructure Improvements in 2020 document.

<table>
<thead>
<tr>
<th>Instance</th>
<th>Will be implemented during</th>
</tr>
</thead>
<tbody>
<tr>
<td>NA01</td>
<td>June 2020</td>
</tr>
<tr>
<td>NA02</td>
<td>Completed</td>
</tr>
<tr>
<td>NA03</td>
<td>June 2020</td>
</tr>
<tr>
<td>NA04</td>
<td>Completed</td>
</tr>
<tr>
<td>NA05</td>
<td>July 2020</td>
</tr>
<tr>
<td>Instance</td>
<td>Will be implemented during</td>
</tr>
<tr>
<td>----------</td>
<td>--------------------------</td>
</tr>
<tr>
<td>NA06</td>
<td>Completed</td>
</tr>
<tr>
<td>NA07</td>
<td>July 2020</td>
</tr>
<tr>
<td>NA91</td>
<td>July 2020</td>
</tr>
<tr>
<td>EU00</td>
<td>June 2020</td>
</tr>
<tr>
<td>EU01</td>
<td>June 2020</td>
</tr>
<tr>
<td>EU02</td>
<td>June 2020</td>
</tr>
<tr>
<td>EU03</td>
<td>July 2020</td>
</tr>
<tr>
<td>EU04</td>
<td>July 2020</td>
</tr>
<tr>
<td>AP01</td>
<td>July 2020</td>
</tr>
<tr>
<td>CA01</td>
<td>September 2020</td>
</tr>
<tr>
<td>CN01</td>
<td>January 2021</td>
</tr>
</tbody>
</table>

**GND Name Authorities Changes**

The German National Bibliographic Center DNB (Deutsche Nationalbibliothek) has announced that as of 16 June 2020 the GND (Gemeinsame Normdatei) Name Authorities marked as type N will no longer be supported and will be removed from the GND authority files.

For more information, see [GND Name Authorities Changes](#).

Download a PDF of the [Release Notes and Resolved Issues](#).

Cliquez ici pour consulter la version française de la section "Profitez au maximum de cette version"
Make the Most of May's Release

Action Items

- **New Metadata Editor** - The new Metadata Editor is now available for your review in the sandbox. See the [Metadata Editor](#) and [Rollout Plan](#) sections on the Usability Improvements page for more information.

- **Requesting Physical Items** - It is now possible to set the system to ignore rota lenders that own only electronic copies of a resource, if the borrowing resource sharing request has been made to specifically request a physical resource. This can be set up by setting the new rs_ignore_electronic_for_physical_request parameter to 'true'.

- **Recent Entities for Digital Resources** - Collections and Digital representations are added to the list of “Recent Entities” for quick access.

- **Keyboard Shortcuts Enhancements** - Users can now turn off Alma generic shortcuts when it overlaps with a special keyboard on language shortcut. Each user can access a special screen via the user menu, UI preferences.

Upcoming Issues to Note

**Security update - Removing HTTP allowed exceptions for Alma and Primo**

To align with industry standards and avoid security vulnerabilities, Ex Libris is removing its remaining HTTP allowed exception. Alma will require working with HTTPS for all incoming traffic and as result, will redirect all HTTP traffic to HTTPS traffic. This means that all browser activity will continue working as usual. For more information, see [Technical Requirements for Alma and Discovery Implementation](#).

Support for HTTP will be phased out as follows:

<table>
<thead>
<tr>
<th>Release</th>
<th>Environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>June</td>
<td>EU00, EU01, EU02</td>
</tr>
<tr>
<td>July</td>
<td>NA01, NA02, NA03, AP01</td>
</tr>
</tbody>
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All other instances already support HTTPS only. We are also working to identify non browser calls coming from specific IPs and are contacting several customers directly asking to change their calls to HTTPS.

For further assistance, open a Salesforce case and reply with the case number.

**GuideMe Step-by-Step Walkthroughs**

In the Alma May release, we are introducing these new GuideMe flows in the Resource Management functional area:

1. Export Catalog for Cleanup
2. Import Catalog after Cleanup
3. Create a Set for a Manual Job
4. Save a Query for a Manual Job
5. Create Normalization Rule for Local Extensions
6. Create Normalization Process for Local Extensions
7. Run Job to Add Local Extensions
We highly recommend you take a look at these step-by-step walkthroughs available within the Alma interface (All GuideMe flows on Production). These are easily accessible from the GuideMe menu or the Alma help menu.

If you have an idea for a new workflow to add to our growing library, please submit your suggestions at the Idea Exchange under Alma.

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**Next Release Sneak Preview**

Select June 2020 Sneak Preview to view the next release sneak preview.

Download a PDF of the Release Notes and Resolved Issues.

Cliquez ici pour consulter la version française de la section "Profitez au maximum de cette version"

**Make the Most of March's Release**

<table>
<thead>
<tr>
<th>Action Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑ Option to keep Rapid ILL requests open</td>
</tr>
<tr>
<td>☑ Claim request based on Average Supply Time</td>
</tr>
<tr>
<td>☑ Support ability to change to an absolute path in the S/FTP Definition</td>
</tr>
</tbody>
</table>

**Upcoming Issues to Note**

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For further assistance, open a Salesforce case and reply with the case number.

**OBI Upgrade and Data Visualization (DV)**

Ex Libris is upgrading the Analytics platform from version 11 to 12 of OBIEE. As part of this upgrade, the Data Visualization tool is also being added, which adds great value to the analytics platform. To learn more about both OBI 12 and Data Visualization and how DV interacts with Alma, see [Data Visualization (DV) and OBI 12](#). Please note that Data Visualization (DV) will be deployed in 'Preview Mode', meaning it is available for testing and evaluation but is not yet intended for full production use. We will continue to update you on plans for the general release of Data Visualization (DV) later in 2020.

---

**Note**

The originally scheduled release of OBI 12 and Data Visualization has been amended. For further details, see [here](#).

For more information, visit the [FAQ](#) page.

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**Next Release Sneak Preview**

April 2020 is a maintenance release that will not contain any new features.

Download a PDF of the [Release Notes and Resolved Issues](#).

[Cliquez ici pour consulter la version française de la section "Profitez au maximum de cette version"](#)

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**Make the Most of February's Release**

**Action Items**

- Local Extensions for Community Zone-Linked Bibliographic Records - Are you using the Community Zone? Did you always want to add your own proprietary information to Community Zone Bibliographic records? You can now achieve this by using local extensions. For more information see [Working with Local Extension Fields](#).

- "Quick Printing" Option for Multiple Records - Multi Select Quick printing support was added to the 'Pick From Shelf' task list.
**Sandbox Refresh**

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

**OBI Upgrade and Data Visualization (DV)**

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As of December 2019, OBI 12 for Alma Analytics and DV is being used by 14 institutions as early adopters. In March 2020, both OBI 12 and DV will be available to NA01, NA02 and NA03 institutions, and during May 2020 to all other institutions. As part of the OBI upgrade from v11 to v12, institutional reports will be migrated. During the migration (a week as per the following schedule) it will not be possible to create new reports that will be migrated to OBI12. This is referred to as the 'freeze period'.

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<thead>
<tr>
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<th>Date</th>
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<td>Chicago Data Center (NA01, NA02, NA03, NA91)</td>
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<tr>
<td></td>
<td>OBI12 Go Live</td>
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<td>All other Data Centers</td>
<td>Migration of OBI11 reports to OBI12 (freeze period)</td>
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</tr>
<tr>
<td></td>
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<td>May 10 (Release Update)</td>
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For more information, visit the [FAQ](#) page.

**Next Release Sneak Preview**

Select [March 2020 Sneak Preview](#) to view the next release sneak preview.

Download a PDF of the [Release Notes and Resolved Issues](#).  

[Cliquez ici pour consulter la version française de la section "Profitez au maximum de cette version"](#)

**Make the Most of January's Release**

**Action Items**

- [More Possibilities for the Alma Color Theme](#) - We have added an additional 6 new colors themes for an institution to select. This provides more options to fit your institution brand and separation between environments. The colors comply with accessibility standards for contrast.

For information on Primo VE new release features, see the [Primo VE January 2020 Release Notes](#).
Sandbox Refresh

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For more information, visit the FAQ page.

Cost Usage Subject Area in Alma Analytics Deprecated

Please note that in Alma Analytics, the Cost Usage subject area and its related features are deprecated for this release. This includes:

- The fields of the Cost Usage subject area that are available when selecting New > Analysis > Cost Usage
- The out-of-the-box reports and dashboards for Cost Usage under /shared/Alma/Cost per Use/Reports and under /shared/Alma/Cost per use via COUNTER reports and acquisitions data
- The folder Cost per use via COUNTER reports and acquisitions data

All reports that use the Cost Usage subject area no longer work.

Institutions that use reports from the Cost Usage subject area can do the following:

- Take advantage of the over 30 new out-of-the-box reports in the /shared/Alma/Cost per use via COUNTER reports e-inventory and acquisitions data/Reports folder. These reports use the new Cost Usage of the E-Inventory subject area.
- Use the out-of-the-box Electronic Cost Usage Dashboard (which uses the above reports) located in the /shared/Alma/Cost per use via COUNTER reports e-inventory and acquisitions data/Dashboards folder.

Ex Libris, a ProQuest Company
• Make their own customized reports using the Cost Usage dimension of the E-Inventory subject area.

GuideMe Step-by-Step Walkthroughs

Take advantage of our new GuideMe walkthroughs! GuideMe is a help tool layered over Alma, providing step-by-step guidance enabling you to get just-in-time help on selected workflows. These flows are segmented by role displaying flows relevant to your role in your institution. Additional GuideMe flows will be added on an ongoing basis. See GuideMe FAQ for more information.

Next Release Sneak Preview

Select February 2020 Sneak Preview to view the next release sneak preview.

Main Features

Normalization of Community Zone - On Save

October 2020 Resource Management

In collaboration with the CZ Management Group, Ex Libris now prevents the following fields from being added or edited in the CZ by members of the community:

• 856 subfield u
• All 9xx fields excluding 906, 999 and 920

The fields are open for editing like any other Bib fields, however, edits to these fields are not saved. A Normalization Rule to the Community Zone (only) was added to prevent the saving of edits to these fields.

Cleanup of the above fields from the Community Zone will follow.

See Saving Local Extension Fields to the Community Zone.

New Alma Layout Enhancements

September 2020 Administration and Infrastructure

Continuing the rollout of the new Alma layout, the new layout is now available for Alma users. Starting from the August release, Alma Administrators can turn the new functionality on (Opt-in). In September release, users who were opted in can switch between the current and the new layout as they please. (For instructions, see Turning On the New Layout for Users.) In the November release, the new layout will become the default.

Note

Ex Libris recommends that all users gain experience with the new Alma layout before the new layout becomes the default, which was moved from September 2020 release to November release.

The layout enhancements introduced in the September release cover the following areas:

• Configuration Area:
• A new home page for the Configuration area was introduced, to better emphasize the switch to the Configuration area.
• The navigation in the configuration area was made clearer. The Cancel/Back button workflow was emphasized for better clarity.
• ‘Switching a library’ dropdown was visually emphasized and contains a few functional improvements as well.

• Menu Improvements:
  • The way tab navigation works with the menu was improved.
  • We are working toward having the menu accessible according to WCAG 2.1 standard.
  • The menu supports right-to-left alignment.

• Action Icons:
  • The Task list was changed to a panel that can be collapsed

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**New Metadata Editor Enabled**

**September 2020 Resource Management**

Ex Libris announces the rollout of the new Metadata Editor. In the current release, the new Metadata Editor contains the Records Management core functionality (the functionality available in the original Metadata Editor plus new features). Template and Rule management will be rolled out in the upcoming releases (see [Rollout Plan](#)), giving users enough time to adjust to the changes. Starting from the September release, Alma users can switch back and forth between the new and the original Metadata Editors.

**To switch:**

• to the new Metadata Editor, select ![New MDE](#)
on the left-hand side of the top toolbar of the Editor.
• back to the original Metadata Editor, select ![](#)
Old Editor on the left-hand side of the top toolbar of the Editor.

Note

Ex Libris recommends that all relevant users start familiarizing themselves with the new Metadata Editor prior to its Go-Live, which is planned to take place with the deployment of January 2021 release.

See New Metadata Editor Functionality.

New Metadata Editor - Loading Records from Community Zone

September 2020 Resource Management

In the new Metadata Editor, this is how you can load records from the Community Zone.

To load draft records from the Community Zone:

• To check if there are draft records in the Community Zone waiting to be edited, select the Load Community Zone Records button at the bottom of the navigation pane.

• Loading the records might take a few moments, at which time the button changes its text to Loading from Community Zone and is not clickable.

• Once records have been loaded:
  • Records loaded from the Community Zone are displayed in the records list. The button changes to Auto-Loading from Community Zone and is not clickable.

• If there were no records to load (or after the last community record was released from the list), the button returns to its initial state Load Community Zone Records, enabling you to come back at a later time and try again.

See Load Community Draft Records.

New Metadata Editor - Editing Cataloger Level Enhancements

September 2020 Resource Management

In the new Metadata Editor, enhancements were made to editing cataloger levels that allow you to access easily the cataloger level and change it.

To edit cataloging level in the MD Editor when cataloging permission levels have been implemented:
1. Open a bibliographic record in the MD Editor (Resources > Cataloging > Open Metadata Editor). The MD Editor displays the current cataloging level. Any user assigned this or higher cataloging level can edit the record.

   In addition, you can change the cataloging level for the record. You can set any cataloging level equal to or below your cataloging level as the cataloging level for the record.

2. Select a new cataloging level for the record from the dropdown list.

3. Select Save. The current cataloging level of the record is updated to reflect your change.

For your convenience, you can specify the default cataloging level to be displayed in the dropdown, as follows:

<table>
<thead>
<tr>
<th>To:</th>
<th>Do:</th>
</tr>
</thead>
<tbody>
<tr>
<td>To always display in the dropdown your cataloging permissions level.</td>
<td>Set the use_record_cataloging_level_by_default customer parameter to False (default).</td>
</tr>
<tr>
<td>To always display in the dropdown the record's current cataloging level.</td>
<td>Set the use_record_cataloging_level_by_default customer parameter to True. When this is set to True, an overt action on your part is required to change the cataloging level to a different cataloging level. If you are making record changes that do not affect the cataloging level, you may prefer this option. See use_record_cataloging_level_by_default for more information.</td>
</tr>
<tr>
<td>To always display in the dropdown the cataloging level you selected most recently for a record.</td>
<td>Set the cataloging_level_user_preferences customer parameter to True.</td>
</tr>
</tbody>
</table>

See Cataloging Privileges.

**New Metadata Editor - Catalog Set Actions**

**September 2020 Resource Management**

In August release, the Sets tab was added on the Metadata Editor toolbar. Clicking the tab displays the sets sent for cataloging by the Manage Sets page.

Now on this page you can release multiple records from a specific catalog set in a single action. You can reload all set members, including the new ones, and remove these that were excluded from the set. Previously, you could only release records from a catalog set one by one, which could be time-consuming.

Now when right-clicking on a catalog set, the following actions are available:

- Release set - releases all the records and removes the set
- Release displayed records - if you filtered out some records, releases only the visible records.
- Reload set - if changes were done on the bib records elsewhere in Alma, refreshes the records.

See Working with Catalog Sets in the Metadata Editor and Managing Search Queries and Sets.
Activate Collection for Full Text in CDI Only

**September 2020 Resource Management**

If you have electronic collections in Alma that are not active but you would like to make the content of the collection marked as available in CDI, you can now do this using the **Add CDI-only text activation** option. This is relevant for electronic collections that are defined as **Full Text Linking in CDI: Link in record**. The collection level record is published to CDI in the zero title file with the effect that the collection is set to full text available and is discoverable in CDI.

The **Add CDI-only text activation** option is available as an action in staff search results for each electronic collection. Each electronic collection can be toggled to either add or remove the CDI-only text activation. The option is also available as a check box on the CDI tab of the Electronic Collection Editor.

This is applicable to customers that are fully flexible and easy active.

See [Managing Electronic Resources](#).

Coverage Percentage of CDI Records

**September 2020 Resource Management**

Items that are available for CDI now indicate the coverage percentage of the records in CDI. This indicator also includes the last date of calculation for this statistic. This information only displays if the coverage percentage has been calculated. If the date is not populated, it will not be displayed.

Check Version of a Central Catalog Bibliographic Record

**September 2020 Resource Management**

In July 2020 Alma release, the ability was introduced to reload on demand the most recent version of the Bib record that was loaded previously from the Central Catalog (see [Reload Bibliographic Records from Central Catalog On Demand](#)). With the September release, bibliographic records in Central Cataloging (Aleph, SBN, CALIS, etc.) will be loaded automatically from the central catalog by the Metadata Editor.

To support users, in this release Alma automatically loads the most recent version of Bib records when opening a Central Catalog record for editing. To enable this, set the reload_record_from_central_catalog customer parameter to True (the default is False).

See [MD Editor Menu and Toolbar Options](#).

Create Itemized Set from File: Support for matching ISBNS on 020 and 022 subfield a

**September 2020 Resource Management**

Now, when creating an itemized set from ISBNS or ISSNs, you can select whether to match on both valid as well as canceled / invalid fields (020/022 $a and $z) (as before) or to match only on valid fields (020/022 $a).

In the existing functionality, when a set is created from an input file and the input file has ISBN or ISSN as the column header, the identifiers in the input file are also compared to the identifiers which are “Canceled/invalid” (020 z and 022 z). Now you can indicate in the input file’s header column that you want to create an itemized set based on the valid ISBNS and ISSNs.

To do that, indicate one of the following header types in the input file’s column header:
**General Publishing Profile - Option to Include Authority Headings**

**September 2020 Resource Management**

The General Publishing profile now supports the ability to enrich the published data with Authority headings. Any update to the selected authority headings triggers re-publishing of the data. The functionality of updating a record when preferred terms are updated will keep its current functionality.

This is useful, for example, when the name 'Mark Twain' is embedded within a bib record and library would like to publish both 'Mark Twain' and the non-preferred term 'Samuel Clemens'.

The ability to enrich published data with Authority headings is disabled by default. If your institution would like to activate this behavior, please contact Ex Libris customer support.

---

**Note**

Institutions interested in this feature will have to re-publish the data to apply the new policy.

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To support this development, the Authority Enrichment section was added to the General Publishing Profile. Here you can set up your authority enrichment scheme.

See [Publishing and Inventory Enrichment (General Publishing)]

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**Moving Information between Electronic Portfolios**

**September 2020 Resource Management**

Now you can move local administrative information, such as PO-line, license and notes details, between portfolios in different collections, even if these portfolios do not share bibliographic records. Previously, it was only possible if both portfolios shared bibliographic records. This is possible if the portfolios share any of the following:

- The same bibliographic record (the same MMS ID, as before)
- ProQuest Title ID (the ‘bkey’ - populated in the "Parser" parameter of the portfolio)
- ISSN
- e-ISSN
This enables moving portfolio details from a local electronic collection to a Community Zone-activated electronic collection and encourages customers to move a locally-managed electronic collection to a Community Zone-managed electronic collection.

In addition, now you can move the 'Public access model' information between electronic portfolios. To support this, the checkbox "Move public access model" was added to the third step of the Move electronic portfolio information job wizard.

Note
This functionality will be available as part of the September Release Update.

See Running Manual Jobs on Defined Sets.

SRU Institution Zone Holding Lookup - Look Up Electronic Inventory Managed in the Network Zone

September 2020 Resource Management
In a consortia environment, electronic inventory can be managed on behalf of the members in the Network Zone. SRU Institution Zone holding lookup now includes electronic inventory that is managed in the Network Zone on behalf of the Institution Zone.

For this purpose, the SRU Server integration profile was enhanced with a new "Include results of e-resources managed in the Network" option, available in the Institution Zone-level only. When this option is activated, then when searching in the Institution Zone repository, not only the bibliographic data and inventory availability from the Institution Zone is retrieved, but also the Network's bibliographic data and inventory availability for the specific member (if exist).
In some consortia with many members, the configuration of SRU integration profile is done by the Network and is distributed to all members, in order to reduce redundancy of the configuration by all members. In such cases, when the SRU integration profile is marked as "Managed in Network", the new option "Include results of e-resources managed in the Network" is visible in the Network Zone institution as well. The network can determine whether this profile is distributed to members with this option activated or disabled.

Any member using this profile can decide to opt out and manage the profile locally by editing the Network configuration:
See SRU/SRW Search.

**New Auxiliary Digital Usage Type**

**September 2020 Digital Resource Management**
You can now mark digital representations with the **Auxiliary** usage type. This is primarily used when the digital file is a table of contents for the other representations and so should be excluded from the representation delivery services. It will still appear in the Quick Access section of Primo’s full record display.

To support this development, the new **Hide service** Representation Delivery Service with Usage Type = Auxiliary display logic rule (Configuration > Fulfillment > Discovery Interface Display Logic > Display Logic Rules) was added.
List View in the New Alma Viewer

September 2020 Digital Resource Management
You can now display the list of files of a representation in the new Alma Viewer in List View. Click the icons to toggle between List View and Thumbnail View.

Vendor-Controlled PO Line Renewal

September 2020 Acquisitions
To save duplication of work, by simultaneously renewing the vendor subscription and the matching continuous PO line in Alma, you can enable a vendor to automatically update a PO line once the subscription is renewed on the vendor side. At this time, the option is available only for ProQuest renewable subscriptions. In Alma, a new check box is available on the Vendor Details page, System Integration tab, Renew at Vendor System. When enabling this option, you must supply the vendor with your API key to allow the vendor to perform the update to the relevant PO line. For ProQuest RenewMe, the API key is sent to e-renewals@proquest.com. To generate the API key, see the Developer Network. When the check box is selected, a new button appears on the continuous Purchase Order Line Details page, Renew at Vendor System. Selecting
this button opens a ProQuest RenewMe form, which includes the Alma PO line number. When the renewal process completes (in a separate browser tab), the Alma PO line is updated with the updated List Price, Renewal Date and Renewal Note.

This process can also be launched from the ProQuest RenewMe email notification sent to your institution periodically.

To enable this functionality, please contact ProQuest RenewMe customer support at: e-renewals@proquest.com.

See Vendor Controlled Renewals.

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**Accrual accounting - Create Invoice from PO for One-Time Orders**

**September 2020 Acquisitions**

Idea Exchange

Previously, institutions using accrual accounting could not create invoices from a PO. Now, these institutions have the option to create an invoice from a purchase order for one-time orders only.

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**Currency Exchange Rate Overrides**

**September 2020 Acquisitions**

Idea Exchange

For institutions that purchase resources with a currency different than the default currency, and have agreements on specific exchange rates with their vendors, you can now define a fixed exchange rate in a new Explicit Exchange Rates code table (Configuration Menu > Acquisitions > Invoices > Explicit Exchange Rates). Any time a transaction is calculated, it will look for an exchange currency value here. For instance, if purchasing a resource in GBP, while your institution default currency is AUD, you can enter that 1 native currency (AUD) = 1.6 GBP and this value will be calculated when ever a transaction which requires a conversion between AUD and GBP will take place. The list of available currencies in the currency table is based on the currencies entered in the Currency Subset table (Configuration Menu > Acquisitions > Currency Subset). All currencies can be added to the new table with an explicit exchange rate except for the institution’s default currency.

When a fund is encumbered, it is done for the converted amount.

- If an explicit exchange rate is defined on an invoice, that value is used. The new configuration table is not considered.
- Otherwise, if the fixed currency exists in the new table, the exchange rate is calculated from the value defined in the Explicit Exchange Rates table.
- If the currency is not defined in the new table, the daily exchange rates table is used to calculate the exchange rate (same existing functionality as today).

**Example calculations**

Setup:

- Institution default currency is AUD.
- Explicit conversion rates are:
Example 1

The PO line price is in USD

- PO line price - 25 USD
- Fund currency - AUD
- Calculation - 25 USD / 0.7 = 35.71 AUD

Example 2

The PO line price is in USD. The fund currency is in ILS. In this case, the previous functionality performs the conversion from AUD to ILS.

- PO line price - 25 USD
- Fund Currency - ILS
- Calculation - 25 USD / 0.7 = 35.71 AUD. Because there is no ILS in the table rates, the 35.71 AUD is then converted to ILS at the rate of 1 ILS = 0.42 AUD, so 35.71 AUD / 0.42 = 85.02 ILS

The same calculation is performed in the Recalculate Exchange Rate job.

To enable this feature, you must set `currency_exchange_use_explicit_ratio` to `true` (Configuration menu > Acquisitions > Other Settings).

---

**Note**

This functionality will not be supported for invoices created via API. It will be added in a future release.

---

See Configuring Explicit Exchange Rates.

---

**RFID Multi-Scan Function**

**September 2020 Fulfillment**

**Idea Exchange**

You can now configure your RFID reader to scan more than one item at a time. When the new check box on the RFID integration profile, **Handle Multiple Items**, is selected, the integration profile will accept multiple items on the RFID reader.

Once it is enabled, RFID can process the scans, either a single item, or multiple item as follows:
When the RFID button is pressed, the items on the RFID pad will be processed. When processing is complete, a summary confirmation popup will appear, detailing how many items were handled successfully, and presenting any alerts that came up during the scan. If all items are successfully processed, a success message is displayed. If an item requires action, the process is paused until you select Confirm or Cancel. Selecting Cancel only stops processing for the specific item. When multi-scan processing is completed, a summary of the processing is provided. Items that require an action appear under Failed/Canceled Items. Items that do not need action appear under Items Requiring Attention.

**Multi-scan Summary**

You can use the RFID button on the following pages when there is either a single item or multiple items on the RFID pad:

- Scan in items
- Scan in items > change item information - On this tab, multiple items can be processed as stated above with the exception of the following circumstances:
  - When a new barcode is created.
  - When the RFID integration profile is configured to update items and Update RFID is selected on the tab.
- Manage patron services > Loans tab
- Manage patron services > Returns tab
- Return Items

For Bibliotexa, this is only supported when using staffConnect Link (using the Other type in the integration profile) or D-Tech. For additional assistance with StaffConnect link, contact support-ch@bibliotheca.com. For a list of supported RFID vendors, see [Alma - RFID Integration](#) on the Developer Network.

The multi-scan function applies only to reading, not updating. Additionally, please note the circumstances on the Scan In Items Change Information tab where multi-scan is not supported.

See [RFID Support](#).

---

**Lender request Manage Fulfillment Option**

**September 2020 Fulfillment**

The Manage Fulfillment Options action can now link directly to the article. If the lending request is for an electronically owned resource and has enough information to create a link to the article (e.g. publication date and pages). This depends on the electronic resource vendor's platform supporting of article level linking.

See [Managing Fulfillment Options](#).

---

**Merge Records and Combine Inventory Job Enhancements**

**September 2020 Administration and Infrastructure**

Multiple “Merge Records and Combine Inventory” instances can now run simultaneously if each has a separate input file with different record groups. In addition, the performance of this job is improved.

---

**Support for Authentication Forcing in SAML Authentication**

**September 2020 Administration and Infrastructure**

Now the SAML authentication of Alma supports authentication forcing when Alma authenticates users via SAML. Typically, when Alma authenticates users via SAML, it does so directly through the institutional IDP, thus providing end users with an
SSO experience. As such, SAML-2 ForceAuthN was previously not supported by Alma. For more information on SAML ForceAuthN, see [here](#).

If you want to force authentication when Alma authenticates users via SAML, select the ForceAuthN checkbox in the SAML Integration Profile ([Alma Configuration > General > External System > Integration Profiles](#)).

See [SAML-Based Single Sign-On/Sign-Off](#).

---

**New Analytics Objects Subject Area**

**September 2020 Analytics**

The new Analytics Objects subject area is now available. You can use the fields of this subject area to create reports concerning analytics objects, such as scheduled reports and widgets. For more information, see [Analytics Objects](#).

---

**DARA Recommendation to Automate MD Import Profiles**

**September 2020 DARA**

DARA now identifies if you are manually running an MD import and recommends that you configure an MD import profile. Additionally, DARA can identify that you have an MD import profile configured without scheduling and that the vendor has an FTP server. DARA recommends that you configure the MD import profile to access the FTP server and to add scheduling to the profile.

For more information on DARA Recommendations, see [DARA – Data Analysis Recommendation Assistant](#).

---

**Cloud Apps**

**August 2020 Cloud Apps**

Cloud Apps is an open framework which allows developers to write apps which run inside Ex Libris higher education products such as Alma, Primo VE back-office, Esploro, Leganto and Rapido. It adds new features beyond core Ex Libris functionality, which can integrate with other systems, or can provide shortcuts and efficiencies for institution-specific workflows. Once enabled by an institution, Cloud Apps can be searched and installed by end users. Cloud Apps can respond to the context of the user's session, offering additional functionality depending on the current page. Cloud Apps can also be blacklisted or whitelisted.

The Cloud App Center contains two tabs, **Installed Apps**, which shows those apps that have been installed and are
available to run, and **Available Apps**, which shows all the apps that can be used. You can browse or search in either tab. Each app includes the following information:

- Description
- App developer
- Link to the code on Github
- Link to the App in the Ex Libris App Center
- App’s license
- Any external sites the app uses

Watch the [Cloud Apps in Alma](#) video (4:22 minutes).

See [Configuring Cloud Apps](#) and [Ex Libris Cloud Apps](#) on the Developer Network.

---

**Metadata Editor Functionality Improvements**

**Metadata Editor Additional Actions for Records Management**

**August 2020 Resource Management**

As part of the [Metadata Editor improvements initiative](#), the following functionality was added to the new Metadata Editor in the current release:

<table>
<thead>
<tr>
<th>New Metadata Editor Menu Option</th>
<th>Functionality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show Linkage Information</td>
<td></td>
</tr>
<tr>
<td>Add Note</td>
<td></td>
</tr>
<tr>
<td>Assign Record to Another Cataloger</td>
<td></td>
</tr>
<tr>
<td>Release Assignment</td>
<td></td>
</tr>
<tr>
<td>Suppress from Discovery</td>
<td></td>
</tr>
<tr>
<td>Contribute Record to Central Catalog</td>
<td></td>
</tr>
<tr>
<td>Align Record Version with Central Catalog</td>
<td></td>
</tr>
<tr>
<td>Copy to Catalog</td>
<td></td>
</tr>
<tr>
<td>Manage Location Information</td>
<td></td>
</tr>
<tr>
<td>Share with Network</td>
<td></td>
</tr>
<tr>
<td>Validate in Network</td>
<td></td>
</tr>
<tr>
<td>Change Authority Placement</td>
<td></td>
</tr>
<tr>
<td>See Also (For Authority record only)</td>
<td></td>
</tr>
</tbody>
</table>
### New Metadata Editor Menu Option

<table>
<thead>
<tr>
<th>New Metadata Editor Menu Option</th>
<th>Functionality</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Delete Record</td>
</tr>
</tbody>
</table>

### View Related Data

- View Collections
- View in Search
- View Versions of Original Record

---

### New Metadata Editor - Catalog Set Improvements

**August 2020 Resource Management**

In addition to the above, the visibility of sets in the Metadata Editor was improved. A new tab **Sets** was added on the Metadata Editor toolbar. Clicking the tab displays the sets sent for cataloging by the Manage Sets page. This tab is displayed only if it has records. The tab displays the count of total sets in it.

Also, now when opening a record from a set and switching to another format, the set name is displayed as a badge in the set header in the Records list. This notifies you that the record being edited belongs to a set. Another badge, also new, displays the set’s content type.

In addition, now you can perform filtering in the Metadata Editor by set name or record name. This is useful when you have many catalog sets, or many records under a set.
New Metadata Editor - Community Zone Draft Loading

August 2020 Resource Management
The following functionality was added to the new Metadata Editor in the current release: Community Zone Draft Loading. The previous behavior of this option is maintained.

This option is now available at the bottom of the Metadata Editor Navigation pane.

Refresh Alma Screens upon Updates of New Metadata Editor

August 2020 Resource Management
In the new layout of the Metadata Editor, when you click

Minimize the Metadata Editor, the changes you made in the Metadata Editor are immediately reflected in Alma lists and displays. Previously, minimizing the Metadata Editor did not refresh the information in Alma lists and displays, which could result in the display of outdated information. When you delete a record in the Metadata Editor, upon selecting Minimize, Alma displays the "deleted holding" message.

This covers edits made to bibliographic, authority, and holdings records.

New Metadata Editor - Drill Down in Right-hand Pane

August 2020 Resource Management
In addition to the above, now when you work with two records in the left-hand pane of the Metadata Editor, then when switching from one record to the other Alma collapses the details of the first record in the right-hand pane and opens the details of the second record. You can expand the collapsed record, and switch between the two records in the right-hand pane.

For example, when searching for resources in the Metadata Editor, you can select one bib record to view its details in the right-hand pane. If you select a different record, the details of the record will open in the right-hand pane, and the details of the first record will collapse in the right-hand pane. If needed, you can click on the collapsed pane to open it, in which case the currently-opened record will collapse.

The right-hand pane displays the details of the record selected in the left-hand pane, and the details of the previously-selected record are collapsed.
New Alma Layout Enabled

**August 2020 Administration and Infrastructure**
Continuing the rollout of the new Alma layout, and starting from the July release, the new layout will be available for Alma users. Alma Administrators can turn the new functionality on for a specific user (Opt-in). Ex Libris will introduce the new layout gradually over several Alma releases (See Rollout Plan), giving users enough time to understand, experience, and get used to the changes. As part of the rollout plan, we encourage as many users as possible to get themselves familiarized with the new layout. For instructions for the Alma Administrator, see Turning On the New Layout for Users.

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**Note**
Ex Libris recommends that all users gain experience with the new Alma layout prior to the new layout Go-Live, which is planned to take place with the deployment of the September 2020 release.

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The new layout increases your working area, improves navigation, gives you more options to customize your menus, and facilitates improved user workflows. For a full list of changes, see Layout Improvements.

See video for a short training session

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**New Alma Layout Configuration Menu**

**August 2020 Administration and Infrastructure**
In June release, the new Alma layout was introduced. As part of it, the Alma Configurations navigation was integrated to the Main Menu. Now the Alma Configurations navigation was improved to make it clearer that the user is located in Alma Configurations:

- The bar color of the Alma Configuration Menu changes to the default primary color in the user interface to distinguish it from the Alma menu.
- Its icons feature a cog wheel to distinguish them from the regular Alma icons.
- The persistent search bar disappears.
New Alma Layout - Ability to Collapse the Summary Panel

August 2020 Administration and Infrastructure

In the new Alma layout, you can now collapse and expand the right-hand Summary panel on demand. This allows you to get more screen real-estate when you need to work in the page.

To collapse the section, select the ☰ icon located on the bottom of the Summary panel.

See Alma Configurations Improvements.
SAML Certificate Expiration Notification Letter

**August 2020 Administration and Infrastructure**

A new letter called SAML Certificate Expiration Notification Letter was introduced to Alma letters list. This letter reminds Alma administrators that their SAML certificate is nearing expiry date and recommends that they consult with their IT department regarding the potential need to replace it. The letter is sent to users with the General Systems Admin role.

The reminder is sent twice. The sending is triggered by a weekly job that checks if the number of months left till expiry is less than two or one month. If so, the reminder is sent. Thus, the reminder is sent approximately 2 months and then 1 month before SAML expiration.
Patron-facing Column in Letters Configuration

August 2020 Administration and Infrastructure
The Patron Facing column in the Letters Configuration table is now available to all institutions. Previously, it was available only for multilingual institutions.

Edit PO Line from View Mode

August 2020 Acquisitions

Idea Exchange
When reviewing a PO line in view mode, an Edit option is now available. The visibility of the edit button depends on PO line status, PO line assignment. Additionally, the user must have a Purchasing Manager or Purchasing Operator role.

The list of PO line statuses that allow editing are:

- In Review
- Deferred
- Waiting for renewal (Manual or Auto)
- Waiting for Packaging (Manual or auto)
- Ready
- Sent
- Waiting For Invoice

Watch the Edit PO Line from View Mode video (0:48 seconds).

Portfolio Availability Marked as 'not available' when Activated from the Community Zone via Real Time

August 2020 Acquisitions
Portfolios which are activated from the community zone as a result of orders coming into Alma from OASIS/GOBI via API
will enter Alma as not available and require the institution to make the portfolio available in order for it to appear in the discovery system.

For more information, see Real Time Ordering.

Control Access to Item Loan Renewal

**August 2020 Fulfillment**

Loan renewal options are now controlled by a new privilege, Renew Loan Privilege. The privilege is added by default to the following roles:

- User Administrator
- User Manager
- Circulation Desk Manager
- Circulation Desk Operator
- Circulation Desk Operator - Limited

To maintain current behavior, the role is automatically enabled for existing customers. For new customers, it will only be enabled for circulation desk roles.

On the Manage Patron Services Loans tab, the Renew Selected and Renew All links, as well as the Renew row action, only display if the new privilege is enabled.

If the privilege is disabled, when a loaned item is re-scanned in the Loans tab of the Manage Patron Services page, the loan is not renewed.

CDI: 'In CDI' Label Change

**August 2020 Resource Management**

In order to improve the understanding of the CDI information and labels, the label for *In CDI: Yes* has been changed to **Available for CDI search activation**. Additionally, an information icon has been added indicating: This collection can be activated for search independent from its full text activation status.
CDI: Activate For Search - Improved Warning Messages Upon Activation

**August 2020 Resource Management**

When activating a collection from the Community Zone which is already **Active for Search** in CDI in the Institution Zone, the following warning message appears:

![Activation Confirmation](image)

**CDI: History Tab Changes**

**August 2020 Resource Management** SF: 00824788 00826613

Previously, CDI changes recorded in the History tab of the Electronic Collection only included modification dates. The history records will now include changes for the following fields:

- CDI Search activation status
- Do not show as Full Text available in CDI even if active in Alma
- Local Notes

**New Indexes for UNIMARC Bibliographic Records**

**August 2020 Resource Management**

New search indexes were added for UNIMARC Bibliographic records:

- 214 $a - Place of Publication.
- 214 $c - Publisher Name.
- 214 $d - Date of Publication.

See [UNIMARC Search Indexes](#).
Local Control Number as a Local Extension for Community Zone Records

**August 2020 Resource Management**

It is now possible to update bibliographic records that are linked to the Community Zone with a local control number as a local extension.

This allows synchronizing bibliographic records that originated in the Community Zone with third-party catalogs that depend on a local system number.

You can now add a local 035 field as local extension to a record that is linked to the Community Zone. Local fields are marked with the institution icon in the Metadata Editor.

For details, see [Working with Local Extension Fields for Community Zone Records](#).

In addition, a normalization task was created that generates a local control sequence that is stored in the 035 field when, for example, **Edit > Enhance the Record** is selected while editing a record in the MD Editor. See [Working with Normalization Processes](#).

UNIMARC Authority Control field 620

**August 2020 Resource Management**

The bibliographic record UNIMARC field 620 $$d is now controlled by the Authority field 260 $$d. F3 is now active on the field 620 $$d of the bib record.

See [Viewing and Linking to an Authority Record](#).

Identify Records Matching to Alma Records

**August 2020 Resource Management**

Institutions often get a list of record identifiers used in external systems (e.g. in a vendor system). Now you can load this list to Alma and easily check what you already have in Alma and what you don’t have in Alma, in order to facilitate your purchasing decisions.

To enable this, the Create Itemized Set job was modified. This job adds members to a set based on an input file of identifiers (see [Creating Itemized Sets](#)). Now the report produced by this job includes the following options:

- Download a file of records for which a match was not found with Alma records
• Download a file of records matching Alma records

See Identify Records Matching to Alma Records Based on Itemized Set.

---

**Search for Titles by Call Number Range**

**August 2020 Resource Management**

The range operators <, >, <=, >= were added to Advanced search when searching for Titles (All Titles, Physical Titles, Electronic Titles, Digital Titles). These operators were added to the below bib call number indexes:

<table>
<thead>
<tr>
<th>Index</th>
<th>MARC 21 fields</th>
<th>UNIMARC fields</th>
<th>CNMARC fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>NLM-type call number</td>
<td>096 a,z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dewey Decimal Class Number</td>
<td>082 a, 092 a</td>
<td>676 a</td>
<td>676 a</td>
</tr>
<tr>
<td>Other classification number</td>
<td>084 a</td>
<td>686 a, 69X</td>
<td>686 a, 69X</td>
</tr>
<tr>
<td>LC call number</td>
<td>050 a, 055 a, 090 a</td>
<td>680 a</td>
<td>680 a</td>
</tr>
<tr>
<td>UDC</td>
<td>080 a</td>
<td>675 a</td>
<td>675 a</td>
</tr>
<tr>
<td>CLC Classification Number</td>
<td></td>
<td></td>
<td>690 a</td>
</tr>
<tr>
<td>CAS Classification Number</td>
<td></td>
<td></td>
<td>692 a</td>
</tr>
<tr>
<td>RUC Classification Number</td>
<td></td>
<td></td>
<td>694 a</td>
</tr>
<tr>
<td>Other Domestic Classification Number</td>
<td></td>
<td></td>
<td>696 a</td>
</tr>
</tbody>
</table>

These operators add the ability to search for ranges of call numbers on bibliographic record level. This can be useful, for example, if you want to find all titles belonging to a specific subject or range of subjects.

For example, you can search for a range of call numbers across the Dewey Decimal Class Number index:

**Search for Dewey Decimal Class Number call-number ranges**

---

Ex Libris, a ProQuest Company
Viewing one of the titles that came up in the search, we see that its Dewey Decimal Class Number, displayed in 082 field $a$, is included in the specified range.

The 082 field displays the Dewey Decimal Class Number within the specified range

See Performing an Advanced Search.

Watch the Search for Titles by Call Number Range video (1:45 minutes).

**Alma Link Resolver - ISTEX Full Text Service**

**August 2020 Resource Management**
Alma link resolver can now check ISTEX for the existence of an article, based on OpenURL DOI. If the article is available at ISTEX, the patron will receive a link to the full text.
To enable article lookup at ISTEX, activate Community Zone collection ISTEX.

**Alma Viewer Now Supports High-Resolution Images**

**August 2020 Digital Resource Management**
The New Alma Viewer now supports high-resolution images such as jpeg2000 and tiff, delivered via the IIIF-based OpenSeadragon viewer.

**Expand Pane for Better Display of Full Text in New Alma Viewer**

**August 2020 Digital Resource Management**
You can now expand the right pane of the New Alma Viewer to better display full text. To expand the pane, drag the pane separator.

**Purchase Request Form Alert**

**July 2020 Acquisitions**

**NERS Enhancement (ID #5685)**
When a patron in Primo enters an ISBN or EISBN number in a blank Purchase Request form, an alert now displays indicating whether a holdings for the resource exists in the library. Primo displays a message that a holdings does not exist for the identifier placed by the patron, which may be because the resource does not exist, because there is a location, bibliographic record, or holdings that is suppressed from discovery, or because, for electronic resources, the electronic portfolio is not active. This is also relevant for network and multi-campus.

This functionality is controlled by the customer parameter `PR_indicate_for_primo_if_ISBN_exists`, and is enabled by default. See [Configuring Other Settings (Acquisitions)](#).

This enhancement is available for Primo classic only and will be made available for PrimoVE users in a future release. See [Creating a Purchase Request](#).

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**Activating GOBI Real Time Orders Sent from the Relevant Portfolio in the Community Zone**

**July 2020 Acquisitions**

*Idea Exchange* SF: 00596978 00713525 00426146

For orders originating from GOBI, Alma will attempt to locate the relevant portfolio located within a Community Zone collection using the vendor proprietary identifier number or the ISBN/ISSN and activate it within the relevant collection in the institution, for this functionality to work it is important that the relevant collection will be activated from the Community Zone in the institution. In cases where Alma does not find a matching portfolio in the relevant Community Zone collection or if the relevant collection was not activated in the institution, a stand-alone portfolio will be created in Alma will not be linked to a Community Zone portfolio. See [GOBI vendors list](#) for list of Community Zone collections which supports this functionality.

Additionally, three new collections are now available in the [OASIS vendors list](#).

---

**Move Invoice Owner from an Institution to a Library**

**July 2020 Acquisitions**

*Idea Exchange* SF: 00810848

You can now change the owner for an invoice after it is edited. The values for the Owner list depend on the owner of the linked PO line/s, user role scope, library availability for vendor, and vendor account and funds. When saving the invoice, if the invoice owner is the institution but all the PO lines associated with the invoice lines are owned by a single library, a confirmation message displays that allows you to confirm or cancel your changes.

Watch the [Move Invoice from the Institution to a Library](#) video (1:20 minutes).

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**Platform Field Added to the SUSHI Account Details**

**July 2020 Acquisitions**

*Idea Exchange* SF: 00799252 00800227 00801116 00802185 00802271 00807054 00810911 00814981 00818471 00831882

The SUSHI Account Details page now includes a Platform field. This field should be populated for vendors that require a platform code for successful harvesting of usage data. Note that the platform code is case sensitive. Only one platform
code can be used per SUSHI account.

See Managing SUSHI Accounts.

---

**Advanced Search for Users**

*July 2020 Administration and Infrastructure*

You can now search for users by combining search criteria, using Alma advanced search. This is available only to users with the roles and privileges to search for users.

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**Note**

The quick autocomplete search in the Patron Services Workbench currently uses the ‘All’ search, including the new indexes. In the upcoming Release Update, this will be changed so that the search will be limited to names, emails and identifiers.

---

In addition, there are new search options for user records. The new search options in advanced search are:

- **User group** - Equals, Is Empty, Not Equals, Is Not Empty - equals and not equals options display a multiple choice drop-down list.
- **Create date** - Equals, Before, After
- **Birth date** - Equals, Before, After, Is Empty
- **Expiration date** - Equals, Before, After, Is Empty
- **Purge date** - Equals, Before, After, Is Empty
- **Last activity date** - Equals, Before, After, Is Empty
- **Statistical category** - Equals, Is Empty, Not Equals, Is Not Empty - equals and not equals options display a multiple choice drop-down list.
- **Note** - Contains Keywords, Contains Phrase - this option is also available on the simple search
- **Has note type** - Equals, Not equals - displays a multiple choice drop-down list.
- **Has block type** - Equals, Not Equals - displays a multiple choice drop-down list with block types.
- **Has Identifier type** - Equals, Not equals - displays a multiple choice drop-down list.
- **Fine/fee total sum** - <, <=, >, >=
- **Campus** - Equals, Is Empty, Not Equals, Is Not Empty - equals and not equals options display a multiple choice drop-down list.

New options for existing search criteria in advanced search options are:

- **Email** - Equals, Is Empty
- **First Name** - Contains Keywords, Contains Phrase, Is Empty
- **Identifiers** - Equals
- **Job Category** - Equals, Is Empty, Not Equals, Is Not Empty - equals and not equals options display a multiple choice drop-down list.
This feature is not deployed in the sandboxes and will be available only on production environments.

See Searching in Alma.

**XSL Transformation as Part of an Integration Profile**

**July 2020 Administration and Infrastructure**

Now when exporting users from Alma to SIS systems that use other data formats than Alma, you can convert Alma's data format to the specific format required by the target system. Previously, the conversion had to be done outside of Alma, and demanded specific technical knowledge and resources from institutions.

To facilitate the conversion process, you can now do the following:

- Define an XSLT converter to be used by Alma
- Apply the XSLT converter to an Integration Profile that defines the way data is exported/imported from/to Alma
- Manage XSLT converters in Alma:
  - Share converters between institutions
  - Preview results on a demo file
  - Validate converters

Currently, this is possible for the following integration (see Student Information Systems):

- SIS import
- SIS synchronization

The ability to define XSLT converters disabled by default. If your institution would like to activate this behavior, please contact Ex Libris customer support.

To manage XSLT converters, a new page Integration XSL Converters was introduced (available from Configuration > General). This page allows creating and editing EXSL converters, as well as allows institutions to share converters in the Community Zone.

See Integration XSL Converters.

**Notification on Last Community Zone Update**

**July 2020 Administration and Infrastructure**

A notification about the date of the most recent Community Zone update was added to the Help menu located in the Main Menu Icons.
Institutions that work with the Community Zone expect that Community Zone resources will be up-to-date to the most recent Community Zone update. To this effect, the Synchronize Changes from CZ job runs daily in each institution updating authorities and resources from the Community Zone to the local institution.

However, if the number of updates in the Community Zone is very large, the job cannot complete on the same day. Every day the job attempts to close the gap. Thus, in cases of very large Community Zone updates, a delay of a few days might occur in the synchronization of CZ and the local institution. However, when customers do not see the relevant resources updated in their institutions on the day of the Community Zone update, or on the next day, the discrepancy might cause alarm.

The new notification in the Help menu lets you know the date of the last Community Zone update that was implemented in your system. If the date indicated is not today's date, the reason you do not see some Community Zone updates in your system is due to this delay. You need to wait for the following runs of the job to update your resources.

**Note**
In July-deployed environments where the Community Zone Harvesting job has not run yet this notification is not displayed. It will be displayed once the Synchronize Changes from Community Zone job has run.

See Synchronize Changes from CZ and The Alma User Interface.

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**New Alma Layout Enabled**

**July 2020 Administration and Infrastructure**

Continuing the rollout of the new Alma layout, starting from the July release, the new layout will be available for Alma users in the sandbox. For a full list of changes, see Layout Improvements.

Alma Administrators can turn the new functionality on for a specific user (Opt-in). Ex Libris will introduce the new layout gradually over several Alma releases (See Rollout Plan), giving users enough time to understand, experience, and get used to the changes. As part of the rollout plan, we encourage as many users as possible to get themselves familiarized with the new layout. For instructions for the Alma Administrator, see Turning On the New Layout for Users.
The new layout increases your working area, improves navigation, gives you more options to customize your menus, and facilitates improved user workflows. For a full list of changes, see Layout Improvements.

### Creation of Several Itemized Sets From File in Parallel

**July 2020 Administration and Infrastructure**

When creating itemized sets, one of the options to add records to a set is uploading a file that contains the identifiers (MMS ID, ISSN, ISBN, and so forth). The Add Members to Set job runs and creates a set from the file. Previously, only one instance of the job could be run simultaneously. Now any number of instances of this job can run in parallel.

See Creating Itemized Sets.

### Skipped Job Status

**July 2020 Administration and Infrastructure**

The status of jobs that need to be skipped was changed to 'Skipped'. Previously, the status of these jobs was indicated as 'Failed', which was misleading.

Alma skips jobs in the below cases:

- Another instance of the job is currently running, and the job does not allow multiple instances.
- The job is dependent on the completion of another job, and that job is still running.

See Viewing Running Jobs.

### Dependent Job Waiting

**July 2020 Administration and Infrastructure**

The below dependent jobs now wait till the completion of the job they are depended on with the status 'Pending', and start running after that job completion:

- Authorities - Link BIB Headings
- Authorities - Preferred Term Correction
- Authorities - Handle Local Authority Record Updates

---

**Note**

Ex Libris recommends that all users gain experience with the new Alma layout prior to the new layout Go-Live, which is planned to take place with the deployment of the September 2020 release.
• MMS - Build Record Relations

Previously these jobs were skipped with the status 'Failed', which was misleading. See Overview of Jobs.

---

**External Users with Internal Authentication**

*July 2020 Administration and Infrastructure*

For institutions whose Student Information System (SIS) does not offer authentication services, it is now possible to create users as external in Alma, but assign passwords for them directly in Alma. In this case, all the user information, such as name, ID, etc, is managed from the SIS, but the passwords are stored in Alma and managed by the Ex Libris Identity Service.

When this behavior is active, changing a user from external to internal (and vice versa) does not reset the user password; the existing password the user used as an external user is retained.

This new behavior is activated by a customer parameter, upon request. If your institution's SIS does not offer authentication services and would like to activate this behavior, please contact Ex Libris customer support.

See Registering Patrons and Mapping User Accounts to Other Systems.

---

**Request Anonymization and Anonymization Rules**

*July 2020 Fulfillment*

💡 Idea Exchange

You can now define rules for all anonymization types, not just loans. The anonymization job, which runs once daily, is Fulfillment - Handle Historical Archiving. The rules are found in the Fulfillment Jobs Configuration page (Configuration Menu > Fulfillment > General > Fulfillment Jobs Configuration) next to each anonymization type. This is now the only place the anonymization rules are accessed. The link to Loan Anonymization Rules is no longer available on the Fulfillment Configuration menu.

The customer parameter, should_anonymize_requests, which previously anonymized a resource sharing request as soon as it was completed, has been renamed to should_anonymize_requests_immediately_when_complete. Now, when set to true, Alma still anonymizes the request as soon as it is completed and also ignores the anonymization rules.

When creating a rule for request anonymization, if choosing **Library** or **Location** as input parameters, the library and location are calculated as follows:

When a request is completed, if there are multiple items available, if the request was attached to a specific item, for instance, item level request or item already fulfilled the request, the library and location of the item is used. If the request can still be fulfilled by multiple items, the library and location are taken from the holding selected automatically as preferred for fulfilling the request.

As previously, checking resource sharing requests will anonymize both borrowing and lending requests. However, rules can be applied only to resource sharing borrowing requests.

See Configuring Anonymization.

Watch the Request Anonymization and Anonymization Rules video (4:28 minutes).
Option to Exclude the Grace Period When Calculating Fee

July 2020 Fulfillment

Idea Exchange
Previously, when calculating fees, when the grace period ended, fines were immediately implemented and set for the entire period including the grace period. Now, the grace period can be set to not be included in the fine period at all. In the policy, currently, you can now configure new periods. Each of the prior periods now has a second period with excluded from day. When that period is selected, the fee calculations are the same, but they are based on the end time of the grace period instead of the due date.

See Physical Fulfillment.

Watch the Exclude the Grace Period when Calculating a Fine video (1:23 minutes).

Digitization Request File Upload Limit

July 2020 Fulfillment
For attachment digitization requests, the file size limit was increased from 10 MB to 25 MB.

See Digitization Processing.

ISO 18626 - Return Information

July 2020 Fulfillment - Resource Sharing
When using the ISO 18626 resource sharing partner type, return information is now supported. The lending partner can select Send ReturnInfo on the Resource Sharing Partner page to include the information for the originating lending library instead of the resource sharing library. The ISIL code of the lending library is then included in the resource sharing request, if it is populated. The ISIL code is presented on the Resource Sharing Borrowing Task List as Return Information. It is also available in the XML for the ResourceSharingReturnSlipLetter. The field appears in the letter when populated. If the letter is customized, you must manually add the field to the XML in order for it to be populated.

When scanning an item through the Scan In Interface, the destination information is added to each line. When returning through Returns, it is added to the pop-up display.

Check-In for Shipped Items in the Scan In Interface

July 2020 Fulfillment - Resource Sharing

Idea Exchange
You can now set a message to warn the users if they are going to complete a lending process when scanning items. On the Scan In Messages Configuration page, the Complete lending request message, which defaults to none (no message), can be set to Popup message. When this is set, if an item is scanned in and is part of a Resource Sharing Request that is linked to a lending request in status Shipped Physically, the warning message will require a Confirm or Cancel action. This way the user cannot accidentally complete the lending request. If the message is set to Feedback message, rather than Popup, the feedback will tell them that the request will be completed, but the scan in action cannot be canceled.

See Scanning Items.
Export Renew Allowed Indication in API to ILLiad

July 2020 Fulfillment - Resource Sharing
The ILLiad API now supports sending the **Renewals Allowed** field in a resource sharing request. The 'RenewalsAllowed' indication will be set according to the lending workflow profile that is attached to the ILLiad partner. If one of the following is enabled then Alma will send "RenewalsAllowed": true

- Patron renewal
- Staff renewal

If both patron and staff renewal are disabled then Alma will send "RenewalsAllowed": false.

Distribute Users from the Network Zone

July 2020 Collaborative Networks
Networks that share their user list in the Network Zone can create and update the network zone users manually using the Alma Manage Users menu, the API or the Update/Notify Users job. This is in addition to the previously only option to manage the Network Zone users using SIS feeds.

Users can now be updated in the Network Zone in the following ways, and the changes will be reflected in the Institutions that have a copy of the user record:

- The update/notify users job
- Using an API
- Manually updating the user in the User Edit form

See [Centrally Managing Users in a Network Zone](#).

Order Indication for Electronic Resources Ordered from NZ

July 2020 Collaborative Networks
In a Collaborative Network where electronic resources are managed centrally in the Network Zone and the orders are managed in the individual Institution Zones, institutions can order electronic collections or portfolios managed in the NZ.

In such cases, when using the staff search for electronic portfolio and electronic collection for Network Zone resources (both combined and NZ searches), Alma will now display the order icon by the records ordered from the Network Zone. Clicking on the link of the number of orders displays the list of the PO Lines of these orders.
Saving Local Sets in Network Zone

July 2020 Collaborative Networks

Idea Exchange
Now the Institution Zone staff can create a local set of bibliographic records in the Institution Zone and then save the set in the Network Zone.

This is useful in use cases where a set can only be built in the Institution Zone because the query uses search criteria from either localized fields in the bibliographic record or from the inventory (holdings, items, portfolio, etc.) However, you cannot run normalization rules on Network Zone bibliographic records from within the Institution Zone, since non-localized fields in the Network Zone bib records cannot be changed from within an Institution Zone.

The current development allows the Institution Zone staff to save a local set of bibliographic records to the Network Zone, where they can then perform any actions with the set, such as running normalization on the bib records.

To support this functionality, the Save in Network action was added to the Manage Sets page (Admin > Manage Jobs and Sets > Manage Sets). Choosing this action saves a local set of bibliographic records to the Network Zone. See Saving Sets in Network Zone.

The new action runs a job that creates a set in the NZ containing only the records linked to the Network out of all records. See Save Set in Network Report.

Sharing and Contributing General Electronic Services in the Community Zone

July 2020 Collaborative Networks

Users now can contribute their General Electronic Services to the Community Zone, where other institutions can copy and use these services.

Note
The current functionality of distributing general electronic services from Network Zone to Institution Zone using the Distribute Fulfillment Network Configuration job remains as is (see Configuring Fulfillment Information in the Network Zone).
Improvements to Electronic Collections Contributions

July 2020 Collaborative Networks

Electronic collection contribution was enhanced as follows:

• Now you can contribute to additional fields, including static and dynamic URLs.
• Now you can update additional fields of your contributed electronic collections and share your updates with the community.

Additional Electronic Collection Fields that You Can Contribute

The following additional fields can now be contributed:

<table>
<thead>
<tr>
<th>Collection</th>
<th>Service</th>
<th>Portfolio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>URL type: Dynamic URL</td>
<td>URL type:</td>
</tr>
<tr>
<td>Interface name</td>
<td>Linking level</td>
<td>Static URL</td>
</tr>
<tr>
<td>Level URL</td>
<td>Service is free?</td>
<td>Dynamic URL</td>
</tr>
<tr>
<td>Is Free?</td>
<td>Crossref supported</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Language</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Category</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

See Managing Electronic Collections.

Updating Your Contributed Electronic Collections

If you are the contributor to the electronic collection, now you can update additional fields and share these updates with the Community Zone. Your changes are submitted to a job that runs overnight to update the electronic collection, its portfolios, services, and bibliographic records in the Community Zone. This job copies the information from the override fields to the main fields and then removes the override values. This synchronizes your electronic collection with the Community Zone.

To update an electronic collection in the Community Zone:

1. In the Institution tab of the electronic collection, enter the new values in the override fields, and select Update in Community.
   This updates the Community Zone with the new values.
2. In the confirmation message that appears, click Yes.
See [Updating Community Zone Contributed Electronic Collections](#).

**Contributing Static and Dynamic URLs**

Now Alma supports the contribution of portfolio Static/Dynamic URL and service Dynamic URL, in addition to the existing contribution of parser parameter URL. This way, you see in the Community Zone the exact URL that you contributed.

**Override Fields of Community Zone Electronic Collections**

All activated Electronic Community Zone Electronic collections are edited with your own information. Your edits are only local, no changes are made to the Community Zone record.

When editing the collection, you make your edits in the override fields. Any later updates to this electronic collection will update only the main values so that you know what the updates were. Your local override values remain unchanged.

The following additional fields can now be edited:

<table>
<thead>
<tr>
<th>Collection</th>
<th>Service</th>
<th>Portfolio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type (override)</td>
<td>URL type: Dynamic URL</td>
<td>URL type: Static URL (override)</td>
</tr>
<tr>
<td>Interface name (override)</td>
<td>Linking level (override)</td>
<td>Dynamic URL (override)</td>
</tr>
</tbody>
</table>

Ex Libris, a ProQuest Company
Audio Visual Media type Added to the Physical Material Type Description Table

July 2020 Resource Management
The Physical Material Type Description table now includes an Audio visual media option.

See Configuring Physical Item Material Type Descriptions.

Additional Elements in Related Record for Physical Inventory

July 2020 Resource Management
For a child record, Alma now supports displaying a specific item when cataloging a specific issue, part or pages. Previously, Alma supported displaying specific items of the parent record only when cataloging a specific year, volume or barcode.

The following item specifications are now supported:

<table>
<thead>
<tr>
<th>Item Specifications</th>
<th>Value in $g (MARC21 / KORMARC) $v (Unimarc / CNMARC)</th>
<th>Item Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Issue</td>
<td>iss:</td>
<td>Enum B</td>
</tr>
<tr>
<td>Part</td>
<td>pt:</td>
<td>Enum C</td>
</tr>
<tr>
<td>Pages</td>
<td>p:</td>
<td>pages</td>
</tr>
</tbody>
</table>

MARC 21 example:

For the below record, two related holdings are shown:

The link in the child record is cataloged in field 773, including the new label iss: (issue):
After the filtering, only the holdings with the specific item pointed is shown:

**UNIMARC example:**

The parent record with many items in different years, volumes and issues:

The link in the child record is cataloged as follows, including the new label `iss:` (issue):

The child record shows in the repository search only the holdings referred to by this field:

See [Configuring Related Records for Physical Inventory](#).

---

**MARC 21 Updates**

**July 2020 Resource Management**

The following MARC 21 updates (for bibliographic, authority, holdings, classification, and community information formats)
have been added to Alma in the July 2020 release:

- MARC21 BIB
  - Update No. 27 (November 2018)
  - Update No. 28 (May 2019)
- MARC21 Holdings
  - Update No. 28 (May 2019)
- MARC21 Authority
  - Update No. 26, April 2018
  - Update No. 28, May 2019

Refer to http://www.loc.gov/marc/status.html for additional details regarding these MARC 21 changes.

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Reload Bibliographic Records from Central Catalog On Demand

**July 2020 Resource Management**

Users working on Bibliographic records in Central Cataloging (Aleph, SBN, CALIS, etc.) need to ensure that they view and update the most recent version of a Bibliographic record.

A new option **Reload Record from Central Catalog** was added to the Metadata Editor under the File menu. This option enables reloading the most recent version of the Bib record that was loaded previously from the Central Catalog. This restores the Bib entire record from the Central Catalog, removing any changes made by you.

This action is available for Bibliographic records that are managed centrally with the required prefix in 035, and the ones that are managed locally. However, only records managed centrally are reloaded.

![Reload Record from Central Catalog](image)

**Note**

The Reload Record from Central Catalog option is available only when both below criteria are met:

- if you have configured a Central Catalog integration profile,
- when working on Bibliographic records.

See [MD Editor Menu and Toolbar Options](mailto:){#MD-Editor-Menu-and-Toolbar-Options}.  

Ex Libris, a ProQuest Company
Align Record Version with SBN

July 2020 Resource Management

Now users working in SBN can align the local record version with the SBN record version, without making any additional changes to the local version. Since now the date is the same, SBN accepts the record contribution.

A new entry **Align Record Version with Central Catalog** was added to the Metadata Editor ([Tools > MARC Bibliographic](#)). Selecting this option updates the local version of the record with the SBN record version.

![MD Editor with Align Record Version with Central Catalog option](image.png)

**Note**

The option is visible only if a central catalog integration profile for SBN is defined.

See [Integrating the SBN Italian Union Catalogue](#) and **MD Editor Menu and Toolbar Options**.

Public Access Model on the Portfolio Editor

**July 2020 Resource Management**

Access Model defines how end-users can access the electronic resources. The access model has always been indicated in the PO line, but now it is also displayed in a new field **Public access model** that was added to the Acquisition tab of the portfolio editor. This field presets the active access model associated with the portfolio, as inherited from the PO line that created the portfolio. Any updates to the access model on the PO line are reflected in the **Public access model** field of the portfolio editor. See [Editing a Portfolio Using the Electronic Portfolio Editor](#).

You can also change the value of the **Public access model** field directly on the portfolio editor, and this determines the active access model of the portfolio. However, changing the access model value on the portfolio does not update the access model on the PO line.

**Note**

In case a PO line of type 'License Upgrade' was added to the portfolio as an additional PO line, the **Public Access Model** field on the portfolio displays the access model associated with the license-upgrade order.
"Public access model" field on the portfolio editor

The **Include access model in portfolio public note** checkbox, which previously controlled the presentation of the access model on the portfolio’s **Public Note** field in the Alma Link Resolver, was now removed from the New Order API integration profile. See [Real-Time Ordering](#).

To control the presentation of the access model to patrons via Alma Link Resolver, institutions now can use a designated configuration located under **Fulfillment > Discovery Interface Display Logic > Other settings**. Select the checkbox **Enable Display of Access Model** to display in Primo the access model information located on the portfolio.

**Note**

Primo VE will support this configuration in a future release.

The new **Enable Display of Access Model** option is disabled by default. Institutions that previously had the **Include access model in portfolio public note** check box enabled in their integration profile, will need to select the **Enable Display of Access Model** option in the new configuration screen. See [Configuring Other Settings](#).

Manage Selected Physical Items

**July 2020 Resource Management**

Following the changes made in [June 2020](#) release, the actions that previously were displayed as links of the page actions, were now added to the Physical Items list, to enable you to perform actions on multiple physical items in bulk. In addition, when you select items from the list, the item counter above the list now provides an indication of the number of items selected.
Note

Due to changes required in the definition of columns, the default display will be restored as part of July release deployment. If display customization was applied, it will need to be redone.

Some of the actions that can be performed, such as running a job and creating/adding to the itemized set, can only be performed if you possess the required permissions.

See Working with the List of Items.

Watch the Manage Selected Physical Items video (0:51 minutes).

Improvements to Electronic Collection and Portfolio Deletion

July 2020 Resource Management

The process of electronic collection and portfolio deletion was made more user-friendly. Now the options to edit records (add, edit or delete) are disabled on electronic collections, portfolios and services once these resources are marked for deletion. In addition, now you are blocked from attaching a stand-alone portfolio to a collection that is marked for deletion (unless the portfolio has some available services).

Using Community Zone Electronic Collections in Import Profiles

July 2020 Resource Management

Now Import Profiles can work with electronic collections activated from the Community Zone. This means that when importing to an CZ collection, and local portfolios do not exist, the CZ portfolios are imported.

For that purpose, a new checkbox "Use Community Zone portfolios" was added to the Inventory Information tab of the Import Profile Details page (Resources > Import > Manage Import Profiles or Acquisitions > Import > Manage Import Profiles). When selected, then upon import, Alma now attempts to match each bibliographic record against the bibliographic records that have portfolios that are part of the collection activated from CZ.

- If a matching bibliographic record is found, Alma imports the relevant portfolio.

Note

- Note that Alma does not activate this portfolio. You can activate this portfolio at any time. To activate upon import, click the "Activate resource" checkbox at the bottom of the Inventory Information tab.
- If a matching bibliographic record is found, its information is taken from the Community Zone. The information filled in the fields below ("Extract portfolio information from field", "Extract access URL from field", "Extract interface name from field", "Extract internal description note from field", "Extract authentication note from field", "Extract public note from field", "Extract library from field") are ignored.
• If a matching bibliographic record is not found - Alma creates a local portfolio that is associated to the CZ collection.

• If multiple bibliographic records are found as a match in the CZ under the specific collection – no import takes place. The record is reported in the "Resolve import issues" list.

The "Use Community Zone portfolios" checkbox appears only when both the below conditions are true:

• The selected inventory operations are **Electronic** or **Mixed**.

• Portfolio type is **Part of Electronic Collection**.

See [Managing Import Profiles](#).

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**Enhancements to Forms**

**July 2020 Digital Resource Management**

Several enhancements have been added to the Alma Forms feature ([Configuration > Resources > Metadata Configuration > MARC21 Bibliographic or Qualified Dublin Core > Forms tab](#)) when selecting **Add fields**:

• The **Checkbox** field type was added.

• The **Repeatable** field was added to the field types (when configured) to allow the user to add multiple instances of the field. This is available only for Patron Deposit forms.

• For date fields, if configured to be mandatory, the **Default Value** field is set to the current date.

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**Enhanced Sorting Support for Collections**

**July 2020 Digital Resource Management**

**Idea Exchange**

You can now configure the default sorting for titles and sub-collections in Primo VE, using a richer set of title-level sort routines.

• To configure the default sorting of titles in a collection, select an option from the **Sort titles by** drop-down list ([Resources > Manage Collections > Edit Collection > Discovery Tab](#)): 
To configure the default sorting of sub-collections in a collection, select an option from the **Sort by** drop-down list (Resources > Manage Collections > Edit Collection > Sub-collections tab):

- **DARA Recommendation to Identify Missing Items**

  **July 2020 DARA**

  DARA now identifies items that have been missing for a significant amount of time and recommends that you handle them.

  By default, DARA identifies items missing for more than 12 months. You can customize DARA to produce recommendations that better suit the needs of your institution. For more information, see DARA – Data Analysis Recommendation Assistant.

  **Sort Request Facets**

  **June 2020 Acquisitions**

  All facets on the Manage Purchase Requests page, including Requester, are now sorted in alphabetical order.
Access Model Field in POLine

**June 2020 Acquisitions**
In the January 2020 release notes, a new option was introduced to track the access model for concurrent users, which is reflected on the PO line and portfolio (see [Create Order API - Improved Matching and Creation of Portfolios to Work with Community Zone](#)). The access model is now stored in the new **Access Model** field on the PO line for electronic orders. The access model also appears in the portfolio. If you modify the access model on the PO line to be different than the access model on the portfolio, the portfolio will be updated. The access model can also be changed in the Update PO Line Information job.

There is an option to search for PO lines by access model. In the simple search, the search is by the code. In the advanced search, there is a dropdown only description.

For PO lines of type **License upgrade**, the access model is set on the prerequisite page and cannot be modified on the Edit PO line page. For other types of PO lines, the **Access Model** field is editable on the Edit PO line page.

The Access model field will be reportable in Analytics in a future release.

See [Real Time Ordering](#).

Material Type Added to Primo Purchase Request Form

**June 2020 Acquisitions** SF: 00818891
The default material type option was removed from the purchase request form in Alma. To set the default material type of a new purchase request form in both Alma and Primo, a new Purchase Request Material Types configuration table was added, possible values of the new configuration table are Physical or Electronic request types. This replaces the customer parameter that previously controlled the default, `purchase_request_preferred_material_type_default`.

See [Creating a Purchase Request](#) and [Configuring Purchase Request Material Types](#).

CDI Provider Coverage Field

**June 2020 Resource Management**
The **Provider coverage** field is now available on the CDI tab of the Electronic collection editor. When this read-only field is set to **Yes**, the collection is indexed with data received directly from the provider. When set to **No**, a feed from the provider is not available, but at least 80% of the content of the collection is covered in CDI by data received from other providers. The field also displays in the Electronic collection result list, in **Institution**, **Network** and **Community** tabs, below the **In CDI** field, for any electronic collection where **In CDI** = **Yes**.

**Note**
This is relevant only for CDI enabled customers.

See [Electronic Collections](#).

Semi-Annual Re-indexing

**June 2020 Resource Management**
During June, the semi-annual re-indexing (described in greater detail in [Updates](#)) will be run. Features or resolved issues that require re-indexing to be fully functional will be addressed by the June semi-annual re-indexing. See the list below.
- Authority Control of Additional Fields in UNIMARC.
- Advanced search query options were expanded to include additional query options for Electronic Portfolios and Electronic Collections.
- The following similar Arabic letters are now treated as the same letter by authority search:

ا - آ - ی
ى - ي - ی
ه - ه
و - ژ
ك - گ - ك
ف - 
ز - ژ
ب - پ
ج - چ
ق - چ

---

Note

Until re-indexing, browsing of bib headings and authorities search using F3 for these letters may not work properly.

---

Authority Control of Additional Fields in UNIMARC

June 2020 Resource Management SF: 00536407

Authority control of the following fields was added to Alma, following their addition to the 3rd edition of the UNIMARC Authority format:

<table>
<thead>
<tr>
<th>Tags</th>
<th>Search Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Uniform Title (X31, X32)</td>
<td></td>
</tr>
<tr>
<td>231 a-w</td>
<td>Uniform Title</td>
</tr>
<tr>
<td>232 a-w</td>
<td>Uniform Title</td>
</tr>
<tr>
<td>431 a-w</td>
<td>Uniform Title</td>
</tr>
<tr>
<td>432 a-w</td>
<td>Uniform Title</td>
</tr>
<tr>
<td>531 a-w</td>
<td>Related Uniform Title</td>
</tr>
<tr>
<td>532 a-w</td>
<td>Related Uniform Title</td>
</tr>
<tr>
<td>Name-Title (X41, X42)</td>
<td></td>
</tr>
<tr>
<td>241 a-t</td>
<td>Name Title</td>
</tr>
<tr>
<td>242 a-t</td>
<td>Name Title</td>
</tr>
<tr>
<td>441 a-t</td>
<td>Name Title</td>
</tr>
<tr>
<td>442 a-t</td>
<td>Name Title</td>
</tr>
</tbody>
</table>
These fields fully support the Alma authority control workflows, including linking, Preferred Term Correction, and F3.

The following table identifies the search indexes to which the new UNIMARC authority tags are mapped.

<table>
<thead>
<tr>
<th>Search Index</th>
<th>Tags</th>
</tr>
</thead>
<tbody>
<tr>
<td>Uniform Title</td>
<td>231 a-w 232 a-w 431 a-w 432 a-w</td>
</tr>
<tr>
<td>Related Title</td>
<td>531 a-w 532 a-w</td>
</tr>
<tr>
<td>Name Title</td>
<td>241 a-t 242 a-t 441 a-t 442 a-t 541 a-t 542 a-t</td>
</tr>
</tbody>
</table>

See UNIMARC Authority Search Index Mapping.

UNIMARC: Field 610 is Not Controlled by Authority

June 2020 Resource Management SF: 00527854 00645001

For UNIMARC bibliographic records, field 610 (Uncontrolled subject terms) is no longer controlled by authority. This means that F3 search on the field 71X no longer shows the results from field 610, and there is no linking and preferred term correction for field 610.

To support field 610, a new source code option Uncontrolled subject terms was added to the bib headings list in the Metadata Editor available for browsing bibliographic headings. When this source code is selected, the "Vocabulary" option is not displayed because it is not controlled by authority.

Note

Browsing bib headings on subjects with an empty source code only retrieves results from the first five source codes (as done before this change). Headings from field 610 will not be retrieved. To see results from field 610, the "Uncontrolled subject terms" source code must be specifically selected.
If your institution uses UNIMARC and would like to activate this behavior, please contact Ex Libris customer support.

**Note**
This feature will be available in August after the re-indexing job has completed.

See [Browsing Bibliographic Headings](#).

### Additional Localized Values in Originating System Table

**June 2020 Resource Management**
The following values were added to the Import Profile Originating System code table ([Configuration Menu > Resources > Record Import > Originating Systems for MD Records](#)).

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RIALTO</td>
<td>Rialto</td>
</tr>
<tr>
<td>BRILL</td>
<td>Brill Online Primary Sources</td>
</tr>
<tr>
<td>EASTVIEW</td>
<td>East View Information Services</td>
</tr>
<tr>
<td>THIEME</td>
<td>Thieme Verlag</td>
</tr>
<tr>
<td>BLOOMSBURY</td>
<td>Bloomsbury</td>
</tr>
<tr>
<td>CRL</td>
<td>Center for Research Libraries</td>
</tr>
<tr>
<td>DE_GRUYTER</td>
<td>De Gruyter</td>
</tr>
<tr>
<td>HST</td>
<td>Henry Stewart Talks</td>
</tr>
<tr>
<td>INGRAM</td>
<td>Ingram</td>
</tr>
<tr>
<td>KYOBO</td>
<td>Kyobo</td>
</tr>
<tr>
<td>SYMPHONY</td>
<td>Symphony</td>
</tr>
<tr>
<td>ULS</td>
<td>United Library Services</td>
</tr>
</tbody>
</table>

See [Configuring Originating Systems for Import Profiles](#).
**Advanced Search Options Expanded**

**June 2020 Resource Management**

**NERS Enhancement (ID #4057):** Advanced search query options were expanded to include **Not Contains Keywords, Is Empty** and **Is Not Empty**. See the table below for the list of changes.

<table>
<thead>
<tr>
<th>Find</th>
<th>Conditions</th>
<th>Conditions</th>
<th>Conditions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic Portfolio</td>
<td>Electronic Collection</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Public Note (Electronic Collection) – Contains Keywords, Contains Phrase, Not Contains Keywords, Not Contains Phrase, Starts With, Not Equals, Equals, Is Not Empty and Is Empty</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Internal Description (Electronic Collection) – Contains Keywords, Contains Phrase, Not Contains Keywords, Not Contains Phrase, Starts With, Not Equals, Equals, Is Not Empty and Is Empty</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Electronic Collection</td>
<td>Electronic Collection</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Public Note (Electronic Collection) – Contains Keywords, Contains Phrase, Not Contains Keywords, Not Contains Phrase, Starts With, Not Equals, Equals, Is Not Empty and Is Empty</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Internal Description (Electronic Collection) – Contains Keywords, Contains Phrase, Not Contains Keywords, Not Contains Phrase, Starts With, Not Equals, Equals, Is Not Empty and Is Empty</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note**

This feature will be available in August after the re-indexing job has completed.

Watch the [Advanced Search Options Expanded](#) video (1:34 minutes).

**General Publishing - Structured Coverage Information**

**June 2020 Resource Management**

Previously, Ex Libris provided the coverage and embargo information of electronic holdings in a textual human-readable format, for example: "Available from 1982 volume: 1 issue: 1. Most recent 4 year(s) not available", in multiple languages. Now, this information can be published in its raw format. This enhancement is useful for integrating with 3rd-party systems that use the coverage and embargo information to calculate the availability of electronic titles.

To support this development, new fields that allow for a more granular definition of the coverage and embargo information were added to the general publishing profile of electronic portfolios. The following fields can now be published (see the corresponding representation of these fields in the electronic resource editor below):

- From Year
- To Year
- From Month
The new Coverage and Embargo Information fields

The new portfolio coverage-related fields and sections were added to the Electronic Inventory Enrichment section of the Publishing Profile Details page.

### New fields in the Electronic Inventory Enrichment section

This is the list of the new fields in the Electronic Inventory Enrichment section.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Portfolio Coverage Information</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Repeatable field</strong></td>
<td>Enter a field number into which to put the coverage information in the output record (one that is not used by the bibliographic record); this field is mandatory. For example, if you enter 950, the output will contain <code>&lt;datafield tag=&quot;950&quot; ind1=&quot;&quot; ind2=&quot;&quot;&gt; ... &lt;/datafield&gt;</code>, with the information you enter in this area in subfields of this field.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------</td>
<td>------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Portfolio id subfield</td>
<td>For each piece of coverage information that you want to be included in the output file, enter the subfield in which you want it to appear. See rows below for the coverage information you can add.</td>
</tr>
<tr>
<td>From Year subfield</td>
<td></td>
</tr>
<tr>
<td>Until Year subfield</td>
<td></td>
</tr>
<tr>
<td>From Month subfield</td>
<td></td>
</tr>
</tbody>
</table>
| Until Month subfield | The Coverage and Embargo information is exported according to the selection made in the "Which coverage statement will be applied?" option in the portfolio editor's Coverage tab:  
  • Each value of every subfield publishes the value of its corresponding parameter from Date Information table and Embargo on the Portfolio Editor.  
  • The published coverage information is simplified on the portfolio level in the following way:  
  • Rows that consist of date elements only (year/month/day) are consolidated into the minimum-possible representation of date range(s) that cover all the date ranges for this specific portfolio. This means that the exported date ranges completely cover the true availability of the portfolio.  
  • The simplification process does not occur for date-information rows that has Volume and/or Issue specified, they are published as-is. |
| From Day subfield    | The embargo date range(s) are calculated and published separately in the Embargo section. |
| Until Day subfield   |                                                                              |
| From Volume subfield |                                                                              |
| Until Volume subfield|                                                                              |
| From Issue subfield  |                                                                              |
| Until Issue subfield |                                                                              |
| Portfolio Embargo Information |                                        |
| Repeatable field     | Enter a field number into which to put the embargo information in the output record; this field is mandatory. For example, if you enter 950, the output will contain <datafield tag="950" ind1="" ind2=""> ... </datafield>, with the information you enter in this area in subfields of this field. |
| Portfolio ID subfield | For each piece of embargo information that you want to be included in the output file, enter the subfield in which you want it to appear. |
| Operator subfield    | See above.                                                                   |

**Note**

In the Embargo section of the output file, the **Operator** field exports the below operators. Since '<' and '>' characters are special characters in XML, using them within the XML content might cause errors in the output. Thus, these characters are encoded in the XML output as follows:
### Field Description

<table>
<thead>
<tr>
<th>Published Sign</th>
<th>Meaning</th>
<th>Meaning within the output</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;</td>
<td>&lt;= Less than or equals to</td>
<td>Most recent X year(s) available</td>
</tr>
<tr>
<td>&gt;</td>
<td>&gt;= Greater than or equals to</td>
<td>Most recent X year(s) not available</td>
</tr>
<tr>
<td>&lt;=</td>
<td>&lt; Less than</td>
<td>Most recent X-1 year(s) available</td>
</tr>
<tr>
<td>&gt;=</td>
<td>&gt; Greater than</td>
<td>Most recent X+1 year(s) not available</td>
</tr>
</tbody>
</table>

**Number of Years subfield**
The number of years/months included/excluded (based on the selected operator) from the portfolio coverage.

**Number of Months subfield**

---

See [Publishing and Inventory Enrichment (General Publishing)](#)

---

### Portfolios Display Service and Collection Data

**June 2020 Resource Management** SF: 00570136 00577949 00821547 00821550 00408242 00115067

**NERS Enhancement (ID #5054)**

**Idea Exchange**
Alma now displays certain electronic service and collections information as read-only information in the Portfolio Editor. This is useful for users viewing the electronic portfolio, since this service and collections information may be relevant to their needs. Now, these users do not have to open the Service Editor or Collection Editor to access this information, but can see all the relevant information in one place.

**Note**
These parameters are displayed only for portfolios included in electronic collections; they are not displayed for standalone portfolios.

The following service and collection parameters are now displayed in the Portfolio Editor:
<table>
<thead>
<tr>
<th>Portfolio tab</th>
<th>Service parameters</th>
<th>Collection parameters</th>
</tr>
</thead>
<tbody>
<tr>
<td>General tab</td>
<td>• Base Status,</td>
<td>• Selective Indication,</td>
</tr>
<tr>
<td></td>
<td>• Activate From,</td>
<td>• Interface Public</td>
</tr>
<tr>
<td></td>
<td>• Activate To,</td>
<td>Name</td>
</tr>
<tr>
<td></td>
<td>• Site Down,</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Site Down Reason,</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Site Down Date</td>
<td></td>
</tr>
<tr>
<td>Linking tab</td>
<td>• Crossref Supported,</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Crossref Enabled,</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Proxy Enabled,</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Proxy Selected,</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Link Resolver section (including API code, Link Resolver Plugin Status, Link Resolver Plugin Active),</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Linking List section</td>
<td></td>
</tr>
<tr>
<td>Notes tab</td>
<td>• Authentication Note,</td>
<td>• Authentication Note,</td>
</tr>
<tr>
<td></td>
<td>• Public Note</td>
<td>• Public Note</td>
</tr>
</tbody>
</table>

Service- and Collection-related parameters in the Portfolio Editor

See [Managing Electronic Resources](#).

**Change Physical Items job - Ability to Change all Temporary fields for Physical Items**

**June 2020 Resource Management**

SF: 00121556 00486264 00471848 00017848 00604866 00043563 00098197 005567256 00060934 00148673 00101955 00174362 00070445 00520048 00052510 00116547 00070339 00166961 00517178

The Change Physical Items job has been enhanced with the following:
• Additional parameters were added, which allow setting and clearing all parameters related to temporary location changes. The parameters correspond to the options available on the Physical Item Editor tabs that can be accessed by doing a repository search for physical items and selecting **Edit** for one of the items in the search results list. For the full list of fields, see [Updating Item-Level Information](https://support.exlibrisgroup.com).  

• Configurable "Statistics Notes 1/2/3" parameters were added. See [Configuring Statistics Notes](https://support.exlibrisgroup.com) for information about configuring fixed dropdown lists of options for statistics notes.  

• The parameters that pertain to permanent and temporary locations were divided to separate sections to enable better visibility and clearer workflows.  

• The page layout visually reflects the dependencies between the different parameters.  

• Sequence-related parameters are supported.  

The enhanced Change Physical Items job  

See [Change Physical Items job](https://support.exlibrisgroup.com).  

**Manage Selected Physical Items**  

**June 2020 Resource Management**  

SF: 00121556 00486264 00471848 00017848 00604866 00043563 00098197 00567256 00060934 00148673 00101955 00174362 00070445 00520048 00052510 00116547 00070339 00166961 00517178  

On the Physical Items list, the **Manage Selected** dropdown was added that holds some of the actions that can be performed on multiple physical items in bulk.  

These actions can only be performed if you possess the required permissions.  

See [Working with the List of Items](https://support.exlibrisgroup.com).
Contribution Possible for Miscellaneous Books Collection

**June 2020 Resource Management**

Now portfolio contributions can be made to the additional electronic collection:

- Miscellaneous eBooks

See [Contributing to the Community Zone – Portfolios](#).

Display Institution Name in New Alma Viewer and Deposit Interface

**June 2020 Digital Resource Management**

You can now configure your institution name to appear in the New Alma Viewer and Deposit interface. To configure this feature, set the value of the `repDeliveryViewer.Alma` parameter (Configuration > Fulfillment > Digital Fulfillment > Alma Viewer Labels) to the institution name. Note that for new institutions that have not configured an institution name for the original Alma Viewer, the word **Alma** appears by default.

Display Terms of Use and Copyrights in Alma Viewer

**June 2020 Digital Resource Management**

*Idea Exchange*

You can now configure the Alma viewer to display Terms of Use and Copyright information in the Descriptive Information pane in the Alma Viewer. This information is taken from MARC fields 540 $3 $a $f $u and 542 $3 $f $u respectively. To support this new feature, two new rows were added to the Delivery Profiles Metadata table for MARC records. Enable these rows to display the Terms of Use and Copyright information.

![Delivery Profiles Metadata Table](image)

Customize the New Alma Viewer and Deposit Interface with Primo Studio

**June 2020 Digital Resource Management**

You can now customize the New Alma Viewer and the Deposit Interface using Primo Studio.

**Note**

You must have a deposit profile configured to customize the deposit interface with Primo Studio.
• For Primo VE users:

To customize the New Alma Viewer using Primo Studio:

1. Select the new **Customization** tab from the Alma Viewer configuration page (**Configuration > Fulfillment > Discovery Interface Display Logic > Viewer Services > Alma Viewer**).
2. Select a Primo View, a Representation ID, and select **Generate Link**.

![Customization Tab](image1)

3. Select the Open Primo Studio link.

Primo Studio opens, allowing you to customize the Alma Viewer. Create a customization package and upload it to Alma.

For more information on using Primo Studio, see [Using Primo Studio](#).

To customize the Deposit Interface using Primo Studio:

1. Select the new **Patron Deposit Customization** link (**Configuration > Resources > Deposit**).
2. Select a Primo view and select **Generate Link**. The Open Primo Studio link appears.

![Patron Deposit Customization](image2)

3. Select the **Open Primo Studio** link.

Primo Studio opens, allowing you to customize the Deposit Interface. Create a customization package and upload it to Alma.

For more information on using Primo Studio, see [Using Primo Studio](#).

• For standard Primo users:

To customize the Deposit Interface and the New Alma Viewer using Primo Studio:

From the Primo Studio section on the Alma Viewer and Deposit Customization page (**Configuration > General > Alma Viewer and Deposit Customization**):
To configure the deposit interface using Primo Studio, click **Customize Deposit**.

To configure the Alma viewer using Primo Studio, enter a representation ID, and select **Customize Alma Viewer**.

Primo Studio opens, allowing you to customize the Deposit Interface. Create a customization package and upload it to Alma from the Upload Package section.

For more information on using Primo Studio, see [Using Primo Studio](#).

---

**Enhancements to Forms**

**June 2020 Digital Resource Management**

Several enhancements have been added to the Alma Forms feature:

- You can now configure vocabularies that allow you to define the possible values for the form fields from **Configuration > Resources > Controlled Vocabulary Registry - Forms**. For more information, see Controlled Vocabulary Registry - Forms.

- The following field types can now be added to forms (**Configuration > Resources > Metadata Configuration > MARC21 Bibliographic or Qualified Dublin Core > Forms tab**) when selecting **Add fields**. This replaces the Type field within the form:
  - Combo box Multi-select – a drop-down list of checkboxes. Multiple checkboxes can be selected.
  - Combo box single-select – a drop-down list of checkboxes. Only one can be selected.
  - Radio Button – multiple radio buttons are displayed. Only one can be selected.
  - Text Box – replaces the text (single line) field type.
The following fields were added to the field types:

- Tooltip – a tooltip message to display
- Language – the languages the institution accepts as a thesis or dissertation language
- Vocabulary – the vocabulary of possible values for the combo box and radio button fields

For more information, see Working with Forms.

The following enhancements were added to the Configuring Deposit Profiles page (Resources > Deposits > Manage Deposit Profiles):

- You can now select multiple access rights policies. Depositors can select which policy they want to apply to the deposit.
- The Public Instructions field is now translatable.
- The User Group field was redesigned as a drop-down list and allows for multiple selections.
- The following fields were added:
  - Maximum number of files – the maximum number of files that can be deposited per deposit
  - Maximum file size (each, in MB) – the maximum size of the files allowed in the deposit
  - Allowed extensions – the extensions of the files allowed in the deposit
Select Order of Holdings, Availability, and Requests in Get It

June 2020 Fulfillment

Idea Exchange

Previously, when showing a holdings’ availability in Get It, the sequence of the text was hard-coded (x copy, y available, z requests).

Using the new label added to the 'Labels' configuration screen: c.search.htmlCreator.unifiedDisplay, institutions can:

• Resequence the existing labels, for example “x available, x requests, x copies”.
• Add a descriptive text before, after or between each one of the labels, for example “x available, resources, x requests, x copies”.
• Remove labels which are not needed, for example ”x available, x copies”

The new label is formatted as: {{copies_labels}}, {{available_labels}}, {{requests_labels}}. All content within the curly brackets cannot be changed or translated because they represent other existing labels. Text can be added before, after or between each pair of curly brackets. If needed, there is also the option to remove one of the labels so it will not be displayed in the Get It.

The following labels are used to populate the information within the 3 curly brackets of the new label:

• Brackets within the new label: {{copies_labels}} will be populated with information from these existing labels:
  ◦ c.search.htmlCreator.copy for a single copy
  ◦ c.search.htmlCreator.copies if there are multiple copies

• Brackets within the new label: {{available_labels}} will be populated with information from this existing labels:
  c.search.htmlCreator.available. If you have configured Time to reshelve, the following labels may replace it:
  ◦ c.uresolver.getit2.item_list.status.SOME_HOLDING_ITEMS_AWAITING_RESHELVING,
  ◦ c.uresolver.getit2.item_list.status.ALL_HOLDING_ITEMS_AWAITING_RESHELVING.

• Brackets within the new label: {{requests_labels}} will be populated with information from these existing labels:
  ◦ c.search.htmlCreator.request if there is a single request
  ◦ c.search.htmlCreator.requests If there are multiple requests
Note

- A new label was added for zero requests.
- The numbers were added to the existing labels. For instance, now instead of *copies*, the default label is `{0}` copies.

See [List of Commonly Used Labels](#).

---

**Hold Request Loan Indicator**

**June 2020 Fulfillment**

If you create a hold request, the Loan Audit Trail now includes a *Hold Loan* field to indicate if the loan originated from a hold request. This will be reportable in Analytics in a future release.

See [Viewing Loan History](#).

---

**Request Notes in Pick from Shelf List**

**June 2020 Fulfillment**

💡 **Idea Exchange**

On the Pick from Shelf list, if one or more request notes exist, they are now displayed aggregated together with a "|" (pipe symbol) in between each request. Only notes for active requests that are being picked by the current circulation desk are displayed. The notes of the active request are presented in the Pick Up Requested Resources page in no specific order. If you click the link for the request queue, all requests are displayed along with a new column that displays the request notes.

Watch the [Request Notes in Pick from Shelf List](#) video (0:48 minutes).

See [Pickup at Shelf](#).

---

**RFID Support for Scanning Multiple Items**

**June 2020 Fulfillment Early Adopter Phase**

💡 **Idea Exchange**

Institutions that have RFID readers at their circulation desks now have the option to perform a single scan for multiple items positioned on the RFID reader. The support for scanning multiple items is available in all the relevant pages that allow RFID scans. The multi-item scan is being enhanced for RFID readers connecting directly to Alma, and is not related to integration of self-check machines with Alma via the SIP2 protocol. This functionality is now in the testing phase and is dependent on the RFID hardware and vendor. Due to the COVID-19 pandemic, the ability to scan multiple items may be helpful for institutions to minimize staff's contact with physical items, if your institution would like to become an early tester and activate the multi-item scan functionality in your sandbox and/or production environments, please contact Ex Libris support.

Ex Libris, a ProQuest Company
Searching for Resource Sharing Requests from Persistent Search Bar

**June 2020 Fulfillment Resource Sharing**

You can now search for resource sharing requests from the persistent search bar on the top of the application. All existing search options also remain available. The default search option for the resource sharing requests is External Request ID.

See [Searching in Alma](https://www.alma.exlibrisgroup.com/).

Limit User Manager Role by Account Type

**June 2020 Administration and Infrastructure**

新基建 (ID #6348) SF: 00758495

You can now attach an attribute to the User Manager role, as well as other roles that can manage user information, such as Circulation Desk operators, to limit the user from editing users that have specific roles or user groups.

When adding one of the below mentioned roles to a user, a new checkbox is available on the User Roles Details page. **Can’t edit restricted users** enables you to define that the user with this role cannot edit other users records that have been defined as 'restricted'. If **all** of this user's relevant roles have the **Can’t edit restricted users** selected, the user will have edit/delete access **only** for users that are not restricted. The user will still be able to view the limited access user records, but not make any changes (including to contact info, etc.). If one of the users’ roles is not limited, the users are is not limited in their edit/delete access.

By default, this value is not selected.

This is applicable for the following roles:

- General System Administrator
- User Administrator
- User Manager
- Circulation Desk Manager
- Circulation Desk Operator
- Circulation Desk Operator - Limited
- Repository Manager

User record types that are considered restricted, and therefore cannot be updated by users that have the **Can’t edit restricted users**, can be defined by their user group or by their roles. In other words, it is possible to define that user records that have a specific user group will be considered restricted, and/or to define that user records that have a defined role will be considered restricted. Any user record that is assigned either one of the restricted user groups, or one of the restricted roles will not be updateable by users that have the **Can’t edit restricted users** attribute activated on their above mentioned roles.

A new configuration page, **Users Restricted for Editing**, is available on the User Management configuration menu to define which user roles and groups will be restricted for editing by those users that have the **Can’t edit restricted users** check box selected.

See [Managing User Roles](https://www.alma.exlibrisgroup.com/) and [Restricting Users for Editing](https://www.alma.exlibrisgroup.com/).
DARA Recommendation to Configure New Alma Viewer

June 2020 DARA
DARA identifies that you have not yet configured the new Alma Viewer and recommends that you do so.

For more information, see DARA – Data Analysis Recommendation Assistant.

'Printouts Queue' Link Visibility

June 2020 Administration and Infrastructure
This change continues the change made in the May release, in which the following user roles were added:

- The Printout Queue Operator - can access the Printouts Queue, but can see only the letters they have printed (which means they do not have access to the Printed By filter).
- The Printout Queue Manager - can access the Printouts Queue, and can see all the letters there. Has access to the Printed By filter.

Up till the current release, all system users could access the Printouts Queue link (Admin > Printing). Starting from the current release, only these two user roles will be granted access to the Printouts Queue link. To support this, the below changes take place:

- The Printout Queue Operator role is automatically added to all the users who have printed to the Printout Queue within the previous 30 days.
- The Printout Queue link becomes hidden for all users without one of the above roles.

To manage this change, Ex Libris recommends that you do the following to enable access to the Printout Queue to all users who needs this access:

- To grant access to the Printouts Queue link only to specific users, make sure to add one of the above roles to all users that need to receive access to the link.
- To grant access to the link to new users, add the new Printout Queue Operator role to a Role Profile. This will make the link available for all users which are created with the relevant job category or user group, and a corresponding role assignment rule for the Role Profile in place. For details about Role Profiles, see Configuring Role Profiles.

See Printouts Queue.

PO Lines in the Recent Entities List

June 2020 Administration and Infrastructure
PO lines now appear in the Recent Entities list.

The Recent Entities list that was introduced in the March release now lists the Purchase Order lines which were added, updated, and deleted within the last 7 days by the user. The addition of the Purchase Order line to Recent Entities is a
helpful way to find the POL the user recently accessed, even if they do not remember its identifying number.

Below is a detailed list of cases in which PO Lines appear in the Recent Entities list:

<table>
<thead>
<tr>
<th>Entity Type</th>
<th>Included in the Recent Entities List when:</th>
<th>Not included in the Recent Entities List when:</th>
</tr>
</thead>
</table>
| PO Lines    | • PO Line was created from the Prerequisites screen  
• PO Line was created from a Purchase Request  
• PL Line was created from the Metadata Editor  
• PO Line was edited from any of the task list screens  
• PO Line was edited from the Manage EDI tasks  
• PO Line was updated from the Receiving Workbench screen  
• PO Line was deleted from any screen | • PO Line was created by the EOD job  
• PO Line was created by API  
• PO Line was deleted as the result of PO deletion  
• PO Line was updated by any Alma job or Process Automation  
• PO Line was updated via invoice  
• PO Line was updated via the Activation task list |

The following information is provided in My Recent Entities pane for each PO Line:

<table>
<thead>
<tr>
<th>Entity Type</th>
<th>Information Displayed</th>
<th>Example</th>
</tr>
</thead>
</table>
| PO Line     | • PO Line description  
• PO Type  
• PO Line number | ![Example](image) |

See [Recent Entities list](#).

**Outbound and Inbound Files Encryption**

**June 2020 Administration and Infrastructure**

Now it is possible to encrypt files uploaded to Alma and have Alma encrypt files it created. The encryption is based on the OpenPGP standard and uses Private/Public Key encryption provided by the institution to encrypt the files. The encrypted files have the .gpg file prefix.

The current development complements file security in Alma, which supports FTP and SFTP protocols for file encryption during transfer. This development allows encrypting files before being placed on the FTP server. This development is useful for institutions that would like to add another layer of security to sensitive data, such as patron information.

See [Developer Network](#).

**Primo Publishing (Single & Network) - Change in Authority Synchronization Frequency**

**June 2020 Administration and Infrastructure**

Ex Libris has conducted an analysis of the Primo Publishing process with the intention of increasing its overall throughput, stability and performance, and has decided to optimize the Authority synchronization and change it to run once every 24 hours. The Primo Publishing frequency will remain the same. For example, if your Primo Publishing process runs every 6 hours, then the authority synchronization will happen at the fourth run.
Ability to create/update the vendor details on a purchase order line using APIs

May 2020 Acquisitions
An option to create and/or update the fields within the Vendor Details section have been added to the Update PO Line and Create PO Line APIs. See Rest PO Line in the Developer Network.

Monthly Run Option for SUSHI Harvesting Job

May 2020 Acquisitions

Idea Exchange
The SUSHI Harvesting job can now be run on a monthly schedule, in addition to the weekly scheduling option. The monthly schedule offers four predefined optional dates across the month. This will save institutions from trying to harvest usage data each week, which can result in redundant failures in case reports are not ready yet.

See Managing SUSHI Harvesting.

Ability to Activate Portfolio from CZ using Create Order API

May 2020 Acquisitions

Idea Exchange
The functionality, which was originally introduced in the January release, is designed for orders originating from OASIS. It is now available for 11 providers (see complete list).

This functionality eliminates the need to load full MARC records via an import process, due to the fact that the ordered resources are activated from the Community Zone (which includes full bibliographic records for the ordered electronic resource).

Pre-requirement: The relevant Community Zone collection must be active in your Institution Zone. If the collection is not available in the Institution Zone, a standalone electronic resource (portfolio) is created and the order is associated to it, requiring the use of a full MARC update via an Update Inventory import profile for complete descriptive information and access information.

Example:
An order is sent from OASIS for an electronic resource "1,000 Comic Books You Must Read" from ProQuest EBook Central. Alma associates the OASIS order with the relevant portfolio by activating the relevant portfolio from the collection "Ebook Central Perpetual, DDA and Subscription Titles", including complete descriptive information and access information.

See Real-Time Ordering.
New Metadata Editor

May 2020 Resource Management
The new Metadata Editor is now available for your review in the sandbox. See the Metadata Editor and Rollout Plan sections on the Usability Improvements page for more information.

Watch the New Alma Metadata Editor video (4:40 minutes). To view the video on an alternate video host, click here.

View Community Zone Portfolio Linking Information

May 2020 Resource Management

NERS Enhancement (ID #5790)

Idea Exchange
In order to assist with the decision of activating Community Zone portfolios, you can now view portfolio linking information from search results in the Community Zone tab. Previously in order to view the linking information of a Community Zone portfolio, you had to activate the portfolio. See Linking Information on the Searching in Alma page for more information.

UTF-8 Special Character Handling

May 2020 Resource Management

Alma offers a new method of handling UTF-8 special characters (with diacritics). UTF-8 special characters may be represented in both the composed or decomposed version of the character in bibliographic or authority records. Now, you have the option to configure your system with normalize on save always to save the composed version of special characters. This may be especially useful to implement to avoid the use case where multiple records are changed due to their conversion to composed representation. Such records are marked for preferred-term correction (PTC) and cause heading updates (the only difference is the composed/decomposed nature of a special character).

For more information, see UTF-8 Special Character Handling in Alma.docx

Statistical Notes

May 2020 Resource Management

Idea Exchange
In advanced search for Physical titles and Physical items, you can now search for statistical notes. See Searching for Statistical Notes for more information.

Note

Full inventory indexing needs to be run to enable this functionality.
MARC 21 and UNIMARC Updates

May 2020 Resource Management
The following MARC 21 holdings and authority configuration profile updates have been completed:

- MARC 21 Holdings – Update No. 28 (May 2019)
- MARC 21 Authority – Update No. 26 (April 2018) and Update No. 28 (May 2019)

The following UNIMARC bibliographic configuration profile updates have been completed:

- 135 $a/1 Special Material Designation
  - New codes: d – computer disc, type unspecified, e – computer disc cartridge, type unspecified, k – computer card, s – standalone device
  - Renamed: j – magnetic disk, r – online
- New field 214
- New subfield 2 for the following fields: 200, 225, 510, 532, 541
- The following new subfields for the 602 field: c, d, o
- The following new subfield for the 604 field: 2
- The following new subfield for the 623 field: 3

The following UNIMARC authority configuration profile updates have been completed:

- 101
  - Repeatable
  - New indicator 2 – Source of code
    - # – ISO 639–2 language code
    - 7 – Source specified in subfield 2
  - New subfield 2 – System Code (NR)
- The following new subfields for the 123 field: q, r, s, t, 2
- The 106 field renamed to 106 CODED DATA FIELD: ENTITY NAME AS SUBJECT ACCESS POINT
- The following new fields: 180, 370, 822
- The following new X23 fields: 223, 423, 523, 723

API Usage Subject Area

May 2020 Analytics
The new API Usage subject area is now available. You can use the fields of this subject area to create reports that display usage of Alma Analytics by API. For more information, see API Usage.
Add Roles from Profiles For Widgets and Dashboards

May 2020 Analytics

When creating Analytics Widgets and dashboards (Configuration Menu > Analytics > Analytics Objects List or Analytics > Analytics Objects > Analytics Objects List) you can now select a profile of roles to assign to the widget or dashboard.

![Add Roles from Profiles](image)

For more information, see Scheduling and Subscribing to Alma Analytics Reports.

For more information on role profiles, see Configuring Role Profiles.

Improved Performance For Alma Analytics

May 2020 Analytics

Ex Libris is currently implementing performance upgrades to the Alma Analytics infrastructure. These upgrades will greatly improve performance when running analytics reports. These upgrades will be rolled out gradually. For the May release, the upgrades will be made available to NA02.

Normalization of Generic XML to Alma XML

May 2020 Digital Resource Management

Alma now supports XSL transformer rules to convert generic XML files in a DCMI schema to an XML format recognized by Alma. This enables a RESTful API to load the file into Alma. For example, you can load an ETD Admin file with a SWORD API into Alma in ETD-DCAP format.

Recent Entities for Digital Resources

May 2020 Digital Resource Management

Actions performed for the following digital resources are now indicated on the Recent Entities pane:

- Digital Collections
- Digital Representations
- Digital Files
- Digital Deposits

For more information, see Recent Entities List.
Material Type Mapping

May 2020 Digital Resource Management

You can now map Alma material types to DCMI types that you configure. The DCMI types that you configure are available in the Material Type drop-down lists wherever they exist in Alma. Additionally, when the DCMI types that you configure are the value in the `dc:type` or `dcterms:type` fields in a DC bibliographic record, Alma will display the record with the mapped Alma material type. To support this feature, a new mapping table is available at `Configuration > Resources > Cataloging > DCMI Material Type Mapping`:

![Mapping Table]

---

Related Digital Records

May 2020 Digital Resource Management

Idea Exchange

Related digital records are now indicated when clicking View It.

Source: The New York times book review, [0026-7806]
Full text available at: ProQuest Regional News Northeast New Platform_CreateLicenseTest_0068151459
Available from 1997.
Full text available at: ProQuest Regional News Northeast New Platform 0065151228
Available from 1997.
Full text available at: ProQuest Regional News Northeast New Platform 0401151226
Available from 1997.
Digital Version(s)
The New York times 1 file(s) (pg. 16.83 KB)

Services For Related Titles
Digital Version(s)
Picasso work 1 flats (pg. 80.78 KB)

Related Records

To support this feature, the new Disable Related Record Services for Digital configuration option is now available (Configuration > Fulfillment > Discovery Interface Display Logic > Related Records).
Clear this option to allow the related records indication for digital records to be displayed

Multiple Viewers Available for Staff Delivery

May 2020 Digital Resource Management

Library staff can now select which viewer is used to display a digital file. To support this feature, a new Delivery section was added to the Digital Representation Resource Editor that displays the available viewers. Unavailable viewers are marked as Disabled.
Option for Locate of Electronic Resources

May 2020 Fulfillment Resource Sharing
You can now set a policy to not send a borrowing request to a lender that has only an electronic version of the requested resource, if the request has been requested for a physical format. When the new parameter, rs_ignore_electronic_for_physical_request, is set to true, the borrowing locate process for physical requests ignores lenders’ electronic inventory, as shown in the table below. Lenders which have the requested resource only in electronic form are then removed from the rota by the locate process.

If the Allow other formats check box is selected, when creating a new borrowing request, electronic resources are allowed, regardless of the value in the parameter.

The below table describes how the locate process runs with regard to the possible combinations of the Ignore Electronic and Digital Resources option in the locate profile and the new rs_ignore_electronic_for_physical_request parameter.

<table>
<thead>
<tr>
<th>rs_ignore_electronic_for_physical_request</th>
<th>Allow other formats is not selected</th>
<th>Allow other formats is selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>rs_ignore_electronic_for_physical_request = false</td>
<td>Ignore Electronic and Digital Resources is not selected in Locate Profile Details</td>
<td>Allow electronic regardless of format</td>
</tr>
<tr>
<td></td>
<td>locate profile ignore electronic is selected in LocateProfile Details</td>
<td>ignore electronic regardless of format</td>
</tr>
<tr>
<td>rs_ignore_electronic_for_physical_request = true</td>
<td>locate profile ignore electronic is not selected in Locate Profile Details</td>
<td>ignore electronic if physical / physical non-returnable</td>
</tr>
<tr>
<td></td>
<td>locate profile ignore electronic is selected in Locate Profile Details</td>
<td>ignore electronic regardless of format</td>
</tr>
</tbody>
</table>

See Borrowing Locate Process.

Control the presentation of related holdings in Primo

May 2020 Fulfillment

NERS Enhancement (ID #5340)

Idea Exchange
New configuration options are available for the Get It display, these options provide institutions the control of whether or not to present related holdings for patrons using Primo/PrimoVE. A more granular option provides the institutions with the option to present related records only for serials or only for monograph titles.

See Enabling the Display of Related Records in Primo for more information.
'Printouts Queue' Link Visibility

May 2020 Administration and Infrastructure

Now you can grant access to the Printouts Queue link (Admin > Printing) only to specific users. To support this, two new user roles were added:

- The Printout Queue Operator - can access the Printouts Queue, but can see only the letters they have printed (which means they do not have access to the Printed By filter).
- The Printout Queue Manager - can access the Printouts Queue, and can see all the letters there. Have access to the Printed By filter.

The change in Alma will be implemented gradually, over the May and June releases, as follows:

- In May release: No change in behavior. All users can still access the Printouts Queue link.
- In June release:
  - The Printout Queue link becomes hidden for all users without one of the above roles.
  - The Printout Queue Operator role is automatically added to all the users who have printed to the Printout Queue within the previous 30 days.

To manage this change, Ex Libris recommends that you do the following within the duration of the May release:

- If grant access to the Printouts Queue link to existing users, make sure to add one of the above roles to all users that need to receive access to the link.
- To grant access to the link to new users, add the new Printout Queue Operator role to a Role Profile. This will make the link available for all users created with the relevant job category or user group, and a corresponding role-assignment rule for the Role Profile in place. For details about Role Profiles, see Configuring Role Profiles.

In addition, in the May release the retention period for items in the Printout Queue will be increased from 7 days to 30 days, after which the Alma cleaning job will clean the items. There is currently no way for customers to control the retention period.

See Managing User Roles.

Keyboard Shortcuts Enhancements

May 2020 Administration and Infrastructure

Now you can view the full list on the Shortcut Customization page (User menu > Shortcut Customization).

You can also disable global Alma keyboard shortcuts. You may want to do that in cases when your language requires usage of the same keyboard keys for typing accents or diacritics. Note that you can disable the Alma shortcuts, but cannot define other Alma shortcuts for the same action.

See Global Alma Hot Keys.

Sorting Tables Alphabetically in All Languages

May 2020 Administration and Infrastructure

Continuing the enhancements introduced in March 2020, now you can sort additional tables alphabetically in Alma, regardless of the language of the data in the table. The data is sorted according to the alphabet of the selected language.

This was implemented in the following tables within Alma:
New SAML Certificate

May 2020 Administration and Infrastructure

The current DigiCert SAML Certificate will expire in January 2021. If your institution uses this certificate, Ex Libris recommends that you consult with the IT dept. in your institution, and if required, replace the certificate for Alma and/or Primo VE. If replacing the certificate, this must be done in coordination with your IDP. For more information, see Replacing a Signed Certificate.

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

**Note:** No immediate action is needed. Replacing the certificate can be done at any time till its expiry on January 1, 2021.

DARA Recommendations for My Electronic Resources by Provider

May 2020 DARA

The My Electronic Resources by Provider feature in Alma allows you to view your subscriptions with providers and their availability status in Alma and activate any resources that you access but have not activated. DARA can now determine if the feature is relevant for your institution, but is not in use, and recommend that you use it.

For more information, see DARA – Data Analysis Recommendation Assistant.

For more information on the My Electronic Resources by Provider feature in Alma, see My Electronic Resources by Provider.

Viewing Your Recent Documents

March 2020 Administration and Infrastructure

The Recent Entities, part of My Activity Center, is a system-level interface that lists all the entities you have added, updated, and deleted within the last 7 days. You can scroll through the list and select an entity to resume your work, or you can view the entity in view-only mode. The Recent Entities list is a helpful way to find the records you have recently accessed, even if you do not remember their names. It also allows you to easily view your recent changes to your records. At any moment you can open and close the Recent Entities list, and then resume your ongoing work without interrupting its context.
From the Recent Entities pane you can:

- Open the entity in a view-only mode or in edit mode.
- Search for a certain entity in the list.
- Narrow down the list to a specific type of repository entity, such as physical items, or to entities accessed on a specific day.
-Dismiss entities from the list.

Watch the [Viewing Your Recent Documents](#) video (1:06 minutes).

See [Recent Entities List](#).

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**Preferred Material Type in Purchase Requests**

**March 2020 Acquisitions**

**Idea Exchange**

You can now select a material type for purchase requests in Alma. The field previously called Requested Format has been renamed to Material Type and moved to the Resource Information section. In addition to the Physical and Electronic options that appeared previously, a new option is available, Default. When selected, the Default option determines the Material Type value for the PO line based on the customer parameter, purchase_request_preferred_material_type_default. When the parameter is P (for physical), the material type is determined by the default value in the Physical Material Type Descriptions table. When the parameter is E (for electronic), the material type is taken from an internal table of electronic types, and is Book. The table of electronic material types is internal and cannot be modified. If you choose an option other than Default, a new field, Choose Type, allows you to specify the exact material type needed. This selection options for the Choose Type field are dependent on the selection in the Material Type field, so that the list will include only Electronic or Physical material types, accordingly.

The accompanying modifications for the Primo Purchase Request Form will be added in an upcoming release.

See [Creating a Purchasing Request](#).

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**SUSHI Performance Improvements**

**March 2020 Acquisitions**

Ex Libris, a ProQuest Company
Idea Exchange
The SUSHI harvest process now contains new performance enhancements. Additionally, the Missing Data tab has been renamed to the Monthly Usage Data tab. The errors on this tab are now further refined to help you troubleshoot connection issues. The yellow icon ( ) indicates that the connection to the vendor was successful, but the vendor did not send any data. While the red icon ( ) indicates that the vendor connection attempt was unsuccessful. The green icon ( ) indicates, as previously, that the usage report file was successfully uploaded.

See Viewing Usage Data.

Link Resolver Get It Services – Prevent Services for Wrong Titles

March 2020 Resource Management

NERS Enhancement (ID #6201)
When an OpenURL does not contain any identifiers, the link resolver matches a bibliographic record based on the OpenURL title. At times the match is inaccurate and can result in Get It services for the wrong title. You can now configure Alma to limit the link resolver to display Get It services for titles that were matched only based on identifiers. See Using Standard Identifiers for more information.

Import Local Extensions to Community Zone Records

March 2020 Resource Management SF: 00475068 00660067 00666609 00686792 00740123 00173800 00223460 00108985 00134538
It is now possible to add local extensions via the import process. This is a continuation of functionality that was released in February that enables the addition of local extensions to Community Zone records. This capability is enabled through new configuration options in the Repository, Update Inventory, and New Order import profiles under Match Actions. See Community Zone linked records handling and Support for local extensions for bibliographic records linked to the Alma CZ for more information.

UNIMARC 463 Related Records

March 2020 Resource Management SF: 00694838
Similar to UNIMARC 461, Alma now supports UNIMARC 463 for related records. See display_specific_related_items and Using the UNIMARC Linking Fields for Related Records for more information.

Bibliographic MMS ID Appears in Additional Search Results and Various Resource Editors/Lists

March 2020 Resource Management
The bibliographic MMS ID now appears in search results for physical items, electronic collections, and portfolios. In addition, the MMS ID appears in the header information for the following resource editors/lists: Physical Item Editor, List of Holdings, List of Items, Electronic Collection Editor, Electronic Portfolio Editor, and the Electronic Service Editor. See below for examples.

**Physical Items Search Results**

**Electronic Collections Search Results**

**Electronic Portfolio Search Results**

**List of Holdings**

**List of Items**
New Alma Viewer

March 2020 Digital Resource Management

Idea Exchange
The newly designed Alma Viewer is now available to view digital resources. To enable the new viewer, select the Use New Viewer checkbox in the Alma Viewer configuration (Configuration > Fulfillment > Discovery Interface Display Logic > Viewer Services > Alma Viewer):
The new viewer has the following features:

- (URM-120778) Full-Text Display – the new viewer can display a full text file along with the digital one. To hide the full text file, select the Hide fulltext check box in the Alma Viewer configuration (Configuration > Fulfillment > Discovery Interface Display Logic > Viewer Services > Alma Viewer).

- (URM-117479) File-level Delivery – when selecting Share Displayed File for a file in the new viewer, the link opens to the selected file of the representation.
In addition, you can now deliver a file from the search results when searching for a digital file:

- (URM-120744) Embedded Image in Primo VE – you can configure the new Alma Viewer to appear in Primo VE in a new Quick Access section. You are able to view the files of the representation, download the files, and open them in the full viewer.

You can configure display logic rules with the new Representation Quick Access service to control the Quick Access display.

- (URM-120706) Hide Representations with Obtrusive Copyrights from Quick Access – You can create a display logic rule (Configuration > Fulfillment > Discovery Interface Display Logic > Display Logic Rules) that hides representations with obtrusive copyrights from the Quick Access section of Primo VE.

An upcoming Alma release will support full customization of the new Alma viewer through Primo Studio.
Access Rights Template URL for Remote Repositories

**March 2020 Digital Resource Management 00740460**
You can now configure a unique URL, separate from the delivery URL, to check access rights for remote repositories. To support this enhancement, the Access Rights Template field was added to the Delivery tab of the Remote Digital Repository Details page ([Configuration > Resources > Record Import > Remote Digital Repositories](#)). It replaces the Check Access Rights checkbox.

![Access Rights Template](image)

Enhancements to In Parallel Digitization Workflow

**March 2020 Digital Resource Management**
The following workflow was added for digitization requests that are configured to be processed in parallel to the digitization workflow ([Configuration Menu > Fulfillment > Copyright Management > Digitization and Copyright Rules](#)):

- While the request is being processed, the representation is marked as inactive.
- If the request is approved, the representation is marked as active.
- If the request is rejected, the representation is deleted.

Pop-up Messages in the Scan In Interface

**March 2020 Fulfillment**

![Scan In Interface](image)

**NERS Enhancement (ID #5299)**

**Idea Exchange**
You can now configure how pop-up messages will display in the Scan In Interface. All messages can be configured to appear as a pop-up message, a feedback message, or to not appear at all. This is defined in the Scan In Messages Configuration table. Additionally, a yellow icon is added to the list of scanned items for patron request of types **Booking Requests, Physical Requests**, and **Patron Digitization Requests** to draw the scanning operator's attention that some items have a patron request associated with them.

An additional informational message was added to the Scan Items page for lost items which were returned (**Lost** status removed). This message appears as a feedback message and can be configured similar to all other messages in the Scan In interface to appear as a pop-up message, a feedback message, or to not appear at all.
Watch the [Pop-up Messages in the Scan In Interface](#) video (2:04 minutes).

See [Configuring Scan In Messages](#).

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**Keep Rapid ILL Requests Open**

**March 2020 Fulfillment Resource Sharing**

You can now define whether the Rapid ILL API will close a request that it operates on. When the **Close request when exported** check box is selected on the Resource Sharing Partner page, the request is closed when exported, as it has done previously, and the request status is updated to **Exported to 3rd party**. This is the default. When the check box is not selected, the request remains active after it is exported to Rapid, and the request status is updated to **Sent to partner**. This allows the request to remain viewable in Primo even though it has been exported. Requests that are left open must be manually closed.

See [RapidILL Parameters](#).

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**Claim Resource Sharing Request**

**March 2020 Fulfillment Resource Sharing**

**NERS Enhancement (ID #5632)**

**Idea Exchange**

For peer-to-peer resource sharing partners, you can now trigger an automatic claim letter when a configured period of time is reached. For example, when the **Automatic Claim** check box is selected and the **Time to Claim (days)** field is set to 7, if a request was sent 7 days ago and the request's status is still **Sent**, a claim letter is automatically triggered and the request status is set to **Claimed**.

You can also configure an option to send a cancel message and continue through the rota.

In case of an Email/SLNP partner, the letter is sent by email.

For ISO requests, the notice is sent in a General Message. The text in the message can be configured.

See [Resource Sharing Partners](#).

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**Publishing Profile Templates for Rapid ILL**

**March 2020 Fulfillment Resource Sharing**

Setting up a new integration with Rapid ILL requires defining sets of lendable and non-lendable resources, as well as publishing profiles that expose that information to Rapid ILL via OAI.

Defining the publishing profiles can now be made using Community Zone contributed profiles. When defining a new integration with Rapid ILL, you can now localize the Community Zone publishing profiles with the description **EXL profile for Rapid ILL**, and attach your defined sets to the relevant profiles. Using these templates speeds up the Rapid ILL integration process. For more information, see [Alma Holdings Harvest for RapidILL](#).
SAML User Updates

March 2020 Administration and Infrastructure
You can now map SAML assertions to a user's fields according to an uploaded XSL file. The file is uploaded in the XSL configuration file field in the Self Registration section of the SAML integration profile.

In addition, the new Recreate user roles upon login check box in the Self Registration section allows you to force a role recalculation every time a user logs into Alma, based on the Roles Assignment Rules.

See SAML Authentication on the Ex Libris Developer Network.

DARA Enhancements

March 2020 DARA
DARA was enhanced with the following changes:

- The Mark as Done and Dismiss actions were replaced by the new Remove action
- The Let's Do It button was replaced by a button with an action specific to the recommendation, such as Create SUSHI account and View Title in Search.
- The Show Me Why button was renamed to More Info. The recommendation description was shortened to make it more focused and the some of the information was moved to the More Info page.
- A new job marks recommendations as implemented even when they are handled outside of the DARA workflow.

DARA Interface Enhancements
Cancel All on Printing Queue

**March 2020 Administration and Infrastructure**
The Printout Queue page now has an option to cancel multiple printouts by selecting all the printouts you want to cancel and selecting **Cancel Selected**.

See Printouts Queue.

Export to Excel Enhancements on Job Reports

**March 2020 Administration and Infrastructure**
When exporting the events list of a job report, Alma now limits the number of rows to 10 thousands rows. Rows above this number are not exported. To export specific rows of the job report, use the controls on the report page.

Sorting Tables Alphabetically in All Languages

**March 2020 Administration and Infrastructure**
Now you can sort tables alphabetically in Alma, regardless of the language of the data in the table. The data is sorted according to the alphabet of the selected language.

This was implemented in the following tables within Alma:

- User roles table – Type/Group columns
- User list table – Name/Account Type/Record Type columns
- Funds and Ledgers table – Type/Status columns
- Import Profiles table - Profile Type column
- Resolve Import Validation Errors table - Profile Type column
- License table - Status column
- Process List table - Business Entity column
- Terms of Use and Policies table – Type column
- Policy Management table – Policy Type column

New Letter Type on Letter Configuration

**March 2020 Administration and Infrastructure**
A new letter "Change Rapido Request Terms Letter" was added to the list of configurable letters available in Alma. This letter is part of new resource-sharing abilities that are currently being developed. Ignore it for now.

See Letter List.

Absolute and Relative Paths in the S/FTP Definition

**March 2020 Administration and Infrastructure** SF: 00736685
Alma now supports the ability to indicate both an absolute and a relative path to the input directory in the S/FTP import protocol when creating import profiles to third-party systems.
See Managing Export Profiles.

Real Time Ordering - Purchase Type License Upgrade as an Additional PO Line

February 2020 Acquisitions
PO lines with a Purchase Type of License Upgrade created via New Order API will be associated to the relevant portfolio as an additional PO line. Previously, PO lines with a Purchase Type of License Upgrade were associated to the relevant portfolio as a main PO line. Now, the main PO line reflects the original PO line that initiated the order, while the PO line with a purchase type of License Upgrade complements the main PO line.

See Real Time Ordering.

Suppress Access to PO Line Summary Information

February 2020 Acquisitions
You can now disable access to review a PO line and view in-depth acquisitions information for users with the roles of Repository Manager, Physical Inventory Operator, or Electronic Inventory Operator. To do so, contact Ex Libris customer support.

Improved Claiming Functionality for Continuous PO Lines

February 2020 Acquisitions

Idea Exchange Previously, if an item’s due date arrived and the item was not received, a claim letter was sent to the vendor. Now, if the next expected item also does not arrive, you can send an additional letter to the vendor which includes details for both items which did not arrive. This function is enabled when the claim_continuous_item_level parameter is set to true.

See Configuring Other Settings (Acquisitions).

Entering PO Line Number in Item Editor

February 2020 Resource Management
When entering the PO line number in the Item Editor page, the number is now validated, even when typing the number instead of selecting it from the pick list.

Watch the Entering PO Line Number in Item Editor video (0:48 minutes).

Search Indexes for Specific OCLC Numbers

February 2020 Resource Management
For simple and advanced titles searches (All titles, Physical titles, Electronic titles, and Digital titles), the following search indexes were added: OCLC Control Number (019), OCLC Control Number (035a), OCLC Control Number (035a+z), and OCLC Control Number (035z).
With these new indexes, you can now locate specific OCLC numbers for improved search results and improved Excel exports.

See [OCLC Control Number](#) for more information.

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**Local Extensions for Community Zone Bibliographic Records**

**February 2020 Resource Management**

SF: 00475068 00660007 00666609 00686792 00740123 00173800 00223460 00108985 00134538

All institutions can now create and maintain local extensions to Community Zone bibliographic records in order to record their own proprietary information.

With this capability, institutions can enter and maintain local information in the MARC 21 77X/78X, 09X, 59X, 69X, and 9XX fields. This can be done with the MD Editor for one record at a time, or for multiple records by running a job with a normalization process that updates local extension fields. Local extension data can be searched, exported, published (general publishing and to Primo) and handled using APIs (see [Bibliographic Records and Inventory](#) in the Developer Network). When linked bibliographic records are synchronized during Community Zone updates, the local extension content is not overridden.

See [Working with Local Extension Fields for Community Zone Records](#) for more information.

Please note that the March release will include the ability to load local extensions to Community Zone records via the import process.

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**Suppress Bibliographic Record from External Search**

**February 2020 Resource Management**

You can configure Alma to suppress bibliographic records from external searches. To perform this configuration, first configure the SRU or Z39.50 integration profiles to suppress searches of records with the Suppress from External Search tag:
You can tag records to be suppressed from external searches in the following areas:

- From the Metadata Editor – select **Suppress from External Searches** (Tools > Management Tags) for a record.

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**Note**

The Z39.50 and SRU protocols have different behavior when the suppress records based on "Suppress from external search" option is selected:

- Z39.50 – Records that are tagged as Suppress Records from Publish/Delivery are also suppressed from external searches even if they do not have the Suppress from External Search tag.
- SRU – Only records tagged as Suppress from External Search are suppressed from external searches.

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Ex Libris, a ProQuest Company
In the Set Management Tags tab of import profiles (all types except Update Inventory, Authority, Initial Authority) for records imported using the profile:

- From the new Set Management Tags job:

In addition, it is possible to search for bibliographic records that are suppressed from external search:

**Suppress from External Searches - MD Editor**

- In the Set Management Tags tab of import profiles (all types except Update Inventory, Authority, Initial Authority) for records imported using the profile:

**Suppress Records from External Searches - Import Profile**

- From the new Set Management Tags job:

**Set Management Tags**

In addition, it is possible to search for bibliographic records that are suppressed from external search:
### Enhanced Configuration of Deposit Status Update Letter

**February 2020 Digital Resource Management** SF: 00709117

You can now customize the Deposit Status Update Letter using the same workflow as other Alma letters from [Configuration > General > Letters > Letters Configuration](#). This allows you to configure additional elements of the letter, including a reason for the letter, a delivery URL, and a note.

![Deposit Status Update Letter](image)

**Deposit Status Update Letter**

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

### Improved Performance For Alma Analytics

**February 2020 Analytics**

Ex Libris is currently implementing performance upgrades to the Alma Analytics infrastructure. These upgrades will greatly improve performance when running analytics reports. These upgrades will be rolled out gradually. For the February release, the upgrades will be made available to NA04.

### Last Patron Activity Date

**February 2020 Administration and Infrastructure**

[Home](#)

**NERS Enhancement (ID #5631)**
Idea Exchange

You can now view the last activity date for specific activities in the Last Patron Activity Date field of the User Details Page. The field is display only and will be available for analytics in an upcoming release. Due to privacy concerns, data will only be collected from activation of this new feature onward. If the option is disabled, all data collected in this field will be deleted for all users. When enabled, this field is updated when any of the following activities are executed:

- Placing a request of any type - hold, booking, digitization, acquisition, resource sharing
- Borrowing an item (all workflows, including self-check / API)
- Returning an item (all workflows, including self-check / API)
- Loan renewal (except automatic renewal), or renewal request (for resource sharing loans)
- Update of user information from Primo

The following activities do NOT update the Last Patron Activity Date field:

- Using the Pay button on the Manage Patron Services page
- Canceling a request in Alma or Primo
- Patron Purchase Request sent from Primo - this will be added in a later release

To enable this option, select yes in the new Record Last Patron Activity Date page (Configuration > User Management > General).

Watch the Last Patron Activity Date video (1:36 minutes).

See Managing Users and Configuring Last Patron Activity Date.

Absolute and Relative Paths in the S/FTP Definition

February 2020 Administration and Infrastructure SF: 00736685
Alma now supports the ability to indicate both an absolute and a relative path to the input directory in the S/FTP import protocol when creating import profiles to third-party systems. See Managing Export Profiles.

UPDATE: This feature has been temporarily disabled. It will be reinstated in the future. For now, indicate the output path to the FTP as a relative path: do not preface the path with the '/' sign.

Quick Printing Option for Multiple Records

February 2020 Fulfillment

When printing call slips for multiple items, you can select several items and print slips for all of them in one action with the Quick Print functionality. The quick print functionality aggregates all the slips into a single PDF (within a popup window) and allows the operator to either send these to a designated printer or save the created PDF to a file. See Pickup at Shelf.

DARA Recommends Local Standalone Portfolios to Link to the Community Zone

February 2020 DARA

Based on ISSN / ISBN matching, DARA now recommends local standalone portfolios for linking to the Community Zone. Linking to the Community Zone enables you to receive updates automatically without the need to update the portfolio.
manually.

DARA Recommendation to Link Standalone Portfolio to the Community Zone

Let's Do It for Linking a Standalone Portfolio to the Community Zone

For more information, see DARA – Data Analysis Recommendation Assistant.

For more information about linking, see Link to Community.

DARA Recommends Linking Local Electronic Collections to the Community Zone

February 2020 DARA
Based on the electronic collection name, DARA now recommends local electronic collections for linking to the Community Zone. Linking to the Community Zone enables you to receive updates automatically without the need to update manually.

DARA Recommendation to Link Electronic Collection to the Community Zone
Library Filter Added to Recommendations List

February 2020 DARA
A new Library filter was added to the List of Recommendations that you can use to filter the list by library. This feature is relevant for recommendations such as Unavailable Portfolios, Missing Items, and Local Electronic Collections.

New Columns Added to DARA Export File

February 2020 DARA
The following columns were added to the Excel file that is produced when you export recommendations using the Export icon:

- Entity Type – for example: Electronic Service, Physical Item, Electronic portfolio
- Entity ID – for example: the Electronic Service ID, the Item PID, or the Electronic portfolio PID
- Additional Info – for example: the columns of the analytics report or the Access type, Authentication note, and Public note of the electronic collection
DARA Now Recommends Configuring Description Templates

January 2020 DARA
DARA now identifies that you have not configured description templates, which are used to generate descriptions for physical items based on ENUM/CHRON information, and directs you to configure them.

DARA – Description Templates

For more information, see DARA – Data Analysis Recommendation Assistant.

For more information on configuring Description Templates, see Configuring Description Templates.

Role Configuration for DARA Recommendations

January 2020 DARA
You can now configure DARA Recommendations on the new Configuring DARA Recommendations page (Configuration > General > General Configuration > DARA Recommendations):

DARA Recommendations Configurations

Move the slider to activate/deactivate a recommendation for your institution. When deactivating a recommendation, an option to dismiss all existing recommendations of that type is displayed. This functionality was moved to this page from the Data Sharing profile page.

Select the Actions button to display the list of roles that are configured for the recommendation. You can remove or add one of the configured roles.
Bulk Dismissal of DARA Recommendations

January 2020 DARA
You can now dismiss several recommendations at one time by selecting the recommendations and clicking Dismiss selected.

Create Order API - Improved Matching and Creation of Portfolios to work with Community Zone

January 2020 Resource Management
When the New Order API runs, Alma now uses the vendor proprietary identifier number or the ISBN/ISSN to search and match the incoming order to an existing portfolio in an electronic collection. If no match is found Alma will attempt to activate the relevant portfolios from the collection in the Community Zone.

The newly created PO line will be associated to the existing portfolio as the main PO line, and if a PO line already existed on the portfolio this PO line will be set as an additional PO line. The access model description, as defined in the Access Model table, is added to the PO line Notes tab and to the portfolio's Public Notes field for display in Primo.

The access model description is only added to the portfolio's Public Notes field if the Include access model in portfolio public note check box is selected on the New Order API integration profile.

This functionality is currently supported for orders originating from OASIS for ProQuest EBook Central content. A future
New Purchase Type **License Upgrade** Available for Purchase Order Lines

**January 2020 Acquisitions**

A new purchase type **License Upgrade** is available for Purchase Order lines, this will enable institutions to record purchases which reflect license upgrades purchase model. Additionally, a PO line can now be created without a fund and price for scenarios such as described above where a **License upgrade** has no charge and needs to be recorded in the system. The option to set a PO line as no charge is compatible with the following acquisition methods: **Purchase**, **Approval Plan**, and **Purchase at Vendor System**. When selecting any of these values in the **Acquisition Method** of the PO line, the **No Charge** check box appears. When this check box is selected, the **Funding** and **Pricing** sections are hidden.

See **Manually Creating a PO Line**.

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**COUNTER Release 5**

**January 2020 Acquisitions**

With the January 2020 release Alma is now fully compliant with COUNTER release 5. COUNTER Release 4 will continue to be supported along with COUNTER release 5. This is the case for both Alma as well Alma Analytics. For more information, see video **COUNTER Release 5 in Alma and Alma Analytics** as well as Knowledge Center entry **Managing COUNTER-Compliant Usage Data**.

As COUNTER Release 5 is a new functionality for both Alma as well as for multiple vendors which supports this and other which will support this in the future, there may be several issues which can raise during the initial adjustment period. Below you can find a few scenarios and their possible solution. At any case if you are unable to work as expected with a certain vendor it is recommended to approach the vendor as well as contact Ex Libris support so that both parties can try and investigate.

**Possible Issues/Solutions:**

- **Issue:** I cannot harvest from a specific vendor.

Possible solution: Determine if the "test connection" functionality works as expected (at the level of the SUSHI account). If not, confirm that the following credentials are configured correctly:

  - Vendor URL, it is recommended to use certified SUSHI vendors from the "quick pick" list, if one does not exists and you manage to configure a new vendor and harvest the data successfully, please help other members of the community by contributing this vendor as a certified SUSHI vendor.
  - Customer ID
  - Requester ID
  - User name / Password
  - API key (for vendors which support this type of connection)

Possible solution: If the **Test Connection** works as expected, manually harvest each report configured on the account (each report has a "harvest now" row action). Possible analysis to provide to Ex Libris support or the vendor: use the URL below, substituting the vendor-supplied information to see if the report is presented. If the report cannot be retrieved, an error is displayed in the **Exception** section with details from the vendor (for example: **Requestor is Not Authorized to Access Usage for Institution**).
If the report is retrieved, save the downloaded report in JSON format and manually upload it to Alma. If the manual upload fails, this may be a phrasing issue either at Alma or the vendor. The URL format is: https://<Vendor_SUSHI_Harvest_URL>/reports/<report_type>?customer_id=XXXXX&api_key=XXXXX&begin_date=YYYY-MM-DD&end_date=YYYY-MM-DD. To form the URL, use the credentials supplied by the vendor, and omit redundant or superfluous parameters (for example, when API_key is not needed).

- Issue: Alma cannot "Save" newly created account.

Possible workaround: This issue may occur for vendors which use an API key as an identifier. This is caused by a wrong structure of the vendor's "Reports" API which Alma calls to check if the configured reports on the vendor accounts are supported by the vendor. To solve this, create an account and configure the reports, save it, edit it again and add the API key.

For any issue with COUNTER 5, please contact ExLibris support.

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**Phrase Search in the Simple Search Box**

**January 2020 Resource Management**

💡 Idea Exchange  SF: 00668493

Alma now supports phrase search in the simple search box. All entities and index types that have the option to use phrase search in Alma's advanced search also have this capability with simple search when using double quotation marks to identify the phrase. See [Performing a Simple Search](#) for more information.

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**BIBFRAME Added to the Export Bibliographic Records Job**

**January 2020 Resource Management**

Alma now supports exporting bibliographic records in the BIBFRAME and RDA/RDF output formats. See [Export Bibliographic Records](#) for more information.

Watch the [Export Records in BIBFRAME Format](#) video (1:31 minutes).

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**Community Zone Set Management**

**January 2020 Resource Management**

In addition to the Community Zone set management announcements made in the December release (see [Community Zone Set Management](#)), the January release adds the following Community Zone sets features:

- Cataloging an authority record set of Community Zone records
- Exporting a set of Community Zone records (with Export Authority Records or Export Bibliographic Records)
- Creating or updating a set of Community Zone records via API (see [Rest APIs – Configuration and Administration](#) in the Developer Network)
Alma-Based Authority Management

January 2020 Resource Management
Alma now supports contribution of authorities that are managed in an Alma institution. For an institution that manages local authority records and publishes them to the Community Zone, there is now the option to have the Alma community contribute to these authority records (like the National Library of Israel (NLI) implementation). If you are an institution that 1) currently manages an authority file locally, 2) publishes it to the Community Zone, and 3) wants to have other authorized members of the Alma community contribute changes to this authority file, contact Ex Libris to analyze the feasibility of your request. If your authority requirements match the criteria for this functionality, Ex Libris will work with you to implement this capability. See Working with NLI Integrated Authority Records for an example of how this is feature is used, and see Alma-Based Authority Management for more information.

Download Original File in Universal Viewer

January 2020 Digital Resource Management SF: 00700969
You can now download a file from the Universal Viewer in the original format in which it was uploaded to Alma. To download the original file, select the download icon.

You configure the icon to appear from Configuration > Fulfillment > Discovery Interface Display Logic > Viewer Service > Universal Viewer. Select the Display Original Image Download Link checkbox:
Deposit Interface Customization

January 2020 Digital Resource Management

Idea Exchange SF: 00593963 00709116

You can now customize the Deposit user interface. To support this feature, a new configuration page was created at Configuration > General > User Interface Settings > Alma Viewer and Deposit Customization:

![Configuration Page](image)

Alma Viewer and Deposit Customization

You can perform the following customizations from this page:

- Upload a customization package created in Primo Studio
- Upload a logo image file
- Enter a URL that is opened when you select the logo

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**Note**

In a future release, you will be able to customize the Alma Viewer from this page as well.

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Network Zone Import with Local Extensions

January 2020 Collaborative Networks SF: 00474265 00490469 00510530 00537427 00549465 00694413 00200674 00210745 00018526 00105104 00106863 00119947

For Network Zone member institutions, import can now be used for adding / managing local extensions in the Network Zone. See Adding Local Extensions Using Import for more information.

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Fulfillment Network Pickup Locations

January 2020 Fulfillment / Collaborative Networks

The calculations of a pickup location for a Primo patron request will be now be modified for institutions that are part of more than one fulfillment network. As an example, institutions A and B are a fulfillment network, while institutions A and C are a separate fulfillment network:

Previously, when a patron from institution B finds a title in institution A, the pickup locations presented are from all three
institutions because A is the owner of the item and A is in networks with both B and C.

Now, rather than displaying all possible pickup locations based on the item owner, Alma will also utilize the Primo login institution, institution B, and only display the pickup locations that can serve both item owner (A) and login institution (B), in this scenario, A and B.

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**Leganto Configuration Menu**

**January 2020 Fulfillment**

All Leganto configuration links that previously appeared in the Leganto sub-section of the Fulfillment tab in the Alma configuration menu are now moved to a single Leganto tab on the configuration menu (for those institutions that are configured for Leganto). The Settings mapping table now appears in each of the Legano tab's sub-sections. Only those customer parameters that are pertinent for that section are displayed in each link.

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**More Possibilities for the Alma Color Theme**

**January 2020 Administration and Infrastructure**

💡 **Idea Exchange**

Adding to the existing 11 color schemes on the Branding Management Page (Configuration Menu > General > User Interface Settings > Alma Logo and Color Scheme), you can now select from the following new colors: Denim Blue, Pine Green, Teal Green, Cerise, Violet, and Brown.

![Alma Color Palette](image)

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**Cloud Passwords**

**January 2020 Administration and Infrastructure**

In the next step of the move to Ex Libris Identity Service, which launched in January 2019, we are removing all passwords from the Alma database. See the [Ex Libris Identity Service](https://developer.exlibrisgroup.com) in the Developer Network.

This change only affects users that have not logged in since the beginning of 2019. However, if you have Primo/PDS which hasn't been upgraded for some time, there could be active users which still have passwords in the Alma database. This will only be users whose passwords are not strong enough to be written into the Identity Service automatically.

To handle users without passwords, you can do any of the following:

1. Add a "forgot password" link to Primo which will be useful also for users without password. See the Knowledge Article, [How to add a 'Forgot My Password' link to the login page in the new UI when using Alma for authentication](https).

2. Create a list of the relevant users using an Analytics report and send them an email using the Update/Notify Users job (with a link to page where they can create a new password). See [Editing/Messaging Users in Bulk](https).

3. Do nothing. The patrons who cannot login will approach a librarian who will set a new password for them.
**View Changes Made by Jobs**

**September 2020 Fulfillment Course Reserves**

**NERS Enhancement (ID #6763)**

In the **Recent Changes** tab of the Edit Reading List page in Alma, you can now view the changes made by certain jobs to the reading list or to citations within the reading list. In the past, only manual changes appeared in this tab.

Changes made by job in recent changes tab

Changes resulting from the following jobs appear in the **Recent Changes** tab of an affected reading list:

- Reading List Citation Update Task
- Reading List Bulk Update
- Roll Over
- Activate/Deactivate Courses

If notifications are enabled, the changes also appear in the notifications dialog in Leganto, for students and instructors.

Changes made by job in Leganto notifications

If email notifications are configured, the student/instructor also receive notifications via email.

**APIs for Course Enrollment**

**September 2020 Fulfillment Course Reserves**

Three new APIs have been added. These enable viewing enrolled users in a course, enrolling users in a course, and un-enrolling users from a course.

- **Endpoint for "View Enrolled users in course" API:**

  ```
  GET /almaws/v1/courses/{course_id}/users
  ```

  The response is a list of students enrolled in this course.

- **Endpoint for "Enroll users to course":**

  ```
  POST /almaws/v1/courses/{course_id}?op=enroll_user&user_ids=id1, id2,...
  ```

  The parameters entered are:
- op - the only supported value is enroll_user

- user_ids: a list of 1 or more Alma user IDs separated by a comma

- Endpoint for "Un-enroll users from course" API:

  
  DELETE /almaws/v1/courses/{course_id}/users/{user_id}

  For more information on these APIs, see the Developers Network.

Search for Citations by Keyword

September 2020 Fulfillment Course Reserves

NERS Enhancement (ID #6805)

For simple Alma searches only, the Keyword option has been added to Citation searches to allow staff to search for specified keywords in citations’ metadata (such as Author, MMS ID, Title, and so forth). When selecting the Citations type of search, Keyword is now the default selection. For more information, see Searching in Alma.

![Search Citation Lists by Keyword](image)

Note

- Citation searches by keyword do not support the use of Boolean operators (such as AND or OR), and if these operators are specified, they will be 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.
New Task List Filters

August 2020 Fulfillment - Course Reserves

NERS Enhancement (ID #6770)

Four new filters have been added to the Task List.

The **Reading List - Unassigned - processing** filter contains a number of sub-list divisions of reading lists having a status of *not complete*, two of which have been exposed:

- **Reading list - Unassigned - being prepared** -- Selecting this filter will open the Reading List Task List on the Unassigned tab, with the reading lists filtered by publication status = Active and Status = Being Prepared.

- **Reading list - Unassigned - being processed** -- Selecting this filter will open the Reading List Task List on the Unassigned tab, with the reading lists filtered by publication status = Active and status = Being Processed.

Two new citations filters have been added:

- **Citations - Being prepared** -- Selecting this filter will open the Edit Citation screen, with the citations filtered by citation status = Being Prepared. These are citations that faculty have not yet sent for library review. This filter applies to historical citations as well as new ones.

- **Citations - In process** -- Selecting this filter will open the Edit Citation screen, with the citations filtered by citation status = In Process. These are citations that were sent to library review (and display the status "Sent" in Leganto).
Reusing Already Digitized Files Between Citations

June 2020 Fulfillment - Course Reserves

Librarians can now search for and copy files between citations to avoid the need to digitize files that have already been digitized. Select **Attach Existing File** from a citation's actions list.

![Image of Attach Existing File button]

The next screen will display a result screen showing all citations with similar identifiers or titles which include an attached file.

![Image of result screen]

You can select a citation by selecting the radio button corresponding to the citation and clicking **Select**. Selecting a citation on this screen copies and attaches the file to the original citation.

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**Note**

If a file already exists on the citation, attaching a new file will replace the existing one. Also, In Progress digitization requests on the citation will be canceled.

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Instructor Personal Copy Management

May 2020 Fulfillment - Course Reserves

Alma now includes enhanced workflows to enable instructors to lend their personal copies of items to the library for circulation. This allows the library to catalog instructor-owned copies, track which instructor owns the item, and easily re-use previous items in subsequent terms.

When enabled, library staff can indicate that an item is a personal copy when creating a Brief Citation (**Add Citation > Add Brief**) and enter the instructor’s name. Alma will store information about all instructor-owned copies using dedicated
personal copy locations. Locations in the library are automatically created when the instructors’ copies are cataloged, with one location per instructor. All items deposited by the instructor will be created in that same location.

Instructor’s Name for Personal Copy

Personal copy locations indicate that the items are owned by the instructor, and also allow the library to track items that are not physically in the library at that time, but rather, in the instructor’s possession. All personal copy locations and the items in them will be suppressed. When the instructor lends the item to the library, the item can be moved to a temporary location representing a non-personal copy location in the library, where it will circulate according to standard fulfillment rules. For example, library staff may move the item to the temporary location of “Course Reserves” with a due back date of the end of the term. The item will temporarily circulate as part of the library collection, but with the instructor’s name stored as the permanent location, indicating the person to which the item should be returned at the end of the term.

Copy Moved to Desired Location

When the item is moved back to its permanent location, which is the personal copy location, it will automatically be suppressed. The item can then be returned to the instructor, but the record does not need to be deleted and can be easily re-used in subsequent terms by following the workflow above.

To enable this feature, configure the following parameters:

Personal copy library: To enable the personal_copy_library flag (Fulfillment > General > Other Settings) you must enter a library code as the parameter value, such as MAIN. This code corresponds to the library where the personal copy locations will be created.

Personal copy fulfillment unit: To enable the personal_copy_fu flag, you must enter a fulfillment unit code as the parameter value. Fulfillment terms for items in the instructor-owned locations are determined by the rules set in this Fulfillment Unit. Keep in mind that the intended workflow is that items in an instructor location are not currently part of the library collection and are physically stored with the instructor.

For more information on adding citations to a reading list, see Contributing Instructor Resources to a Reading List.

Managing Purchase Requests Created From Citations

March 2020 Fulfillment - Course Reserves

The Course Information table has been added to the Purchase Request form, displaying basic information about the course.
The following facets have been added to the Manage Purchase Requests screen (Acquisitions > Manage Purchase Requests):

- Processing department
- Academic department
- Campus
- Course year
- Course term
- Citation tag

The following search criteria have been added:

- Course Code
- Course Instructor
- Requester
Automate Reading List Status While Course Active or Inactive

March 2020 Fulfillment - Course Reserves

From the Activate/Deactivate Courses section, staff can now automate the reading list status for a course while it is either Active or Inactive. For example, staff can set a reading list status to be Being Prepared while a course is active, and to change to Archived when a course has been deactivated (when it has ended) (Fulfillment > General > Fulfillment Jobs Configuration).

Automating Reading List Status While Active or Inactive

For more information on activating/deactivating schedule jobs, see Viewing Scheduled Jobs and navigate to Activate/Deactivate Courses in the Scheduled Jobs table.
Publisher Parameter Checks Against All Publishers

Leganto now allows you to set the parameter publisher to check against all publishers when you submit a copyright request (Fulfillment > Copyright Management > Digitization and Copyright Rules).

All publishers are stored in the **Copyright Publishers** table (Fulfillment > Copyright Management > Leganto Copyright Settings).

For more information about adding a digitization and copyright rule, see Configuring Leganto Copyright-Related Procedures.

For more information about adding all publishers at once, see Adding a Digitization and Copyright Rule and navigate to Publisher in the Digitization and Copyright Rule Clause Types table.

Rollover Newer List

You can now roll over a course with single list creation mode. Additionally, a new check box was added to course loader, On Rollover copy only newest list. This avoids duplicated lists during rollover if, for some reason, multiple lists are associated to your course.

- **On Rollover copy only newest list**

Suppress eBooks in the CDI Tab

You now have the option to suppress/unsuppress collections in the CDI tab, even when they are not marked as In CDI: Yes. The CDI tab is now shown for all CDI users. When In CDI is not Yes, limited information will be displayed in the CDI tab. If there are portfolios, the Suppress option is available. Otherwise, a message is displayed to indicate that there is nothing to display. For multi-campus installations, the suppress option is displayed in the Group section (also with limited...
Additionally, you can now find suppressed collections in the Advanced Search.

Additional Enhancements

- **September 2020 Fulfillment**
  When a loan is not renewed because the patron is expiring, the reason is now reflected in the report as "Patron card will expire."

- **September 2020 Analytics**
  The **Only P** and **Only E** tabs were added to the Title Overlap Analysis dashboard. These tabs display reports of records that have only one type of inventory and do not perform an overlap analysis. Additionally, the **Overlap Any Inventory** tab was added that displays reports of records that have any overlap between physical, digital, or electronic items.

- **September 2020 Analytics**
  An out-of-the-box dashboard and reports are now available for the API Usage subject area. For more information, see Out-of-the-Box Reports.

- **September 2020 Analytics**
  The following fields were added to the **Portfolio** and **Electronic Collection** dimensions of the E-Inventory subject area and to the **Bibliographic Details** folder for all subject areas in which it appears:
  - Managed by Provider – indicates if the electronic resource is managed by the provider
  - Provider Name – the name of the provider

- **September 2020 Analytics**
  The following new options were added to the **Find Overlap By** drop-down list in the **Title level overlap analysis** dashboard by which you can determine the overlap:
  - ISBN single (normalized)
  - ISSN single (normalized)
  - OCLC Control Number single (035a)

- **September 2020 APIs**
  You can now get the list of users that were not successfully updated when the integration profile of type **Users** was run via the API. For more information, see the Developer Network.

- **September 2020 APIs**
  All portfolios activated from the Community Zone through the PO line API are not available.

- **September 2020 APIs**
  A new field, last_patron_activity_date, is now available in the GET User API.

- **August 2020 Acquisitions** SF: 00803718
  When selecting an invoice from a location other than the Invoice Task List, the available action is now **View** rather than **Edit**.

- **August 2020 Fulfillment**
  Editing a requested item will no longer trigger a printing of a new resource request slip.
  Also, previously, if an active request was deactivated as a result of a requested item becoming unavailable, when the item became available again and was scanned in to be placed on the hold shelf a resource request slip was sometimes not printed. Now the slip will print correctly in this circumstance.

- **August 2020 Resource Management**
The following search indexes in the advanced search have been added or changed as follows:

- **CDI Suppress Full Text** – was added to find suppressed collections
- **In CDI** - the operator has changed
- **CDI activation required** - the operator has changed

For all of these indexes, the operator is: "Equals" with two values: "Yes", "No".

- **August 2020 Resource Management**
  The CDI facets were removed from the **Community** tab because **Active for search** regards the local level only.

- **August 2020 Digital Resource Management**
  The MMS ID is now displayed for digital titles and files on several pages in Alma, such as for repository search results, the Digital Resource Editor, and the Collection Resource Editor:

  ![MMS ID in Repository Search Results](image1)

  ![MMS ID in Collection Resource Editor](image2)

- **August 2020 Digital Resource Management**
For new institutions that have not configured an institution name for the original Alma Viewer, the institution name will now be hidden in the New Alma Viewer and Deposit interface by default. To configure the institution name to appear, set the value of the `repDeliveryViewer.Alma` parameter (Configuration > Fulfillment > Digital Fulfillment > Alma Viewer Labels) to the institution name.

• **August 2020 Analytics**

**Idea Exchange**
The following fields were added to Holding Details > Physical Items and the Bibliographic Details dimension:

- **Holding Details:**
  - BIB 008 MARC – the contents of the 008 field of the MARC holdings record
  - BIB LDR MARC – the contents of the LDR field of the MARC holdings record

- **Bibliographic Details:**
  - BIB 008 MARC – the contents of the 008 field of the MARC bibliographic record
  - BIB LDR MARC – the contents of the LDR field of the MARC bibliographic record
  - Government Publication – the government publication type (for MARC 21 this is based on MARC 008 pos. 28)
  - Form of Item – the form of the item (for MARC 21 this is based on MARC 008 pos. 23)

**Note**
In August, the above fields appear in the "Bibliographic Details" and "Holding Details" folder and the data will be populated for new records. In September, the data will be populated in these fields for new and updated records. During November and December, the historical data will gradually be populated and will be completed in January.

• **August 2020 Analytics**
The **Event Date and Time** field was added to Events > Event Keys. It contains the event date with the time stamp.

**Note**
This Event Date and Time field will have data for events that occur from this release and later.

• **August 2020 Analytics**
The **Bibliographic IDs** dimension was added to the Titles subject area. It contains the following fields that display one number per row for each MMS ID:

- ISBN single (Normalized)
- ISSN single (Normalized)
- OCLC Control Number single (035a)

Note that these fields appear in Analytics in August but will be only partially populated. They will be fully populated in the September release.

• **August 2020 APIs**
All existing electronic APIs now support the additional override fields that were added to the various electronic resources (collection, service, portfolio).

• **August 2020 APIs**
The GET Items API now has an option to filter by receive-date and expected-receive-date.
When querying an import profile via API, the job ID of the scheduled job related to this profile is now included in the response.

- **July 2020 Acquisitions** SF: 00564392 00636479
  A new filter, **Equals**, is available for the PO line pickup form. This means that the vendor code/name must be a 100% match for the name in the search box, including case sensitivity.

- **July 2020 Acquisitions**
  A new field, **redistribute_funds**, was added to the Update PO Line API. When the field is **true**, Alma now splits the new price per fund according to its percentage in the order (similar to the redistribute lines in the PO Line details). When the field is **false**, which is the default, the previous functionality is maintained. The field is sent as a parameter on the URL (redistribute_funds=true) and relevant only for Update PO Line (PUT).

- **July 2020 Acquisitions**
  Performance has been improved for the Received Items List. As a result, the PO line list on the page is now sorted by creation date, from newest to oldest.

- **July 2020 Acquisitions** SF: 00532439
  You can now define the address From value for conversation emails as either the current user's email or the library's email. Set the conversation_send_from_logged_in_user_address parameter to true to use the current user's email, or false for the library's email.

- **July 2020 Administration and Infrastructure**
  The footer bearing the Ex Libris logo was introduced on Alma pages.

- **July 2020 Fulfillment** SF: 00818602
  Users with the Circulation Desk Operator role can now access the Advanced Tools section of the main Fulfillment menu. See User Roles - Descriptions and Accessible Components.

- **July 2020 Fulfillment** SF: 00811064 00833669 00835370 00840241
  The Requests - Recalculate After Inventory Update job now processes inventory changes only for the last seven days. See Viewing Scheduled Jobs.

- **July 2020 Fulfillment**
  You can now add the External ID of the resource sharing request to the fulfillment request slip.

- **July 2020 Fulfillment** SF: 00643324 00646605
  Previously, for resource sharing borrowing requests, locating a resource at a partner configured with Locate Profile of type ‘Z39.50’ failed if the title or author of the borrowing request contained the ‘&’ sign. Now, the ‘&’ sign can be removed before the locate process is executed. The rs_z39_locate_replace_amp parameter defines what will be substituted in place of the ‘&’ sign. When set to **NONE**, which is the default, the ‘&’ sign remains in place and is not removed. When set to **AND**, it is replaced with " AND ". When set to **BLANK**, it is replaced with a space. See Configuring Other Settings (Fulfillment).

- **July 2020 Fulfillment** SF: 00638391 00640030 00790183 00795599
  In resource sharing requests, Resource sharing physical shipment and Resource sharing digital shipment are now available in the configurable request statuses on the Request Pickup Configuration page.

- **July 2020 Fulfillment** SF: 00797108
  Previously, on the Courtesy Letter, the renew status appeared on the notification to the patron with the default text instead of a customized description. This was fixed.

- **July 2020 Analytics**
  The Monthly Usage Data out-of-the-box report was added to the Usage Via COUNTER Reports - Release 5 folder. It is based on the information displayed in the Monthly Usage Data tab of Alma (Acquisitions > Import > Load Usage Data) and displays for each platform what data was and was not loaded for each month.

- **July 2020 Analytics**
  The following fields for linked records were added to the Bibliographic Details dimension in every subject area in which
it appears:

- Link ID – the link ID
- Linked to CZ – indicates if the record is linked to the Community Zone
- Linked to NZ – indicates if the record is linked to the Network Zone

**July 2020 Analytics**
The **Chinese Classifications (Taiwan)** folder was added under the Other Classifications folder in the subject areas in which it appears. You can use the fields of this folder to create reports relating to the classification system used for Chinese in Taiwan.

**July 2020 Analytics**
The following fields were added to the Fulfillment subject area regarding requests:

- Loan Details > Is Hold Request Loan – indicates if the loan was initiated by a hold request
- Loans > Loans (Not In House) from Hold Request – the number of not in house loans that came from a hold request
- Loans > Loans (Not In House) from Booking Request – the number of not in house loans that came from a booking request

**July 2020 Analytics** SF: 00816223
The **Creation Date and Time** and the **Modification Date and Time** fields were added to Purchase Requests > Purchase Request Details. These fields expand on the existing Creation Date and Modification Date fields by displaying the time together with the date.

**July 2020 Analytics**
The **Portfolio Details for Consortia** dimension in the E-Inventory subject area was renamed to **Portfolio Details for Consortia Members** to clarify that it is to be used by the network members.

**July 2020 Analytics** SF: 00824333 00824805 00833645
The following fields were added to E-Inventory > Electronic Collections to support the new Central Discovery Index (CDI):

- No. of Electronic Collections (In Repository + In CDI)
- No. of Electronic Collections (In Repository + Not In CDI)
- In CDI
- Active for Fulltext In CDI
- Active for Search In CDI
- CDI Full Text Linking
- CDI Full Text Rights
- CDI Newspapers
- CDI Number of Records
- CDI Resource Types
- CDI Search Rights
- CDI Update Frequency
- CDI Provider Package Code
- CDI - Subscribe to only some titles in this collection
- CDI - Do not show as full text available even if active in Alma
- CDI Local Note
**July 2020 Analytics** SF: 00626259 00686799 00708175

Idea Exchange Database usage is now included in usage statistics in the E-Inventory subject area.

**July 2020 Analytics**

For UNIMARC records, Bibliographic Details > Publication Date is now taken as follows:

- the bibliographic details publication date comes from 210 subfield d (no change from current behavior)
- If there is no 210 subfield d, the publication date comes from field 214 subfield d.
- if both fields do not exist, the publication date comes from field 100 subfield a pos. 9-12

**Note**

This feature will be available in August after the re-indexing job runs.

**July 2020 APIs**

When creating a patron digitization request using API, it is now possible to define also the following fields (relevant for partial digitization request): Volume, Issue, Part, Publication Date. See [https://developers.exlibrisgroup.com/alma/apis/xsd/rest_user_request.xsd/](https://developers.exlibrisgroup.com/alma/apis/xsd/rest_user_request.xsd/).

**July 2020 APIs**

The [Update user API](https://developers.exlibrisgroup.com/alma/apis/xsd/rest_user_request.xsd/) now supports the option to recalculated user roles based on role assignment rules.

**July 2020 APIs**

The [create purchase request API](https://developers.exlibrisgroup.com/alma/apis/xsd/rest_user_request.xsd/) now supports defining of the requested material type. When purchase request is approved (in UI or using the API), the corresponding PO line will be created accordingly.

**July 2020 APIs**

The User Request API now includes managed by code and description.

**July 2020 APIs**

The Invoice export XML now includes the number of attachments.

**June 2020 Acquisitions** SF: 00693223

The Vendor field in Import profile of type Update Inventory is now mandatory.

**June 2020 Acquisitions** SF: 00792980

Users with the PHYSICAL_INVENTORY_MANAGE privilege can now edit the holdings record from the Receive New Material page.

**June 2020 Acquisitions**

The COUNTER 5 report types were added to the existing report type filter on the SUSHI Account list. Additionally, a new filter was added for the COUNTER release.

**June 2020 Acquisitions** SF: 00684631 00722807 00798105 00799762 00802108 00808311 00810525 00817615 00817616

The new barcode field on the Scan-In Change Item Information page is now cleared between one scan-in operation and another.

**June 2020 Resource Management**

Based on customer feedback, the following changes were made to clarify search activation:

- Previously, a number of collections had the In CDI flag set to No. This indicates that the collection cannot be activated for search separately from the search activations. However the collections could still be indexed in CDI. Now, the In CDI = No flag will not be displayed. The In CDI = Yes stays as it was to indicate collections that can be activated for search separately from the full text activation.
- The **In CDI = Yes** flag now includes a tool-tip on mouse-over to provide more information about that status.

- **June 2020 Resource Management**
  Support for SFX shared holdings is now available with CDI.

- **June 2020 Resource Management**
  The **CDI activation required** indicator is now available for customers that are using the EasyActive setting to databases that are not activated by default because they require a subscription. This applies for cases such as Scopus and Web of Science. The indicator appears for collections that are marked as **in CDI: Yes** and that are not free for search. The indicator appears in two places:
    - The CDI tab of the electronic collection editor
    - The results list of an electronic collection search

  A new filter is now available on the advanced search. **CDI activation required** has options for **Equal** or **Not Equals** **Yes**.

- **June 2020 Fulfillment**
  In the Scan In Items page, every scan operation now adds a new row to the scanned items list.

- **June 2020 Fulfillment**
  SF: 00582843 00595624 00744976 00745688 00752320 00752428 00146355 447078
  The Fine fee payment receipt letter now uses the value of payment method from the Payment Method configuration page.

- **June 2020 Fulfillment - Resource Sharing**
  SF: 00747822
  When receiving an item to fulfill a borrowing resource-sharing request, if the borrowing request has no external identifier yet (e.g. for a BLDSS partner) and the **generate_resource_sharing_temp_barcode** parameter is set to true, the temporary barcode is now taken from the stub item's barcode.

- **June 2020 Fulfillment - Resource Sharing**
  SF: 00729018
  Suppressed holdings are ignored now for the purpose of considering self ownership in Logic Rules. For example, if a customer sets a logic rule to hide the resource sharing request link when Ownership=true, and a record has only suppressed holding records with items, the link is still displayed. The self ownership condition was not actually taking into account the suppressed location, but now also the availability check may be affected.

- **June 2020 Analytics**
  The **Modified By** and **Creator** fields were added to Funds Expenditure > Vendor.

- **June 2020 Analytics**
  The **Num of Research Assets (Active)** and **Num of Research Asset Files** fields were added to Titles > Title Measures.

- **June 2020 APIs**
  A new API allows retrieving the attachments under a specific invoice, GET /acq/invoices/{invoice_id}/attachments/{attachment id}. For more information, see the Developer Network.

- **June 2020 APIs**
  You can now create a request using API for pickup in a different institution. This is relevant for fulfillment networks. Additionally, managed by information is now available in the user request API.

- **June 2020 DARA**
  DARA now supports R5 COUNTER Reports for SUSHI Vendors for the Automate Usage Data and Load Usage Data recommendation types. For more information, see DARA – Data Analysis Recommendation Assistant.

- **May 2020 Resource Management**
  The controlled vocabulary of subfield 4 for the following fields in the GND Authority metadata configuration was updated: 500, 510, 511, 550, and 551.

- **May 2020 Resource Management**
The Bibliographic Alignment Configuration and the Authority Alignment Configuration section in the SBN integration configuration profile is no longer under construction. In addition, the job reports are now ready for bibliographic and authority alignment (see SBN Job Report for Bibliographic and Authority Alignment).

- **May 2020 Resource Management**  
The Alma import profile crosswalk conversion for DANMARC to MARC 21 was enhanced. See Source format for more information.

- **May 2020 Fulfillment** SF: 00477529 00514344 00524344 00554469 00597712 00614459 00705363 00721465 00754884 00811039 00435898  
  On the In Process Items page, the order of the filters has changed for acquisition departments.

- **May 2020 Fulfillment**  
  On the request form in Get It, once a patron clicks on the Submit button, the button is disabled so that it cannot be clicked twice.

- **May 2020 Fulfillment - Resource Sharing**  
  When creating a digitization request because of an AFN request for a digital copy, the following fields should be added in the note:
  - Article/Chapter Title
  - Volume
  - Issue
  - Chapter
  - Pages
  - Year

  **Note:** If any of these values exist, the digitization request is created as a general digitization request with the Partial Digitization attribute enabled.

- **May 2020 Fulfillment - Resource Sharing**  
  A new field is now available on the PUSH API transaction for ILLiad, The CitedIn field differentiates between a request imported from Alma and a request submitted directly to ILLiad. When coming from Alma, the CitedIn field contains Sent from Alma.

- **May 2020 Fulfillment - Resource Sharing**  
  For the resource sharing real time item level requesting process, the barcode is now populated in the lending request regardless of the request format and whether the lender has activated the Locate By Barcode option.

- **May 2020 Fulfillment - Resource Sharing / Collaborative Networks** SF: 00694833  
  The user's selection for Activity Status on the Resource Sharing task lists is now always retained for the user. Previously, the value was only retained during a given session. Additionally, when attempting to show all completed tasks in the task lists, an error message now displays to indicate that you must enter a search term when selecting an activity status other than Active.

- **May 2020 Analytics**  
  The No. of Available Portfolios and No. of Unavailable Portfolios fields were added to E-Inventory > Portfolio.

- **May 2020 Analytics** SF: 00626259 00686799 00708175  
  You can now create reports for electronic collections without portfolios from the E-Inventory subject area in Alma Analytics. To support this enhancement the No. of Electronic Collections Without Portfolios (In Repository) field was added to E-Inventory > Electronic Collection.

- **May 2020 Analytics**  
  The following new out-of-the-box reports were added to shared/Alma/Titles/Reports:
  - Titles with physical inventory received in the last month
• Titles with electronic inventory activated in the last month

• **May 2020 Analytics**
The following fields relating to place of publication were added to the Bibliographic details shared dimension for every subject area in which it appears.

◦ Place of Publication - Country
◦ Place of Publication - State
◦ Place of Publication - City

• **May 2020 Administration and Infrastructure** SF: 00754378 00756448 00793632 00824171
The following letters are now listed in the letter list. The first four can only be activated or deactivated:

◦ AssignToLetter
◦ UserRegistrationLetter
◦ ProcessCreationLetter
◦ InvoicePaymentLetter
◦ ExportUserLetter - this letter will not have an option to generate a preview.

• **May 2020 Administration and Infrastructure**

**Idea Exchange**
The City and Postal Code from a user's physical address are now visible in the Contact Information page.

• **May 2020 APIs** SF: 00178286
The GET ITEMS API (GET /almaws/v1/bibs/{mms_id}/holdings/{holding_id}/items) has the following new options.
New query parameters. Dates have the format YYYY-MM-DD.

◦ create_date_from, create_date_to - filter based on item creation date
◦ modify_date_from, modify_date_to - filter based on item modification date
◦ view - the currently supported value: label. When this parameter is retrieved, label information for each item will be returned - in the same way view=label works for a single item.

• **May 2020 APIs**
You can now download log files in the Developer Network, with one line per API request, including date/time, IP address, the API called, the request method and response code. To enable the log file, in the Developer Network, go to **Build my APIs > Reports > History**, enter the configuration for a specific API-key, and select **Save detailed log files**.

• **May 2020 APIs** SF: 00745740
The GET Fees API now includes external_transaction_id.

• **May 2020 APIs**
The Get-Printouts API now supports filtering by specific printer IDs. For more information, see the **Developer Network**.

• **March 2020 Fulfillment - Resource Sharing / Collaborative Networks** SF: 00694833
The user's selection for **Activity Status** on the Resource Sharing task lists is now always retained for the user. Previously, the value was only retained during a given session. Additionally, when attempting to show all completed tasks in the task lists, an error message now displays to indicate that you must enter a search term when selecting an activity status other than **Active**.
Due to technical issues, this feature was not released in the March release. It will be deployed in an upcoming release.

• **March 2020 Fulfillment - Resource Sharing / Collaborative Networks**
You can no longer create broker partners in a Network Zone institution. NCIP, BLDSS, RapidILL, and INNReachAPI must be created only in a member institution.
• **March 2020 Fulfillment - Resource Sharing**
  You can now configure whether the Distribute Central Resource Sharing Configuration job will distribute the value in the **Shared Barcodes** field on the Resource Sharing Partner page. To maintain the value locally, which is the existing behavior, set the customer parameter, `rs_override_local_partner_shared_barcodes`, to **false**. This is the default. When the parameter is set to **true**, the **Shared Barcodes** field is disabled at the local institution level and can only be updated by the network.

• **March 2020 Analytics**

  **NERS Enhancement (ID #5631)**
  The **Last Activity Date** field was added to every place that user details appear. It indicates the last date that a patron was active (for example, made a request or borrowed, renewed, or returned an item).

• **March 2020 Analytics** **SF: 00632314 00661797**
  The following fields were added to the Fulfillment subject area. They provide information concerning the institution at which an item was loaned when it is not the institution that owns the item:

  ◦ **Loan Details > Loaned at Another Institution**
  ◦ **Loan Details > Loaned at Institution Name**
  ◦ **Loan Circulation Desk > Loaned at Institution Circulation Desk**

• **March 2020 Analytics**
  The following fields were added to the Physical Items subject area under Physical Item Details and Fund Information > Fund Measures. They allow you to create reports according to the type of request.

  ◦ **Num of Requests (Booking)**
  ◦ **Num of Requests (Digitization)**
  ◦ **Num of Requests (General Hold)**
  ◦ **Num of Requests (Physical Item)**
  ◦ **Num of Requests (Total)**

• **March 2020 Analytics**
  The **Shipping Date** and **Shipping Date (Calendar)** fields were added to Borrowing Requests > Borrowing Request Details. They indicate the date the lender shipped the item to the borrower.

• **March 2020 Administration and Infrastructure**
  A new Alma extension is available that helps you automatically print letters and slips from the Alma print queues. With this new print daemon extension, there is no need to use email based printing. It also automatically updates itself when new versions are available for easy management and upkeep. The application can be found at [https://github.com/ExLibrisGroup/alma-print-daemon](https://github.com/ExLibrisGroup/alma-print-daemon) and in the Ex Libris Developer Network App Center.

• **March 2020 APIs**
  Additional fields have been added to the Create and Update Vendor and Create PO Lines APIs. For more information, see **Rest PO Line** and **Rest Vendor** in the Developer Network.

• **February 2020 Resource Management**
  The controlled vocabulary for 043 $c and 075 $b were updated in the GND Authority metadata configuration. The 043 $c was updated to address a new country code and 075 $b was updated to correct a typo.

• **February 2020 Digital Resource Management**
  The **Originating System ID** field for remote digital repositories was renamed to **Originating Record ID** when adding digital representations. This field is already indexed and searchable.
You can now reactivate a borrowing request for all partner types. In order to reactivate the request, the following conditions must be met:

- The user must have the Reactivate privilege.
- The request is in a final status (for the complete list of final statuses, see Workflow Actions).
- The requester is an active user.
- If an active partner exists, the workflow profile for the partner must include Reactivated.

On the Receive Items page, the Location field no longer changes when a new due date is entered. The field now changes only when the item creation rule is triggered.

You can now control the behavior of resource sharing requests that fail to send a message to the partner. To eliminate the need to manually dismiss the notes, set the rs_failure_note_need_dismiss to false. When the parameter is set to true, which is the default, the existing behavior (notes requiring manual dismissal) is retained. See Configuring Other Settings (Fulfillment).

The GET-Representations API now includes a new parameter, originating_record_id, which enables filtering remote representations by the unique ID of the object in the remote repository.

The Traffic History report on the Developer Network API dashboard now includes options to select a date range and select a specific API key when API key is selected in the Group By drop-down list. See the Developer Network.

Two new Printouts APIs allow you to communicate with the Online Print Queue. You can check for new printouts using the GET API. The POST API marks the files printed. For more information, see the Developer Network.

You can now manage purchase order requests via APIs. This includes options to get, update, approve or reject purchase requests, or fetch a purchase request list. For more information, see the Developer Network.
- **February 2020 Analytics**
  The new **Funds Overview for Fiscal Period** report was added to the Acquisitions folder and dashboard. It includes the new Fund Transaction fields that were added for the January release.

- **February 2020 Analytics**
  The following fields were added to Titles > Title Measures:
  - Number of Titles with Physical Items (Active)
  - Number of Titles with Physical Items or Holdings Records (Active)
  - Number of Titles with Holdings Records and No Items (Active)
  - Number of Titles with Electronic Portfolios (Active)
  - Number of Titles with Electronic Collections (Active)
  - Number of Titles with Digital Representations (Active)

- **February 2020 Analytics**
  The **Electronic Resource Collection Overlap** folder under Shared/Alma was removed, because the information in this folder is now available in the **Titles with Multiple Portfolios** report located under /shared/Alma/Cost per use via COUNTER reports e-inventory and acquisitions data/Reports.

- **February 2020 Analytics**
  The **Return After Lost** field was added to to Fulfillment > Loan. It indicates the number of items returned with the Lost process status.

- **February 2020 Analytics**
  The new **Fund Rules** dimension was added to the Fund Expenditure subject area. It includes the following fields:
  - Expenditures prior to fiscal period (days)
  - Fiscal period end encumbrance grace period (days)
  - Encumbrances prior to fiscal period (days)
  - Fiscal period end expenditure grace period (days)
  - Overencumbrance allowed
  - Overencumbrance limit percent
  - Overencumbrance warning percent
  - Overexpenditure allowed
  - Overexpenditure limit sum
  - Overexpenditure warning sum
  - Override Rules Information (Yes/No)
  - Transfers prior to fiscal period (days)

- **January 2020 Acquisitions** SF: 00730306
  You can now update a vendor with the PUT API with an existing EDI code.

- **January 2020 Digital Resource Management**
  Alma now supports the auto-generation of thumbnail files for the jpeg2000 format.

- **January 2020 Fulfillment** SF: 00753133 00449565 00724914 00380383 00595649 00696222 00718324 00364224 00722572 00714969 00740348 00756284 00363006 00733243 00547021
  The performance of the Send Courtesy Notices and Handle Loan Renewals job is improved. Additionally, loans for a
single user are now aggregated into one letter. If there are more than 100 loans, they will be split into an additional
letter.

• **January 2020 Fulfillment** SF: 00710105 00732714
  Merge users now includes options to migrate purchase requests, and data from Primo VE and Leganto from the source
to the target user.

• **January 2020 Fulfillment** SF: 00506433 00508143
  The Export Users job now allows you to rerun failed jobs. Jobs that failed due to a server restart will rerun
automatically. All other failed jobs can be rerun from the Jobs History list.

• **January 2020 Fulfillment / Collaborative Networks**
  The Pick From Shelf Task List and the Request Monitor now include the Fulfillment Network Institution Code and the
Fulfillment Network Borrowing ID in order to facilitate troubleshooting between network fulfillment institutions. These
fields can also now be searched using persistent search bar.

• **January 2020 Fulfillment Resource Sharing** SF: 00685289 00753932
  The Distribute Central Resource Sharing Configuration job now correctly updates rota template members. Additionally,
partners with inactive status will also be added to the rota template. Known issue: Inactive partners appear as active in
the Rota Template, but will not be considered when running the Sending Rules.

• **January 2020 Administration and Infrastructure**
  For customers who do not have an Alma premium sandbox, the **Standard Sandbox** link has been added to the Help
Menu to allow them to access their sandboxes from Alma.
• **January 2020 Administration and Infrastructure**  
Previously, the DARA icon, which provides a shortcut to the Manage Recommendations page (Admin > Recommendations > Manage Recommendations), displayed when any recommendations were available. With this enhancement, the icon will also display the number of recommendations that are available.

![DARA Icon with Count Indicator](image)

• **January 2020 Administration and Infrastructure**  
The list of preferred languages in the user record are now sorted by the language the user is in and not by the English text or English code. See an example of this change below.

![Language Sort](image)

• **January 2020 Analytics**  
The following shared reports were added:

  - **Acquisitions:**
    1. POLs which have a renewal date in the next three months (next quarter) with bibliographic and POL information
    2. Expenditure trends for physical and electronic resources for last 8 full quarters
    3. Serial Issues Claims Report (Items with material type issue and expected receiving date greater than seven days that have not been received)
    4. Non-Serial Issues Claims Report (Items without material type issue and expected receiving date greater than seven days that have not been received)

  - **Usage via Alma Link Resolver:**
    1. Alma Link Resolver Usage Requests for the last complete 24 months
    2. Alma Link Resolver Usage Requests from Primo and not Primo for the last complete 24 months

  - **Usage via COUNTER reports:**
    1. COUNTER report loading analysis for the last complete 24 months

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**Note**

If your sandbox cannot be located after selecting the link, please open a Support case and provide the URL for your sandbox.
 Deleted Records Report

 Events:

 - Events of type Physical Item went into transit and transited in less than 24 hours for the last year

 E-Inventory:

 - Portfolios with portfolio library unit different than electronic collection library unit

 January 2020 Analytics

 In the Usage by title report (shared/Alma/Usage/Reports) the month labels at the bottom of the graph were moved to be vertical instead of horizontal to be more readable.

 January 2020 Analytics

 The name of the Library Name field in reports and prompts located under shared/Alma/Inventory/Reports was changed to Library (Active).

 January 2020 Analytics

 The Cost Usage subject area and its related features are deprecated. This includes:

 - The fields of the Cost Usage subject area that are available when selecting New > Analysis > Cost Usage
 - The out-of-the-box reports and dashboards for Cost Usage under /shared/Alma/Cost per Use/Reports and under /shared/Alma/Cost per use via COUNTER reports and acquisitions data
 - The folder Cost per use via COUNTER reports and acquisitions data

 All reports that use this subject area no longer work.

 Institutions that use reports from the Cost Usage subject area can do the following:

 - Take advantage of the over 30 new out-of-the-box reports in the /shared/Alma/Cost per use via COUNTER reports e-inventory and acquisitions data/Reports folder. These reports use the new Cost Usage of the E-Inventory subject area.
 - Use the out-of-the-box Electronic Cost Usage Dashboard (which uses the above reports) located in the /shared/Alma/Cost per use via COUNTER reports e-inventory and acquisitions data/Dashboards folder.
 - Make their own customized reports using the Cost Usage dimension of the E-Inventory subject area.

 January 2020 Analytics

 The Week Number and Start of Week fields were added to all Date dimensions in Alma Analytics. In addition, all Date dimensions were aligned to include the same fields.

 January 2020 Analytics SF: 00689762 00714049

 The Author (Contributor) field was added to the Bibliographic Details folder for all subject areas in which it appears. For MARC21 the data for this field comes from MARC fields 700, 710, and 711, and for CNMARC it comes from the 702, 711, and 712 fields.

 January 2020 Analytics

 The Uniform Resource Identifier field was added to the Bibliographic Details folder for all subject areas in which it appears. The data for this field comes from MARC field 856, subfield u.

 January 2020 Analytics

 Idea Exchange
NERS Enhancement (ID #5619)
The following fields containing the OCLC control number were added to the Bibliographic Details folder for all subject areas in which it appears. The data for these fields comes from MARC fields 019 and 035.

- OCLC Control Number (019)
- OCLC Control Number (035a)
- OCLC Control Number (035a+z)
- OCLC Control Number (035z)

January 2020 Analytics
The following fields were added to Fund Expenditure > Fund Transaction:

- Transaction Cash Balance: Allocated Balance – Expenditure Balance
- % remaining (Considering expended and encumbered): (Available Balance / Allocated Balance) * 100
- % remaining (Considering only expended): (Cash Balance / Allocated Balance) * 100

January 2020 Analytics SF: 00524082
The user detail fields in the Requester subject area are now anonymized. For more information about the anonymization of Analytics reports, see Anonymizing Analytics Report Details.

January 2020 Analytics
The Call Number Prefix field was added to Physical Items > Holding Details. The data for this fields comes from MARC field 852, subfield k.

January 2020 Analytics
The shared Electronic Resource Collection Overlap folder under Shared/Alma will be deleted for the February release. The information in this folder is included in the Titles with multiple portfolios report located under /shared/Alma/Cost per use via COUNTER reports e-inventory and acquisitions data/Reports.

September 2020 Fulfillment Course Reserves
A flag has been added to control whether the requester note in the purchase request form is auto-generated from the course information. This flag resides in the Other Settings table, found in Fulfillment Configuration > General > Other Settings. The requester note contains information about the course, instructor, number of copies, and number of participants and is pulled to PO lines and orders. For more information, see Purchase Requests.

Note
This flag is set to "false" by default. To enable the auto-generation of the requester note, you must set the flag to "true".

September 2020 Fulfillment Course Reserves
When an instructor makes a digitization copyright request in Leganto, their name now appears in the Requester column of the In Process Items table in Alma.
• September 2020 Fulfillment Course Reserves
In the Reading List Citation Update job, you can now select to embed or unembed the PDF files attached to the citations. You can also select to embed the PDF files in read-only mode, such that they cannot be downloaded. For more information on running manual jobs, see Running Manual Jobs on Defined Sets.

Embedding options in Reading List Citation Update job

• September 2020 Fulfillment Course Reserves
Now, when editing the Copyright Attributes of a citation, if you enter a page range in the Required Pages fields and the Resource Total Pages field has no value, then you must enter a value in the Resource Total Pages field. If you do not enter a page range in the Required Pages fields, the Resource Total Pages field can remain empty.

Resource Total Pages field mandatory

• September 2020 Fulfillment Course Reserves
To support cases when multiple courses use the same reading list, the Activate/Deactivate Courses job (Configuration Menu > Fulfillment > Fulfillment Jobs Configuration) is performed on the reading list as follows:
- **On activation** – The specified action is performed only when the first course becomes active.
- **On deactivation** – The specified action is performed only when the last course becomes inactive.

Activate/Deactivate Courses Job in Fulfillment

For more information, see [Configuring Fulfillment Jobs](#).

- **September 2020 Fulfillment - Course Reserves / Analytics**
  Reading Lists without citations are now displayed in the Course Reserves subject area.

- **August 2020 Fulfillment - Course Reserves**

  ![NERS Enhancement (ID #6863)](image)

  **NERS Enhancement (ID #6863)**

  Two new material types have been made available for selection when creating a citation: Book Extract and Conference Paper. This corresponds to two new entries in the Citation Material Type table, found in the [Fulfillment Configuration > Courses](#) menu.

![New Book Extract, Conference Paper Types](image)

- **May 2020 Fulfillment - Course Reserves**
  Excel exports from the Edit Citations screen now include the Course Code, Course Term, No. of Participants, and Academic Department columns.
May 2020 Fulfillment - Course Reserves
Previously, when a librarian issued a digitization request for an item on a reading list, the email notification the librarian received with the digitized file lacked some of the information needed to associate the file with the correct citation. The following information is now included in the email notification so that librarians will know which citation to associate this file with:

- Name of the reading list
- Citation ID
- Creator of the request (the person who submitted the request).

May 2020 Fulfillment - Course Reserves
When working with the DCS, instructors can now make digitization requests for citations on reading lists that are not associated with a course or courses. For more information, see Integrating with the UK's Digital Content Store (DCS).

May 2020 Fulfillment - Course Reserves
In the Edit Citations screen, Alma now provides a link to reading lists in each citation in Alma.

May 2020 Fulfillment - Course Reserves / Analytics
In the the Course Reserves subject area, the Leganto Citation Library Discussions field was added to Reading List Citation dimension and the Leganto List Library Discussions field was added to Reading List dimension. They display the library discussions.

January 2020 Fulfillment - Course Reserves / Analytics
The Number of Student Suggestions field was added to Reading Lists dimension of the Leganto Student Usage, Leganto Instructor Usage Events, and Course Reserves subject areas.

Resolved Issues

September 2020 Release Update Analytics SF: 00877007
The column Electronic Collection Type was not displaying properly. This was fixed.

September 2020 Release Update Acquisitions SF: 00852361
Several PO line labels/messages were overridden with new labels. This was fixed.

September 2020 Release Update Acquisitions SF: 00878083
Previously, electronic material type data was retrieved randomly, with the order even changed between releases. Now, the display order is constant, with the value, Book, always displaying first.

September 2020 Release Update Administration and Infrastructure
Internal notes used to copy from network institution to institution members were internal, even though users and their segments in institution members should be external. This was fixed.

September 2020 Release Update Administration and Infrastructure SF: 00873257
Changes to centrally managed users would not distribute to IZ if no identifier was configured for Cross Consortia Identifiers other than the Primary Identifier. This was fixed and no additional Identifier is needed for it to properly distribute the user.

September 2020 Release Update Fulfillment SF: 00856691
The Check Availability calendar was not being translated. This was fixed.

September 2020 Release Update Fulfillment SF: 00526574 00543813 00785654 00809107 00820110 00858407

Ex Libris, a ProQuest Company
Resource Request Monitoring: The last item on the first page was duplicated and displayed as the first item on the second page. This was fixed.

- **September 2020 Release Update Fulfillment - Resource Sharing** SF: 00861382
  The selected "Automatically print slip" in the Return action for a borrowing request was not saved in the session. This was fixed.

- **August 2020 Release Update Administration and Infrastructure** SF: 00864689
  The deposit forms editor displayed an error message for missing mandatory fields. This was fixed.

- **August 2020 Release Update Administration and Infrastructure** SF: 00865984
  The process of updating centralized managed users from NZ to IZ used to delete identifiers on the IZ user. This was fixed.

- **August 2020 Release Update Fulfillment** SF: 00866671
  In Lending Request, we were unable to fulfill digitization requests for electronic records. This was fixed.

- **August 2020 Release Update Resource Management**
  You can now activate for full text in CDI electronic collections of both type **aggregator/selective** AND type **database**, but still have the bib record suppressed in the Institution Zone and for multi-campus environments. This is available for both FullyFlexible and EasyActive customers.

- **August 2020 Release Update Resource Management** SF: 00865641 00866740
  Collection became Inactive following August Release. This was fixed.

- **August 2020 Release Update Resource Management** SF: 00856824
  Primo VE ViewIt and GetIt and link resolver delivery options were very slow. The performance has been improved.

- **August 2020 Release Update Resource Management** SF: 00865201
  ViewIt link was missing after reloading record. This was fixed.

- **July 2020 Release Update Administration and Infrastructure** SF: 00852614 00852620
  When network_users_unique_identifiers CP was set to PARTIAL/FULL, it was not possible to create a linked user from a different institution. This was fixed.

- **July 2020 Release Update Administration and Infrastructure** SF: 00858089 00858275 00858446 00858458
  00858541 00858554 00858880 00858968
  URL-based widgets were not working. This was fixed.

- **July 2020 Release Update Administration and Infrastructure** SF: 00851144 00851573 00852490 00856577
  00858010 00858073 00858103 00858120 00858600
  00858643
  Several target URLs were built incorrectly from the parser parameters. This was fixed.

- **July 2020 Release Update Administration and Infrastructure** SF: 00858791 00858129 00858133 00858140 00858157
  00858151 00858173 00858160 00858164 0085815 00858179 00858183 00858186 00858191 00858192 00858201
  00858202 00858222 00858214 00858215 00858224 00858226 00858230 00858231 00858245 00858236 00858242
  00858249 00858255 00858316 00858320 00858327 00858335 00858349
  Linking was not working when a Portfolio had a Parser Program in Portfolio Level and the same Parser Program as the Service. This was fixed.

- **June 2020 Release Update Administration and Infrastructure**
  The User Restriction parameter restricted operators even on inactive user roles. This was fixed.

- **June 2020 Release Update Administration and Infrastructure** SF: 00849299 00849317 00849324 00849388
  00849399 00849807 00850147
  Users with Circulation Desks Manager/Operator roles could not add segments to users. This was fixed.
- June 2020 Release Update Resource Management SF: 00849256 00849258 00849264 00849277 00849368
  In some cases, the Expired Hold Shelf page was not loading properly. This was fixed.

- June 2020 Release Update Resource Management SF: 00849136 00849143 00849153
  When saving records that contain Hebrew fields, the following error would occasionally appear: 'Subfield "" is not listed in profile for field XXX, Space character expected after $$'. This was fixed.

- June 2020 Release Update Resource Management SF: 00849141 00849142
  The Arabic Authorities were not displayed correctly in F3 Search. This was fixed.

- May 2020 Release Update Resource Management SF: 00793677
  A 240 field was added to authorize publishing fields that are available to be published in case of a link. To use this function, run a republish, either full or a set.

- May 2020 Release Update Administration and Infrastructure SF: 00838131 00838223 00838321
  Users with a SAML profile could not open the Local/LDAP link to their premium sandbox. This was fixed.

- May 2020 Release Update Administration and Infrastructure SF: 00838226 00838263 00838304
  The persistent search bar was not appearing as designed. This was fixed.

- March 2020 Release Update Analytics SF: 00808024 00809948
  The user identifiers Identifier1 and Identifier2 did not work as expected. This was fixed.

- March 2020 Release Update Resource Sharing
  When running the Update BLDSS Requests job, requests were created a day after the job ran. This was fixed.

- March 2020 Release Update Resource Management SF: 00818975 00818977 00818980 00818984 00818987 00818992 00818998 00819011
  Publishing to Primo job, configured with Linked-Data enrichment, reported errors for some records. This was fixed.

- March 2020 Release Update Resource Management SF: 00792532 00808405 00809422 00809619 00809832 00810074 00810223 00810334 00810932 00811395 00811621 00811854 00812239 00812339 00812434 00812514 00813828 00814206 00814255 00814340 00815346 00816694 00816880 00817237 00818408 00818424
  New Order Import ended with status 'Failed'. PO lines and bibs were created, but PO lines did not advance from 'In Review' status due to 'Exception: Cause: {1}' message. This was fixed.

- March 2020 Release Update Resource Management SF: 00816820
  Updating author information when contributing records to SBN failed in some cases. This was fixed.

- March 2020 Release Update Resource Management SF: 00819310
  Publishing Platform job report did not match the actual exported files. This was fixed.

- March 2020 Release Update Resource Management SF: 00819923 00820064 00820240 00820246 00820281 00820592
  The New Order Import profiles were creating unexpected items. This was fixed.

- February 2020 Release Update Acquisitions SF: 00807839 00807977 00809090
  Users with roles Fund Manager and Ledger Manager could view/edit PO lines from other sub-libraries. This was fixed.

- February 2020 Release Update Administration and Infrastructure SF: 00808037 00808053
  When multiple SAML profiles were configured, login failed in some cases. This was fixed.

- February 2020 Release Update Resource Management SF: 00807920 00808116 00808118 00808124 00808564 00808682
  When running the "Change Holding Information" job and the holdings did not match the normalization rule, the holdings were changed anyway. This was fixed.

  In some case, icon indicators for Electronic Portfolios and Electronic Collections in Community Tab Search Results was not displayed as expected. This was fixed.

- February 2020 Release Update Administration and Infrastructure SF: 00808782
  In some cases, on physical titles search results, after clicking the NZ icon, the NZ and CZ tabs disappeared. This was fixed.

- February 2020 Release Update Resource Management
  Authority changes caused relinking of irrelevant bibs. This was fixed.

- February 2020 Release Update Resource Management SF: 00788636 00807876

Ex Libris, a ProQuest Company
In the Metadata Editor, when clicking F3 on various fields, no matches were found. This was fixed.

- **February 2020 Release Update Administration and Infrastructure** SF: 00807849 00807903 00808385 00808404 00808466 00808507 00808539
  When a printer was defined as Printout Queue, and Quick Print was active, the "Overdue and Lost Item" job failed, providing false reports when sending emails. This was fixed.

- **January 2020 Release Update Fulfillment** SF: 00797183 00797572 00797586
  A fund indexing error occurred when searching for certain funds. This was fixed.

- **January 2020 Release Update Administration and Infrastructure** SF: 00696703
  Linked users were not found using Self Check. This was fixed.

- **January 2020 Release Update Resource Management** SF: 00734680
  Blocks on user records were deleted during user synchronization. This was fixed.

- **January 2020 Release Update Resource Management** SF: 00725563
  A subfield in UNIMARC was not published correctly to Primo Central. This was fixed.

- **January 2020 Release Update Resource Management** SF: 00754006 00793216
  The Z39.50 protocol was not working properly. This was fixed.

- **January 2020 Release Update Fulfillment** SF: 00797743
  The **Send Resource Sharing overdue messages to borrower** job fails during lending requests with multiple barcodes. This was fixed.

- **January 2020 Release Update Fulfillment**
  The customer parameter **temp_set_attribute_in_uresolver** was not set to true for all customers. This was fixed.

- **January 2020 Release Update Resource Management** SF: 00797333
  The Expand function was not set as the default in the authority browse list. This was fixed.

- **January 2020 Release Update Administration and Infrastructure**
  The statistics gathering rate was too low. This was fixed.

- **September 2020 Acquisitions** SF: 00681407 00864770
  It was not possible to schedule the PO Import approvals job. This was fixed.

- **September 2020 Acquisitions** SF: 00830707 00847319 00822514
  The calculation of the disencumbrance was wrong in some cases. This was fixed.

- **September 2020 Acquisitions** SF: 789519
  Purchase requests created from citations did not function correctly. This has been fixed.

- **September 2020 Acquisitions** SF: 00860419
  Portfolios created from Purchase Requests were created with 'null' in the Static URL field. This was fixed.

- **September 2020 Administration and Infrastructure** SF: 00839569 00565625
  In some cases, submitting any user details from Primo duplicated the user address. This was fixed.

- **September 2020 Administration and Infrastructure** SF: 853225
  Creating linked users from REST API ignored the Linked Account Shared Fields configuration. This was fixed.

- **September 2020 Administration and Infrastructure** SF: 851815
  When using the Populate Profile button when setting up a SAML integration profile, Alma sometimes picked the wrong certificate from the IdP metadata. The logic was refined to select a more appropriate certificate.

- **September 2020 Administration and Infrastructure** SF: 00859965 00854281 00858195 00856900
  New Alma Layout: Clicking the Configuration Menu icon did not open the menu nor the screen. This was fixed.

- **September 2020 Administration and Infrastructure** SF: 00855562 00862790 00869261 00868913 00859733 00855150 00864913 00855325 00856332 00868775 00870037 00867272 00860061 00864710 00855263 00866929 00859771 00862827 00867402 00869127 00868840 00861228 00867935 00864490 00865075
  New Alma Layout: The Configuration Discovery menu was the same as the normal Discovery menu. This was fixed.

- **September 2020 Administration and Infrastructure** SF: 00856707 00857647 00856211 00865541
  New Alma Layout: The Layout and Menu settings could not be changed. This was fixed.

- **September 2020 Administration and Infrastructure** SF: 00868351 00857195 00869587
  New Alma Layout: adding a user to the Allowed Emails table and hitting Save did not save the user to the table. This was fixed.
• **September 2020 Administration and Infrastructure** SF: 00840623
  When hitting Back from Metadata Editor, the cursor jumped to the beginning of the records list, and not to the relevant record. This was fixed.

• **September 2020 Administration and Infrastructure** SF: 00723862 00828709
  Embedding the Alma Universal Viewer did not work. This was fixed.

• **September 2020 Administration and Infrastructure** SF: 816910
  If an image was very large, it was cut off in the New Alma Viewer. This was fixed.

• **September 2020 Administration and Infrastructure** SF: 858644
  In the new Alma viewer, when using Internet Explorer (V.11), the descriptive metadata text sometimes overlaps itself depending on the zoom level. This was fixed.

• **September 2020 Analytics** SF: 840943
  The Lending Requests analytics report did not run properly. This was fixed.

• **September 2020 Analytics** SF: 475138
  In Course Reserves > Reading List Citations > Citation Origin, the value 'Brief' was displayed, which is not a possible value in Alma. This was changed to 'Manually added', which is the value displayed in Alma.

• **September 2020 Analytics** SF: 808270
  When creating a report to display the number of PO lines by receiving date, multiple values were unexpectedly displayed. This was fixed.

• **September 2020 Analytics** SF: 860999
  When the Receiving Date (Latest in POL) field was added to a report, it did not run properly. This was fixed.

• **September 2020 Analytics** SF: 859562
  In the Fulfillment SA, when policy loan information was added to a report, it did not run properly. This was fixed.

• **September 2020 Analytics** SF: 815272
  Alma failed to delete invoices with more than 1000 invoice lines. This was fixed.

• **September 2020 API** SF: 825895
  The Run-a-job API returned an incorrect error message when the job could not run due to a block by an existing job. The error message now correctly states the reason for the error.

• **September 2020 API** SF: 838651
  When retrieving bibliographic records via API, if a top level collection and its titles were added in DC, an error was displayed. This was fixed.

• **September 2020 API** SF: 00846334 00844039
  When updating a PO line using API, a few date fields were sometimes moved by one day (expected_activation_date, subscription_from_date, subscription_to_date, renewal_date). This was fixed.

• **September 2020 API** SF: 852683
  In some cases, the following APIs were returning the same records in the results: Get-portfolios, Get-Invoice-lines and Get-user-requests. This was fixed.

• **September 2020 API** SF: 853072
  In the Create Request API, an incorrect error message was returned when the to/from pages fields had incorrect numbers. This was fixed.

• **September 2020 API** SF: 859358
  When running the GET-Users API with an offset parameter larger than the total number of users, a misleading error message was returned. This was fixed. Now an empty list of users is returned.

• **September 2020 API** SF: 842128
  In the Update Bib API, the suppress_from_external_search and suppress_from_publishing fields were not updating linked records. This was fixed.

• **September 2020 Digital Resource Management** SF: 00835926 00858986 00859950 00830064
  When logged in to Primo and selecting a digital service, the new Alma Viewer opened, but the user was not logged in. This was fixed.

• **September 2020 Digital Resource Management** SF: 842983
  If the representation ID was hidden in the List of Representations, the representation would not open properly. This was fixed.

• **September 2020 Digital Resource Management** SF: 858645

Ex Libris, a ProQuest Company
Images in files converted from docx to HTML did not display properly in the New Alma Viewer. This was fixed.

- **September 2020 Fulfillment** SF: 00679794 00502218
  When scanning an item that had a Transit for Reshelving request in the Scan In items page, if the Automatically Print Slip field was set to Yes, the error message "Print Slip failed" appeared, although no slip should have been printed. This was fixed.

- **September 2020 Fulfillment** SF: 00849307 00842073 00851175
  Translations of the request types were added to the Scan-In Interface and the Requests Queue pages.

- **September 2020 Fulfillment** SF: 797108
  Previously, the renew status appeared on the notification to the patron with default text instead of the customized description. This was fixed.

- **September 2020 Fulfillment** SF: 733582
  The request queue was displayed as empty for items in a temporary location. This was fixed.

- **September 2020 Fulfillment** SF: 729409
  If the Activate/Deactivate Courses job got restarted in the middle of the job’s run (e.g. due to a server restart) the job’s report was sometimes incorrect. This was fixed.

- **September 2020 Fulfillment** SF: 634501
  When an item was ongoing for a digitization process, its status was not translated in the Get It tab. This was fixed.

- **September 2020 Fulfillment** SF: 00656957 00660691 00613937 00722446 00673680 00727744 00733968 00728339
  The Link Resolver match was incorrectly being made on the 022 $y. This was fixed by a temporary customer parameter "temp_uresolver_ignore_022_subfield_y_for_matching". Once set to True, UResolver does not use 022 sub-field y for matching. The fix can be applied only after the full indexing process.

- **September 2020 Fulfillment** SF: 00666746 00667589 00739982 00790054 00792178 00803728
  The response time was improved for the SIP2 check in process.

- **September 2020 Fulfillment** – Course Reserves SF: 823643
  Some purchase requests could not be deleted. This has been fixed.

- **September 2020 Fulfillment** – Course Reserves SF: 855004
  The code length of the Additional Reading List Statuses Code table has been increased from 20 to 50 characters.

- **September 2020 Fulfillment** - Resource Sharing SF: 00627623 00648980 00810104 00821414
  The Other Details section of a Resource Sharing Borrowing Request sometimes showed information from an incorrect record. This was fixed.

- **September 2020 Fulfillment** - Resource Sharing SF: 701342
  The available items in the drop-down menu for Primo resource requests were sorted by description inconsistently with the correct sorting done through the Get It tab, which displays the one-digit volume descriptions before the following volumes. This was fixed. The sorting is now the same in both actions.

- **September 2020 Fulfillment** - Resource Sharing SF: 701755
  The XML of the Resource Sharing Shipping Slip Letter was missing the issue_level_description information. This was fixed.

- **September 2020 Fulfillment** - Resource Sharing SF: 00699723 00758359
  In some cases, returning items generated an incorrect Resource Sharing Return Slip letter. This was fixed.

- **September 2020 Fulfillment** - Resource Sharing SF: 844916
  The Rapid partner had no default external_id that caused the re-assignment of the Rota to have an active partner with no external_id. This was fixed.

- **September 2020 Fulfillment** - Resource Sharing SF: 814254
  When a borrowing request is created for a non-periodical, the authorOfComponent element is now used to populate the Chapter author request field, and the titleOfComponent element is now used to populate the 'Chapter title' request field.

- **September 2020 Resource Management** SF: 853876
  In the Change Holdings Information job, the normalization tasks dropdown was populated with Bibliographic normalization tasks. This was fixed.

- **September 2020 Resource Management** SF: 864280
  Problem with Items/Holds linked to a specific Bib record. That was fixed.
For some of contributed portfolios, URL or parser parameters disappeared in CZ. This was fixed.

In some cases, the Link Electronic Resources to CZ job was failing. This was fixed.

In some cases, publishing to Primo did not reflect the relations – it did not create PLK fields. This was corrected.

The report of the Activate/Deactivate Courses job was enriched with more information.

The loading speed of the Repository Search > Community tab was improved.

In three scenarios: (1) Update of a linked NZ record by a member institution; (2) Update of an NZ record (which has linked records in member institutions) by the NZ institution itself; (3) When a member institution clicks the “Link” button on an NZ record in the “Network” tab, thus linking the NZ record to the member for the first time.

Default value of 'content origin' filter in 'manage sets' page was not 'All' for all languages. This was fixed.

Browse shelf listing showing results out of order, but when clicking Go again - the order corrects itself. This was fixed.

SRU used port 80 instead of port 443. This was fixed and now port 443 is used.

ISMN numbers beginning with M did not validate correctly. This was fixed. Input length is now restricted to 10 (prior to 2008) or 13.

When contributing musical and non-musical audio records to SBN, field 127 was not contributed to SBN central catalog and was erased from Alma. This was fixed.

Contribution to SBN was not working if the originating system ID was not an SBN. This was fixed.

The Update/Notify Users job was incorrectly setting the date in the Expiration date and Purge date of users when it should have cleared the date. This was fixed.

Importing UserStatCat files failed with a file type error. This was fixed.

Previously, for Chinese, Japanese and Korean languages, user names with hyphens were ignored in an auto complete search. This was fixed.
• **August 2020 Administration and Infrastructure SF: 00851665 00851137**
  Using the Identity Service, a failed login attempt was taking 6-7 seconds. The performance has been improved.

• **August 2020 Administration and Infrastructure SF: 00719541 00692168 00803974**
  Citation Details displayed the wrong details. This is fixed

• **August 2020 Administration and Infrastructure SF: 798363**
  The email was not valid on sending query to a Requester for Purchase Request. The validation was changed

• **August 2020 Administration and Infrastructure SF: 00811628 00803782**
  Citation Details displayed the wrong details. This was fixed

• **August 2020 Administration and Infrastructure SF: 00859965 00854281 00858195 00856900**
  New Alma Layout - when clicking the Configuration menu, it does not appear in the menu nor on the screen. This was fixed.

• **August 2020 Administration and Infrastructure SF: 00861227 00857012 00856589 00855608 00854546 00858304**
  New Alma Layout - Upper-right menu icons disappeared when in the Configuration Menu. This was fixed.

• **August 2020 Administration and Infrastructure SF: 00856707 00857647**
  New Alma Layout - was not able to change the Layout and Menu settings. This was fixed.

• **August 2020 Administration and Infrastructure SF: 00836625**
  The URL to the logo was configured in the Alma Viewer, but clicking on he logo did not take you to the URL. This was fixed.

• **August 2020 Analytics SF: 800551**
  Letters Configuration 'Updated by' field was not populated when the interface was in Chinese. This was fixed.

• **August 2020 Analytics SF: 814587**
  If usage data was uploaded from an Excel file that had more than 100 rows, the file was cut off at the nearest hundredth row. This was fixed.

• **August 2020 Analytics SF: 758519**
  In Alma Analytics Dewey groups, some headings from Group 3 were located in Group 2. This was fixed.

• **August 2020 Analytics SF: 696528**
  Maximum field lengths in Analytics did not match field lengths in Alma. This was fixed

• **August 2020 Analytics SF: 00825825 00846109**
  The Citation License Type field did not display data for citations in Analytics. This was fixed.

• **August 2020 API SF: 828423**
  The GET-Partner API when used with JSON was returning NCIP_P_2_P instead of NCIP_P2P. This was fixed.

• **August 2020 API SF: 678797**
  In the GET e-collection API, when the <free> field had no value defined, it was not retrieved based on the e-services free field values. This was fixed.

• **August 2020 API SF: 826324**
  In the Create fee API, the credit fee type has been added as a negative amount, similar to the UI.

• **August 2020 API SF: 845455**
  When using the Create-Item API without the barcode field, Alma generated a barcode twice, such that a sequence was skipped. This was fixed.

• **August 2020 API SF: 848603**
  In some cases, the following APIs were returning the same records in the results: Get-Invoices, Get-Courses, and Get-E-Collections. This was fixed.

• **August 2020 Fulfillment SF: 756230**
When a PO is being handled by two users or the same user in two different browsers, it sometimes caused the PO to be locked for editing for one of them, and an unclear error message was displayed. This was fixed. The error message now indicates that the record was updated by another user and to reload the record.

- **August 2020 Fulfillment** SF: 00806633 00591203 00573929 00820755
  Updating the status of an in-process item from a work order department was not reflected in the Resource Request Monitor. This was fixed.

- **August 2020 Fulfillment** SF: 815893
  Previously, when a booking request was created with a preview period and was immediately being activated but no item was available to fulfill, the request got stuck and could not be reactivated. This was fixed. Now Alma will attempt to activate the request again at the original request start time (without the preview period).

- **August 2020 Fulfillment** SF: 00785640 00803254
  Performance improvements were made to the booking conflict validation process. Also, in some cases, Alma incorrectly allowed creation of conflicting booking requests, for example when there was a combination of title level and item level booking requests. This was fixed. Now Alma always blocks conflicting bookings.

- **August 2020 Fulfillment** SF: 795186
  When the Ful Citations Slip Letter was partially customized and the Subject field was not, it was not possible to send the report directly by mail. This was fixed.

- **August 2020 Fulfillment** SF: 719290
  In some cases the courtesy notice was sent by the Notifications - Send Courtesy Notices and Handle Loan Renewals job after the due date has already passed. This was fixed. The courtesy notice will no longer be sent if the due date has passed.

- **August 2020 Fulfillment** SF: 711645
  In some cases, an item that was loaned remained on the Pick From Shelf list.

- **August 2020 Fulfillment** SF: 744218
  Previously, if an operator selected a file to upload, and then clicked the Done button before the file finished uploading (while the file upload status is still Pending), the document delivery failed. This is fixed. There is now a Refresh button on the page and internal validation when selecting Done.

- **August 2020 Fulfillment** SF: 00859693 00845845
  Performance improvements have been made for booking requests.

- **August 2020 Fulfillment** SF: 731438
  In some cases, when renewing a borrowing request for a user with an active block, the renew was performed on the wrong request. This was fixed. Known issue - in some cases, when the task list is filtered and an override pop up window is displayed, the action completes and returns to the list without the previously selected filter.

- **August 2020 Fulfillment** SF: 752632
  BLDSS Borrowing requests which were already located, and were then canceled, can now be located again, and then resent to BLDSS.

- **August 2020 Fulfillment** SF: 814825
  Previously, chapter details were not sent for BLDSS requests with citation type of Book. This was fixed.

- **August 2020 Fulfillment** SF: 00856571 00817529 00711328 00713683
  In some cases, errors were generated for additional updates received after a request was completed. This was fixed.

- **August 2020 Fulfillment** SF: 804275
  On the Resource Sharing Request form for citation type Book, rft.atitle from OpenURL was not mapped to field Chapter when the rft.genre was bookitem. This was fixed.

- **August 2020 Fulfillment** SF: 809042
  The Resource Sharing Borrowing Requests - Other Details section showed information from the wrong record. This was fixed.

- **August 2020 Fulfillment** SF: 834121
  When the ReasonUnfilled was set to 'Responder specific' (value 28) the message failed to be sent because it is not supported. This was fixed, the 'Responder specific' was removed from the ILLUnfillReasons table.

- **August 2020 Resource Management** SF: 832255
  The results page for Inventory Network Group did not display results as expected. This was fixed.

- **August 2020 Resource Management** SF: 841907
  When running Synchronize Bib Records With External Catalog job on a cached NZ record, and in the 'Marc21 Bib
normalize on save' process there is a 'BibGenerateControlNumberFrom009' task, some 035 fields disappeared from
the cached NZ record. This was fixed.

- **August 2020 Resource Management** SF: 797479
  MARC21 'Place of Publication: the 'PLACE_OF_PUBLICATION' field of the 'MMS_DISPLAY' table (used by Analytics)
  is populated only with the first subfield $a of field 260, although this subfield is repeatable. This was fixed. Now all
  subfields $a of field 260 are extracted and concatenated with a space. Note that if the record has no 260 $a, but has
  264 $a, all occurrences of 264 $a will be concatenated into the 'PLACE_OF_PUBLICATION' field.

- **August 2020 Resource Management** SF: 00851559 00846653 00846635
  "Manage Selected" dropdown for physical items was not the same as listed in June release notes. The release notes
  were fixed.

- **August 2020 Resource Management** SF: 00828647 00732872
  Selecting Load Portfolios from electronic service editor in view mode threw 404 error. This was fixed. Load Portfolio
  and Move Set of Portfolios are now hidden in view mode and only available in edit mode.

- **August 2020 Resource Management** SF: 00808319 00808805
  "View in Discovery" and "Test Access" for some portfolios triggers "Some error occurred while retrieving services"
  error. A data corrector was created to fix these portfolios.

- **August 2020 Resource Management** SF: 681833
  When depositing IE from Rosetta and the API failed, the Digital Representation was still partly created in Alma (could
  be found when searching for IE number but was not visible in representation list). This was fixed.

- **August 2020 Resource Management** SF: 00838752
  In some cases, existing records did not appear in Primo. This was fixed.

- **August 2020 Resource Management** SF: 00810989
  Searching for digital titles by Title Collection ID did not work properly. This was because Alma failed to build the
  collection facet when there were more than 1000 collections in the facet. This was fixed.

- **August 2020 Resource Management** SF: 835585
  The c.uresolver.viewit.related_type_list.RELATION – Label showed up for Related Titles in Primo, but did not appear in
  the Labels table. The label was added.

- **August 2020 Resource Management** SF: 838401
  Field 856 for Marc21 was not flattened to Analytics - only the first occurrence appeared. This field now appears in
  Analytic for multi values. This fix requires full indexing.

- **August 2020 Resource Management** SF: 838920
  New MDE wasn't displaying Copy&Merge/Copy&Overlay options on Search External results. This was fixed.

- **August 2020 Resource Management** SF: 00843616 00830498 00843704
  When opening a record that linked to NZ in the new MDE, the popup message 'Reload Original Record...' always
  appeared. This was fixed.

- **August 2020 Resource Management** SF: 00843640 00846051
  In the new MDE, the control vocabulary popup was not displayed. This was fixed.

- **August 2020 Resource Management** SF: 843682
  In the new MDE, the 'Push Selected to MDE' button was missing from the Related Records results page. This was
  fixed.

- **August 2020 Resource Management** SF: 00839335 00854789
  New MDE - Widening the navigation panel caused the panel buttons to disappear. This was fixed.

- **August 2020 Resource Management** SF: 00743079 00724600 00582937 00813326 00708722 00527201 00548004
  00832661
The semicolon in the 800 and 830 fields was removed when linking to authority. To avoid this, set "add_punctuation_for_heading" to "Y".

- **August 2020 Resource Management** SF: 832599
  Unimarc records with specific linked authority in publishing to Primo were not added to the results. This was fixed. The fix requires full publishing.

- **August 2020 Resource Management** SF: 840590
  The SBN selection in External Resources search was not remembered from session to session. This was fixed.

- **August 2020 Resource Management** SF: 823942
  Conversion from MARC21 to UNIMARC deleted 9xx fields. This was fixed.

- **August 2020 Resource Management** SF: 794676
  In the Metadata Editor, the keyboard shortcut for "Change authority placement" was missing. This was added.

- **August 2020 Resource Management** SF: 793726
  Normalization rules were not applied during contribution to Central Catalog. This was fixed.

- **August 2020 Resource Management** SF: 798373 818925 847519
  In some scenarios, the value of the "Default" field in the Barcode Generation Configuration was dropped and appeared as blank after being set to 'Yes' previously. This was fixed.

- **August 2020 Digital Resource Management** SF: 00681833
  When depositing IE from Rosetta and the API failed, the Digital Representation was still partly created in Alma (could be found when searching for IE number but was not visible in the representation list). This was fixed.

- **August 2020 Digital Resource Management** SF: 00819416
  The Add Titles to Collection job failed to remove titles from existing collections. This was fixed.

- **August 2020 Digital Resource Management** SF: 00825924
  The representation attached to a bib record with physical holdings on it did not have access, no matter the access rights policy. This was fixed.

- **August 2020 Digital Resource Management** SF: 00800562
  When uploading a file sized less than 100KB as a thumbnail, Alma identified it to be over 100KB. This was fixed.

- **August 2020 Digital Resource Management** SF: 00838639
  Default rules were missing in Sandbox Viewer Services. This was fixed.

- **August 2020 Digital Resource Management** SF: 00841684
  DCAP local fields were not appearing in prima_search section. This was fixed.

- **August 2020 Digital Resource Management** SF: 00838212
  When the Use Primo Metadata Fields for Delivery checkbox was selected, local fields were not supported. They are now supported and display properly.

- **July 2020 Acquisitions** SF: 00797894 00804675 00806266
  Performance enhancements were added to the PO line creation process.

- **July 2020 Acquisitions** SF: 00757142 00830347 00719198 00757646 00796170 00815392 00725019 00727030 00724503 00729501 00727818 00754788 00715117 00807475
  Improvements were made for the slow response time on the Receive New Material page.

- **July 2020 Acquisitions** SF: 00791901 00734706
  Performance improvements were made for the Receiving Department Items loaded page.

- **July 2020 Acquisitions** SF: 00793139
  In some cases, adding an email address to a work order caused it to fail. This was fixed.

- **July 2020 Acquisitions** SF: 00641376
  When entering a material type of JOURNAL in the PO line, it was saved as Journal Package. This was fixed.

- **July 2020 Acquisitions** SF: 00736046 00752661
  When creating a new purchase request that creates the bibliographic record, the record is suppressed from publishing but it is not indexed as such. Because of this, it could not be found as a record with Tag Suppressed (Title) = 'Yes'. This was fixed.

- **July 2020 Acquisitions** SF: 00593516 00817537
  When receiving a new item for a continuous PO line, an incorrect calculation caused the item status to be 'in place' instead of 'not in place'. This was fixed.
• **July 2020 Acquisitions** SF: 00788285  
  In some cases, using a prediction pattern to receive an unreceived journal caused the process fail. This was fixed.

• **July 2020 Acquisitions** SF: 00715242  
  Previously, when the MMS ID equaled zero in the Electronic Resource Activation Task List, the URL did not display or export. This was fixed.

• **July 2020 Acquisitions** SF: 00791724 00648063 00650554 00599063 00834322  
  E-books unexpectedly appeared in the Claim list. This was fixed.

• **July 2020 Acquisitions** SF: 00794334  
  A tooltip in the Vendor EDI Add Organization Unit was not correct. This was fixed.

• **July 2020 Administration and Infrastructure** SF: 00813037  
  In the Harvest Now process, when one report failed, all other reports failed as well. This was fixed.

• **July 2020 Administration and Infrastructure** SF: 00821922 00799361 00820939 00846528 00800843 00813098 00810358 00837632  
  In the SUSHI harvesting process, when a vendor returned an error about date arguments, the harvest process failed. This was fixed.

• **July 2020 Administration and Infrastructure** SF: 00791077  
  When sorting by SUSHI account in the SUSHI vendor list, some SUSHI accounts were missing. This was fixed.

• **July 2020 Administration and Infrastructure** SF: 00819599  
  In the Fines/Fees Notification Profile Record, the maximum amount was not saved. This was fixed.

• **July 2020 Administration and Infrastructure** SF: 00792037  
  Previously, every fine/fee which was created manually was written with a creator and modifier by the first and last names of the operator. This was fixed. Now it is written with the operator’s user name so it will be aligned with fines fees created automatically.

• **July 2020 Administration and Infrastructure** SF: 00829990  
  On the Payment Receipt Letter, the barcode now appears for fines that were attached to barcodes but are not attached to loans.

• **July 2020 Administration and Infrastructure** SF: 00646323  
  When attempting to add a service unit to the Receiving Operator Role after it was created, an error was generated. This was fixed.

• **July 2020 Administration and Infrastructure** SF: 00711273 00683998 00813793 00718441 00713315 00715329 00835417 00821778 00709386 00735257 00722852 00843064  
  In some cases, the History tab of the User Details page appeared with the blue indicator on the tab, but there were no changes. This was fixed.

• **July 2020 Administration and Infrastructure** SF: 00769496  
  In some cases, on the User Management Information page, when selecting the Force password change on next login checkbox, the selection was retained between users. This was fixed.

• **July 2020 Administration and Infrastructure**  
  On the User Record page, the Contact Information tab was accessible even though it should have been restricted. This was fixed.

• **July 2020 Administration and Infrastructure** SF: 00821765 00813150  
  In some cases, logging into to Alma failed due to certain Service Units used in 'Currently at'. This was fixed.

• **July 2020 Administration and Infrastructure** SF: 00823694  
  When creating a Quick Registration in a member institution, some user fields were not updated by the Network SIS loader. This was fixed.

• **July 2020 Administration and Infrastructure** SF: 00842264 00831324 00843538  
  In some cases blank address information displayed as 'Null' in user contact information tab. This was fixed.

• **July 2020 Administration and Infrastructure** SF: 00825934  
  In the resetting the password with the Forgot Password option, some of the error messages appeared in English regardless of the user's selected language. This was fixed.

• **July 2020 Administration and Infrastructure** SF: 00656217 00668227 00734071 00590725 00648393 00697253 00720620 00655322  
  The Ex Libris footer sometimes appeared in the middle of the page. This was fixed in new Alma layout.

• **July 2020 Administration and Infrastructure** SF: 00793460  
  Ex Libris, a ProQuest Company
The Alma course search criteria appeared cut. This was fixed.

- **July 2020 Administration and Infrastructure** SF: 00579885
  Inconsistent naming between navigation links and page titles. This was fixed in Alma new layout

- **July 2020 Administration and Infrastructure** SF: 00571440 00601352 00815480 00625940 00599103
  Heading shifts side to side made it difficult to select configuration menu. This was fixed.

- **July 2020 Administration and Infrastructure** SF: 00840213 00752066 00805055
  Quick User information automatically populated PIN and sent emails (Chrome, German interface). This was fixed.

- **July 2020 Administration and Infrastructure**
  When using the new menu, running 'Move set of portfolios' job reverted the interface back to the regular interface. This was fixed.

- **July 2020 Administration and Infrastructure** SF: 00634501
  In the Approval Requests List, The contents of the Digitization Type and Warning columns were not translated. This was fixed.

- **July 2020 Administration and Infrastructure** SF: 00553228 00794082
  Request button in Get It not fully clickable in Firefox. This is fixed

- **July 2020 Administration and Infrastructure** SF: 00833857
  QuickAccess display (embedded in the new Alma viewer) for Network Zone, Institution Zone, and related records is not working. This was fixed.

- **July 2020 Administration and Infrastructure** SF: 00798177 00828521 00831894 00793551 00797609 00746802 00834883 00738472 00739039 00787476 00745299 00746782 00757744
  The Letters purge with retention job was always ending with a failure result, even though it had executed successfully. This was fixed.

- **July 2020 Administration and Infrastructure** SF: 00746782 00746802 00829876 00830601 00835901 00841620 00842305 00845005
  The Letters purge with retention job ended with a failure result for some customers who set no retention value on any letter. This was fixed.

- **July 2020 Analytics** SF: 00816692
  Analytics “Interface status” has numeric value instead of Active/Inactive

- **July 2020 Analytics** SF: 00832429
  The Newly Created Portfolios out-of-the-box report referred to private folders or unconfigured prompts. This was fixed.

- **July 2020 Analytics** SF: 00622887 00791102
  In Analytics, in the Fulfillment subject area under the Loan Details folder, the Loan Note field contained no data even when the loan had a note. This was fixed.

- **July 2020 Analytics** SF: 00625633 00795793 00847844 00650924 00733831 00795408 00792709 00840418 00817982
  The Daily Book Request report sent an error message instead of the report. This was fixed.

- **July 2020 Analytics** SF: 00752860 00739058 00794706
  The Physical Items > Holding Details > Holdings Record Creation Date analytics field displayed the same value as the Holding Details > Holdings Record Modification Date analytics field and not the holding record's creation date as it appears in Alma. This was fixed.

- **July 2020 Analytics** SF: 00642793
  The Transaction Type Pie chart on the Acquisitions dashboard could not be edited to display the remaining allocation regardless of status. This was fixed.

- **July 2020 Analytics** SF: 00832277 00756030 00823270
  There was no difference between the data in the Fulfillment subject area between the Patron Details folder and the Borrower Details folder. This was fixed, and now the Patron Detail folder displays information from the time of the loan and the Borrower Details folder displays the current information.

- **July 2020 Analytics** SF: 00753773 00842063 00845646
  Results did not appear for reports with the Bibliographic Details > Language of Cataloging field in Analytics reports if the record does not include an 040 $b field. This was fixed.

- **July 2020 Analytics** SF: 00827498
  The Portfolio Access Type field (Inventory >Portfolio Details) returned two values for 'None'. This caused portfolio
duplication in the report. This was fixed and now only one record is displayed in the report.

- **July 2020 Analytics** SF: 00819855
  LC Classification range 195.001 to AC199.999 showed incorrect groups. This was fixed.

- **July 2020 API** SF: 00720750 00720048 00551789
  The New Order API was not recording the version when holdings were updated. This was fixed.

- **July 2020 API** SF: 00798293
  The GET Purchase-Requests API failed when the relevant user was missing a first or last name. This was fixed.

- **July 2020 API** SF: 00821361
  The Update-Portfolio API was updating the portfolio incorrectly when the payload included more than one local_date_coverage_parameters. This was fixed.

- **July 2020 API** SF: 00820598
  The Retrieve Electronic Collections API was slow when called without any search parameters. This was improved.

- **July 2020 API** SF: 00813079
  Hold Requests created by API didn't include item barcode. This was fixed.

- **July 2020 API** SF: 00819485
  The GET-Users API, when used with wrong search syntax for the 'q' parameter, wasn't returning the expected error message. This was fixed.

- **July 2020 API** SF: 00836954
  The Get-Requests-By-Bib-mms-id was skipping digitization requests in some cases. This was fixed.

- **July 2020 API** SF: 00695928
  The Create Portfolio API (POST /bibs/{mms_id}/portfolios/) was creating multiple IEE records. This was fixed.

- **July 2020 API**
  The GET-Bibs API was not returning the total_record_count field. This was fixed.

- **July 2020 API** SF: 00840598
  The GET-Bibs API returned an error when, according to the search parameters, no record was found. It now returns an empty list of records.

- **July 2020 Resource Management**
  Display issues on the the CDI Collection Tab were fixed.

- **July 2020 Resource Management**
  Publishing to CDI failed when there was an empty publishing profile. This was fixed.

- **July 2020 Resource Management**
  DB type collections showed the selective indication option in multi-campus. This was fixed.

- **July 2020 Fulfillment**
  Previously, you could not place a manual description request if the item was in a temporary location. This was fixed.

- **July 2020 Fulfillment** SF: 00492161
  A performance improvement has been made for selecting a new processing location in Alma.

- **July 2020 Fulfillment** SF: 00635597 00793126
  Request recalculation ignored the On Shelf request policy. As a result, recalculation of a request sometimes caused the request to switch to an available item even if the On Shelf request policy did not allow it. This was fixed.

- **July 2020 Fulfillment** SF: 00648548
  The Primo Get-It pane loading time was slow for serial titles that had many related records. The loading time was improved. Additional improvements are in progress.

- **July 2020 Fulfillment** SF: 00824480
  Under certain circumstances, the last renew status of a loan was incorrect. This was fixed.

- **July 2020 Fulfillment** SF: 00809021
  A content indicator was added to the Instructors tab in the course details page.

- **July 2020 Fulfillment** SF: 00842579 00823488
  The Quick Print Preview of Ful Resource Request Slip Letter was not Supporting Japanese Characters. This was fixed.

- **July 2020 Fulfillment**
  If the Notifications - Send Courtesy Notices and Handle Loan Renewals job failed to send emails because of users with no preferred email address, the job completion status was set to either Completed with Errors or Completed with
Warnings according to the percentage of failures. Now the job completion status is always set to Completed with Warnings in this case, regardless of the number of failures.

**July 2020 Fulfillment**
A performance improvement has been added in the fulfillment area.

**July 2020 Fulfillment** SF: 00809197
When cancelling a request from the Patron Services page, the cancellation reasons did not appear in the order of the code table, as they do when cancelling form the Monitor Requests page. This was fixed.

**July 2020 Fulfillment**
If the Loans - Overdue and Lost Item job failed to send emails because of users with no preferred email address, the job completion status was set to either Completed with Errors or Completed with Warnings according to the percentage of failures. Now the job completion status is always set to Completed with Warnings in this case, regardless of the number of failures.

**July 2020 Fulfillment**
Translations were added for labels and buttons within the user summary section of the Patron Services page.

**July 2020 Fulfillment** SF: 00726894 00759677 00698458
Alma does not support sending emails to invalid addresses. This is now reflected on the job report.

**July 2020 Fulfillment** SF: 00743690
When importing a calendar from an excel file, events with 'Yearly' recurrence were incorrectly imported as 'Weekly' events. This was fixed.

**July 2020 Fulfillment** SF: 00756146
Some performance improvements were done for handling NCIP messages. Additional improvements are planned for future releases.

**July 2020 Fulfillment** SF: 00432307
The Pick from Shelf print slip report is now sorted in the same order as the UI list.

**July 2020 Fulfillment** SF: 00414707 00474012 00801139 00549665 00459766 00612811 00526298 00392229 00736894 00460182 00558398
The content indicator of requests and returns tabs on the Patron Services page are now populated when coming from user details Manage Fulfillment Activities.

**July 2020 Fulfillment** SF: 00740059 00574434
When trying to place a request from Patron Services, and the record had only items in a temporary location, the Booking button that not appear within the Submit Request popup. This was fixed.

**July 2020 Fulfillment** SF: 00792171 00790545 00812022 00798431
When a physical item request was in the pick from shelf stage, and then the item information was changed, the resource request slip was immediately printed a second time. Now, a new resource request slip is printed in this case only if one of the following fields is changed: Location, Description, Material type, Item policy, Process type. Note: If the request will not be handled (i.e. it is still in the pick from shelf stage) until the next execution of the Requests - Recalculate after Inventory Update job, the job will process the request and will trigger a printing of a new slip regardless of which fields were changed.

**July 2020 Fulfillment** SF: 0079385 00790545 00812022 00798431
The reshelving of an item was wrongly considered an inventory update and therefore incorrectly triggered request recalculation by the Requests - Recalculate after Inventory Update job. Since the job also reprints resource request slips during the recalculation, this caused the slips for these items to be printed a second time for no reason. This was fixed. Now reshelving will no longer trigger request recalculation and therefore the slips will not be reprinted.

**July 2020 Fulfillment**
Patron information will now be exported within the exported document (XML) for any request type with such information.

**July 2020 Fulfillment**
When an AFN request was created for an item that was temporarily in remote storage, the request was sometimes placed in Pick from Shelf status instead of Waiting for Remote Storage status. This was fixed.

**July 2020 Fulfillment** SF: 00701755
The XML of the Resource Sharing Shipping Slip Letter was missing the issue_level_description information. This was fixed.

**July 2020 Fulfillment** SF: 00690928
Ex Libris, a ProQuest Company
The series title number was not added to FulOutgoingEmailLetter and QueryToPatronLetter. This was fixed.

- **July 2020 Fulfillment** SF: 00746820 00805568
  When trying to renew a lending request either manually or automatically, and the Resource Sharing library has no opening hours, the renew response was sent without a due date and an internal error displayed to the page in the manual action. This was fixed. Now, in this circumstance, the renew action is not performed, no message is sent to borrower and an informative error displays on the page.

- **July 2020 Fulfillment**
  When converting an article resource sharing request to a digitization/hold request, the note did not include the Article Title and Author information. This was fixed.

- **July 2020 Fulfillment** SF: 00812077 00821850
  In some cases, shipping a lending request digitally resulted in an error. This was fixed.

- **July 2020 Fulfillment** SF: 00694833
  The parameter rs_override_local_partner_shared_barcodes to override the shared barcodes in the distribution of partners was enabled for all BIBSYS institutions.

- **July 2020 Fulfillment** SF: 00800370
  When sending an NCIP AccepItem message for a borrowing request that was initially created by Alma, Alma ignored the DateForReturn field and did not update the request due date accordingly. This was fixed. Alma now updates the borrowing request with the new due date if set. No change is done in the loan due date in case the item is loaned already.

- **July 2020 Fulfillment** SF: 00740309 00453083 00731900 00736130 00728401 00741175 00626932 00623005
  Notes containing a carriage return in ISO messages sometimes caused the message to fail. This was fixed, Carriage returns are now removed from the notes of all ISO messages.

- **July 2020 Fulfillment** SF: 00648258 00684788
  The dynamic URL was not encoded properly. This was fixed.

- **July 2020 Fulfillment** SF: 00460098 00715241 00450769 00580891
  Previously, if the ful_network_default_pickup_inst parameter was set to the patron, the initial value of the pickup institution field in a fulfillment network request form was left blank. This was fixed. Now, when the parameter is set to patron, the initial value is set to the patron's institution, meaning that linked account users show the patron's source institution. Note that this depends on the configuration of the item's owning institution and not on the logged in primo user.

- **July 2020 Fulfillment**
  The pickup institutions list in Alma and Getit request forms is now alphabetically sorted.

- **July 2020 Fulfillment** SF: 00751777 00729366 00727865
  A performance improvement was made to the Loan - Overdue and Lost Item job.

- **July 2020 Fulfillment** SF: 00831954
  Previously, the Request Send Report job always appeared as active on the Fulfillment Jobs Configuration page, although the job was actually inactive. This was fixed.

- **July 2020 Fulfillment**
  In some cases, the External_System_RS_Export job failed to export the request due to a change in the request or item during the job execution. This was fixed.

- **July 2020 Resource Management** SF: 00756530
  In Repository Search, when searching in advanced search using Additional Publication year > Contains keywords = &x22;", the results page was not loaded properly. This was fixed.

- **July 2020 Resource Management** SF: 00792655
  When merging secondary bib record 'A' (attached to an Electronic Collection) into a primary bib record 'B', the Electronic Collection was correctly attached to record 'B'. However, a redundant representation of the primary record 'B' remained active, which caused this record to be published twice. This was corrected. The redundant representation of the primary record 'B' is deleted as part of the merge and combine process.

- **July 2020 Resource Management** SF: 00826000
  'Physical Inventory Operator' role does not work as expected, causing users without Repository Manager role unable to see the holdings/items links when opening a public itemized set. This was fixed.

- **July 2020 Resource Management** SF: 00788933 00816952 00759342
  The 500 Internal error was issued when attempting to save predicted items. This was fixed.
• **July 2020 Resource Management**
The relinking option of a holding or an item (functionality available for the Physical Inventory Operator/Extended/Manager/Repository Manager/Purchasing Operator/Purchasing Manager roles) was allowed for any holding or item even when they are not in the same library scope.

• **July 2020 Resource Management SF: 00789803 00789816**
When holdings had more than one item and one of the items changed his location to a new holdings, the Modify column contained wrong data. That was fixed. Old data wasn't fixed, to fix it, re-save the item.

• **July 2020 Resource Management SF: 00812367**
In the Physical Item 'view' mode, the 'Relink to another bibliographic record' button is now visible only to the following roles, which include the 'PHYSICAL_INVENTORY_MANAGE' privilege: Repository Manager, Physical Inventory Operator (+ extended), Purchase Operator, Purchase Manager.

• **July 2020 Resource Management SF: 00239222**
After contributing an electronic collection to the Community Zone, updating the URL of a portfolio in the collection changed the local portfolio but not the Community Zone. This was fixed.

• **July 2020 Resource Management SF: 00688677**
When a portfolio already had a license attached and the import profile did not contain a license, portfolio license was not deleted. This was fixed.

• **July 2020 Resource Management SF: 00754725**
Portfolio with a big amount of coverages caused overlap analysis to fail. This was fixed.

• **July 2020 Resource Management SF: 00799486**
The Upload Electronic Holdings job for Ovid was not activating or updating monographs when multiple profiles were set up in a multi-campus environment. This was fixed.

• **July 2020 Resource Management SF: 00828538 00804299 00824720**
When an identifier from an Upload Electronic Holdings job input file already existed in at least two different bibliographic records within an institution, the portfolio was not activated or updated by the job. This was fixed.

• **July 2020 Resource Management 'Type' label appeared twice in the 'Manage Column Display' when searching for electronic collections. This was fixed to appear only once.**

• **July 2020 Resource Management**
The 'Service' label that appeared in the 'manage column display' when searching for electronic collections was removed because the 'Services' label already exists and therefore, the 'Service' label is unnecessary.

• **July 2020 Resource Management SF: 00826322**
The Upload Electronic Holdings job used to update and reindex every active portfolio in the input file, even if no changes were made. The job now checks for changes before updating portfolios.

• **July 2020 Resource Management SF: 00827823 00828566**
The upload electronic holdings job used to update and reindex every active portfolio in the input file, even if no changes were made. The job now checks for changes before updating portfolios.

• **July 2020 Resource Management SF: 00838823 00827077 00841414 00827875 00826257**
A new data corrector, DataCorrectorDeleteCollection, was created in order to manually delete collections were the deletion job failed. This can be run from the Data Corrector page.

• **July 2020 Resource Management SF: 00839043**
The "Selected Full Text' service could not be deleted from electronic collection. This was fixed.

• **July 2020 Resource Management SF: 00809493**
In some cases, removing a link to a bibliographic record in an electronic collection did not trigger the publishing of the bib record as deleted. This was fixed: now when a bib record is separated from a collection, it is properly published as deleted.

• **July 2020 Resource Management SF: 00731853**
With the October release, the Publish Electronic Records to CDI job was made available for all customers, even when the parameter publish_to_central_index was set to 'PC only'. This was fixed.

• **July 2020 Resource Management SF: 00794242**
In enrichment publishing, the Create Date/ Modification Date was wrong in some cases. This was fixed.
• **July 2020 Resource Management** SF: 00796215
  Error messages displayed when trying to delete collections relating to a workflow, such as import, profile/deposit, and profile/digitization profile did not provide enough information. This was fixed.

• **July 2020 Resource Management** SF: 00814009 00802283
  A new data corrector & DataCorrectorDeleteCollection, was created to manually delete collections where the deletion job failed.

• **July 2020 Resource Management** SF: 00827068 00798456
  Running Update Electronic Holdings Integration Profile for SPRINGER produced the error 'An error occurred while downloading vendor's file'. This was fixed. The jobs that did not complete successfully, now provide the right indication.

• **July 2020 Resource Management** SF: 00829504
  In some cases, 'Combine set' showed as failed, but succeeded to create the new set. This was fixed.

• **July 2020 Resource Management** SF: 00791647
  Portfolios that were linked to more than one service (wrong service ID in TPS) caused a different number for collection and service. A data corrector was added to fix the issue.

• **July 2020 Resource Management**
  ‘Held By’ page – Summary Holdings: previously only field 866 subfields $a and $z were displayed. This was fixed. If the holdings record contains fields 866, 867, or 868 (all three are repeatable) with subfields $a (non-repeatable) and $z (repeatable), all of them will be displayed. Fields are separated with “;” (space semicolon space), and subfields with “–” (space dash dash space).

• **July 2020 Resource Management** SF: 00701001
  Browse Shelf Listing of Dewey call numbers: the sorting of the browsed results has been corrected for Dewey call number that contain an underscore (“_”). This fix is relevant only when the “Dewey_normalization_numeric_sort_after_underscore” customer parameter is set to “true”. In addition, full inventory indexing is required, with the “recalculate Holdings Operational” option enabled.

• **July 2020 Resource Management** SF: 00602927 00479956 00826458 00627399 00602926
  Advanced search with the “Contains Phrase” operator (and also “Starts With”, which is available for some indexes) did not work for search phrases that included an apostrophe. This was fixed.

• **July 2020 Resource Management** SF: 00658944 00670815 00752783
  Previously, when saving a record and the record was not changed, the ‘Modified By’ did not change, but the ‘Modification Date’ did change. This was fixed. Now the ‘Modified By’ does change when the record is saved and no change was made.

• **July 2020 Resource Management**
  When cataloguing in Hebrew, and adding a Hebrew letter directly after $s$, the key Backspace does not work. When the ‘show directional characters’ option is on, the ‘backspace’ key does not work at all on ‘$s$w’ (for example). If the ‘show directional characters’ option is off, only clicking twice on the backspace key works. Both issues were fixed.

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the Metadata Editor, a warning message was displayed, followed by a system error message; as a result, the record was deleted although it should not have. This was corrected.

- **July 2020 Resource Management** SF: 00759171
  CNMARC profile - content code values for field 100 position 17 had the same value for 2 codes. The value of code k at position 17 of field 100 was updated.

- **July 2020 Resource Management** SF: 00681621
  After browsing for an item with a specific source of classification or shelving scheme (call number type = source specified in subfield $2) through the 'Browse Shelf Listing' feature, editing it and then returning back to the MD Editor by selecting 'Cancel,' 'Save' or the 'Back' arrow, the user was not directed back to the Browse Shelf Listing with the previous parameters settings. This was fixed.

- **July 2020 Resource Management** SF: 00814758
  Relinking holdings did not remove the merged empty holding. This was fixed.

- **July 2020 Resource Management** SF: 00830152
  MD Editor New UI - problematic display of info message 'Alma has attempted to link the bib heading...'. This was fixed.

- **July 2020 Resource Management** SF: 00702239
  The headings of field 490 were wrongly linked to authorities. The data was fixed (link removed), and added code that prevents future link of unauthorized fields.

- **July 2020 Resource Management** SF: 00754256 00790005 00707903
  AUTH heading - punctuation was removed when linking an authority record via F3, even though parameter add_punctuation_for_heading was set to "N". This was fixed.

- **July 2020 Resource Management** SF: 00795572
  When Editing CZ NLI Authorities, no drop-down list for Expand from Template appeared. This was fixed.

- **July 2020 Resource Management** SF: 00798137
  CZ authority records for NLI - F3 was not working in 37X-fields for some institutions. This was fixed.

- **July 2020 Resource Management** SF: 00744438
  Field 075 (Type of entity) was missing in the MARC21 Authority profile. This was fixed.

- **July 2020 Resource Management** SF: 00813630
  After updating a BARE authority record, the 035 was missing. This was fixed.

- **July 2020 Resource Management** SF: 00820894 00629897 00667186 00504073 00500239 00602332
  An error was reported for a specific case when running the Update Inventory import profile. It was fixed.

- **July 2020 Resource Management** SF: 00743313
  In some cases, a New Order import job that imported greater than 50 records that all used the same PO created the PO twice. This was fixed.

- **July 2020 Resource Management** SF: 00821832
  Alma was slow when opening 'Monitor and View Imports'. This was fixed.

- **July 2020 Resource Management** SF: 00819352
  While updating an existing import profile, the confirmation message indicated that a new profile was added. The feedback message was fixed.

- **July 2020 Resource Management** SF: 00811504
  312, 314, 320 and 330 UNIMARC fields were not converted to MARC21 fields during import. This was fixed.

- **July 2020 Resource Management** SF: 00822760
  Contribution of SBN Authority record of type Authore failed after modification. A specific error message was added.

- **July 2020 Resource Management** SF: 00822752
  Contribution of Titolo Uniformi authority records generated a different response from SBN than other authority types. Alma functionality was modified to handle this.

- **July 2020 Resource Management** SF: 00553890
  For UNIMARC Browse Bibliographic Headings, some titles did not display properly. This was fixed. A full inventory re-indexing (including 'recreate bib headings') needs to be run for this fix to be fully functional.

- **July 2020 Resource Management** SF: 00813711 00742324
  SBN integration - Search for fingerprint (T012) was missing for materials other than Music. Impronta search fields were added.
• **June 2020 Acquisitions** SF: 00824172 00756602 00820715 PO Line that has items with Expected receiving date in the past and arrival date is empty did not go in to claim list. This was fixed and now PO Line that has items with Expected receiving date in the past and arrival date is empty is set to Claim even if the expected receiving date of the PO Line is in the future.

• **June 2020 Acquisitions** SF: 00757262
  The Query to requester letter was not marked as Patron Facing in the Letters Configuration page. This was fixed.

• **June 2020 Acquisitions** SF: 00756111
  The Purchase Requests labels from PurchaseRequestStatus were not translated properly. This was fixed.

• **June 2020 Acquisitions** SF: 00802858
  On the Manage Purchase Requests page, assigning an old purchase request sometimes failed. This was fixed.

• **June 2020 Acquisitions** SF: 00733730 00735241 00734629 00758520 00735153 00743778 00736304 00733665 00735583
  On the Receive New Material page, it was not possible to search and find PO Lines with special characters ("", ?, ?, ?, "?"). This was fixed.

• **June 2020 Acquisitions** SF: 00733944 00725447 00708804
  On the In Process Items page, the filter change was incorrectly indicated and the check boxes were cleared. This was fixed. Now when selecting Done, the check boxes remain selected.

• **June 2020 Acquisitions** SF: 00788558 00731832 00733608 00755417 00711275 00715519 00682815 00709013 00724532 00803528 00802837 00716970 00732970 00727471 00730225
  On the E-activation task list, an error message was displayed when selecting Done. This was fixed.

• **June 2020 Acquisitions** SF: 00805776 00810902 00805360 0081037 00812173 00840951 00820300 00796875 0082630
  When saving a new SUSHI account, if there was a problem verifying the report type(s) with the vendor, the account was not saved. This was fixed. Now, the user is informed of the problem via a confirmation message and the account can be saved.

• **June 2020 Acquisitions** SF: 00800873
  In the SUSHI harvesting job, the word retrieved was misspelled. This was fixed.

• **June 2020 Administration and Infrastructure** SF: 00486570 00669543 00592486 00751698 00614625 00669055 00709013 00730731 00734083 00792265 00615607 00728348 00743968 00639741 00655349 00818122 00729353 00734810 00747349 00741419 00742648 00626193 00727434 00751040 00574099 00666641 00626801 00822909
  Some Alma menus did not appear when working with Alma in Chrome. This was fixed.

• **June 2020 Administration and Infrastructure** SF: 00791495
  In some cases, attempting to edit the User Notifications Letter resulted in an error. This was fixed.

• **June 2020 Administration and Infrastructure** SF: 00745285
  The letter ILL_EMAIL_TO_USER was missing on the Letter Configuration page. This was fixed. Please note that only the Activation Status and Retention Period of this letter are controlled via the Letter Configuration page.

• **June 2020 Administration and Infrastructure** SF: 00795641
  In some cases, an error appeared when a user logged in. This was fixed.

• **June 2020 Administration and Infrastructure** SF: 00818479
  On the new Rialto menu, the Analytics menu is missing the Data available as of and Data updated as of information. This was fixed.

• **June 2020 Administration and Infrastructure** SF: 00832212
  When creating a Resource Sharing request via Primo, the Requested Media field was not set to the default value Any in languages other than English. This was fixed. If the field is left empty, the default value is now set to Any in all languages.

• **June 2020 Administration and Infrastructure** SF: 00754992 00792615 00785391 00804629
  The widget "Scheduled Jobs Status" sometimes marked a job list as successful even if some jobs failed or completed with errors. This was fixed.

• **June 2020 Administration and Infrastructure** SF: 00719689
  Sometimes when opening the deposit page, if the language was changed, the form language still defaulted to the previous language. This was fixed.
• **June 2020 Administration and Infrastructure** SF: 00804150 00823076
  The Suppressed status set by 'Set Management Tags' job was not indexed for search. This was fixed.

• **June 2020 Analytics** SF: 00731299
  The OBI displayed the wrong number of citations for lists associated with multiple courses. This was fixed.

• **June 2020 Analytics** SF: 00747199
  Notes from the 852 field were truncated in the Holding Local Param fields to 500 characters. This was fixed by increasing the size limit of the fields to 4000 characters.

• **June 2020 Analytics** SF: 00799268
  Analytics export to CSV was limited to 250K rows. This was fixed by expanding the limit to 500K rows.

• **June 2020 Analytics** SF: 00754949
  In the Course Reserved subject area, the Copyright Status field was empty even when in Alma the copyright status was 'Not determined'. This was fixed, and now the Copyright Status field in analytics displays 'Not determined'.

• **June 2020 Analytics** SF: 00695629 00758129
  Sometimes some of the characters of fields in Alma do not appear in Alma Analytics. This was fixed.

• **June 2020 API** SF: 00803524
  The Update/Notify Users Job was could not change users from External to Internal and send the Identity service mail at the same time. This was fixed.

• **June 2020 API** SF: 00791906
  The Linked data API returned invalid XML when including links to portal.dnb.de. This was fixed.

• **June 2020 API** SF: 007991906
  The Get-POL-Items API can now be run with limit and offset parameters. By limiting the number of items returned the API can respond quicker.

• **June 2020 API** SF: 00790601
  In the Update-Portfolio API, the <static_url> field did not take effect. This was fixed.

• **June 2020 API** SF: 00814667
  In some cases, the Get-invoices API returned an incorrect invoice_date. This was fixed.

• **June 2020 API** SF: 00800639
  Previously, the Update-Vendor API deleted and created new vendor accounts and interfaces each time the API was used. Now, when using the Get-Vendor API, IDs for the accounts and interfaces will be retrieved, when included in the Update-Vendor payload, to identify the existing accounts and interfaces.

• **June 2020 API** SF: 00621714 00757380 00808321
  The 'Retrieve Job Instance Details' API did not retrieve the 'Rejected users' alert from the SIS job. This was fixed.

• **June 2020 Fulfillment** SF: 00740116
  Alma quick printing did not work when RFID was active. This was fixed.

• **June 2020 Fulfillment** SF: 00757624 00817997
  On the Scan-In Change Item Information page, an asterisk was added to the Location field to indicate that it is a mandatory field.

• **June 2020 Fulfillment** SF: 00740116
  In the Change Bulk Due Date job, the FTP test, when applicable, is now executed once per job instead of once per notification.

• **June 2020 Fulfillment**
  Previously, when scanning in an incomplete multi-part item via RFID, if the operator chose to continue the scan anyway by clicking the Confirm button in the warning popup which is displayed in this case, sometimes instead of scanning in the current barcode, a previously scanned barcode was scanned again. This was fixed.

• **June 2020 Fulfillment** SF: 00800639
  If an item was in department at a process, scanned in with no following requests and was designated to transit for reshelving, the description, call number and other fields were not displayed in the items details within the list. This was fixed.

• **June 2020 Fulfillment**
When using RFID and returning an item, if the security bit update failed, clicking Retry set the security bit to the wrong value. This was fixed.

- **June 2020 Fulfillment** SF: 00820005
  An error occurred when editing a loan limit rule containing an input parameter with a value that no longer exists, such as a library or location. This was fixed.

- **June 2020 Fulfillment** SF: 00663937 00694029
  In a SIP2 patron information request from a Bibliotheca kiosk, the Overdue Items request was not aligned with the Charged Items request. This was fixed. Now, Alma returns only the overdue items without the charged items. Also, when BP or BQ message elements are requested, Alma now returns only the requested items.

- **June 2020 Fulfillment** SF: 00725360
  For a title with multiple items, of which some were digitizable and some were not, Get It sometimes displayed all the items as not digitizable. This was fixed.

- **June 2020 Fulfillment** SF: 00496219 00642577
  An error occurred when editing a loan limit rule containing an input parameter with a value that no longer exists, such as a library or location. This was fixed.

- **June 2020 Fulfillment** SF: 00791142
  To improve performance, optimizations were performed for the reading rooms desks, active hold shelf pages.

- **June 2020 Fulfillment**
  On the Return items page, when using RFID, if the security bit update failed, an error was generated when selecting Retry. This was fixed.

- **June 2020 Fulfillment** SF: 00703944
  The potential accrued overdue fine sometimes did not appear in the Overdue And Lost Loan Notification letter. This was fixed.

- **June 2020 Fulfillment** SF: 00630663 00690064 00806630 00732232
  Selecting Submit Request on the Manage Patron Services page occasionally resulted in an error, typically when selecting the second time. This was fixed.

- **June 2020 Fulfillment** SF: 00663701 00637694 00630971 00794626 00634371 00637626
  When an item was put into transit to fulfill a Personal Delivery request, the From locations for transit were incorrectly listed as the same as the To locations. This was fixed.

- **June 2020 Fulfillment** SF: 00685089
  Restore requests were incorrectly triggering an Item is Requested by Another Patron block. This was fixed.

- **June 2020 Fulfillment** SF: 00742228
  Placing a shipping request from the lending institution's Manage Fulfillment Option failed when the holding had a description but the items did not. This was fixed.

- **June 2020 Fulfillment** SF: 00653309
  Previously, the locate job did not check if the location of the item was suppressed or not, so items from suppressed locations were retrieved. This was fixed.

- **June 2020 Fulfillment**
  In a fulfillment network, the Hold Shelf list did not display items from a different institution if the other institution was from a different server. This was fixed.

- **June 2020 Resource Management** SF: 00754782
  The Authority Control Rules menu was not visible for some allowed users (for roles Cataloger_administrator and General_System_Administrator). The was fixed.

- **June 2020 Resource Management** SF: 00806297 00827966 00802931 00813156 00797996 00803517 00790964 00788304
  Merging a patron with Primo VE preferences into an internal user and an external user (checking 'Copy as internal' checkbox) failed and left the patron inactive. This was fixed.

- **June 2020 Resource Management** SF: 00176545 00644159
  OCLC connection always returned success message even though the record was not exported. This was fixed and now, in case of failure there will be an error message: Import failed. Reason: <>

- **June 2020 Resource Management** SF: 00734291 00819136 00754714
  Update inventory import's job was updating "Set Management Tags" section of a bib record, although this section is not included on profile configuration. This was fixed.
In unusual scenarios, using UI or API, it was possible to create two items with the same barcode when barcodes are generated automatically. This was fixed.

When running the 'Change Holding Information' job and the holdings did not match the normalization rule, the holdings, incorrectly, were changed anyway. This issue was fixed.

Customer's time zone impact on the following date fields that are in 'Electronic Service Editor' page: 'Active from date', 'Active until date' and 'Service unavailable message as of date' was fixed.

Fixed adding services so that they were not properly displayed.

Space characters in portfolio linking static URLs were encoded as '+' instead of '%20', leading to some broken links. This has been fixed.

Fixed, serviceId will not hold the collection id after data corrector work.

When using create E activation task from the electronic resource if the PO Line is not found an error message is displayed. This was fixed.

Fixed an error caused by an empty list in some environments.

When connecting to a remote digital repository that required authentication did not work. This was fixed.

A user with the Digital Inventory Operator role could not manage or create sets with a content type of Digital Titles. This was fixed by giving the Digital Inventory Operator role the SETS_EDIT privilege.

Fixed handling of deleted holdings + items in member to trigger publishing from NZ.

Search for portfolios with a URL that contains 'www.' and/or special characters (period, hyphen etc.) returned with no results.

Searching for Storage Location ID 'Is Empty' under 'Physical Items' did not work properly. This has been corrected. For this fix to take effect, full inventory indexing must be run.

The hyphen '-' from the authority field 400 $$d appeared in front of the year. This was fixed.

Sets with a forward slash ' /' character in the set name caused an error in analytics. This was fixed.

The 'All' (default) option was not the first in other languages. This was fixed.

Normalize apostrophe (in the four forms listed) to nothing instead of space when creating filing value (which is used for searching and sorting bib headings). U+0027

In the MDEditor when browsing title heading and the active registry has unimarc kormarc or cnmarc activated, if a title heading match more than one registry the view is showing only the first bib for the first registry. The issue has been fixed and now the user show all the bib of the different registry.

In some cases, an SRU search in the Network Zone with the Enrich with Members Availability option selected caused an error message when holdings for a member consisted only of collections. This was fixed.
- **June 2020 Resource Management SF: 00792125 00815482**
  Merge records and combine inventory for network records: In some cases (mostly when the primary network record was linked to a CZ authority record), the local (cached) secondary record – of the member institution performing the merge action - was not deleted, and its inventory was not transferred to the primary record; in addition, the primary record was locked for editing. Both these issues have been fixed.

- **June 2020 Resource Management SF: 00753109**
  Changed order of filters in Solr configuration for text_japanese fields so that both pre-composed diacritics and combining diacritics are normalized to the same values.

- **June 2020 Resource Management SF: 00527082**
  Browse Bibliographic Heading -> choose a heading first time (click 'view') resets the scroll bar of the headings window. This was fixed.

- **June 2020 Resource Management SF: 00502554**
  Switching between previous versions in the MD Editor does not reset the scroll bar. This was fixed.

- **June 2020 Resource Management SF: 00714086**
  In some cases, when a member institution performed 'Merge & Combine' from the MD Editor on two network records, the 'primary' network record was locked. This has been corrected.

- **June 2020 Resource Management SF: 00736194**
  When returning to MD Editor from Item/Portfolio/POL creator in Hebrew UI there is an error. This was fixed.

- **June 2020 Resource Management SF: 00686125 00789542 00791248**
  Merge records and combine inventory for network records: In some cases (mostly when the primary network record was linked to a CZ authority record), the local (cached) secondary record – of the member institution performing the merge action - was not deleted, and its inventory was not transferred to the primary record; in addition, the primary record was locked for editing. Both these issues have been fixed.

- **June 2020 Resource Management SF: 00668558**
  New MDE - Push to MDE is not working when a record does not have a modification date. This was fixed.

- **June 2020 Resource Management SF: 00741786**
  Preferred Term Correction job must check $6 linkage when matching the value of the linked datafield in the bib heading record with the source datafield's $6 value in the bib record when dealing with 880 fields, otherwise, if multiple 880 fields are linked to the same heading, only the first matching 880 field will be corrected.

- **June 2020 Resource Management SF: 00789824 00754247**
  Local Authorities had extra spaces - resulted with them being able to be found by F3, but not linked. The issue will be solved by running full inventory index on authorities - with recalculate MMS Opr and recalculate Auth heading.

- **June 2020 Resource Management**
  Headings 800, 810 with $$e unlinked after PTC - when auth priority is defined for a subject. This was fixed.

- **June 2020 Resource Management SF: 00803094**
  F3 did not show matched authority for linked headings. This was fixed. The $w was removed from the filling value of the 650 field.

- **June 2020 Resource Management SF: 0066607**
  The BIBFRAME view of bibliographic records was missing links for local authority records. This was fixed.

- **June 2020 Resource Management SF: 00752996**
  When trying to resolve multi-match issue of MD Import, which required manual handling, the 'Approve Import' button appeared - this was fixed. 'Approve Import' will appear only in cases of issues that have been assigned to handling type 'Manual'.

- **June 2020 Resource Management SF: 00813099 00800488**
  New Order/Metadata Import fails with an error. This was fixed.

- **June 2020 Resource Management SF: 00810041**
  When working with an Aleph central catalog integration profile, it is possible to use the Z39.50 target that is defined in the profile as an external search target (without configuring it in the external search resources/profiles) The attributes...
for searching this target were not customizable. This was fixed and now the Z39.50 attributes can be customized by modifying the 'Z39 Term Transformation' mapping table. This can be done by Ex Libris staff only.

- **June 2020 Resource Management** SF: 00815780
  When contributing a record to SBN it was not possible to reload the record from SBN when contribution fails. This was fixed.

- **June 2020 Resource Management** SF: 00827795
  Publishing information for the Central Discovery Index was missing. This was fixed.

- **June 2020 Resource Management** SF: 00825111
  A database collection that was deactivated in Alma still got published to CDI. This was fixed.

- **June 2020 Resource Management** SF: 00825966 00827809
  Changes to the CDI Selective settings for Aggregator or Selective collections did not get published to CDI correctly, which resulted in incorrect availability information in CDI. This was fixed.

- **June 2020 Resource Management**
  The facet count in for CDI related facets was not always correct after searching for an electronic collection. There is currently no solution to provide accurate numbers for the CDI related facets, so they were removed to avoid confusion.

- **June 2020 Resource Management** SF: 00756125
  Similar Arabic letters will be treated as the same letter. Each of the letters below, which are in the same row, will be treated as the same letter:

  - ا - أ - إ
  - ي - ي - ئ
  - ه - ه
  - و - و
  - ك - ك
  - ف - ف
  - ز - ز
  - ب - ب
  - ج - ج
  - ق - ق

  This new functionality requires reindexing, and until the reindexing occurs, browsing of bib headings, and authorities search using F3, may not work properly.

- **May 2020 Acquisitions** SF: 703086
  The PO line advanced search did not take the scope into account. This was fixed.

- **May 2020 Acquisitions** SF: 632395
  When executing import EOD for Electronic Resource and the Do not create EActivation task field was selected, the creation of activation tasks was not skipped. This was fixed.

- **May 2020 Acquisitions**
  The MR1 SUSHI harvest failed because the title was not sent. This was fixed.

- **May 2020 Administration and Infrastructure** SF: 793075
  There is a new configuration option that can be set by Support to address this issue. See the UTF-8 Special Character Handling section in the May 2020 release notes for details.

- **May 2020 Administration and Infrastructure** SF: 00675534 00694010
  Using '@' for email addresses in Swiss & German keyboards, in Edge and IE browsers did not work. This was fixed.

- **May 2020 Administration and Infrastructure** SF: 733011
  Using the AltGr+S hotkey to type the Polish letter ‘?’ opened the Scan In Items page instead. This was fixed.

- **May 2020 Administration and Infrastructure** SF: 00755480 00802287 00806050 00799674 00757561 00751297 00791907 00751472 00798026 00751896 00808876 00749748
  After the removal of the XML to Letter Admin page, XML notices continued to be sent with no way to remove them. This was fixed.

- **May 2020 Administration and Infrastructure** SF: 00798967 00800321 00812794

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When trying to log in to Alma via SAML, and then, on the same browser, going to the local authentication, the second link displayed the IdP login page again. This was fixed.

- **May 2020 Administration and Infrastructure** SF: 816651
  In the new Alma layout, clicking 'Save' after creating a physical item via the Metadata Editor saved the item successfully but did not leave the Metadata Editor page. This is fixed.

- **May 2020 Administration and Infrastructure** SF: 713313
  We refresh the search labels cache after distributing code tables

- **May 2020 Administration and Infrastructure**
  The ALTO search could not find punctuation marks. This was fixed.

- **May 2020 Administration and Infrastructure** SF: 435157
  Slow upload times were noted in production. This was fixed.

- **May 2020 Analytics** SF: 560641
  The 'Updated by' field now shows the logged in user that made the change and not the default Ex Libris user.

- **May 2020 Analytics** SF: 00622887 00791102
  In Analytics, in the Fulfillment subject area under the Loan Details folder, the Loan Note field contained no data even when the loan had a note. This was fixed.

- **May 2020 Analytics** SF: 796152
  The Storage Location ID field was missing from the Physical Item Details folder in the Physical Item Historical Event SA. The field was added.

- **May 2020 API** SF: 745259
  The Update Electronic Collection API did not work with JSON. This was fixed.

- **May 2020 API** SF: 755430
  The GET Bibs API was returning an incorrect error message when searching for a non-existent Holding record by API. This was fixed.

- **May 2020 API** SF: 720739
  The Create invoice API was slow in some cases. The performance of the API was improved.

- **May 2020 API** SF: 742722
  In the PUT/POST Partners APIs, address, emails and phones did not support 'ALL' as an option. This was fixed.

- **May 2020 Digital Resource Management**
  When uploading a folder with multiple files using the digital uploader, a timeout occurred before all of the files were uploaded. This was fixed.

- **May 2020 Digital Resource Management** SF: 00746220
  When deleting digital representation and title, and restoring it back - process didn't re-index the mms, thus title didn't appear in the collection editor as assigned. This has been fixed. Tested successfully in release env.

- **May 2020 Digital Resource Management**
  Labels generated by file name during upload were truncated after the first period to remove the file extension. This was changed to the last period in case the file name contains a period.

- **May 2020 Digital Resource Management**
  Changes to a label in the digital representation editor were not saved after sorting the files of the representation. This was fixed.

- **May 2020 Fulfillment** SF: 00560122 00704105 00795363
  Previously, refreshing a linked user duplicated the local Fines and Fees without identification. This was fixed.

- **May 2020 Fulfillment** SF: 00671156 00740455
  Previously, if a user could not be deleted during the Purge Users job, the job failed. Now, the job will continue processing the other users.

- **May 2020 Fulfillment** SF: 698572
  Previously, you could update the user Primary ID with value of one of its identifiers. This was fixed and will now cause a validation error.

- **May 2020 Fulfillment** SF: 706151
  The block period of overdue blocks was sometimes one day longer than the expected period. This was fixed.

- **May 2020 Fulfillment** SF: 755073
  Previously, when creating a new item in a department on the Scan-In Interface - Quick Cataloging, the item status
appeared as In Place. This was fixed. Now, the item will automatically appear as in process.

- **May 2020 Fulfillment**
  The Interested Users filter on the In Process Items page is now visible only to an acquisitions department.

- **May 2020 Fulfillment** SF: 789946
  A performance improvement was made for laptop loans on the Physical Item Editor page.

- **May 2020 Fulfillment** SF: 792211
  Previously, when a requested item was scanned and went into hold shelf processing, the label was not translated. This was fixed.

- **May 2020 Fulfillment** SF: 752360
  After logging in successfully to an Alma account on a self-check machine, if the user attempted to toggle to the renew function, the application crashed with error “SelfCheck station is not available. Please contact library staff.” This was fixed.

- **May 2020 Fulfillment - Course Reserves** SF: 813666
  In Alma, a reading list that has an large number of instructors on the course has an issue in that the “view in Leganto” click through is not displaying has not been fixed.

- **May 2020 Fulfillment - Resource Sharing** SF: 00453083 00736130 00626932 00736136 00623005 00396861
  In some cases, an ISO message for lending resource sharing requests did not reach the partner but a 'failed to send' note was not added to the request. This was fixed.

- **May 2020 Fulfillment - Resource Sharing** SF: 00715708 00789988 00797208
  Updating the Calendar via the Opening Hours caused the Locate By Fields to be removed from the library's configuration. This was fixed.

- **May 2020 Fulfillment - Resource Sharing** SF: 00757888 00713861
  When a patron canceled a resource sharing request after the lender has already shipped an item to fulfill it, no return slip was sent to the circulation desk printer when receiving the item. This was fixed.

- **May 2020 Fulfillment - Resource Sharing** SF:
  A borrowing request that was mistakenly handled as Expired could not have been processed as Lost. This is not a valid scenario, but the Lost operation should not fail. This was fixed.

- **May 2020 Fulfillment - Resource Sharing** SF: 00797850 00704709
  Multiple workflow profiles existed with the same name after a Resource Sharing distribution from the Network. This resulted in actions that are allowed in the profile not working as expected. This was fixed, the local duplicate entries were removed.

- **May 2020 Resource Management** SF: 00744929 00755431 00822996
  Multiple Unpaywall Open Access service links were appearing, all leading to the same page. This was fixed.

- **May 2020 Resource Management** SF: 00436593 00086774 00156886 00389885 00606963 0023575 00393482
  The number of items in the MD Editor > View Inventory > Holdings tab did not reflect the total number of items but, instead, just the items which were not in a temporary location. This was fixed; a new counter of items in a temporary location was added.

- **May 2020 Resource Management** SF: 00619843 00566391 00758554 00576447 00528941 00569039
  Previously, not all operations were updating the Modified By column for Item History. This was fixed.

- **May 2020 Resource Management** SF: 637543
  In the Item Sequences Configuration page, when using the Recent Searches functionality in the 'Library' field, the 'Library' field was populated with corrupt data. This is fixed.

- **May 2020 Resource Management**
  The 'Delete Holdings' link in the 'List of Holdings' page, which was visible to users with the 'Physical Inventory Operator' role, is now visible only to users who have the 'Physical Inventory Operator Extended' role.

- **May 2020 Resource Management** SF: 653695
  Alma Analytics displayed collections in a library when none actually existed. This was fixed.

- **May 2020 Resource Management** SF: 710203
  Previously, the short title appeared in the Community Zone Updates Task List. Now, instead, the full title appears in the Community Zone Updates Task List.

- **May 2020 Resource Management** SF: 00721519 00785187 00713860 00725762 00735823 00715415 00721481
  00740421 00724700 00738299 00727882 00725700 00746946 00730607 00687731 00758191 00818363 00726866
The issues with deleting electronic collections have been fixed.

- May 2020 Resource Management SF: 00715159 00716908
  This was a data issue. With a new data correction tool, Support is now able to address this data issue.

- May 2020 Resource Management SF: 703769
  Group settings without date information were not handled correctly for all cases when publishing to Primo Central. This was fixed.

- May 2020 Resource Management SF: 719349
  The holdings file included two entries for the same MMS ID (one with coverage lines and one without), and this caused the wrong availability to appear in Primo. This was fixed.

- May 2020 Resource Management
  A portfolio with more than one Available For group with no date information caused the coverage line to disappear from the institution file. This was fixed.

- May 2020 Resource Management SF: 00800627 00613840
  The output message to the System aborted job was changed.

- May 2020 Resource Management SF: 00660320 00690610
  Portfolios with embargoes were not handled as expected in the 'Overlap and Collection Analysis.' New logic was added to apply the embargo on the coverage(s).

- May 2020 Resource Management SF: 00704675 00803581 00713184
  Alma did not show thumbnails while Primo did show thumbnails. This is fixed.

- May 2020 Resource Management
  The label of the item-level advanced search index 'Item Creation Date' was incorrect; it was 'Creation Date (Title).' It was changed to 'Creation Date (Physical Item).'

- May 2020 Resource Management SF: 640658
  The "Starts With" operator in Advanced Search did not retrieve any results when the searched value contained an apostrophe (e.g. America's). This has been corrected. This fix is relevant for all indexes and all search types (e.g. "Authorities", "All Titles" etc.).

- May 2020 Resource Management SF: 751131
  Support is able to use DB/Solr diff to resolve the specific problem, and additional development was completed to prevent future occurrences of the issue.

- May 2020 Resource Management SF: 00715383 00715065
  In some cases, there were missing entries in the browse shelf listing. This was fixed. In addition, a data issue was fixed.

- May 2020 Resource Management SF: 689944
  A link from the SFX API did not display properly in ViewIt. This was fixed.

- May 2020 Resource Management SF: 703383
  Hanzi to Pinyin transliteration did not display certain words. This was fixed.

- May 2020 Resource Management SF: 00457470 00669321 00380400 00812026 00797958 00634818 00559471 00800600 00629754 00528741 00797802
  Text in angle brackets <> was not displayed in the Metadata Editor F3/ View and in Browse Bib headings. This was fixed.

- May 2020 Resource Management SF: 582715
  Accented characters in Alma were encoded in two different ways, depending on whether they were loaded through the migration process or through manual input via the Alma user interface. This was fixed.

- May 2020 Resource Management SF: 00684642 00719956 00704993 00689036
  Validation Form of Material MARC21 adds alerts to records where there is no issue. This was fixed.

- May 2020 Resource Management SF: 590998
  In the Metadata Editor, the controlled vocabulary did not work correctly for field 317. This was fixed for subfield $$S$$. In some cases, records from the Community Zone linked to the Network Zone linked to the Institution Zone appeared in the repository and could not be saved. This was fixed.

- May 2020 Resource Management SF: 00713297 00698811 00683610
When updating authorities by import from a different originating system, 'ghost' authority headings remained in the system. This was fixed.

- **May 2020 Resource Management** SF: 751589
  In the Metadata Editor when using F3 on bibliographic headings and viewing more than one authority record and after clicking Edit on the authority record on the right side, all the viewed authorities were opened. This was fixed.

- **May 2020 Resource Management** SF: 734584
  The 'Single match same inventory' parameter in the Repository PDA profile was disabled. This was fixed.

- **May 2020 Resource Management** SF: 00802735 00803944
  The ISBN (exact sub-field match)/ 024 / 035 Match Method did not appear as a non-serial match method in the import profile. This was fixed.

- **May 2020 Resource Management** SF: 00823462 00824326 00825553 00825572 00828484
  There was a problem with the search activation in the Electronic Resource Editor that caused search activations to fail. This was fixed.

- **May 2020 Resource Management**
  Based on customer feedback, the labels for CDI in the brief records on Alma where changed as follows:
  - **Active for Full Text in CDI only** to **Full Text active in CDI only**
  - **CDI Search Rights to Search Rights in CDI**
  - **CDI Full Text Rights to Full Text Rights in CDI**
  - **CDI Full Text Linking to Full Text Linking in CDI**

- **May 2020 Resource Management**
  There was an issue with the CrossRef collections caused by a recent release. Items from a CrossRef collection that were available for search were incorrectly flagged as full text available on Primo. This was fixed and already rolled out with an injection.

- **May 2020 Resource Management** SF: 00570136 00577949 00821547 00821550 00408242 00115067
  Portfolio Resource Editor now presents data elements that are inherited from collection/collection service in a read-only mode.

- **March 2020 Analytics** SF: 00718544
  When there is no Creative Commons License, its status is marked as NOTDETERMINED, which causes the data from the analytics report to not be displayed. This was fixed, and now the when there is no Creative Commons License, it is marked as NONE and the data is retained.

- **March 2020 Analytics** SF: 00733619
  On the Fulfillment dashboard, for the 'Recalled items', 'Loans by title', and 'Loan items ratio' tabs, selecting a library from the prompt does not filter the data according to the selected library. This was fixed.

- **March 2020 Analytics**
  Reports with fields from the Fulfillment > Location dimension did not work because the reports were not updated to the new name of the dimension 'Item Location at time of loan'. This was fixed.

- **March 2020 Acquisitions** SF: 00717850
  An item which received today didn't filter in the items list, that was fixed.

- **March 2020 Acquisitions**
  Users with fund manager and purchasing operator could view and edit po lines from libraries out of the purchasing operator scope. This was fixed.

- **March 2020 Acquisitions** SF: 00563366
  In the Invoices tab of a vendor, when the user clicks Export to Excel the Excel file had duplicate invoice records. This was fixed.

- **March 2020 Acquisitions** SF: 00474875 00506687 00501341
  The PO Line index was enhanced to recognize TSVCC Chinese characters when searching PO Lines by title.

- **March 2020 Acquisitions** SF: 00693673 00687775
  At last page of results in Receiving Department Items, clicking on the second or subsequent results navigates to the incorrect record. This was fixed.

- **March 2020 Acquisitions** SF: 00710006 00720642 00738299 00789801 00804131 00724535 00785097 00789312 00686458 00751176 00666128 00732123 00755738 00793303 00785315 00699674 00742718
  The electronic activation job Ebook Central Academic Complete UKI Edition created many electronic collections due to
a problem caused by restarts on the server or a one-time failure. This was fixed, and the activation job should activate only one electronic collection as expected.

- **March 2020 Acquisitions** SF: 00668826 00654532 00658372 00661555
  In the PO Line Claim Letter, Subject and newSubject were not translated. This was fixed.

- **March 2020 Acquisitions** SF: 00686401
  The Trial notification job sent the notification even for draft trials. This was fixed.

- **March 2020 Acquisitions** SF: 00697123 00800887 00799574
  In the Missing Data page, duplication occurred due to case sensitivity. This issue was fixed in the new Monthly Usage Data tab which was developed as part of the SUSHI Performance handling story. See March release notes.

- **March 2020 API SF: 00675602**
  Retrieve Logical Set members API was repeating members in some cases. This was resolved.

- **March 2020 API SF: 00674879 00751850**
  Update License API was not working with controlled vocabulary terms - this was fixed.

- **March 2020 API SF: 00675602**
  Create hold-request API: when a user has 2 patron roles, one in the relevant library (expired) and the other in ANOTHER LIBRARY (without expiration date). When this patron will try to create a request for an item in the library where the expiration date for its role is in the past, although the TOU would enable this request, the request will be blocked in the UI, but worked by API. Now it will be blocked in the API as well.

- **March 2020 API SF: 00756689**
  The GET-item-by-barcode API, when called with format=json was redirecting without including the format=json parameter. This was fixed.

- **March 2020 Administration and Infrastructure SF: 00792366**
  On the Bulk Fine Waiving page, the Maximum Fine Threshold to Waive field now allows only numbers to be entered.

- **March 2020 Administration and Infrastructure SF: 00565625**
  In some cases submitting any user details from Primo duplicated the user address. This was fixed.

- **March 2020 Administration and Infrastructure SF: 00526195 00683661 00594501 00593504**
  Updating the password from Primo without entering the old password displayed a success message without actually updating the user password. The was fixed, an error message is now displayed.

- **March 2020 Administration and Infrastructure SF: 00784779**
  A user name for anonymized users could not have been used for new users. This was fixed.

- **March 2020 Administration and Infrastructure SF: 00806662**
  In some cases the schedule was not registered for the network so it was not triggered as expected. This was fixed.

- **March 2020 Administration and Infrastructure SF: 00726836 00811228 00723953 00728941 00734979 00712692 00809109 00745078 00724300 00789589 00812080 00724745 00715568 00745556 00728204 00802979 00727572 00754705 00728623 00753252 00806557 00810404 00726794 00741888 00752152 00732236 00810329 00752202 00708803 00790953 00725663 00812135 00740922 00751259 00720417 00749650 00754260 00723949 00810039 00727498 00747160 00727529 00753144**
  The 'Synchronize Changes from CZ' job was hanging in status 'Pending'. This was fixed.

- **March 2020 Administration and Infrastructure SF: 00711365 00662917**
  In the Browse Shelf Listing, the call number drop-down was not translated. This was fixed.

- **March 2020 Administration and Infrastructure**
  Could not publish to Primo from Alma Sandbox. This was fixed.

- **March 2020 Resource Management SF: 00725313**
  When a record in the Metadata Editor is shared with the Network Zone and matches exist and the user selects to review them, the drop-down list of actions is limited to only Edit and Link actions. This fixes the issue where previously there were multiple, unclear steps presented.

- **March 2020 Resource Management SF: 00741644 00631221 00405927**
  The inventory_item and hdemetadata tables now provide the date and changed-by operator values of deleted items for reporting in Analytics. Previously, the values provided by these tables did not reflect the date and operator of deleted items. This was fixed. Note that this fix applies to deleted items in Alma going forward from the implementation of this fix and that old data cannot be corrected.
Previously when the 'display_specific_related_items' customer parameter was set to 'true,' there was an issue in the scenario described below where the related items from record “C” are displayed under record “A” only when searching for record “C,” and when searching for record “A” or “B,” record “A” is included in the results list, but the related items from record “C” are not displayed under it. Scenario: * Record A - A bibliographic record with no inventory related via the 773 field to two bibliographic records (and the two related records had items). * Two Related Records: &nbsp;&nbsp;&nbsp;&nbsp; Record B - A record with subfield g (for a specific item) &nbsp;&nbsp;&nbsp;&nbsp; Record C - A record with no subfield g (show all related records) This issue was fixed. Now, regardless of the search term, if record “A” is included in the results list, the related items from record “C” are displayed in addition to the specific related item from record “B.”

Searching for item descriptions caused an exception in Solr when the description contained a period and an asterisk and the solr_searching_language customer parameter was set. This has been fixed.

Previously, there was an unexpected change in the behavior of the Add Members to Set Job initiated from a file containing a list of barcodes when the file contained invalid barcodes. The job report showed 'completed successfully' and the 'Total invalid' count did not match the count of rows in the error file. This issue was fixed.

Previously, some items automatically fulfilled requests without going through remote storage when returned through the NCIP check-in from AWS. This issue was fixed. The scenarios have been expanded in which the correct behavior should take effect.

Previously, the Aleph Bridge import job resulted with many skipped holdings and items that failed with a general error. This issue was fixed.

Linking an Institution Zone bibliographic record to a Network Zone record (that is linked to the Community Zone) creates an Institution Zone bibliographic record that is linked to the Community Zone, and the Network Zone bibliographic record is linked to the Community Zone.

Previously, using the Borrowing request > Add from external search function in the the Alma Korean interface did not return any results. However, the same query using the Alma English interface did provide results. This was fixed.

When a network member did a repository search and the held by holdings had the fields 866/867/868 with subfield $$a and $$z, the $$z information did not appear under 'Summary Holdings' in the search results. This was fixed.

Previously, an Institution Zone record was linked to a Network Zone record with the 461 using the MMS ID of the Network Zone record; and the PLK field was built using the parent record in the Institution Zone which is not correct for Primo's retrieval of the child record in the Institution Zone. This issue was fixed.

Previously, an Institution Zone record was linked to a Network Zone record with the 461 using the MMS ID of the Network Zone record; and the PLK field was built using the parent record in the Institution Zone which is not correct for Primo's retrieval of the child record in the Institution Zone. This issue was fixed.

Previously, there was an issue with duplicates created as a result of the activation job. This issue was fixed. No duplication of any type is created as a result of the activation job. The activation job will activate at once (not partially and without duplication) the desired collection from the Community Zone.

The publishing platform was not accurate with the number of rows/records per file. This issue was fixed.
Previously, text in angular brackets was not correctly displayed in Get It. This was fixed.

- **March 2020 Resource Management** SF: 00699001 00603065 00523838 00584547 00627509 00793741 00575243 00562853 00583035 00728906 00650084 00583399 00610138 00585549
  Previously, when saving a holdings record sometimes the 852 field disappeared. This issue was fixed.

- **March 2020 Resource Management** SF: 00576280 00638264
  In the Metadata Editor, after creating a new holdings for a bibliographic record on the left, replacing it with another bibliographic record on the right, and then creating another holdings using the hotkey Ctrl+Alt+H, two new duplicated holdings were created instead of one. This was fixed.

- **March 2020 Resource Management** SF: 00724927
  Previously, the HanziToPinyin normalization task performed the wrong linking when the configuration option was set to not show the script code. This was fixed.

- **March 2020 Resource Management**
The character mapping was updated for the new Chinese author number characters and corresponding codes.

- **March 2020 Resource Management** SF: 00754495
  Previously, the pop-up assistance in Hebrew for the 260 and 264 fields did not appear in certain cases. This issue was fixed.

- **March 2020 Resource Management** SF: 00745730 00659624
  In MARC21, subfield $$e is no longer part of the matching between bibliographic and authority records for fields 800, 810 in bibliographic records and for fields 100, 110, 400, and 410 in local authorities.

- **March 2020 Resource Management** SF: 00741789
  Previously, when editing a record and using F3, deleted authority headings appeared. This issue was fixed. The deleted authority headings were removed.

- **March 2020 Resource Management** SF: 00791189 00753671 00433424 00799709 00723729 00735697 00800317 00743323 00726722 00751756 00724396 00724235 00723804 00809557 SF:URM-116960

- **March 2020 Fulfillment** SF: 00700596

- **March 2020 Fulfillment** SF: 00706100
  As a result of corrupted data, bibliographic headings were not updated. The issue was fixed by removing the corrupted authority headings.

- **March 2020 Resource Management** SF: 00666607
  The BIBFRAME view of bibliographic records was missing links for local authority records. This was fixed.

- **March 2020 Resource Management** SF: 00757187 00653367 00657820 00611415
  The data keeping policy was improved, and the display of manual issues was restricted to one year back. This solution should reduce the number of oops errors on the 'Manual Handling' page.

- **March 2020 Resource Management** SF: 00741219
  In some cases, the EOD import job with the import profile fails and shows 'Failed in Commit after calling NZ.' This was fixed.

- **March 2020 Resource Management** SF: 00809119
  Previously, the Publishing MODS to Primo failed if the Related records information enrichment option was selected in the publishing profile. This was fixed.

- **March 2020 Fulfillment** SF: 00641086 00680411 00686405 00652613 00796319
  In some cases, when saving a rule on the Request Pickup Configuration page, an error was generated. This was fixed.

- **March 2020 Fulfillment** SF: 00693233 00695620 00809863
  When scanning in a requested item from a different institution, the Print Slip action did not work when the fulfillment_network_unique_barcodes customer parameter was set to FULL. This was fixed.

- **March 2020 Fulfillment** SF: 00721687
  Previously, when Alma responded to a patron information request (SIP 63) at a self-check machine, if the patron's city was blank, the response (SIP 64) included a null string in the patron's address. This was fixed.

- **March 2020 Fulfillment** SF: 00647458
  In some cases, when a requested item was checked out to a patron other than the requester, the loan was not blocked. This was fixed.

- **March 2020 Fulfillment** SF: 00728860

Ex Libris, a ProQuest Company
On the Manage Patron Services page, the counter for the number of items renewed using the Renew All action was sometimes incorrect. This was fixed.

- **March 2020 Fulfillment** SF: 00756362 00614301
  When requesting an ASRS remote storage item, sometimes the request appeared in Alma with a status of Request Communicated to Remote Storage, even though the communication with the ASRS server failed. Now, if the communication fails, Alma cancels the request with cancellation reason: Failed to communicate with remote storage.

- **March 2020 Fulfillment** SF: 00806219 00754850 00634538
  Previously, if the Send Requests to Remote Storage Job failed after it processed the requests but before it exported the XML file to the FTP (e.g. as a result of server restart or FTP connection error), the requests were not exported but in Alma they appeared as if they were. This was fixed. Now, if the job fails, the requests will remain in Waiting for remote storage status, so that they will be handled again on the job's next run.

- **March 2020 Fulfillment** SF: 00678803 00724446
  Previously, if the Send Requests to Remote Storage Job failed after it processed the requests but before it exported the XML file to the FTP (e.g. as a result of server restart or FTP connection error), the requests were not exported but in Alma they appeared as if they were. This was fixed. Now, if the job fails, the requests will remain in Waiting for remote storage status, so that they will be handled again on the job's next run.

- **March 2020 Fulfillment** SF: 00711645
  In some cases, an item that was loaned remained on the Pick From Shelf list. This was fixed.

- **March 2020 Fulfillment** SF: 00727734
  Previously, when scanning a barcode and request ID in the Scan In Interface, if multiple requests existed, the item was always attached to the first request in the queue. This was fixed.

- **March 2020 Fulfillment** SF: 00804714 00804727
  Performance improvements were added to Get It for the fulfillment network configuration.

- **March 2020 Fulfillment** SF: 00719048
  In some cases, an item that was loaned remained on the Pick From Shelf list. This was fixed.

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  In some cases, an item that was loaned remained on the Pick From Shelf list. This was fixed.

- **February 2020 Acquisitions** SF: 00708476
  In the In Process Items page, the Modified By column displayed the first operator that modified the record instead of the last operator. This was fixed.

- **February 2020 Acquisitions** SF: 00674166 00733466
  In some cases when a PO Line was closed and reopened the PO Line’s title was changed to the title of the previous PO Line handled. This was fixed.

- **February 2020 Acquisitions** SF: 00790022
  In some cases, the PO Lines that were created from EOD ignored the purchasing review rules and continued the workflow. This was fixed.

- **February 2020 Acquisitions** SF: 00680283
  The additional information was missing from invoice export XML when created from Physical - Standing Order order line. This was fixed.

- **February 2020 Acquisitions** SF: 00702085
  Total invoice lines amount did not display sum under invoice line detail. This was fixed.

- **February 2020 Acquisitions** SF: 00685088 00769493
  When changing the price in the invoice line page the Redistribute line did not happen automatically and required the user to click it. This was fixed and now redistribute lines will happen automatically when changing the price.
- **February 2020 Acquisitions** SF: 00626738
  E activation link from advanced search did not work. This was fixed and works as expected now from both searches (simple & advanced)

- **February 2020 Acquisitions** SF: 00671578 00532041
  Selecting the trials link to a survey form led to an error. This was fixed.

- **February 2020 Acquisitions** SF: 00747060 00793722 00731551 00787767
  Executing the data corrector caused the available for field to be empty. This was fixed and now the available for field gets the value depending on the owner.

- **February 2020 Acquisitions** SF: 0059302 00746552
  Typo was corrected in the message displayed to user when adding a fund to a PO Line or Invoice line and there was an encumbered warning.

- **February 2020 Acquisitions** SF: 00710513 00699403
  In Rollover Ledgers Job > Add job, When the Create Allocation From is changed from the default 'None' to anything else and then selecting 'Copy' in Action, the value in the field Create Allocation From returned to None. This was fixed.

- **February 2020 Acquisitions** SF: 00702666
  The PO was stuck because of duplicate POs that were created in the EOD. This was fixed. For documentation: The input EOD file was invalid: There is no option to send PO number with two different libraries. If such situation is needed, they should send vendor invoice number but not PO number.

- **February 2020 Acquisitions** SF: 00540508
  When selecting Acquisitions > Import > Load Usage data it took more than seven seconds for the page to load. This was fixed.

- **February 2020 Administration and Infrastructure** SF: 00792366
  In the bulk fine waiving screen, typing anything other than numbers will be prevented.

- **February 2020 Administration and Infrastructure** SF: 00526195 00683661 00594501 00593504
  Updating password from Primo without entering the old password would display a success message, but without actually updating the user password. The was fixed, an error message is now displayed.

- **February 2020 Administration and Infrastructure** SF: 00659374 00758194 00717340 00750708 00799429
  In some cases, when searching for a user with a hyphen the user was not found. This was fixed.

- **February 2020 Administration and Infrastructure** SF: 00715406
  Changed name display so that when configuration specifies both name and preferred name, both are displayed even if they are identical.

- **February 2020 Administration and Infrastructure** SF: 00103990
  Checking the SMS Preferred in Primo my account was not validating the SMS number. This was fixed, whenever a blank SMS number is submitted an error message is displayed.

- **February 2020 Administration and Infrastructure** SF: 00661018
  The Auto Complete search for users in Japanese environments did not return results when the last name contained spaces. This was fixed.

- **February 2020 Administration and Infrastructure** SF: 00695423
  The external resources screen has special implementation and therefore the options to choose the number of results to display cannot be used. Issue was fixed by removing the option to set a different number of results than 20.

- **February 2020 Administration and Infrastructure** SF: 00705746 00657295 00792211
  In Manage Items Returns, the pop-up message when returning an item to be reshelved to a temporary location was not translated. This was fixed.

- **February 2020 Administration and Infrastructure** SF: 00735668 00643584
  The IdP Reset Password pages, when used with a language-code parameter, did not follow with the requested language to error-message pages. This was fixed.

- **February 2020 Administration and Infrastructure** SF: 00702404
The One-Time Logic using email pages, when used with a CSS skin, did not follow with the requested skin to a error-message pages and the success screen. This was fixed.

- **February 2020 Analytics** SF: 00717661
  When creating a report in the E-Inventory subject area with fields from the Bibliographic Details dimension, if the the Originating System field is added, some of the results where Originating System is expected to be "Unknown" did not appear in the report. This was fixed.

- **February 2020 Analytics** SF: 00642793
  The Transaction Type Pie chart on the Acquisitions dashboard could not be edited to display the remaining allocation regardless of status. This was fixed.

- **February 2020 Analytics** SF: 00637768
  Subfolders were not displayed properly in the Analytics Object List, which prevented dashboards from being added to the list. This was fixed.

- **February 2020 API** SF: 00648237
  The IdP Reset Password pages, when used with a CSS skin, didn't follow with the requested skin to the page where new password is requested. This was fixed.

- **February 2020 API** SF: 00646813 00725471 00678614
  "The Update-User API failed when the user had 'Receiving Operator' role with the scope of the institution, but with a service-unit parameter in a scope of a library. This was fixed.

- **February 2020 API** SF: 00714379
  The Create Set API didn't work when creating a logical set by library/locations. This was fixed.

- **February 2020 API** SF: 00720665
  When updating a portfolio using an API the history tab showed that a 'change' was made to library even though this field was not touched. This was fixed.

- **February 2020 Fulfillment** SF: 00705635
  Export Users job sometimes failed to upload XML file due to invalid characters. This was fixed, the invalid characters are removed before retrying to upload the file.

- **February 2020 Fulfillment** SF: 00729923 00704493 00703731 00608577
  If an item's barcode was changed while the item was in a work order, the item was sometimes not found when searching for it by the new barcode on the Manage in Process Items page. This was fixed.

- **February 2020 Fulfillment** SF:
  When SMS was activated, if the Loans - Overdue and Lost Item job failed to send an SMS message because there is no preferred SMS number on the User Detail page, the job completion status was set to Completed with Errors. Now the SMS message is not sent, without causing the job status to be Complete with Errors. The SMS messages which were not sent will continue to be reported inside the job report as before.

- **February 2020 Fulfillment** SF: 00744296 00735221
  Placing a request on a title with multiple items that belong to remote storage failed under a specific configuration. This was fixed.

- **February 2020 Fulfillment** SF: 00733124 00769441
  Previously, if a library was removed from a lost loan profile, the locations list still remained saved on the profile, even though it was not displayed in the UI. Additionally, if a library and locations were selected, removing the location(s) from the profile did not work. Both issues are fixed.

- **February 2020 Fulfillment** SF: 00756362 00614301
  When requesting an ASRS remote storage item, sometimes the request appeared in Alma with a status of Request Communicated to Remote Storage, even though the communication with the ASRS server failed. Now, if the communication fails, Alma cancels the request with cancellation reason: Failed to communicate with remote storage.

- **February 2020 Fulfillment** SF: 00639641
  Previously, in some circumstances, when a user requested a title from primo with two holdings or more, a pickup location appeared in the drop-down list that was not applicable. This was fixed.

- **February 2020 Fulfillment/Collaborative Networks** SF: 00696523
  In some cases the Rota Templates and Assignment Rules did not update from the Network. This was fixed by applying a data corrector.

- **February 2020 Fulfillment - Resource Sharing** SF: 00688547 00684300
  In some cases, the locate process did not run for a partner and therefor left it in the rota, despite not having any items
for the request. This was fixed. The Manual Locate Job now runs on all relevant partners.

- **February 2020 Fulfillment - Resource Sharing** SF: 00659455
  Chapter author and chapter title are now determined by the content of SLNP message

- **February 2020 Resource Management** SF: 00674416
  When running the 'Change Holding Information' job and the holdings did not match the normalization rule, the holdings, incorrectly, were changed anyway. This issue was fixed.

- **February 2020 Resource Management** SF: 00705243
  The Locations filter on the List of Items page does not present the correct list of locations, per the user interface language being used (German). This issue was fixed.

- **February 2020 Resource Management** SF: 00696284 00709644 00719581 00714169 00730541
  When running the 'Change Holding Information' job and the holdings did not match the normalization rule, the holdings, incorrectly, were changed anyway. This issue was fixed.

- **February 2020 Resource Management** SF: 00703769
  In the Physical Item Editor, the locations and libraries were not translated. This was fixed.

- **February 2020 Resource Management** SF: 00716894
  Two portfolios connected to two different bibliographic records with the same ISBN / ISSN did not link properly to the Community Zone. This was fixed. The recommended workflow is to avoid creating bibliographic records with the same ISBN / ISSN.

- **February 2020 Resource Management** SF: 00720954 00735159 00719431 00759325 00788382
  Two portfolios connected to two different bibliographic records with the same ISBN / ISSN did not link properly to the Community Zone. This was fixed. The recommended workflow is to avoid creating bibliographic records with the same ISBN / ISSN.

- **February 2020 Resource Management** SF: 00718384
  In the Physical Item Editor, the locations and libraries were not translated. This was fixed.

- **February 2020 Resource Management** SF: 00721075 00718384
  When creating a logical set (Admin > Manage Jobs and Sets > Manage Sets > select Add Set > Logical) after completing a filtered repository search, the repository search filter appeared on the Repository Search page (wizard step 2) of creating a logical set. This issue was fixed. A refresh is now completed to avoid this issue.

- **February 2020 Resource Management** SF: 00393209
  When an institution's authority linking strategy is based on ID and an authority search for "bibliographical records matching this value" was performed, the authority ID prefix was ignored and returned irrelevant records. This issue was fixed.

- **February 2020 Resource Management** SF: 00793673
  The Primo VE facets filter appeared as code, labels were missing. The Primo VE user interface was fixed.

- **February 2020 Resource Management** SF: 00719909
  In the scenario where 1) there are two network bibliographic records A (primary) and B (secondary), 2) a member institution had a local bibliographic record linked to the network record B, and 3) the local record B was related to a PO
line AND the member institution performs 'Merge Records & Combine Inventory' for the two network bibliographic records A and B, record B was merged into A; and B was deleted. However, when B was deleted the PO lines previously associated with record B were not associated with record A. This was fixed.

- **February 2020 Resource Management** SF: 00681621
  After selecting an item to edit through the 'Browse Shelf Listing' feature and then returning back to the MD Editor by selecting Cancel, Save or the Back arrow, the user is not directed back to the Browse Shelf Listing with the previous parameters settings. This was fixed.

- **February 2020 Resource Management** SF: 00686125 00668558 00668457
  In some cases, when a member institution performed 'Merge & Combine' from the MD Editor on two network records, the 'primary' network record was 'locked by System' for one hour. This has been corrected.

- **February 2020 Resource Management** SF: 00738891
  The following values that were not up-to-date were corrected/added to the UNIMARC bibliographic metadata profile, field 105, positions 4-7: m = dissertation or thesis (original) 7 = academic thesis below the doctoral level, including the masters v = dissertation or thesis (revised) w = religious text

- **February 2020 Resource Management** SF: 00714086
  In some cases, when a member institution performed 'Merge & Combine' from the MD Editor on two network records, the 'primary' network record was 'locked by System' for one hour. This has been corrected.

- **February 2020 Resource Management** SF: 00742361
  Brackets were missing in the SBN to UNIMARC converted record when a title was preceded by one-letter articles. This was fixed.

- **February 2020 Resource Management** SF: 00727349
  Access to the Authority reference file using F3 was not working with Polish characters for certain fields such as the 373 field. This was fixed.

- **February 2020 Resource Management** SF: 00749800
  For UNIMARC Browse Bibliographic Headings, some titles did not display properly. This was fixed. Subfield e is now added to the headings (only for display and sorting purposes, not for matching or linking with Authority records) created out of the bibliographic fields 200 (Title and Statement of Responsibility), 225 (Series), and 410 (Series - LINKING ENTRY). A full inventory re-indexing (including 'recreate bib headings') needs to be run for this fix to be fully functional.

- **January 2020 Acquisitions** SF: 00752082 00727349 00730262 00729330 00744537 00729810
  When receiving multiple journals on the Received Items List page, an error occurred. This was fixed.

- **January 2020 Acquisitions** SF: 00747168 00507810 00527371 00620630 00664064 00653943 00622470 00599063 00653943 00662030
  When an electronic colleciton is linked with a PO Line, the E-Resource activation status was not correctly specified. This was fixed. In electronic collections, if the resource has at least one active service and one active portfolio OR it links to unsuppressed bib that has a URL, it will be considered as active in the PO Lines List and in the Resource List (drawer).

- **January 2020 Acquisitions** SF: 00612971 00701400 00706193 00587292 00701536
  In some cases, the PO status was stuck in Sent even though all PO Lines were closed or cancelled. This was fixed.

- **January 2020 Acquisitions** SF: 00703816 00713459 00678527 00678592 00715117
  Performance enhancements were made for invoice processing.

- **January 2020 Acquisitions** SF: 00651755
  When a credit invoice had a VAT amount, the VAT percent was set to a negative value. This was fixed.

- **January 2020 Acquisitions** SF: 00709722
  If a fund had a negative value, when selecting the fund in the invoice line, the encumbered amount was ignored and the fund was not returned. This was fixed.
- **January 2020 Acquisitions** SF: 00547688
  Alma failed to load the ONIX-PL file downloaded from the EDItEUR standard site. This was fixed.

- **January 2020 Acquisitions** SF: 00663075 00664985 00661891
  When releasing a record from In Process Items, the notification listed the title of the first record on the list, not the records that were released. This was fixed.

- **January 2020 Acquisitions** SF: 00662798
  Funds with diacritics could not be searched without the diacritic in a PO Line. This was fixed.

- **January 2020 Acquisitions** SF: 00652867 00658378 00658935 00661365 00666910 00669189 00670391 00671242 00673591 00678741 00679884 00682352 00683646 00690546 00691907 00696311 00699969 00703191 00704170 00706221 00707100 00707838 00707881 00708128 00708223 00708646 00709670 00709834 00710470 00710791 00711242 00711913 00712385 00712478 00712579 00712812 00712993 00713029 00713483 00714098 00714297 00714337 00714613 00714724 00714740 00715148 00716947 00717911 00717912 00717921 00717922 00717930
  Previously, PO lines were stuck in an Auto Packaging status because the PO line was assigned to the previous user. When the user selected **Save and Continue** on the PO Line details page, the PO line progressed in the workflow to **Auto Packaging** and a message was displayed, **PO Line was updated and in status Auto Packaging**. When clicking the PO line link in that message, the PO line was opened in edit mode and assigned to that user. This was fixed. Now, when the user clicks the PO line link, if the PO line is not editable, it is opened in view mode and therefore will not be assigned to this user.

- **January 2020 Administration and Infrastructure** SF: 00510675
  When editing a user record where the address was mandatory, but not entered, the validation stated that the preferred email was not selected. This was fixed.

- **January 2020 Administration and Infrastructure** SF: 00674580 00583762
  When accessing the User Details page without edit permission, the action buttons appeared but when selected, caused the page to freeze. The buttons were removed for users without edit permissions.

- **January 2020 Administration and Infrastructure** SF: 00481959
  The Circulation Desk Operator - Limited role could not update or delete blocks, even though the Create Remove Blocks privilege was enabled. This was fixed.

- **January 2020 Administration and Infrastructure** SF: 00600227
  When creating a new user through Manage Patron Services, the header of the User Information section wasn't translated to the active UI language. This was fixed.

- **January 2020 Administration and Infrastructure** SF: 00736416
  The last name was not appearing correctly in most letter emails. This was fixed.

- **January 2020 Administration and Infrastructure** SF: 00671738
  Under macOS Mojave 10.14.4, for users with the Circulation Desk Operator - Limited role, Alma displayed a blank page when adding a circulation desk parameter. This was fixed.

- **January 2020 Administration and Infrastructure** SF: 00727579 00721405 00634501 00690185
  In the Physical Item Editor, in the upper Summary section, Process type and Status were not translated. This was fixed. Additionally, when a physical item has a Process Type that is “not-in-place” (such as Patron digitization request, Acquisition technical services, and Transit For Reshelving), it is not translated in non-English interfaces. This was fixed for the search results list of Physical Items, the upper Summary section of the Physical Item Editor, and the List of Items page.

- **January 2020 Administration and Infrastructure** SF: 00706221
  Email-based login to Alma and Primo included a confirmation that the email was sent, but it was only displayed in English. It is now translated according to the user's preferred language.

- **January 2020 Administration and Infrastructure** SF: 00435157
  Slow upload times were noted in production. This was fixed.

- **January 2020 Analytics** SF: 00753341 00788057 00756900
  The missing field 'Preferred Phone Number' was added back to the subject area.

- **January 2020 Analytics** SF: 00206593 00659631
  In Analytics, data was not returned for roles in the Events subject area. This was fixed.

- **January 2020 Analytics** SF: 00612626
  Ex Libris, a ProQuest Company
Adding the 'Event end date' field to Analytics reports in the Physical Item Historical Events subject area for transit events that do not have an end date caused the report to not display any data. This was fixed.

- **January 2020 Analytics** SF: 00694317
  The Publication Date is now populated according to the following prioritization: MARC field 264 subfield c, if empty then MARC field 260 subfield c, if empty then MARC field 008 pos. 7-10.

- **January 2020 Analytics** SF: 00706573
  A link on the Loan per Library tab of the Fulfillment Dashboard to the Items Loaned per Patron Group tab was broken. This was fixed.

- **January 2020 Analytics** SF: 00717478 00705114
  When the value of the Return Date field in Analytics (Fines and Fees > Loan Details) was null because the loan is not returned, reports erroneously displayed '01/01/1'. This was fixed and now the field is empty.

- **January 2020 API** SF: 00739973
  In the user-request REST API and Webhook XSD, the manual_description field was missing. The field was added and will be retrieved in GET requests.

- **January 2020 API** SF: 00717237
  In some cases, updating portfolios via the API was changing the Activation Date by one day. This was fixed.

- **January 2020 API** SF: 00692798 00741188 00727951
  When running the GET Bib API with expand=e_avail against a network and portfolios that exist in the network, the subfields $$0$$ and $$a$$ were not retrieved. This was fixed.

- **January 2020 API** SF: 00731954
  Previously, multiple overdue blocks could be created for the same returned loan. This was fixed. Now, a single block should be created for each loan. The block should be created according to the updated return date, if it is different than the return date.

- **January 2020 Fulfillment** SF: 00537240
  In some cases, when sending multiple checkout messages for the same user on a self-check machine, the loan limit could be exceeded. A performance improvement was implemented to address this issue.

- **January 2020 Fulfillment** SF: 00326538
  On the Held By Patron and On Shelf tabs of the Active Hold Shelf, clicking loan links caused an error. The loans are no longer clickable.

- **January 2020 Fulfillment** SF: 00137820 00073829 00684133 00133442 00218631 00361884 00684052 00137916
  In some cases, the booking calendar had available slots appearing as not available and vice versa. This was fixed.

- **January 2020 Fulfillment** SF: 00491212 00570186
  The Resource Sharing distribution job did not correctly handle partners that were deleted in the Network Zone and created again with the same code. The job also blocked deletion of partners that are connected to completed resource sharing requests regardless of the BorrowingRequestsActiveFilters code table. This was fixed. The job now updates these partners as required and consults the BorrowingRequestsInactiveFilters tables for deletion.

- **January 2020 Fulfillment - Resource Sharing** SF: 00629860
  A renewal request sent to an itemless library was not processed correctly. This was fixed.

- **January 2020 Fulfillment - Resource Sharing** SF: 00693541
  Previously any recall operation initiated by fulfillment processes on an item in resource sharing would process the recall. This was fixed. The recall will not be allowed if the item is in resource sharing and the status is Returned by Partner.

- **January 2020 Fulfillment** SF: 00530054 00661611 00712276 00715321
  The Test Access functionality in the portfolio editor was not working for URLs with non-latin alphabet characters. This has been fixed.
• **January 2020 Resource Management** SF: 00663766  
  Field 530 was not mapped correctly to the oai dc field when publishing a MARC record to the oai _dc format. This was fixed.

• **January 2020 Resource Management** SF: 00700517  
  Ex Libris fixed the customer data and deleted the additional portfolios.

• **January 2020 Resource Management** SF: 00509995  
  The wrong permission flag was removed from tar compression code.

• **January 2020 Resource Management** SF: 00720896  
  This was fixed by support with 18.10.

• **January 2020 Resource Management** SF: 00702435  
  In Publishing to Primo, authority enrichment information was not published for UNIMARC records that used the working with ID strategy and had links to multiple authority headings per field. That was fixed.

• **January 2020 Resource Management** SF: 00673395 00658396  
  If an item came back from a resource sharing request to its remote storage by an NCIP check-in message, it would have automatically started the next resource sharing request instead of being put in place. This was fixed.

• **January 2020 Resource Management** SF: 00679188  
  Previously, when a remote storage item was checked in via an NCIP check-in message, Alma did not check if the item did indeed belong to remote storage, but, instead, automatically put it in place. This was fixed. Alma is now checking if the item belongs to the current remote storage.

• **January 2020 Resource Management** SF: 00663701 00630971 00637626 00565091  
  When viewing an in-transit item from search results where the To Circulation Desk is empty, then viewing a second item where the To Circulation Desk is not empty, and subsequently, returning to the first item, the first item shows the To Circulation Desk of the second item instead of remaining empty. This was fixed.

• **January 2020 Resource Management** SF: 00653455  
  When a network member did a repository search and the held by holdings had the fields 866/867/868 with subfield $$a and $$z, the $$z information did not appear under 'Summary Holdings' in the search results. This was fixed.

• **January 2020 Resource Management** SF: 00653455 00638264  
  When the MD Editor is open in split mode while editing a bibliographic record in one and a holdings record in the other, creating a new holdings record results in two holdings where one is related to the wrong bibliographic record. This issue was fixed with the exception of creating a new holdings record using the shortcut key ctrl+alt+h. The full fix will be handled in a later release.

• **January 2020 Resource Management** SF: 00628384  
  For a member institution, clicking on the record's link in the list of matches in the MD Editor displays the Community Zone icon instead of the Network Zone icon. This was fixed. In addition, when an Network Zone record already exists in the draft list, the record's link is now hidden for this record in the list of matches.

• **January 2020 Resource Management** SF: 00720432  
  The contribution of serial records to CALIS did not work. This was fixed.

• **January 2020 Resource Management** SF: 00634901  
  Subdivisions were duplicated in records with trailing punctuation (period). This was fixed.

• **January 2020 Resource Management** SF: 00719942 00700533  
  A new setting has been enabled that handles subfield u in the following manner: * Subfield u is ignored while browsing headings suggestions (F3) * Subfield u is kept after selecting the suggested heading * Subfield u is not part of the linking process * Subfield u is not part of the Preferred Term Correction process Reindexing needs to be run for this to be fully functional.

• **January 2020 Resource Management** SF: 00702435 00639130
The output file of the 'Duplicate Title Analysis’ job included deleted bib records. This has been corrected.

- **January 2020 Resource Management** SF: 00647258 00694008 00531194 00604766 00493144 00644802
  If the import finds at least one match, and the upon match method is 'DO NOT ADD,' then the import report did not display the matched records. This was fixed.

- **January 2020 Resource Management** SF: 00691126 00618086
  After the import job completed successfully, no email report was sent for the import job. This issue was fixed.

- **January 2020 Resource Management** SF: 00727936 00654643 00714134
  View Import on the Resolve Import Issues page led to an Oops error. This issue was fixed.

- **January 2020 Resource Management** SF: 00630562
  When importing UNIMARC/CNMARC bibliographic records using the ISSN match method (exact subfield match), records that had position 6 of the LDR as 'l - Electronic Resources' and position 7 as ‘s - Serial' were not matched correctly by the ISSN. This was fixed.

- **January 2020 Resource Management** SF: 00685475
  The crosswalk of OAI DC Format to MARC21 on the Repository profile was not supported. This issue was fixed.

- **January 2020 Resource Management** SF: 00731980 00676139
  the indication rule was not applied for import profiles defined in a network member institution when the 'Use Network Zone' parameter was checked in the import profile. This has been fixed.

- **January 2020 Resource Management** SF: 00693333
  Import with an Excel file that contains lines with one of their cells containing a space character was not processed correctly. This was fixed.

- **January 2020 Resource Management** SF: 00706413 00734597
  When contributing a record to CALIS, subfields a and z of the 920 field were saved in the wrong order. This was fixed.

- **January 2020 Resource Management**
  The manner in which Alma processes identifying records that need to be reviewed for change based on new or updated authority records has been modified for institutions that have implemented ID-based authority record linking. Now for institutions using the ID-based authority linking method when there are new or updated authority records, Alma uses an ID-based method for identifying bibliographic records that need to be checked for potential linking by the linking process. This ensures that the Authority Control Task List entries reflect more accurate and meaningful changes.

- **January 2020 Digital Resource Management** SF: 00708419
  The universal viewer was not working for non-production environments in the EU region. This was fixed.

- **August 2020 Fulfillment - Course Reserves** SF: 00807715 00799263 00700777 00845032 00838423 00846555 00804475 00743043 00802218 00803943 00804742 00802807 00860411
  Course information was still displayed in Discovery after the course ended. This was fixed. Now, when a course ends, the course information is removed by the following publishing process.

- **June 2020 Fulfillment - Course Reserves** SF: 00661451
  The course code was not included in the file name when exporting lists to PDF in bulk. This was fixed.

- **June 2020 Fulfillment - Course Reserves** SF: 00808391
  When changing the **Material Type** from Article to Electronic Article, changing the secondary type changed the fields in the citation’s metadata section in the primary type. This was fixed.

- **June 2020 Fulfillment - Course Reserves** SF: 00732979
  Copyrights for chapters were being approved when non-numeric characters were entered. This was fixed.

- **May 2020 Fulfillment - Course Reserves** SF: 00828403
  When editing a book chapter citation, duplicate Publication Date and Place of Publication fields appeared and displayed identical information in the Main section and More Item Details section. This was fixed.

- **March 2020 Fulfillment - Course Reserves** SF: 00558998
  The Course Loader job report did not show a deleted lists event (using the **Delete** operation). This was fixed.

- **March 2020 Fulfillment - Course Reserves**
The course loader job performance has been improved.

- **March 2020 Fulfillment - Course Reserves** SF: 00557726
  In the Alma Citations brief display, the Pages, Chapter Author, and Chapter Title fields were hidden by default and have been added. This was fixed.
• **March 2020 Fulfillment - Course Reserves** SF: 00573621 00699342 00706209
  The course loader file was processing duplicate files. This was fixed.

• **March 2020 Fulfillment - Course Reserves** SF: 00711351
  Interface enhancements were made on the owner subscription letter.

• **March 2020 Fulfillment - Course Reserves** SF: 00688241 00709144 00735529
  Copyright recalculation does not function after rollover. This was fixed.

• **March 2020 Fulfillment - Course Reserves** SF: 00736258
  Submit button for digitization requests not functioning for a specific journal. This was fixed.

• **March 2020 Fulfillment - Course Reserves** SF: 00797118
  Citation processing rules created purchase requests without fulfilling the rules. This was fixed.

• **February 2020 Fulfillment - Course Reserves** SF: 00665112
  Analytics data does not include owners added using the `set_instructors_as_owners` flag. This was fixed.

• **January 2020 Fulfillment - Course Reserves** SF: 00725347 00729516
  The resource locate was being triggered when no changes were made in the citation. This was fixed.

• **January 2020 Fulfillment - Course Reserves**
  Previously, when the `resource_locate_multiple_matches` parameter was set to `manually`, and multiple results were matched, selecting Save and Run returned the user to the Edit Reading List. This was fixed. Now, the repository search page will appear, and the operator will be able to select the title.

• **January 2020 Fulfillment - Course Reserves** SF: 00728534 00713135
  When selecting the All tab of a Reading List, an error was displayed. This was fixed.

• **January 2020 Fulfillment - Course Reserves** SF: 00731299 00583061
  After September, the Number of Citations field counted only citations with usage. It was fixed and now it includes all citations. The Number of Citations now includes the number of citations in the reading list without any relation to the usage. The Activity Score field is impacted similarly as its calculation is based on the Number of Citations field.

• **January 2020 Fulfillment - Course Reserves** SF: 00717468
  The Course Code field, which appears in the Course Reserves and Usage, has been increased to 255 characters.