Alma January 2019 Release Notes

Ex Libris The bridge to knowledge
### Action Items

- **Note Field Added to the Primo Purchase Request** – If you enable patrons to place purchase requests directly from Primo, you will be glad to know that you can now set up their request forms so they can add additional information in a note field on the Primo request form.

- **Delete Interested Users in Closed PO Lines** – You can now manage privacy concerns more efficiently by setting up Alma to detach interested users from PO lines that have been closed or canceled.

- **Support Streaming Video and Audio for Alma Viewer** – This major milestone will provide patrons with an advanced viewing experience whereby video or audio content can be streamed using adaptive bitrate streaming, and video files that can’t be rendered by the browser to MPEG-4 can be converted.

- **Block File Download** – This feature will provide you with further flexibility in controlling access rights to your content by providing basic access to content, but without the ability to download or print.

- **Support Excel as an Alma Digital Import Physical Source Format** – You are now provided with an additional efficient method for importing metadata for digital content into Alma.

- **Idea Exchange: Display Logic Rule Enhancements** – Do you need to hide the CCC Get It Now services from patrons when any other full text service is available? Take advantage of the new display logic enhancements to create the following display logic rule: `Hide service Full Text with Interface with value CCC Get It Now if exists service Full Text`

- **NERS Enhancement (ID #5746): Multiple Printers for Circulation Desks and Work Order Departments** – Circulation desks can now be easily set up with multiple printers. When connecting to the circulation desk, users are then able to choose the desk’s printer that they would like to use.

- **Idea Exchange: Process Type for Lost and Paid** – If you would like lost items to be removed from the patron loans list as soon as the full lost item charges are paid, you can now do so.

For information on Primo VE new release features, see the [Primo VE January 2019 Release Notes](#).
Publishing to PubMed – Changes to FTP Configuration

Last month we announced that as a result of discussions with PubMed and at PubMed's request, the publishing to PubMed process will be modified to use a default FTP configuration configured by Ex Libris in conjunction with PubMed. Although this change was carefully tested end to end by Ex Libris and PubMed, it will not take place with the January release as previously announced, but rather later in the year. As we get closer to its release, we will provide pre-release instructions in the monthly release notes.

Widgets for Analytics Reports

Due to technical limitations, Ex Libris decided to block the option to configure out-of-the-box reports (in the Alma directory of the OBI) as Analytics object widgets as of the Alma February 2019 release. Analytics objects of type Widget, Report, and Scheduled report will need to be defined from the Analytics institutional directory and not from the Alma directory. For information on copying your out-of-the-box reports to your Analytics institutional directory, see the Widgets for Analytics Reports knowledge article.

Transport Layer Security (TLS) Support

TLS is a cryptographic protocol that provides authentication and data encryption between different endpoints (for example, the user’s desktop and the application server). Various vulnerabilities (such as POODLE and DROWN) have been found in TLS versions 1.0 and 1.1 in recent years.

To avoid security vulnerabilities and to align with industry standards, Ex Libris is removing its support for TLS 1.0 and 1.1 in both Alma and Primo. This will occur on all sandbox environments as of the March release (February 17th, 2019) and on all production environments as of the May release (May 5th, 2019). Effective May 6, 2019, Ex Libris will support only TLS 1.2 or later.

You can find additional information on TLS at:

- https://www.thesslstore.com/blog/apple-microsoft-google-disable-tls-1-0-tls-1-1/

Next Release Sneak Preview

View a list of features that are planned for the Alma February 2019 release.
Check Availability and Pricing

January 2019 Acquisitions
A new tool enables purchasing operators to search Proquest OASIS (Online Acquisitions and Selection Information System) for resources, and to view pricing information for the retrieved records. In order to activate this feature, please contact Ex Libris support.

Removal of Item Search in Amazon

January 2019 Acquisitions
Item Search in Amazon was removed from the menu following issues with the Amazon integration. Ex Libris will re-evaluate possible enhancements of existing acquisitions workflows by integrating with Amazon APIs for a later redeployment.

Note Field Added to the Primo Purchase Request

January 2019 Acquisitions
The Primo (and not Primo VE) Purchase Request form now contains an optional Requester Note field. For existing customers, it is disabled by default and can be enabled in the Purchase Request Form Customization. This field previously existed in the Alma purchase request form only.

See Customizing Primo Request Forms.

Delete Interested Users in Closed PO Lines

January 2019 Acquisitions SF: 00552434 00581443
You can now control deletion for interested users in all closed and canceled PO lines. Set the po_line_remove_interested_users to true to allow the entries to be deleted. A new system job, PO Line - Delete interested users, runs weekly to delete users that are linked to closed or canceled PO lines.

See Manually Creating a PO Line.

Price Note Added to the Invoice Line

January 2019 Acquisitions
A new field, Price Note, is now available on the invoice line. The note appears on the Invoice Line Details page, in the Invoice Line List, and when the invoice lines are exported to a spreadsheet. The column is hidden by default in the Invoice Line List and can be added using the Manage Column Display button. The Price Note may also be imported when loading an invoice from an Excel file or by the RESTful API.
Copy Full URL for Public Trials

January 2019 Acquisitions
The full URL for a trial can now be copied to the clipboard so the user can use it outside of Alma without the need to copy the partial URL and add the server name.

Ordering a Centrally Managed Electronic Resource

January 2019 Acquisitions / Collaborative Networks
You can now place an order on electronic resources that are managed centrally in the Network Zone even if they do not have a license of type Negotiation.
The functionality can be divided between those orders of centrally managed electronic resources that have a license negotiation, and those that do not have a license negotiation.

Orders with a license negotiation

- If the license negotiation specifies that the resource is negotiated for the member, the order is created in the Institution Zone with all the negotiation information.
- If a license negotiation exists for the resource, but the resource was not negotiated for the member:
  - The user is prompted with the following message, "Please note that this resource has a negotiated license on the Network Zone and your institution is not part of it. Do you want to create a local order?"
  - The member can place an order, which is created in the Institution Zone and linked to the centrally managed resource. The member can then create a local license and associate it to a local order.

Orders without a license negotiation

- If the resource is available for the member, as defined by the group configuration, it can be ordered with the Order action. The order is created locally and linked to the Network Zone resource.
- You can create a local license in the Institution Zone and associate it with the locally created order.

On the License Details page, in the Inventory tab, a new section, Resources from the Network, shows electronic collections and portfolios. This section is available for orders with or without a license negotiation.

License Details Page - Inventory Tab

The local license can include terms of use that are viewable by the end user via the link resolver in the Primo View It tab. This action is available for orders with or without a license negotiation.
Support Streaming Video and Audio for Alma Viewer

**January 2019 Digital Resource Management SF: 00165705 00215803**

The Alma Viewer now supports streaming video and audio. You can convert existing digital representations to streaming format using the new Media Conversion Job. The job creates a new representation for the converted format that Alma can use to display streaming video and audio.

The job has two output formats, **HTTP LiveStreaming (HLS)** and **MPEG-4**. Select **HTTP LiveStreaming (HLS)** to convert a digital representation to streaming format. Select **MPEG-4** to convert video and audio formats that are not compatible with the browser to MPEG-4 format.

For more information, see the [Media Conversion job](#).

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**Note**

Streaming format files are far larger than the original files.

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Block File Download

**January 2019 Digital Resource Management SF: 00581066**

You can now configure access rights to allow the display of digital files in the Alma Viewer, but block patrons from
downloading the files from the viewer. To support this feature, the *Allow View* and *Allow Download* check boxes were added to the Access Rights Rule page. When the *Allow Download* check box is cleared, downloading the file is unavailable from the viewer and the *Download, Save As*, and *Print* buttons do not appear.

Block File Download

**Support Excel as an Alma Digital Import Physical Source Format**

**January 2019 Digital Resource Management** SF: 00581080 00583175

Excel is now supported as a physical source format for non-remote digital import profiles.

Excel Physical Source Format

For more information, see [Importing Records with CSV or Excel Files](#).

**Display Logic Rule Enhancements**

**January 2019 Fulfillment**

*Idea Exchange* SF: 00494112 00366748 00373168 00412601 00035318 00122128

The display logic user interface was enhanced, offering more flexibility in defining display logic rules.

The following syntax is applicable to the display logic rules: *Hide service <service> with Interface/collection With Value <interface/collection >if exists service <service>.* It is now possible to include multiple values for each place holder <>. The *With Value* field pick up list was replaced with a multiple select drop-down list. The field also now has auto-complete functionality, which allows you to begin typing a string that appears in any of the values.

As an example of the new syntax, a display logic rule displays as follows: *Hide service Full Text with Interface with value CCC Get It Now if exists service Full Text.* The full text service of CCC Get It Now is hidden if there is any other full text available.
Note that the next release will also include the ability to edit or duplicate a display logic rule and a more efficient way to order the display logic rules.

See Adding Display Logic Rules.

Multiple Printers for Circulation Desks and Work Order Departments

January 2019 Fulfillment

NERS Enhancement (ID #5746) SF: 00179615 00234790 00016753 00021474 00123193
You can now assign more than one printer to a circulation desk or work order department, allowing each operator to select a printer individually from one of the defined printers. There is now a Default Printer option and a new Additional Printers multiple selection field in the Printing Information section of the circulation desk, and in the General Details section of the Work Order Department. When multiple printers are defined and the Currently At location is selected, the available printers are now also displayed in the drop-down list. Once the user has selected a printer, the selection is saved between sessions. If only one printer exists for a location, it is not necessary to select a printer. If the user has not selected a printer, the default printer is used.

See Adding a Department and Adding a Circulation Desk.

Process Type for Lost and Paid

January 2019 Fulfillment

Idea Exchange SF: 00624220
When an on loan item's status is changed to Lost and the last lost or replacement fee is closed, the loan status can now be changed to Lost and paid and the loan is closed. For this to happen, the close_paid_lost_loan parameter must be set to true. If the parameter is set to false, the previous behavior is enforced. The parameter defaults to false for existing customers and to true for new installations.

To support the new loan status, a new label is available in the Discovery Interface Labels, c.uresolver.getit2.item_list.status.LOST_AND_PAID_LOAN.with_no_expected_date. Its default value is Lost and Paid.

See Lost Loan Management.

Preferred ID Based Services

January 2019 Fulfillment / Administration and Infrastructure
To improve the Link Resolver linking hit rates, electronic services that use the provider's ID as the linking mechanism will now be presented as the first option in the Link Resolver View It & page regardless of the sort order defined in the Online Service Order.

The electronic services which use the provider ID as a linking mechanism are ProQuest and Gale.

To disable this option, on the Online Services Order page, set the Prefer ID based Linking services field to No.

See Configuring the Order of Online Services.
Complete Reported Lost Item to Partner Borrowing Requests

**January 2019 Fulfillment - Resource Sharing**

A borrowing request whose status is **Report lost item to partner** or **Report damaged item to partner** can now be changed to **Completed** by using the **Change Status** action. When the status is changed, the temporary item is removed and the loan is closed. A lending request whose status is **Lost and Fee Communicated** may now be changed to **Completed** using the **Change Status** action.

See [Managing Resource Sharing Borrowing Requests](#).

Support Conditional Message

**January 2019 Fulfillment - Resource Sharing**

An ISO message can now be sent from a lender to a borrower to await a reply on certain lending conditions before fulfilling the request. In the Lending Request Task List, the new **Conditional** row action appears in the actions menu. The link appears only when the item is not yet shipped and only for ISO partners that are defined in the Borrowing Workflow Profile as supporting the Conditional action. When the status of the request is **Conditional**, a new **Date for Reply** field also appears on the task list.

A Conditional widget is available to display the lending request task list with the status filtered to **Conditional** and the list sorted by **Date for Reply** in descending order.

When selecting the new action, a pop-up window is displayed with a mandatory **Reason**, a **Date for reply**, which is the last day the lender will wait to receive an answer from the borrower, and a **Note** field. The borrowing request then changes to **Conditional** status, and the **Date for Reply** field is displayed. A **Conditional Reply** action is displayed on the row action menu for the borrowing institution to respond. When the borrower selects the action, a window is displayed for the user to select **Yes** or **No** in response to the condition specified by the lender. If the response is **Yes**, the request status changes to **Sent** and **Date for Reply** field is cleared. If the response is **No**, the status changes to **Rejected by Partner** and continues to the next partner in the rota. When the response is returned to the lender, if the response value is **No**, the request is rejected. If the value is **Yes**, the **Date for Reply** field is cleared and the request status returns to **Created lending request**. The response is recorded in an audit note.

See [Managing Resource Sharing Lending Requests](#) and [Managing Resource Sharing Borrowing Requests](#).

Enhancements to Handling Multiple Matches During Resource Locate

**January 2019 Fulfillment - Course Reserves**

Until now, when Alma found multiple matches during a resource locate (for citations added using the Process and Enrich Citations in Bulk job or when saving a citation added by an instructor in Leganto), Alma did not attach any of the matches that it found to the citation. The job report indicated that multiple matches were found. A librarian could then manually match the citation to a repository entity.

You can now use **resource_locate_multiple_matches** and **resource_locate_multiple_matches_priority** (see [Configuring Other Settings](#)) to configure how Alma handles multiple matches:

- **resource_locate_multiple_matches** is set to **manual** by default, which is the current behavior. Set to **first_by_inventory_type** and also set the next parameter to have Alma attach the citation to the first entity found according to priority type (see next field).
- When you select **first_by_inventory_type** for **resource_locate_multiple_matches**, set the priorities for matching in **resource_locate_multiple_matching_priority** using the values **E** (electronic), **P** (physical), and/or **D** (digital). in
priority order, separated by commas. For example, E, P indicates first priority electronic, second priority physical, and not to consider digital matches.

The Process and Enrich Citations in Bulk page was enhanced to support these options and in a few other ways. The old course date fields were combined to use a single date range picker, and the other previous fields were slightly moved and renamed (but otherwise remain the same).

To support the new multiple match handling feature, the field When multiple matches are found was added. Select either Handle manually or Use first matching resource. If you select Use first matching sequence, select the priorities from the drop-down lists for the three resource types.

Ex Libris Identity Service

As a result of working with the Authentication Focus Group, Ex Libris decided to introduce the Ex Libris Identity Service, based on a dedicated identity management solution. This service replaces the internal authentication method previously used by live Alma customers, and all existing customers will be migrated to this service. After migration, all passwords for internal Alma users will be stored in the Ex Libris Identity Service, to be hosted by Ex Libris in its data centers. For more information on this new service, see https://developers.exlibrisgroup.com/alma/integrations/user-management/authentication/exl_identity_service.

This change is transparent to most users logging in to Alma or Ex Libris discovery systems. All Alma operators are prompted to change their passwords at first login after the January update, even if their passwords meet requirements. Patrons who attempt to log in to Ex Libris discovery systems with passwords that do not meet requirements are prompted to change their passwords (and the new passwords cannot be previously used passwords). The following password considerations are now in place:

- The password strength cannot be configured. The password must be 8 characters long and cannot contain the username. The password_regex parameter is no longer considered.
- The password does not have an expiry date. The days_password_change parameter is no longer considered.
- The password locks for 30 minutes after five unsuccessful login attempts.

You can customize the Change Password dialog box that such users will encounter on the Internal Login Messages page in Alma (Configuration menu > General > User Interface Settings > Identity Service Labels). You can view the results of your changes by going to the following URL, which presents the Change Password dialog box: https://<your Alma
When a user enters a wrong user and password combination, the error message now includes a **Forgot password?** link. It will link to the reset password page, similar to patrons that have no password.

The Reset Password Letter is sent to an individual user by selecting the **Reset your password for the identity service** option in the **Send message** drop-down list on the User Details page. The letter is sent to a group of users by running the Update/Notify Users job and selecting the **Identity Service mail** option in the **Send notification to user** drop-down list on the job parameters page.

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**Note**

The workflow for new customers also involves an email using the Reset Password Letter (letter code: ResetPwLetter), for which you can customize the XSL and labels.

The following deployment schedule applies to the Identity Service:

<table>
<thead>
<tr>
<th>Date</th>
<th>Deployment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dec 23rd, 2018</td>
<td>Enable the Identity Service on Alma sandbox environments</td>
</tr>
<tr>
<td>Jan 13th, 2019</td>
<td>Enable the Identity Service on APAC Alma Production environments</td>
</tr>
<tr>
<td>Jan 20th, 2019</td>
<td>Enable the Identity Service on EU Alma Production environments</td>
</tr>
<tr>
<td>Jan 27th, 2019</td>
<td>Enable the Identity Service on NA Alma Production environments</td>
</tr>
</tbody>
</table>

See [Ex Libris Identity Service](https://www.exlibrisgroup.com).
Additional Features

• **January 2019 Acquisitions** SF: 00541435 00543592
  Two new fields, *Subscription dates range* and *Additional information*, are now available in the ERP invoice export XML. Both fields are under the `<invoice_line>` tag.

• **January 2019 Acquisitions**
  Anonymous answers are now included in the statistics calculation of a public trial.

• **January 2019 Resource Management** SF: 00465903 00501033 00501180 00556888 00575293 00577544 00422286 00468629 00164947 00182230 00362562 00396319 00422286
  The total counts in your search results are now precise and not approximate.

• **January 2019 Resource Management** SF: 00425709 00595338
  The Browse Bibliographic Headings functionality now handles Spanish language characters as follows (if you have configured Spanish language support):

<table>
<thead>
<tr>
<th>Letter</th>
<th>Search</th>
<th>Sort</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ñ/ñ</td>
<td>Searching for Ñ/ñ does not retrieve results for N/n and the reverse.</td>
<td>Sorted after n.</td>
</tr>
<tr>
<td>Ç/ç</td>
<td>Searching for Ç/ç does not retrieve results of C/c and the reverse.</td>
<td>Sorted after c.</td>
</tr>
<tr>
<td>L·L/l·l</td>
<td>Searched for as if it were the digraph ll.</td>
<td>Sorted as ll.</td>
</tr>
</tbody>
</table>

• **January 2019 Resource Management**
  To support Japanese language functionality for Repository Search, Browse Bibliographic Headings, and Browse Authority Headings, Alma performs the following (if you have configured Japanese language support):

  ◦ Punctuation removal
  ◦ Normalization between Hiragana and Katakana
  ◦ Iterated character normalization
  ◦ Normalization of variant Kanji characters

• **January 2019 Resource Management**

  **Idea Exchange:** SF: 00608223
  The following new match profiles are now available for repository import profiles:

  ◦ Title Statement Extended Fuzzy Non-Serial Match Method (key: com.exlibris.repository.mms.match.TitleStatementExtendedCDLMatchingProfile)
  ◦ Title Statement Extended Fuzzy Serial Match Method (key: com.exlibris.repository.mms.match.TitleStatementExtendedCDLSeMatchingProfile)

  These profiles have the same functionality as the **Extended Fuzzy Non-Serial Match Method** and **Extended Fuzzy Serial Match Method** profiles, except that when matching against the title, the new profiles match only by 245 abkn and not by 245 abkn, 245a, 210a, 246a (which the **Extended Fuzzy Non-Serial Match Method** and **Extended Fuzzy Serial Match Method** profiles do).

  For more information, see [Match Methods – Explanations and Examples](#).
• **January 2019 Resource Management SF: 00575576**
Until now, when an item was in a temporary location, the enrichment fields were not published in the publishing output file when using the Primo publishing profile. From now on, any subfields that are added to the enrichment section are published with the record even if the item is in a temporary location.

• **January 2019 Resource Management / Collaborative Networks SF: 00522037**
A new parameter, **Ignore resource type during matching**, was added to the **Link a set of records to the Network Zone** job. See [Link a Set of Records to the Network Zone](#) on the [Running Manual Jobs on Defined Sets](#) page for more information.

• **January 2019 Digital Resource Management**
You can now add custom headers when running the Remote Representation Migration and the Generate Representation from Existing Bib jobs. These headers are necessary when creating representations from remote repositories that have access right restrictions based on IP restrictions and authentication. To support this feature, the **Add HTTPS Request Header** link was added that allows you to add a name and value to the header.

![Add Custom Headers](#)

For more information, see the [Remote Representation Migration](#) and the [Generate Representation from Existing Bib jobs](#).

• **January 2019 Fulfillment**
When an item is scanned in a location other than its owning library and is being reshelved due to the **Reshelve Without Transit** rule, the destination field in the scan-in result now includes the owning library in addition to the location. For example, **Reshelve to Main - Stacks (STACK)**.

• **January 2019 Fulfillment**

**Idea Exchange**
On the Requests Monitoring page, the values of the pickup location and owning library facets will be now sorted alphabetically.

• **January 2019 Fulfillment**

**Idea Exchange**
The Active resource sharing request limit policy now ignores active requests which were already returned from the patron to the library, but were not yet returned to the lender. See [Adding Fulfillment Policies](#).

• **January 2019 Fulfillment - Course Reserves SF: 00518177 00606545**
Starting from this release, new citation titles include bibliographic record field 245 subfields a, n, p, h, b, f, g, k, and s. Note that subfield c is not included.

• **January 2019 Fulfillment - Course Reserves**
You can now delete any alert directly from the **Alerts** tab on the Edit Reading List or Edit Citations pages.

• **anuary 2019 Analytics**
The **PO Line Inventory Library Code** field was added to Funds Expenditure > PO Line. It displays the code of the library of the ordered inventory.

• **January 2019 Analytics**
The **Title Author Combined and Normalized** field was added to the Bibliographic Details folder in every subject area in which it appears. It displays 100 characters of the normalized title and the first four letters of the author.
• **January 2019 Analytics** SF: 00587917
  In the Acquisitions dashboard, the Transaction Date Fiscal Year prompt was changed to Fiscal Year Description.

• **January 2019 Analytics**
  The following fields were added to Funds Expenditure > Fund Transactions and are useful for viewing trends and statistics on print as compared to electronic PO lines and expenditures.
  - Transaction Expenditure Amount of type Electronic Format
  - Transaction Expenditure Amount of type General Format
  - Transaction Expenditure Amount of type Physical Format
  - Number of POLs of type Electronic Format
  - Number of POLs of type General Format
  - Number of POLs of type Physical Format
  For a video explaining this feature, see Analyze Fund Expenditures by Physical or Electronic Types.

• **January 2019 Analytics**
  The Courtesy Notification Sent field was added to the Loan Details folder of the Fines and Fees and Fulfillment subject areas. It indicates whether a courtesy letter was sent to the patron concerning an overdue loan. This field contains data only from the beginning of July 2018.

• **January 2019 Analytics**
  The name of the Acquisitions - Expenditure Per Reporting Code of PO Line with prompt for transaction date range report located at: /shared/Alma/Industry Standard Reports/DBS was changed to Acquisitions - Expenditure Per LC Subject with prompt for transaction date range.

• **January 2019 Analytics**
  The Invoice Line - Additional Information field was added to Funds Expenditure > Invoice Line.

• **January 2019 Administration and Infrastructure**
  You can now navigate up or down rows in a list using the up or down arrow keys. Pressing down from the last row opens the next page (if there is one). Pressing up from the first row opens the previous page (if there is one).

• **January 2019 Administration and Infrastructure**
  Alma is now translated into Japanese.

• **January 2019 APIs**

  **Idea Exchange** SF: 00173742
  It is now possible to submit a purchase request using an API. This enables the institution to seamlessly integrate with internal systems.
• **January 2019 Resource Management / Collaborative Networks** SF: 00522037
A new parameter, *Ignore resource type during matching*, was added to the Link a set of records to the Network Zone job. See Link a Set of Records to the Network Zone on the Running Manual Jobs on Defined Sets page for more information.

• **January 2019 Digital Resource Management**
You can now add custom headers when running the Remote Representation Migration and the Generate Representation from Existing Bib jobs. These headers are necessary when creating representations from remote repositories that have access right restrictions based on IP restrictions and authentication. To support this feature, the Add HTTPS Request Header link was added that allows you to add a name and value to the header.

For more information, see the Remote Representation Migration and the Generate Representation from Existing Bib jobs.

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When an item is scanned in a location other than its owning library and is being reshelved due to the Reshelve Without Transit rule, the destination field in the scan-in result now includes the owning library in addition to the location. For example, Reshelve to Main - Stacks (STACK).

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  The following fields were added to Funds Expenditure > Fund Transactions and are useful for viewing trends and statistics on print as compared to electronic PO lines and expenditures.
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  ◦ Transaction Expenditure Amount of type Physical Format
  ◦ Number of POLs of type Electronic Format
  ◦ Number of POLs of type General Format
  ◦ Number of POLs of type Physical Format
  For a video explaining this feature, see [Analyze Fund Expenditures by Physical or Electronic Types](#).

• **January 2019 Analytics**
  The **Courtesey Notification Sent** field was added to the Loan Details folder of the Fines and Fees and Fulfillment subject areas. It indicates whether a courtesy letter was sent to the patron concerning an overdue loan. This field contains data only from the beginning of July 2018.

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  The name of the **Acquisitions - Expenditure Per Reporting Code of PO Line with prompt for transaction date range** report located at: /shared/Alma/Industry Standard Reports/DBS was changed to **Acquisitions - Expenditure Per LC Subject with prompt for transaction date range**.

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  The **Invoice Line - Additional Information** field was added to Funds Expenditure > Invoice Line.

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  It is now possible to submit a purchase request using an API. This enables the institution to seamlessly integrate with internal systems.
Content Operations

New Authority Vocabularies - January 2019

January 2019 Content Operations
1,117 authority records from the Library of Congress Demographic Group Terms (LCDGT) were added to the Alma Community Zone.

Authorities Community Zone Updates - January 2019

January 2019 Content Operations
The following are the Library of Congress subject authority updates for the period of November 16th through December 20th:

- Number of records updated: 89
- Number of records added: 120
- Number of records deleted: 21

The following are the Library of Congress name authority updates for the period of November 16th through December 20th:

- Number of records updated: 18075
- Number of records added: 27931
- Number of records deleted: 471

The following are the Library of Congress Genre/Form Terms (LCGFT) updates for the period of November 16th through December 20th:

- Number of records updated: 12
- Number of records added: 10

New Electronic Collections Added to the Alma CKB - January 2019

January 2019 Content Operations
The following electronic collections were added to the Alma Community Zone from November 19th through December 23rd:

- Bell Publishing, Ltd. Publications
- California Agriculture
- Cambridge Journals CJDA Complete HSS Package Americas 2018
- Cambridge Journals CJDA Complete STM Package 2017
- Cambridge Journals CJDA Complete STM Package Americas 2018
- Cambridge Journals Full Package Standard Ams 2018
- Cambridge Journals Full Package Standard UK 2017
• Cambridge Journals Full Package Standard UK 2018
• Cambridge Journals North American Full Package 2017
• Cambridge University Press Journals Digital Archive 2017
• Cambridge University Press Journals Digital Archive 2018
• Cambridge University Press Journals Digital Archive HSS 2017
• Elsevier ScienceDirect eBook - Elsevier Masson French Health Sciences Collection 2017
• Elsevier ScienceDirect eBook - Engineering 2011
• Elsevier ScienceDirect eBook - Engineering 2012
• Elsevier ScienceDirect eBook - Engineering 2013
• Elsevier ScienceDirect eBook - Engineering 2014
• Elsevier ScienceDirect eBook - Engineering 2015
• Elsevier ScienceDirect eBook - Environmental Science 2010
• Elsevier ScienceDirect eBook - Environmental Science 2011
• Elsevier ScienceDirect eBook - Environmental Science 2012
• Elsevier ScienceDirect eBook - Environmental Science 2013
• Elsevier ScienceDirect eBook - Environmental Science 2014
• Elsevier ScienceDirect eBook - Environmental Science 2015
• Elsevier ScienceDirect eBook - Finance 2010
• Elsevier ScienceDirect eBook - Finance 2011
• Elsevier ScienceDirect eBook - Finance 2012
• Elsevier ScienceDirect eBook - Finance 2013
• Elsevier ScienceDirect eBook - Finance 2014
• Elsevier ScienceDirect eBook - Finance 2015
• Elsevier ScienceDirect eBook - Forensics, Security, and Criminal Justice 2013
• Elsevier ScienceDirect eBook - Forensics, Security, and Criminal Justice 2014
• Elsevier ScienceDirect eBook - Forensics, Security, and Criminal Justice 2015
• Elsevier ScienceDirect eBook - Pharmacology, Toxicology and Pharmaceutical Science 2011
• Elsevier ScienceDirect eBook - Pharmacology, Toxicology and Pharmaceutical Science 2012
• Elsevier ScienceDirect eBook - Pharmacology, Toxicology and Pharmaceutical Science 2013
• Elsevier ScienceDirect eBook - Pharmacology, Toxicology and Pharmaceutical Science 2014
• Elsevier ScienceDirect eBook - Pharmacology, Toxicology and Pharmaceutical Science 2015
• ESVcampus
• IBFD Journal Articles
• ICLR Online
• Jane's Defence & Security News Modules
• Journal of Jewish Studies Online
• Journal of Philosophy
• KB+ JISC Collections Duke University Press Scholarly Collection 2019
• KB+ JISC Collections Geoscienceworld Journals 2019
• KB+ JISC Collections ProQuest Music & Performing Arts Online 2017-2020
• KB+ JISC Collections University Of California Press Complete Collection 2019
• KB+ JISC Collections University Of California Press Complete Plus Collection 2019
• Nauka Online
• OECD Books and Papers
• Priory Medical Journals
• SAGE CQ Press Local Stats Annual / Archive
• SciQuest Online Science Journals
• Springer Nature Care Crui
• Sydney eScholarship Journals Online
• TAEBDC Wiley eBooks 2017
• University of Illinois Department of Mathematics Publications

New External Search Resources - January 2019

January 2019 Content Operations
No new external search resources were added to Alma Community Zone for the January release.
Next Release Sneak Preview (for February 2019)

Note
The features below are currently planned for the next release. However, some of these features may, for various reasons, not be included in this month’s release, but rather in a future Alma release.

Acquisitions
• Vendor Messages – Vendor messages will be sent in the vendor’s preferred language.

Resource Management
• Upload Electronic Holdings – Springer will be added to the available providers list for the Upload Electronic Holdings integration profile.
• Series Statement in the Search Results – There will be improvements in the display of the series statement in the search results.
• New Bibliographic and Authority Records Search Indexes – New bibliographic and authority records search indexes will be added to next month’s release.

Digital Repository
• Dublin Core MD Editor Improvements – Additional keyboard shortcuts will be added for commonly used actions throughout the MD Editor.

Fulfillment
• Idea Exchange – Upload Library Opening Hours Calendar – It will be possible to use an Excel file to upload the library opening hours calendar.
• Idea Exchange – New Preferred Name Fields for User Records – There will be new fields in user records for preferred names.
• Option to Define Item-Level General Electronic Services – It will be possible to define general electronic services at the item level, in addition to the existing title-level option.
• Display Logic Rules – It will be possible to edit or duplicate a display logic rule in addition to controlling the order of the display logic rules.
Resource Sharing

• Borrower Locate Profiles – Borrower locate profiles will be enhanced to determine the availability of electronic resources based on coverage information.

  • Idea Exchange – The View Local Resources option will be streamlined to enable easier swapping of a resource sharing request by an equivalent local hold or digitization request.

Analytics

• Lending Requests Subject Area – The Lending Requests subject area will include information about the shipping format of the lending resource sharing requests.

• Fund Information Folder in the Physical Items Subject Area – The fund information folder in the Physical Items subject area will have a date filter, enabling filtering by the current fiscal period, the previous fiscal period, as well as two fiscal periods ago.

Administration and Infrastructure

• New Shortcut Hot Keys – There will be new shortcut hot keys in multi-tabbed forms.

• Interacting with System Messages – There will be a better way for users to interact with system messages.

APIs

• New Order API Integration Profiles – It will be possible to define multiple New Order API Integration profiles, and select the one to use when using the API.
Resolved Issues

- **January 2019 Acquisitions**
  Locations of purchase requests were saved even when the user canceled the operation. This was fixed. Now locations are saved only when the user selects **Save**.

- **January 2019 Acquisitions** SF: 00423437 00487599 00545729 00219310 00566729 00563269 00516348 00614607 00371432 00491864
  When exporting the purchase request to an Excel file, the **Title** field was duplicated and the requester name was not displayed. This was fixed.

- **January 2019 Acquisitions** SF: 00574310 00603785 00512156
  In the electronic portfolio and physical item search results, the PO line link redirected to a search of PO lines by MMS ID, which caused many issues. This was fixed, and now the links on these pages redirect to a search by PO line ID that returns the correct PO lines linked to the specific inventory.

- **January 2019 Acquisitions** SF: 00622071 00609887 00616956 00608585 00630311 00618155 00499219 00597951 00612423 00615561
  When the list price and the currency were automatically copied from the PO line to the **Inventory Price** field of the physical item, the item could only be saved when the currency was removed from the **Inventory Price** field. This was fixed.

- **January 2019 Acquisitions** SF: 00407521 00359148 00240051
  Updating the remote access field on a license caused an error. This was fixed.

- **January 2019 Acquisitions** SF: 00552832
  The **Service unavailable message as of date** was not functioning as described in the documentation. The current date (today) was always used. This was fixed and the message now functions as described.

- **January 2019 Resource Management** SF: 00469479 00514446
  When importing a profile, the **Originating system** field of the existing record was overridden. This was fixed, and the **Originating system** field of the existing record is no longer overridden upon import.

- **January 2019 Resource Management** SF: 00528190
  F3 functionality for the UNIMARC series fields 225/410 incorrectly indexed the subfields $$f, $$v, $$x and $$z. This was fixed.

- **January 2019 Resource Management** SF: 00571417
  The message displayed when changing the information of items with requests was changed to clearly indicate that existing requests were deleted.

- **January 2019 Resource Management** SF: 00630428 00516759 00575184 00594267 00548433 00523309 00612919 00606787 00516759 00595538
  The Upload Electronic Holdings Job did not operate properly in some cases. This was fixed.

- **January 2019 Resource Management** SF: 00586213 00381020 00423845
  Holdings records were not displayed in the correct sort order in the repository search. This was corrected.

- **January 2019 Resource Management** SF: 00529732 00569066 00532269 00607626
  Items on loan were erroneously deleted. This was fixed.

- **January 2019 Resource Management** SF: 00586311
  Items shipped for a resource sharing request could be deleted. This was fixed.

- **January 2019 Resource Management** SF: 00606674 00583993
  An error message appeared when relinking an item associated with a closed PO line. This was fixed.

- **January 2019 Resource Management** SF: 004226281 00398417 00586342 00558677 00216353 00569196
  Alma did not operate correctly when activating a portfolio from the Community Zone when there was already a local bibliographic record in Alma. This was fixed.

- **January 2019 Resource Management** SF: 00550316 00588322 00554847 00613317 00591088
  Portfolios could not be moved from one collection to another. This was fixed.
• **January 2019 Resource Management SF: 00588610**
The Identifier column in the Community Zone Updates Task List included only ISSNs from the 776$x field. This was fixed.

• **January 2019 Resource Management SF: 00603501**
There was an error when editing a standalone portfolio linked to the Community Zone. This was fixed.

• **January 2019 Resource Management SF: 00582621**
For some electronic collections, an error appeared when trying to open the Edit Collection > General tab. This was fixed.

• **January 2019 Resource Management SF: 0060787 00516759 00595538**
Information in serial and monograph collections was switched by the Upload Electronic Holdings job. This was fixed.

• **January 2019 Resource Management SF: 00464293 00126207 00614272 00460533 00539161 00609465**
An error sometimes appeared when running a publishing profile. This was fixed.

• **January 2019 Resource Management SF: 00555159**
When publishing to Primo, the $$2 GND subfield was erroneously added to some fields. This was fixed.

• **January 2019 Resource Management / Alma-Summon Integration SF: 00568743 00614295**
A deleted portfolio appeared in a Summon holdings file. This was fixed.

• **January 2019 Resource Management SF: 00581959**
Sorting community results by contributing institution caused errors. This was fixed.

• **January 2019 Resource Management / Alma-Summon Integration SF: 00615195**
The Summon publishing job enriched records with See Also headings even though this check box was not selected in the profile. This was fixed.

• **January 2019 Resource Management SF: 00598133 00589521 00527216**
Alma operated slowly when working on electronic collections. To improve speed, when the customer is working on more than 100 portfolios (instead of the previous 1000), changes are done by a background job.

• **January 2019 Resource Management SF: 00403796**
Bibliographic records for print serials did not appear in Alma. This was fixed.

• **January 2019 Resource Management SF: 00211332 00236188 00367344**
In the MD Editor, when using F3 on a MARC 21 bibliographic record in a 7XX field, subfield $$i was taken into consideration when doing a search. This was fixed.

• **January 2019 Resource Management SF: 00420703**
When editing field 260 $$a in the MD Editor, the pop-up displayed incorrect information. This was fixed.

• **January 2019 Resource Management SF: 00490915 00526102 00518923 00521871**
The results for Browse Shelf Listing and Browse Bib Headings were not sorted. This was fixed.

• **January 2019 Resource Management SF: 00629335 00551825 00550263 00559845 00577573 00573395**
When using the Resources > Cataloging > Browse Shelf Listing and the Library and Location parameters were not specified, the back button (<) occasionally displayed inaccurate results. This was fixed.

• **January 2019 Resource Management SF: 00538842**
The Rules tab in the MD Editor loaded slowly. This was fixed.

• **January 2019 Resource Management SF: 00236188 00373541 00205435 00367344**
Using F-3 while the field had a subfield i broke the link to the authority record. This was fixed.

• **January 2019 Resource Management SF: 00579381**
Searching for headings that contained an apostrophe in the Authority Control Task List did not work properly. This was fixed.

• **January 2019 Resource Management SF: 00629579**
When searching an authority record, bibliographic headings pages did not display properly. This was fixed.

• **January 2019 Resource Management SF: 00598614**
When a non-existing location was mistakenly saved as the default location in the Inventory Information tab of an import profile, the profile did not display correctly. This was fixed.
• **January 2019 Resource Management** SF: 00580975
  The MmsTagSyncNationalCatalog task was labeled incorrectly on the **Task Parameters** tab in the List of Processes. This was fixed.

• **January 2019 Resource Management / Collaborative Networks** SF: 00521552 00585377 00565441
  If a Network Zone member added local fields to a record, but did not release it, the fields were nevertheless visible to other Network Zone members. This was fixed.

• **January 2019 Resource Management** SF: 00588392
  After an import job, the 003 field was deleted incorrectly. This was fixed.

• **January 2019 Resource Management**
  Adding a last name to the customer parameter did not update the author number generated. This was fixed.

• **January 2019 Resource Management / Collaborative Networks** SF: 00525613
  For the USC Shoah Foundation VHA e-collection, the count of portfolios in the Community Zone was not updated after additional portfolios were contributed. This was fixed.

• **January 2019 Resource Management / Collaborative Networks** SF: 00457480 00378347 00591318
  When running an MD import with a **Using NZ** type profile, the 001 field of the cached record was set with the institution's own mms_id when creating a new cached record. This was fixed.

• **January 2019 Digital Resource Management** SF: 00528032
  Adding a digital collection with an ampersand (&) in the title resulted in an error. This was fixed.

• **January 2019 Digital Resource Management** SF: 00558115
  The login page did not appear when selecting the representation link when the representation had an access right restriction based on user details. This was fixed.

• **January 2019 Fulfillment / Administration and Infrastructure** SF: 00553635 00567299 00569481 00379252
  Fulfillment rule creation was possible only in English. It is now possible in other languages as well. Note that the name and description are the default values of the fields, which are in English only.

• **January 2019 Fulfillment** SF: 00601190
  The status date of a user's fees did not always update when the fees were waived. This was fixed.

• **January 2019 Fulfillment** SF: 00396729
  On the Resource Request Monitoring page, in the **Request/Process Type** facet, library level work order types were shown by work order code for library-level work orders instead of by name. This was fixed.

• **January 2019 Fulfillment / Collaborative Networks** SF: 00410952 00504795
  In a fulfillment network, when an item from another institution was returned, the transit slip that was generated for sending the item back to the owning institution was missing the **Title** and **Institution Name** for the destination. This was fixed.

• **January 2019 Fulfillment - Resource Sharing** SF: 00581420 00551599 00515489
  In the Primo Resource Sharing form, the **Willing to pay** and **Accept copyright fields** were marked as mandatory in the Resource Sharing Form Customization, but not validated when the form was submitted. This was fixed.

• **January 2019 Fulfillment - Resource Sharing** SF: 00507923
  The Advanced Policy Configuration page could not display the policies of type **Yearly resource sharing requests limit**. This was fixed.

• **January 2019 Fulfillment - Resource Sharing** SF: 00537664
  On the Primo Resource Sharing form, the values of the fields **Article title**, **Journal title**, and **PMID** disappeared when mandatory validations caused an alert to appear. This was fixed.

• **January 2019 Fulfillment - Resource Sharing** SF: 00559687
  In resource sharing, when an article title was missing, the journal title was automatically copied to the article title. Additionally, the publication date from the journal record was copied to the article. This was fixed.

• **January 2019 Fulfillment - Resource Sharing** SF: 00607084
  Selecting **View Local Resources** and **View Network Resources** did not work properly because Alma erroneously searched the 245 $c field for the title. This was fixed.

• **January 2019 Fulfillment - Course Reserves** SF: 00565466
  The size for a value of a parameter when adding a digitization and copyright rule was increased to 4,000 characters.
• **January 2019 Fulfillment - Course Reserves** SF: 00564803 00624960
  When rolling over courses using the course loading integration profile, archived and deleted lists were copied to the new course. This was fixed, and now these lists are not copied to the new course.

• **January 2019 Fulfillment - Course Reserves** SF: 00608349
  The course loading integration profile could not roll over to an existing course. This was fixed.

• **January 2019 Fulfillment - Course Reserves** SF: 00582597
  When adding an electronic book to a reading list in Alma, the book title became the citation chapter title and the platform became the citation book title. This was fixed.

• **January 2019 Fulfillment - Course Reserves** SF: 00634038
  The Process and Enrich Citations job failed on certain citations. This was fixed.

• **January 2019 Analytics**
  The holdings record local fields that could be sent to Analytics needed to have a 9 in them. This was fixed. Bibliographic local fields and holdings local fields can now be any field.

• **January 2019 Analytics**
  UNIMARC bibliographic fields 500 and 501 now link to authorities fields 230 and 245, respectively.

• **January 2019 Analytics** SF: 00574509
  There was an error with Analytics reports that had commas in their names. This was fixed.

• **January 2019 Analytics** SF: 00612302
  In Analytics, adding the From Another Institution description field in the Physical Items History Events report produced an error. This was fixed.

• **January 2019 Analytics** SF: 00585700
  A tooltip was added to the Fund Expenditure > Reporting Code > Reporting Code field stating that it is the Fund Transaction reporting code.

• **January 2019 Analytics** SF: 00620126 00626477 00617391 00627647
  Creating a report from an Analytics set did not work properly. This was fixed.

• **January 2019 Analytics** SF: 00569812
  Analytics did not display the correct language for CNMARC records when there were multiple 101 fields. This was fixed. The complete fix will be seen after a full reindexing.

• **January 2019 Administration and Infrastructure** SF: 00557861
  A user with only the Usage Data Operator role only could not log in to Alma. This was fixed.

• **January 2019 Administration and Infrastructure**
  In the User Details General Information tab, the Preferred Identifier was mislabeled as the Primary Identifier. This was fixed.

• **January 2019 Administration and Infrastructure** SF: 00595277
  The Update/Notify Users job allowed only five resource sharing libraries. The number of libraries is now unlimited.

• **January 2019 Administration and Infrastructure** SF: 00543693 00578601
  License terms were not translated properly. This was fixed.

• **January 2019 Administration and Infrastructure** SF: 00585811
  The Open in a New Window tooltip was not translated properly. This was fixed.

• **January 2019 Administration and Infrastructure** SF: 00506372
  User information did not display properly in the User Information pop-up. This was fixed.

• **January 2019 Administration and Infrastructure** SF: 00517010
  Changing the UI font size did not work properly. This was fixed.

• **January 2019 Administration and Infrastructure** SF: 00402051
  In the Description column of the Predicted Items List, month names did not appear in the selected UI language. This was fixed.

• **January 2019 Administration and Infrastructure** SF: 00551391
  Job history did not appear for some integration profiles. This was fixed.
• **January 2019 APIs** SF: 00585483
  The PO line related APIs did not work for PO lines that had a slash in the PO line number. This was fixed.

• **January 2019 APIs**
  The GET e-collection API returned a blank public_name when the **Public name (override)** field in the UI was empty. This was fixed.

• **January 2019 APIs / Collaborative Networks** SF: 00583238
  In a Network Zone member institution, when using the API to add a local field to a bibliographic record that was linked to a network record, a version was not created. This was fixed.