Alma July 2019 Release Notes

Make the Most of July's Release

Action Items

- **View It Show All** – You can now configure the Link Resolver View It menu to show more than 25 services.

- **Define user notes as Pop up notes** - Using user notes at the circulation desk can be made more efficient with the new option to make the user notes pop up when the patron is identified at the circulation desk.

- **Skip Location Improvements** - You can set up Alma to more efficiently manage requests on multiple copy titles, by setting the system up to prefer available copies that are closer to the requested pickup location.

For information on Primo VE new release features, see the [Primo VE July 2019 Release Notes](#).

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Note

The Content Operations release notes are located [here](#).

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Upcoming Issues to Note

As a reminder, premium sandboxes will update in August according to Alma's premium sandbox refresh policy.

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Next Release Sneak Preview

Select here to view the [next release sneak preview](#).

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Main Enhancements

DARA Enhanced to Suggest Recommendations for Unavailable Electronic Portfolios and Validate Order Information for API Orders

**July 2019 DARA**

DARA can now offer the following recommendations:

- **Unavailable Portfolios** – Using an Alma Analytics report, DARA can identify unavailable electronic portfolios and recommend that you activate them.

- **Validate Order Information for Orders Created by API** – DARA identifies when you have the New Order Integration profile configured in your institution and you have PO lines created by an API, but you did not select any of the Validation of Order Information options for the New Order API integration profile. These options prevent the API from creating new orders without proper funding.
New Vendor for Availability and Pricing

**June 2019 Acquisitions**
Availability and pricing is now available for Askews and Holts on the Check Availability and Pricing page. Because Askews and Holts only supports item search by ISBN, availability and pricing for Askews and Holts is only available when ISBN is part of the search.

For Askews and Holts to be included in the results, verify that the connection parameters are defined on the System Integration tab of the Vendor record. See **Managing Vendors**.

Add Items to the Claim Task List

**July 2019 Acquisitions**
The Claim Task List now includes a new collapsible section, **Claiming Information**. This section, which is only available for physical PO lines, lists the items or holdings and their claim status. For physical one time orders, the list displays all unreceived items linked to this PO Line. The **Go to inventory** link displays the item editor. For physical continuous orders, the list displays all unreceived items that are under the holdings linking to this PO line, based on the prediction pattern. In this case, if there are items, the **Go to inventory** link goes to the the item editor, otherwise it goes to the holdings item lists.

Watch the **View Unreceived Items for Order Lines with Claims** video (1:17 min).

See **Processing Claims**.

Override URL for SUSHI Vendors

**July 2019 Acquisitions**
The **Vendor SUSHI Account** page now includes an **Override URL** in addition to the **Vendor URL**. Either the Override URL or the Vendor URL must be populated. If the Vendor URL for a SUSHI account changes in the list of SUSHI-certified vendors, the Vendor URL is updated. The Override URL is not changed by the update. When the SUSHI harvest job runs, the Override URL is checked first, and then the Vendor URL if the Override URL doesn't connect successfully.

See **Managing SUSHI Accounts**.

Link Resolver View It - Show All Option

**July 2019 Resource Management**

**Idea Exchange** SF: 00507137 00526586 00574938
The Link Resolver View It (which presents context-sensitive electronic services) can now show more than 25 services using a new **Show All** option. See **View It** and **enable_view_it_show_all_results** for more information.

Fields Added to Electronic Inventory Enrichment

**July 2019 Resource Management**
Idea Exchange
The published data for electronic inventory enrichment was extended to include the following information: URL Type, Proxy Selected, Proxy Enabled, Authentication Note, and Internal Description. These publishing changes are available when using the General Profile for publishing. See Publishing and Inventory Enrichment (General Publishing) for more information.

Advanced Search Options for Subjects Index
July 2019 Resource Management

Idea Exchange
For an All titles searches using the Subjects index, the following matching criteria were added to the Advanced search options: Is Empty, Not Contains Keywords, Not Equals, Not Contains Phrase, and Is Not Empty. Note that this requires reindexing and will be fully functional with the completion of the July reindexing. See Performing an Advanced Search for more information.

Semi-Annual Reindexing
July 2019 Resource Management SF: 00485622 00496319 00518183 00519338 00547653 00148764 00150122 00216781 00431291 00004825 00015578 00093413 00584845 00535079 00567724 00593692
During July, the semi-annual reindexing (described in greater detail here) will be run. Previously and in this release, features were announced that require reindexing to be fully functional. The July semi-annual reindexing addresses this requirement. The following list highlights the functions announced that require the July reindexing:

- In the MD Editor, Browse Shelf Listing > call number sorting previously sorted the 852 holdings field in the alphabetic order of the subfields as follows: h, i, j, k, l, m. This did not take into account that $k is the call number prefix. As of the July production release and when enabled by Ex Libris, selecting call number sorting sorts the call numbers in the following order: k, h, i, j, l, m. This change will be applied as part of the July re-indexing to all customers who do not open a case with Support before July 1st to request otherwise. Note that the display text of call numbers has always taken $k into account and appeared first.
- The sort of call numbers for the type NLM and SUDOC was improved. The change is relevant for the sort of physical items in the repository search and for browse shelf listing.
- The MARC 21 775 $x and $z are now indexed under the ISSN and ISBN indexes, and the MARC 21 775 $u, $x, $y and $z are now indexed under the Standard number index.
- Specific to the UNIMARC - Parallel Data Punctuation Display, when a UNIMARC subfield such as 200 $f or 200 $g starts with and equals sign (=), its regular (ISBD) punctuation is ignored, and the equals sign (=) prefix is used instead.
- Specific to Resource Type definitions of MARC 21 bibliographic records:
  - The Textual - Component Part resource type was canceled.
  - The Book chapter - Electronic and Book chapter - Physical resource types were changed to Monographic component part - Electronic and Monographic component part - Physical, respectively.
  - The Journal article - Electronic and Journal article - Physical resource types were changed to Serial component part - Electronic and Serial component part - Physical, respectively.
- For the CNMARC field 200 (title), display elements are now created according to the original cataloging order of the subfields. In addition, the appropriate punctuation is added between the subfields.
- See Authority Search Indexes.
- See Normalized Apostrophe in Alma Repository Search.
• The values for Network Number in Analytics is now taken from the search field instead of the display field. This corrects the issue where Analytics sometimes removed leading zeros for Network Number.

• See UDC Sorting for Browse Bibliographic Headings.

• Subfields of MARC 21, UNIMARC, and CNMARC authority record fields used to create display, sorting, and search elements, were extracted in alphabetical order rather than in cataloging order. This was fixed. As a result, additional bibliographic record elements were created. For MARC 21 display elements, this includes 5XX note fields (excluding 59X, 520 and 505), 59X local note fields, and 69X local subjects. For MARC 21 search elements, this includes 59X local notes, 9XX local fields, 09X local call numbers, and 69X local subjects. For UNIMARC and CNMARC, the display elements include 69X local subjects. Search elements include 69X Other Classification Number, 3XX notes, 9XX local fields, and 69X local subjects.

• The display of the correct language in Analytics was fixed for CNMARC records when there are multiple 101 fields.

• See Local Param Subfield Delimiters.

• When a holdings record is saved and indexed, its call number type is now determined according to the first 852 field instead of the last. Note that Alma supports only one 852 field per holdings record. With this change, if for some reason there is more than one 852 field, the call number type is derived from the first 852 field.

Agency Search Indexes for Authority Records

July 2019 Resource Management
The following indexes were added for Authorities searches in Alma's repository search:

• 040 $a – Original Cataloging Agency, MARC 21 and GND
• 040 $d – Modifying Agency, MARC 21 and GND
• 801 $b, second indicator 0 – Original Cataloging Agency, UNIMARC and CNMARC
• 801 $b, second indicator 2 – Modifying Agency, UNIMARC and CNMARC

To enable these search options, see the Configuring What Search Indexes Are Available section for more information.

Note that this requires reindexing and will be fully functional with the completion of the July reindexing.

Agency and Language Search Indexes for Bibliographic Records

July 2019 Resource Management
The following indexes were added for bibliographic record searches in Alma's repository search:

• 040 $b – Language of cataloging, MARC 21 (KORMARC)
• 100 $a, positions 22-24 – Language of cataloging, UNIMARC and CNMARC
• 801 $b, second indicator 0 – Original Cataloging Agency, UNIMARC and CNMARC

To enable these search options, see the Configuring What Search Indexes Are Available section for more information.

Note that this requires reindexing and will be fully functional with the completion of the July reindexing.

Normalized Apostrophe in Alma Repository Search

July 2019 Resource Management
The various UNICODE forms of an apostrophe are now normalized to the standard ASCII apostrophe for Alma Repository Search when searching text fields such as Subject and Title. This functionality is supported for only the default searching language configured for your system. See Regarding the search string on the Searching in Alma page for more information. Note that this change requires reindexing and that it will be fully functional after the completion of the semi-annual reindexing in July.
UDC Sorting for Browse Bibliographic Headings

July 2019 Resource Management SF: 00374379 00426593

The Universal Decimal Classification (UDC) bibliographic headings are now sorted according to the UDC standard (http://www.udcc.org/index.php/site/page?view=about_structure) in the browse bibliographic headings component of Alma. This change requires reindexing and will be fully functional with the completion of the semi-annual reindexing that is scheduled to run in July. See Browsing Bibliographic Headings for more information.

New Bibliographic and Authority Search Indexes

July 2019 Resource Management

New indexes were created for bibliographic and authority records for MARC 21/KORMARC, UNIMARC, and CNMARC. With these changes, new search terms were added to the simple and advanced staff search options. See MARC 21 Search Indexes, UNIMARC Search Indexes, CNMARC Search Indexes, and Configuring Search for more information. This change requires reindexing and will be fully functional with the completion of the semi-annual reindexing that is scheduled to run in July.

Authority Search Indexes

July 2019 Resource Management

The following new indexes were added for Authority search:

- Genre form (auth_genre_form)
  This is for MARC 21 only. Previously, the 155, 455, and 555 fields were mapped to the Subject search index. Now, these fields are instead mapped to the Genre form index.

- LCCN prefix (lccn_prefix)
  This is for MARC 21 only. The alphabetic characters that begin the 010 $a such as no, sh, or sj are indexed. With this index, you can restrict an authorities subject search to a certain type. The following is the list of search values provided for this search index:
    - n - Name or subject authority record keyed by LC
    - nb - Name or subject authority record originating in the British Library
    - nr - Name or subject authority record originating in the Research Libraries Information Network (RLIN)
    - no - Name or subject authority record originating in the Online Computer Library Center (OCLC)
    - sh - LCSH subject authority record distributed by LC
    - sj - Juvenile subject authority keyed by LC and distributed in the LC Annotated Children's Cataloging Program
    - sp - Subject authority proposal record in the LC catalog. (When it is approved, the record is distributed with the prefix sh.)

The LC Control No. Prefix search option can be used to access this index.
Authority Priorities

July 2019 Resource Management SF: 00358931
Alma now supports authority priorities for bibliographic records with a second indicator of 7. See Authority Priorities for more information.

UNIMARC Authority X41 and X42 Fields

July 2019 Resource Management
The following UNIMARC authority fields were added to support the Alma authority control workflow for linking, preferred term correction, and F3 for UNIMARC:

- 241 AUTHORIZED ACCESS POINT – NAME / TITLE (WORK)
- 441 VARIANT ACCESS POINT – NAME / TITLE (WORK)
- 541 RELATED ACCESS POINT – NAME / TITLE (WORK)
- 741 AUTHORIZED ACCESS POINT IN ANOTHER LANGUAGE AND/OR SCRIPT – NAME / TITLE (WORK)
- 242 AUTHORIZED ACCESS POINT – NAME / TITLE (EXPRESSION)
- 442 VARIANT ACCESS POINT – NAME / TITLE (EXPRESSION)
- 542 RELATED ACCESS POINT – NAME / TITLE (EXPRESSION)
- 742 AUTHORIZED ACCESS POINT IN ANOTHER LANGUAGE AND/OR SCRIPT – NAME / TITLE (EXPRESSION)

See Configuring Cataloging for more information.

Local Portfolio Language

July 2019 Resource Management SF: 00138784
You can now specify the portfolio language when creating new portfolios. Previously, English (eng) was specified by default. The language information can be entered on the New Portfolio page (when creating a new portfolio) or from the Portfolio Loader spreadsheet and is placed in the new bibliographic record's 008 (positions 35-37) for MARC 21 / KORMARC and the 101 0# $a for UNIMARC / CNMARC. Once entered, the language information is part of the export data when you use the Extended Export feature. See Managing Electronic Resources and Portfolio Loader for more information.
Thumbnail Selection for Digital Titles

July 2019 Digital Resource Management SF: 00657096
You can now select the thumbnail that appears for digital titles in the search results and Digital Resource Editor. To support this feature, a new **Properties** tab now appears in the Digital Resource Editor:

You have the following options for selecting a thumbnail for the representation:

- Select the folder icon next to the **Thumbnail Upload** field and select an image from your system.
- Select **Thumbnail Selection** and select a digital file from the representation.
- Select **Use Default Thumbnail** to use the first file of the representation as the thumbnail.

OAI Testing Added to Remote Repository Configuration

July 2019 Digital Resource Management
You can now test the OAI connection when configuring remote repositories. You no longer have to create an import profile to run this test.

To support this new functionality, the following UI elements were added to the remote repository configuration pages:

- The **Authentication** checkbox was added to the general Information tab of the Remote Digital Repository Details page. When selected, the **Username** and **Password** fields appear that allow you to add OAI authentication information.

- The **Test and Save** button was added to each tab of the Remote Digital Repository Details page. When selecting this button, the OAI Test page appears that allows you to test the OAI connection.
Limit Access Rights According to Concurrent Users

July 2019 Digital Resource Management

You can now limit access rights to digital representations according to the number of concurrent users within a specific time frame. To support this feature, Concurrent Users is now available as an access rights parameter:

To configure the Concurrent Users parameter, enter the maximum number of concurrent users allowed to view the representation and the time frame and click Add Parameter.

ViewIt Now Displays List of Representations

July 2019 Digital Resource Management

You can now configure the ViewIt action to group the list of services by representations with links to the available viewers. Previously, representations were grouped by viewer. For example:
To configure ViewIt to display a list of representations, select **Representation** from the **Group Representation Delivery Services by** drop-down list (Configuration > Fulfillment > Display Interface Logic > Other Settings):

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**Temporary Locations for Dematic Remote Storage**

**July 2019 Fulfillment** SF: 537512 541085 637988

A temporary item removal from or addition to remote storage will no longer update the Dematic database.

The Item Delete message will now only be sent when:

- The previous current location is storage and the current location is not storage, or they are not the same remote storage.
- The permanent location is not storage.

The Item Add message will now only be sent when the item's current location is changed from a non-storage location to a storage location and the previous permanent location was not a storage location (or not the same storage location).
By default, this new feature is disabled. In order to enable it, you must set the `temp_asrs_report_temporary_change` parameter to true. The temporary parameter will be deleted in a coming release and this behavior will be the standard behavior.

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**Note**

At the time that the parameter is enabled, or when the parameter is removed (in a future release) and the behavior becomes standard, if an item's permanent location is remote storage but the item is in a non-remote storage temporary location, some items that were removed from storage may not be added back to the remote storage or may be removed again.

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See [Requesting a Dematic ASRS Item](#).

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### Select Request Locations

**July 2019 Fulfillment**

**Idea Exchange** SF: 497109 552740 647394 672739

When a hold request is created and the holdings to fulfill the request is not available in the selected pickup location, Alma now matches the holdings to the request using additional parameters as follows:

1. Alma attempts to locate a holdings belonging to another library on the same campus as the pickup location.
2. If no holdings is found on the same campus, more than one holdings exists in different locations on the campus, or if no campuses have been defined, Alma checks the Transit Time Rules. If a rule exists for this holdings and the new check box, **Use for Hold Request Pickup Calculation**, is selected, Alma chooses this holdings. The check box is displayed only when the **From Library** and **To Library** fields are configured and the **Material Type** field is **Any**. By default, the check box is not selected. See [Adding a Transit Time Rule](#).
3. If more than one holdings has a transit time rule, then the holding with the shortest transit time is selected.

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**Note**

**From Library** and **To Library** are the only input parameters on the transit time rule considered for the location calculation.

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On the **Pick-Up Requested Resources** page, if the **Skip Location** action is available (the request can be fulfilled by at least one other location that the request has not been previously assigned to), a **Manual Skip Location** action now displays in addition to the **Skip Location** action. The manual action suggests a list of alternative locations by which the request may be fulfilled, sorted in the following order:

- Holdings in remote storage with the **Prefer Over Other Locations** check box selected (see [Adding a Remote Storage Facility](#)).
- Holdings whose owning library matches the requested pickup library.
- Holdings on the same campus.
- All other holdings that can fulfill the request but are not at this campus or if no campuses have been defined, the locations will be sorted by their transit time to the pickup location, if a transit time rule between the pickup location library and the location holding library has been defined and if the rule supports Hold Request Pickup Calculation.
- Holdings in remote storage that do not have the **Prefer Over Other Locations** check box selected.
- Holdings that were previously assigned and changed by the Skip Location action.
The same logic is automatically applied if the **Skip Location** action is used, automatically selecting the first location as per the sorting method described above.

See [Pickup at Shelf](#).

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### Hourly Options for Booking Requests

**July 2019 Fulfillment**

**Idea Exchange** SF: 542813 195296

A new booking policy in the Terms of Use, **Booking Resolution**, allows you to define the allowed resolution of your booking request. The policy has four values:

- **Minutes** - The booking will be defined by date, hour, and minutes.
- **Hours** - The booking will be defined by date and hour.
- **Days** - The booking will be defined by date only.
- **Days plus overnight** - The end time of the booking will be defined to the next opening time of the library.

The default value is Minutes, which maintains the previous functionality.

When a booking request is created in Alma or Primo, the start and end time fields are now dependent on the value in this policy. If the value is **Minutes**, time fields are displayed with hours and minutes. If the value is **Days** or **Days plus overnight**, the time fields are hidden. If the value is **Hours**, time fields are displayed with hours and minutes but a warning message indicates that only hours should be selected.

If multiple items exist for the same title with different booking resolutions (due to different terms of use), the least specific resolution is used.

See [Creating Booking Requests](#) and [Adding Fulfillment Policies](#).

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### Support for ISO 18626 Protocol

**July 2019 Fulfillment - Resource Sharing**

Alma now supports the new ISO ILL protocol. When adding or editing resource sharing partners, **ISO 18626** appears under the list of **Profile Types**.

To enable support for this protocol, please contact Ex Libris customer support.

See [Resource Sharing Partners](#) and the [Developer Network](#).

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### Reactivate Resource Sharing Requests

**July 2019 Fulfillment - Resource Sharing**

**NERS Enhancement (ID #5659)**

For completed, peer to peer resource sharing requests, a new row action, **Reactivate Request**, is now available on the Resource Sharing Task List. This action may be used to reactivate a request that has been mistakenly marked as
completed. The option is available on both the borrowing and lending request task list. It is also possible to send a general message to the peer partner at the time the request is reactivated.

For borrowing requests, a temporary item is recreated using the previous barcode with the process status set to **In resource sharing**. The library and location of the item are set to the same values as when the item was initially created. If the item is not yet on loan, a hold request is reinitiated. You can reinitiate the loan manually. If no loan is initiated, the request status is **Request Reactivated**.

For lending requests, the shipped item's process status is set to **In resource sharing** and the item is relinked. The request status is **Request Reactivated**. If the item is in another process, an error is displayed.

For both borrowing and lending, the request's original external ID is maintained.

To enable this action, please contact Ex Libris customer support.


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**Default User Group for Fulfillment Network Locate**

**July 2019 Fulfillment - Resource Sharing / Collaborative Networks** SF: 521843

You can now define a default user group which will be used for the locate process and rules calculation for fulfillment network partners.

The default user group for the fulfillment network locate process and its rules calculation is defined on the lender side in the `default_user_group_for_fulfillment_network_locate` parameter. Any of the institution level user group codes can be used in the parameter. By default, the parameter is empty, which preserves the previous behavior.

When a locate process is executed as part of a borrowing resource sharing request with a fulfillment network partner, if the **Check item requestability** option in the locate profile parameters in set to true, Alma uses the default user group for the requestability checks.

See Fulfillment Network Partner Configuration.

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**Preferred Name Display**

**July 2019 Administration and Infrastructure**

When **Preferred First Name**, **Preferred Middle Name**, or **Preferred Last Name**, are populated on the **User Details** page, they now replace the main **First Name**, **Middle Name** and **Last Name** fields in all places that the name appears within Alma, for example, letters, **Manage Patron Services**, and the **Active Hold Shelf**. The Active Hold Shelf also has an option to sort based on the requester preferred name. If this sort option is selected, but no preferred name is available, the main name is used instead.

The preferred name override is now the default behavior but can be overridden on the **Display User Name** page by selecting a different value in the **Displayed Name Type** field. The options are:

- **Preferred** - As described above, when chosen, any preferred user name fields that are entered will display instead of the main name fields.
- **Main** - The main names are displayed, which is the prior behavior.
- **Both** - The preferred name displays in parentheses after the main name.
The preferred names can also be set in SIS or the API. See API Docs in the Developer Network. The uploaded values of the preferred names can be manually overridden in the Alma interface.

If one preferred name field is entered but not the others, whatever value is in the main name fields will be automatically populated in the other preferred name fields. So, for instance, if Preferred First Name is entered, the values of Middle Name and Last Name will be filled into their corresponding preferred name field. The preferred name values that are automatically updated can be modified by SIS or API, as well as manually via the Alma interface.

See Managing Users.

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**Pop-Up User Notes**

**July 2019 Administration and Infrastructure**

💡 **Idea Exchange**

User notes can now be defined to appear as pop-up notes in Manage Patron Services so that the librarian can inform the patron of any important messages. When a user note is created, a new check-box is available, Pop up note. When selected, the note will display as a pop-up window when the operator enters Manage Patron Users. If a block message also exists for the user, both messages will display in the same pop-up window.

See Managing User Notes.

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**Publishing Member Related Record Information from the Network Zone**

**July 2019 Collaborative Networks**

Related record information for member institution records linked to the Network Zone can be published from the Network Zone to Primo. See Publishing Bibliographic Records to Primo When Working with a Network Zone for more information.

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**Deliver Analytics Report with FTP**

**July 2019 Analytics**

You can now configure scheduled analytics reports to be placed on an FTP server. This can be useful, for example, if you want to make the report available to other departments in your institution.

You configure Alma Analytics to deliver a report to an FTP server on the Analytics Objects List page (Configuration Menu > Analytics > Analytics Objects List or Analytics > Analytics Objects > Analytics Objects List).

Select FTP, select an FTP configuration, and enter a sub-directory.
When the report runs it is sent to the FTP server. For more information, see Running Analytics Reports and Displaying Them in Alma.

Mandatory System Field for New Order API Integration Profile

July 2019 APIs
The System field is now mandatory for the New Order API integration profile. The field values include:

- Basware
- Homegrown
- Multiple
- OASIS ProQuest
- Other
- GOBI YBP

Mapping Bibliographic Record Fields to Citation Fields

July 2019 Fulfillment - Course Reserves SF: 00589678 00623171
You can now configure and normalize the information that is taken from a bibliographic record and copied to a citation when a) a repository citation is created or b) a resource locate succeeds for the citation. For more information, see Mapping Bibliographic Record Fields to Citation Fields.

Changes to the Course Loading Integration Profile

July 2019 Fulfillment - Course Reserves SF: 00629468
Several changes were made to the course loading integration profile:

- You can select the status Rolled Over for rolled over reading lists.
• New setting: **On rollover list creation mode - Multiple** (create a new list for each course) or **Single** (if the list already exists, attach it to the new course).

### Additional Enhancements

**July 2019 Acquisitions** SF: 00459685 00464335 00467323 00468155 00479656 00490607 00555835 00556933 00570764 00572855 00604925 00608129 00610150 00640345 00665227 00216925 00223930 00228366 00239562 00394246 00397599 00418044 00449015

You can now activate a database PO line via a trial. When you select **Activate** from the Manage Trials page, you now receive a message requiring you to un-suppress the BIB record. After confirming, you are taken to the Electronic Collection Editor page. Enter the **Level URL** in the **Additional** tab and select **Save**.

**July 2019 Acquisitions** SF: 00583022
In the Query to requester letter, the receiver’s/user's first and last name is now included in the XML. For example,

```
<h3>@dear@@ &amp;#160; &lt;xsl:value-of select="last_name"/&gt;&lt;/h3&gt;
```

**July 2019 Acquisitions** SF: 00549259
The **Available For** field on the Vendor Details page is now a mandatory field.

**July 2019 Resource Management**
In the MD Editor, the **Add Local Field (Edit &gt; Add Local Field)** was relabeled to **Add Local Extension (Edit &gt; Add Local Extension)** to more clearly identify this function. See [Add Local Extension](#) for more information.

**July 2019 Resource Management**
The display of series statements in repository search results and other places was modified. For the details regarding these changes, see [Series Statements](#). This change requires reindexing and will be fully functional with the completion of the semi-annual reindexing in July.

**July 2019 Resource Management**
When authority priorities are configured and the system finds a multi-match for the first priority, it does not go on to the second/next priority to evaluate the bibliographic and authority records for a match. Instead, the multi-match is reported in the Authority Control Task List. Note that previously, when the system found a multi-match on the first priority, it would continue to the second priority and so forth to attempt to identify a single match. See [Authority Priorities](#) for more information.

**July 2019 Resource Management** SF: 00579331
A new action is available for indication rules: `recordHasDuplicateFields "{fields}"`. Also a new normalization rule is available: `correctDuplicateFields "{fields}"`. See [List of Actions](#) for more information.

**July 2019 Resource Management**
The scheduled job **Authorities - Preferred Term Correction** will now run daily at 04:00 A.M. instead of 03:00 A.M. to enable the previous job **Authorities - Link BIB Headings** enough time to complete.

**July 2019 Resource Management**
If a bibliographic record has either 022a or 776x Alma puts the only ISSN in both the print identifier and online identifier fields. (The same is also true for the ISBN.) This was fixed. The e-ISSN is mapped to the online identifier and the print ISSN is mapped to the print identifier with no duplication.

**July 2019 Resource Management** SF: 00650373 00651623
A weekly scheduling option was added to the existing monthly scheduling option for the Springer Upload Electronic Holdings job.

**July 2019 Resource Management** SF: 00450587 00559468 00575039 00613906 00433542
A new row action, **Rerun**, was added to the Import Job Details page for Repository, New Order, and Update Inventory profile type import jobs that use the Upload file or FTP import protocol, and specify XML or Binary for the physical source format. For situations where an import job failed (such as **Failed in Commit after calling NZ**) that is not due to a data error, this new action enables you to easily run the import job again with the file that is specified in the row from which you select **Rerun**. See [Viewing File Details](#) for more information.
• **July 2019 Resource Management**
  As previously announced in May and June, the GET bibliographic record API and the SRU API now return calculated summary information in the AVA field $$v instead of $$h. See [API Docs > Retrieve Bib](#) in the Developer Network for more information.

• **July 2019 Resource Management** SF: 00651640
  In cases where the OpenURL contains rft.aufirst and rft.aulast elements indicating who the first author is, but the CTO does not list that author first, there is a fix for this. Contact Support to implement this fix (set the parameter) for your system.

• **July 2019 Digital Resource Management**
  Normalization rules for general publishing profiles now support DC and MODS.

• **July 2019 Digital Resource Management** SF: 00558235
  Pure (the Elsevier repository platform) is now available as a remote repository system type.

• **July 2019 Fulfillment** SF: 00633727
  Two new XML fields are now available for the Remote Storage Export XML: `<xb:institutioncode>`, `<xb:institution>`. The new fields contain the destination institution information - code and name respectively. The new fields appear only when relevant. In addition, the existing XML `<xb:library>` field now contains the library name of the destination library even if the library is in another institution.

**Note**

Customers who use the XSD file of this XML should download the new XSD version from the Developer Network and replace their old copy of the XSD file with the new one.

• **July 2019 Fulfillment - Resource Sharing** SF: 00633644
  On a borrowing request, the Patron Request Cost and Patron Receive Cost fields are now disabled after a patron pays them. See [Manually Adding a Borrowing Request](#).

• **July 2019 Fulfillment - Resource Sharing** SF: 00531553 00531927 00531980 00569081 00581187
  All details of a resource sharing request's resource information are now added to the xml of the FulOutgoingEmailLetter, and can be used by customizing the xsl. The path is: notification_data -> request_display.

• **July 2019 Administration and Infrastructure**
  When editing general electronic services, public name and public note now support multiple languages using the [translate information icon](#).

• **July 2019 Administration and Infrastructure** SF: 00647095
  When uploading patron data via SIS, you can now clear a resource library that was incorrectly set.

• **July 2019 Administration and Infrastructure** SF: 00649543
  Attachments of the General Email Message letters sent as part of Letter Retention job can now be purged through the Letters Purge with Retention job. The letter type for these letters is **ILL_EMAIL_TO_USER**.

• **July 2019 Administration and Infrastructure**
  The rows in job reports are now limited to 10,000 records.

• **July 2019 Administration and Infrastructure** SF: 00592330
  When you delete users with fines of less than 1.00, a warning will now appear to confirm that you want to delete the users and waive the fines.

• **July 2019 Administration and Infrastructure**
  The identifier **LCNAF** (Library of Congress Name Authority File Number) was added to the User Identifier Types code table. This identifier is relevant for Esploro users.

• **July 2019 Analytics**
  The name of the Alternative Call Number field was changed to Item Call Number and the name of the Alternative Call Number Type field was changed to Item Call Number Type in Physical Items > Physical Item Details.

• **July 2019 Analytics**
  The new Digital Inventory shared folder was added with the Total Digital Space Usage out-of-the-box report. This report displays your digital space used and remaining.
- **July 2019 Analytics**
  Alma Analytics fields in Fines and Fees > Transaction Date are no longer marked as to be deprecated.

- **July 2019 Analytics**
  The out-of-the-box Industry Standard Reports were enhanced by adding to the top of the reports the date the report was run and the value selected from the prompt.

- **July 2019 Analytics**
  The shared DARA folder was added that contains reports used by DARA.

- **July 2019 Analytics**
  The Original Cataloging Agency and Language of Cataloging fields were added to the Bibliographic Details dimension in all subject areas in which it appears.

- **July 2019 APIs**
  Create and Update Authority APIs now include the same validations as the BIB APIs.

- **July 2019 APIs**
  An interested user can now be added to the PO Line Creation via the POST PO Line and PUT PO Line APIs.

- **July 2019 APIs**
  The APIs for updating and creating Bib and Holdings records now support output as JSON (using the application/xml Accept: application/json). Note that the request still must be in XML (Content-type: application/xml).

- **July 2019 APIs**
  The field ils:total_fines_with_currency was added to the My Account API, after the list of actions. It uses the CurrencySymbol code table, if configured, for example: <ils:total_fines_with_currency>184.50 €</ils:total_fines_with_currency>.

- **July 2019 Fulfillment - Course Reserves / Analytics** SF: 00491061
  The Citation ID field was added to Leganto Instructor Usage Events > Citation Metadata Details.

- **July 2019 Fulfillment - Course Reserves / Analytics**
  Searchable ID fields 4-10 were added to Course Reserves > Courses in Analytics.

### Resolved Issues

- **July 2019 Analytics** SF: 00620126 00622079 00622268 00626477 00646510 00634238 00616394 00613713 0048733 00617391 00627647
  Creating a report from an Analytics set did not work properly. This was fixed.

- **July 2019 Analytics** SF: 00616356
  In Analytics, in the User subject area, in the Note folder, User Viewable did not contain the correct value. This was fixed.

- **July 2019 Analytics** SF: 00616329
  In Analytics, in the E-Inventory subject area, in the Portfolio folder, Is Free did not have the correct value. This was fixed.

- **July 2019 Analytics** SF: 00206593 00659631
  In Analytics, data was not returned for roles in the Events subject area. This was fixed.

- **July 2019 Acquisitions** SF: 00630648
  When editing import profiles, on the mapping tab, the vendor mapping listed only the first 20 vendor accounts. This was fixed.

- **July 2019 Acquisitions** SF: 00649294 00683669
  Trying to save a continuous PO line that did not have a payment acquisition method and was in status Waiting for Manual Renewal resulted in an error. This was fixed.

- **July 2019 Acquisitions** SF: 00649294 00683669
  Trying to save a continuous PO line that did not have a payment acquisition method and was in status Waiting for Manual Renewal resulted in an error. This was fixed.

- **July 2019 Acquisitions** SF: 00657913
  When sending the Query to requester letter the email address of the first letter was reused when sending the second and subsequent queries to requester for different records when managing purchase requests. This was fixed.
- **July 2019 Acquisitions** SF: 00503678 00635723 00621431 00625170
  The interested In letter was sent twice: once when activating a resource using the Update Inventory import profile and again after selecting Done in the resource activation task list. This was fixed, and now the letter is sent only once.

- **July 2019 Acquisitions** SF: 00452820
  The History tab for PO lines presented a Has New Contents icon even when there were no contents. This was fixed.

- **July 2019 Acquisitions** SF: 00636958
  On the Process Items page, selecting all items did not affect all pages, and checked items did not remain checked when navigating to the next page. This was fixed.

- **July 2019 Acquisitions** SF: 00190116 00659854
  The Additional Information column for Invoice Line Details was empty when exported to Excel. This was fixed.

- **July 2019 Acquisitions** SF: 00663075 00664985 00671490
  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.

- **July 2019 Acquisitions** SF: 00618218
  When receiving items, the filter on the Manage Items page only contained options that corresponded to items currently visible on the page, not all options. This was fixed.

- **July 2019 APIs** SF: 00598680
  The Social Login invite letter was sent with a wrong URL when produced using the Create User API. This was fixed.

- **July 2019 APIs** SF: 00671732
  Requests to BLDSS with unusual characters failed. This was fixed.

- **July 2019 Fulfillment** SF: 00539446
  Notes containing special characters did not appear in the Patron Services page. This was fixed.

- **July 2019 Fulfillment** SF: 00487912 00650276
  On the Manage Patron Services page, when selecting Submit Request, then selecting Enter without entering anything, and then selecting a recent title, the relevant buttons did not appear. This was fixed.

- **July 2019 Administration and Infrastructure** SF: 00582602 00405979
  For users, First Name, Last Name, and Email Address were not mandatory when other fields were configured as mandatory. This was fixed, and now they are always mandatory.

- **July 2019 Administration and Infrastructure** SF: 00606663 00549489
  The Purge Users job changed the Expiry Date of the users to the job run date if the Expiry Date had passed. This was fixed.
You could not add the Fulfillment Services Operator role using the Update/Notify Users job. This was fixed.

Since the June 2019 release, when selecting Add from Profiles from a user's record, the Role filter was not sticky during a session. This was fixed.

On the Address Details page of a user, the Address Line 1 was always mandatory even when it was not configured. This was fixed.

You could delete users who had fines of less than 1.00 without any warning. Now a warning appears asking if you want to delete the users (and waive the fines).

On Manage Patron Services page, system users appeared in the auto-complete search incorrectly. This was fixed.

User records sometimes loaded slowly. The response time was increased.

You could not find External Users by searching for their email address. This was fixed.

Community Zone resources activated in a member institution were not reflected in the Network Zone. This was fixed.

A shelf report from a set that included diacritics in the title resulted in an error. This was fixed.

Changing your library location after withdrawing an item automatically withdrew another item from the same holdings. This was fixed.

On the Network tab of the List of Reminders, only the institution name filter worked. All filters now work.

Some items that were deleted still had the status Loan. This was fixed.

Sometimes an All Titles search for a bibliographic record with a relation failed with an internal error. This was fixed.

Alt-S did not select the Save button on the Physical Item Editor page in all tabs. This was fixed.

Holdings and items records did not fully load for bibliographic records with special characters in the 010 field. This was fixed.

A user with the Electronic Inventory Operator role (and not Electronic Inventory Operator Extended) could delete an electronic collection. This was fixed.

Searching for publishing profiles was case-sensitive. It is now case-insensitive.

In the RSS publishing job, in rare cases the Max Days parameter in the RSS publishing profile was ignored by the job. This was fixed.

For a UNIMARC record, 011$$a and $$f did not appear properly and was not published as expected to Google Scholar and Primo Central. This was fixed, and now both subfields appear correctly. This fix will appear after the full re-indexing.
- **July 2019 Resource Management** SF: 00642533 00659833 00642374 00666727 00669411
  The Network Publishing job failed in some cases starting with the March release. This was fixed.

- **July 2019 Resource Management** SF: 00689279 00687735
  When using Publishing to Primo with heading enrichment, if the authority heading included subfield zero the subfield was removed. This was fixed.

- **July 2019 Resource Management** SF: 00624485
  The unique titles report in Overlap and Collection Analysis was sometimes missing titles that should have been included. This was fixed.

- **July 2019 Resource Management** SF: 00603450
  The Withdraw Item job did not update the status of the item. This was fixed.

- **July 2019 Administration and Infrastructure** SF: 00663795
  Some searches took a long time. This was fixed.

- **July 2019 Resource Management** SF: 00622193
  Restoring the search Index government_document_number did not restore the out-of-the-box value. This was fixed.

- **July 2019 Resource Management** SF: 00543414
  The order of the field 200 subfields was incorrect in the search results. This was fixed, and now this field is created according to the original cataloging order of the subfields with the appropriate punctuation is added between the subfields. This fix will appear after the full re-indexing.

- **July 2019 Fulfillment** SF: 00474157
  Holdings availability for Primo was slow when there were many holdings. The performance was improved.

- **July 2019 Fulfillment / Collaborative Networks** SF: 00573219 00671530
  The local fines and fees of a linked account users in a Fulfillment Network would sometimes disappear. This was fixed.

- **July 2019 Fulfillment** SF: 00507714 00595295
  The user information pop-up window in the borrowing request page did not display the user details as configured in the Contact Information Popup mapping table. This was fixed.

- **July 2019 Fulfillment** SF: 00637649
  If a work order request destination was a circulation desk, Alma incorrectly required it to have a hold shelf. This was fixed.

- **July 2019 Fulfillment** SF: 00617285 00659303 00646533
  Editing an item in the Item Editor page sometimes failed with an Updating DNX Failed error. This was fixed.

- **July 2019 Fulfillment / Collaborative Networks** SF: 0064310 00474157
  On the Manage In Process Items page, the All option was not always first in the filters. This was fixed.

- **July 2019 Fulfillment** SF: 00430029 00498775 00660096 00633649 00446671
  When calculating the due date of loans for resource sharing borrowed items, after taking the delivery delay into consideration the due date was sometimes in the past. This was fixed and now the due date is never earlier than the current time.
• **July 2019 Fulfillment** SF: 00656410 00662870 00663990 00671515 00652601
  When `close_paid_lost_loan` was set to true, it was impossible to return an item in Lost and Paid status after the Anonymization job ran. This was fixed.

• **July 2019 Fulfillment** SF: 00666412 00536537
  When a title level request was fulfilled without an item ID associated with the request before being fulfilled (in other words, the item was never put on the hold shelf, or moved or sent in any way before being checked out), the item ID did not appear in the request history. This was fixed.

• **July 2019 Fulfillment** SF: 00655489
  On the Monitor Requests page, when a request was not yet activated, the material type in the facet was Undefined. This was fixed and the correct material type now appears.

• **July 2019 Fulfillment** SF: 00656622
  A non-preferred remote storage item was given preference over a local item. This was fixed. And now a non-preferred remote storage location is given the lowest priority for selection, even if it is in the same library as the pickup location.

• **July 2019 Fulfillment** SF: 00666140
  When searching for requests by patron identifiers, barcode was not matched when searching All. This was fixed.

• **July 2019 Fulfillment** SF: 00549949
  When creating a booking request, if the selected start time was equal to the library's opening time or the selected end time was equal to the library's closing time, the selected time was automatically changed to the previous or next open time. This was fixed.

• **July 2019 Fulfillment - Resource Sharing** SF: 00430105
  On the Patron Services page, in the Returns tab, in the Owned By Library column, the library was wrong for items that were already returned to the partner. This was fixed.

• **July 2019 Fulfillment - Resource Sharing** SF: 00647864
  When creating a borrowing request owned by an itemless library, if the request was in a digital format and a copyright status was selected an error occurred. This was fixed.

• **July 2019 Resource Management** SF: 0021032 00525192 00530594 00552218 00610378 00654826 00629308 00573527 00521788
  Invalid characters in the XML file caused errors when creating MARC records. This was fixed and now the invalid characters are removed.

• **July 2019 Resource Management** SF: 00531849 00531877
  The note included with a lending request that was shipped digitally was missing some request information. This was fixed, and the note now includes, the chapter title for book format and the journal title for article format.

• **July 2019 Resource Management** SF: 00521032 00525192 00530594 00552218 00610378 00654826 00629308 00573527 00521788
  When a user edited a holdings record, selected Expand from Template, and selected a template that is a prediction pattern (such as Serial prediction quarterly months), subfield 8 was always 0 but should have been 1. This was fixed.

• **July 2019 Resource Management** SF: 00633134
  In the MD Editor, MARC 21 field 775 (Other Edition Entry) subfields x and z were not indexed in ISSN and ISBN, respectively. In addition, subfields u, x, y, and z were not indexed under Standard Number. This was fixed. This fix will appear after the full re-indexing.

• **July 2019 Resource Management** SF: 00632691 00477263 00633134
  Community Zone normalization rules were not accessible in a non-English UI. This was fixed.
• **July 2019 Resource Management** SF: 00658381 00633122
  In the MD Editor, when editing a record using Browse Bibliographic Headings, the navigation pane did not display the record. This was fixed, and now Alma refreshes the pane and adds the edited record to the list.

• **July 2019 Resource Management** SF: 00387371 00689391 00450507 00517286 00639019
  When enabled by Ex Libris, for Browse Shelf Listing > call number sorting, the normalized call number, used for sorting, is now created from the 852 holdings field in the order k, h, i, j, l, m instead of h, i, j, k, l, m (that is, subfield $k – call number prefix – is first). This change will be applied to all customers who don't request otherwise in the July re-indexing.

• **July 2019 Resource Management / Analytics** SF: 00577682
  Analytics sometimes removed leading 0s for Network Number, which resulted in display and duplication problems. This was fixed.

• **July 2019 Resource Management**
  In the MD Editor, selecting F3 for field 500 included authority records with 075 $$b.n (NAMES), which was incorrect. This was fixed.

• **July 2019 Resource Management** SF: 00630562
  When importing UNIMARC 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.

• **July 2019 Resource Management**
  When importing a single record from a file and a match was found, and the profile was configured not to import when a match was found, the resulting message was unclear. This was fixed.

• **July 2019 Resource Management** SF: 00625571 00635797
  When importing records, in the Events report the following message sometimes appeared: Cannot retrieve data for XXX. This message is a transient, internal message, and so is not useful and no longer appears. Instead, more relevant messages appear (when relevant).

• **July 2019 Resource Management / Collaborative Networks** SF: 00520109
  When working with a Network Zone, when importing a new record with Use NZ, the central control number was correct but the local counter increased and was searchable. This was fixed.

• **July 2019 Resource Management** SF: 00642889
  In UNIMARC records, 423 field subfield 1 starting by 001 did not link to the system control number. This was fixed.

• **July 2019 Resource Management**
  Contributing Marca records failed because the TIPO authority element in 810 was AU instead of RE. Also, the Citazione field should have been taken from the $9 subfield. These issues were fixed.

• **July 2019 Fulfillment** SF: 00483394 00509600
  There was a display issue with the autocomplete options on the Patron Identification page. This was fixed.

• **July 2019 Fulfillment / Administration and Infrastructure** SF: 00622216 00623763 00607786 00657219 00658387 00654426 00624457 00630642 00650865 00622715 00621943 00639015
  In some cases, Alma performed slowly and displayed a blank screen, especially for fulfillment activities. We took several steps to address this (without being able to identify the root cause: 1) These activities now display an error message with information about the event. 2) You can continue with your flow in the meantime.

• **July 2019 Acquisitions** SF: 00619804
  When using split_values_in_display_license, the license label and content were split into two different labels but had the same name, so they could not be configured separately. This was fixed, and now the first tag is firstRow and the second tag is secondRow.

• **July 2019 Resource Management / Administration and Infrastructure** SF: 00656931
  An HTTP Error 404 was received in several instances, such as the Manage Vendor page, when looking up an electronic collection by title, or managing student users. This was fixed.

• **July 2019 Administration and Infrastructure** SF: 00656217 00668227 00648393 00697253 00655322 00650865
  The ExLibris footer sometimes appeared in the middle of the page. This was fixed.

• **July 2019 Resource Management / Collaborative Networks** SF: 00574627 00585413
  In the MD Editor, when selecting Merge Records and Combine Inventory, a user at a member institution could not merge and combine two Network Zone records that were NOT cached (linked) locally to this member institution. This was fixed.
• **July 2019 Administration and Infrastructure** SF: 00652302 00690656
  A letter's Content text area did not resize when configuring the UI font size to be small. This was fixed.

• **July 2019 Administration and Infrastructure** SF: 00634501 00690185
  In the Summary section of the Physical Item Editor, Process type was not translated. This was fixed.

• **July 2019 Resource Management** SF: 00435157
  Australia noted slow upload times in production. This was fixed.

• **July 2019 Administration and Infrastructure**
  On the Manage Recommendations page, if you dismiss an item without selecting a reason, the reason appeared as null. This was fixed.

• **July 2019 DARA** SF: 00660791
  In DARA, SUSHI recommendations were generated when the existing SUSHI account already existed. This was fixed.

• **July 2019 Fulfillment - Course Reserves / Analytics** SF: 00664513
  Sometimes the shared folder for Leganto Analytics did not appear. This was fixed.

• **July 2019 Fulfillment - Course Reserves** SF: 00639014
  The copyright rules did not work properly for some citations with characters in their ISBN/ISSN. This was fixed.

• **July 2019 Fulfillment - Course Reserves** SF: 00637464 00642155
  Sometimes the shared folder for Leganto Analytics did not appear. This was fixed.

• **July 2019 Fulfillment - Course Reserves** SF: 00624215
  The list configuration feature Select List Size disappeared from the Edit Citations page. It was restored.

• **July 2019 Fulfillment - Course Reserves** SF: 00631493
  Sometimes when adding a citation in Alma, the Citation Default Copyright Status did not work. This was fixed.

• **July 2019 Fulfillment - Course Reserves** SF: 00642218
  When using the course loading integration profile to roll over courses to new courses with the same names, other courses were also incorrectly given these courses' names. This was fixed.

• **July 2019 Fulfillment - Course Reserves** SF: 00369728
  The course end date was sometimes off one day for a course uploaded by the course loading integration profile. This was fixed.

• **July 2019 Fulfillment - Course Reserves** SF: 00595117
  The Activate/Deactivate Courses job sometimes considered course start/end dates as though they were one day before or after the configured date. This was fixed.

• **July 2019 Fulfillment - Course Reserves** SF: 00548441
  In the course loading integration profiles, a rollover operation with copyright = Recalculate set Number of Students to the old course's number of participants instead of the new course's number. This was fixed.

• **July 2019 Fulfillment - Course Reserves / Analytics** SF: 00586204
  Not all citations from a list appeared in Leganto Student Usage Analytics. This was fixed.

• **July 2019 Fulfillment - Course Reserves / Analytics** SF: 00631118
  Digitized citations did not appear in Analytics. This was fixed.