Alma July 2023 Release

The Galaxy
May 1971 – Mariner 9, the first
spacecraft to orbit Mars

Alma July 2023

Release Notes

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Alma July 2023 Upcoming Issues to Note

Gradual Rollout for the New Unified PO Line List

In the August release, users can independently opt in to a New Unified PO line list. The new interface holds multiple enhancements, new ways to interact with the PO line management list, search results, and editing of PO lines. These changes will require users to adapt to a new user experience and may require institutions to update their internal training. To make this process as smooth as possible, a dedicated page was created summarizing the enhancements and advantages of the new interface, and this is in addition to the gradual rollout process, which will be available for users working with PO lines. The design and validation of the new interface were made available thanks to the Alma community, led by the UX focus group actively participating as early adopters and working with the new interface for over a year.

The New Unified PO line task list will have many benefits, including:

1. Information about all PO lines is presented in a single task list that can include PO lines in all workflow stages and assigned to any user.
2. A multiple-facet selection will support a more flexible tool for creating a work set by including PO lines that meet multiple criteria of the same facet in one work set.
3. "Assignment" as a facet.
4. A new "side-by-side" layout option enables users to view a list of PO lines on one side of the window and detailed information regarding the selected PO line on the other side. The information in the Details pane is editable so that users do not have to navigate to a special PO line editing screen to perform basic tasks.
5. It will be possible to add labels to a PO line and to be able to facet or search PO lines by these labels. This brings efficiencies to the PO line processing workflow by enabling on-the-fly tagging orders with workflow-related indications.
6. "Single page" application to save extra navigation needs.
7. Alma pages related to the currently selected PO line can be opened in a slide-out panel on top of the PO line page, enabling users to view and work on them while keeping the PO line in the background so that they don't lose their place in the PO-line list. For example, a user working on a PO line can view and modify the information about the item itself in a sliding panel.
8. New advanced search will give users an easier way of building complex nested queries with a modern and accessible UI. It will utilize a new query builder, allowing the creation of nested logical conditions of 'And' and 'Or.'

See this short video for a preview of the new interface.

Note:

- The current user interface will remain available and easily accessible to allow gradual acclimation if needed.

Alma July 2023 Additional Enhancements

- **July 2023 Analytics**

  The following fields were added to the Analytics Usage Tracking subject area:

  ◦ Usage Tracking Measures > Total Rows Retrieved

  ◦ Usage Tracking Measures > Average Rows Retrieved

  ◦ Query Details > Number of Rows per Report

- **July 2023 Analytics** SF: 06490230

  The **Role Cant Edit Restricted User** field was added to Users > Roles and the **Cant Edit Restricted Users** field was marked as "to be deprecated" from the following locations. This was done, because the **Cant Edit Restricted User** functionality is a function of the role and not of the user.

Subject Area	Dimension
Analytics Objects	Created By
Borrowing Requests (Resource Sharing)	Requester
Course Reserves	Librarian
Digital Waitlist	User Details
E-Inventory	Cost Usage POL Approver
	Electronic Collection PO Line Approver
	Portfolio PO Line Approver
Fines and Fees	User Details
Fulfillment	Borrower Details
Funds Expenditure	PO Line Approver
Leganto Student Usage	Student Details
Physical Items	PO Line Approver
Purchase Requests	PO Line Approver
	Purchase Request Approver
	Purchase Request Assigned To
	Purchase Request Creator
	Purchase Request Modified By
	Purchase Request Requester
Requests	Requester
Users	User Details

Alma July 2023 Resolved Issues

- **July 2023 Acquisitions** SF:06742971
Previously, exporting the results of the Rollover PO Lines job produced an XLS Excel file (i.e., in legacy format). This has been fixed. The job now exports results in XLSX format.

- **July 2023 Acquisitions** SF:06678681
Previously, the po_line_owner_name (library name) and po_line_owner_code (library code) fields were not included in the XML of the PO Line Aggregated Claim Letter, and thus neither the library name nor the library code could not be included in the letter. This has been fixed. These two fields were added to the XML under line_claim_letter_details.

- **July 2023 Acquisitions** SF:06542601
Previously, when a purchase request was saved with EUR selected as the currency of the Estimated cost field, when the request was next opened, the currency was changed into GBP. This issue was fixed. Now, when a purchase request is created with a particular currency selected, the currency is saved correctly and not changed afterwards.

- **July 2023 Acquisitions** SF:06700891
Previously, when the Manage EDI Tasks list was filtered for certain time ranges, in some cases the filtering process failed and an error message was displayed. This was fixed. The process no longer fails in these cases.

- **July 2023 Administration and Infrastructure** SF:06760316 06522876 06577298 06606587 06523115 06524438 06590736
Previously, the History tab of the User Details page sometimes mistakenly included changes to user roles that did not actually occur. This was found to be caused by a problem with a SIS API process. The problem was fixed, and the History tab now reflects changes made by this SIS process correctly.

- **July 2023 Administration and Infrastructure** SF:06689118
Updating translations in code-tables did not update the display of "Updated By" and "Last Updated" values. This was fixed.

- **July 2023 Administration and Infrastructure** SF:06667923
When using a small laptop screen (14 inch), the Feedback button is not responsive and covers alma menu options. This was fixed. The Feedback button is now responsive and adjusts accordingly to screen size.

- **July 2023 Administration and Infrastructure** SF:06604606
"Borrowing requests" and "Lending requests" incorrectly appear twice in the "Customize Tasks List". Only one of the instances actually has an effect on the task list order. This was fixed.

- **July 2023 Administration and Infrastructure** SF:06718285 06698944
When copying a URL from the report URL in the Analytics UI and then attempt to copy and paste something else in the Alma interface, only the URL is pasted. This was fixed.

- **July 2023 Administration and Infrastructure** SF:06684219
Users were unable to add "Order without Inventory" to Quick Links. This was fixed and "Order without Inventory" can now be added to the favorites list.

- **July 2023 Administration and Infrastructure** SF:05322709 05319563 05302114 05323932
A user identifier that was created internally for an external user could not be changed to external. This was fixed.

- **July 2023 Administration and Infrastructure** SF:06699043
Translation for resource sharing request Copyright statements were not displayed for languages with code that are longer than 2 characters (such as Traditional Chinese). This was fixed.

- **July 2023 Analytics** SF:06692517 06782452 06681417 06541187 06422235 06469502 06664277 06725741 06735087 06743440 06756487
Scheduled reports that sent the report to an FTP server sent the following error message "One of the Tag fields is empty. Both Tag fields must have a value", although the reports ran correctly. This was fixed and the error message is no longer sent.

- **July 2023 Analytics** SF:06531765
The event description for event type 3000 was not defined properly. This was fixed and it is now defined as "Search electronic entities in Institution or community".

- **July 2023 Analytics** SF:06630735
  The Rapido Analytics folder appeared for non-Rapido customers. This was fixed, and now the folder appears only for Rapido customers.

- **July 2023 Analytics** SF:06697526
  The time was not dispalyed for the in the new layout of the Analytics Object List for the "Object created by" and "Object modified by" fields. This was fixed and now the time appears.

- **July 2023 Analytics** SF:06737628
  The Manage Widgets popup on the Alma homepage contained only widgets that were shared with the user by role and not by user identifier. This was fixed, and now users can see widgets shared by user identifier.

- **July 2023 APIs** SF:06334199 06499665 06395253 06698172
  Previously, updates to the "Last activity date" of a user were not always indexed correctly. As a result, an advanced search of users by "Last activity date" did not find those users when it should have. This was fixed. Updates to the "Last activity date" of a user are now correctly indexed and can be located by the "Last activity date" advanced search.

- **July 2023 APIs** SF:06691513
  Previously, when the API was used to update the license of an electronic collection, the license start-date was not saved. This was fixed. Now the license start-date of the electronic collection is saved correctly in these cases.

- **July 2023 Digital Resource Management** SF:06678278 06710088
  Password protected PDFs were not viewable with new pdf.js enabled. This was fixed. Users can now view the PDF after entering the password.

- **July 2023 Digital Resource Management** SF:06696878 06696802
  Android devices did not display PDF files. This was fixed.

- **July 2023 Digital Resource Management** SF:06696813
  The copyrights statement is not displayed properly in the Alma Viewer on devices running iOs. This was fixed.

- **July 2023 Digital Resource Management** SF:06651256 06687361 06721849
  PDFs were not displayed correctly in the Alma Viewer using the new PDFJS. This was fixed.

- **July 2023 Digital Resource Management** SF:06594825
  Viewer sessions timed out every 60 seconds regardless of how the the access rights were configured. This was fixed, and now the session period follows the configuration in the access rights rule.

- **July 2023 Digital Resource Management** SF:06684061
  When running publishing profile? on DC output format, the job sometimes failed due to normalization, although no normalization was defined. This was fixed. The job now ignores normalization if it is not defined in the publishing profile configuration.

- **July 2023 Digital Resource Management** SF:06675294
  In the Alma Viewer, some PDFs are displayed with their pages slightly overlapping. This was fixed and the pages now appear correctly.

- **July 2023 Digital Resource Management** SF:06215197
  The Welsh language preference was not carried over from Primo to the Universal Viewer. This was fixed.

- **July 2023 Electronic Resource Management** SF:06579004
  In a miscellaneous collection, an empty value for embargo in the Community Zone portfolio using contribution did not work. This was fixed.

- **July 2023 Electronic Resource Management** SF:06727087
  General Publishing - When there are several pending publishing jobs for the same profile in the queue, only one runs successfully after the previous job is finished. This was fixed and now all the pending jobs run consecutively.

- **July 2023 Electronic Resource Management** SF:06685508
  Push to MDE button was missing in the title list of Collection results. This was fixed and the button is now displayed.

- **July 2023 Electronic Resource Management** SF:06523253
  In Overlap Analysis, lookup titles, titles with ';-'; resulted as no match in the report. This was fixed and now returns as a matched title in the report.

- **July 2023 Electronic Resource Management** SF:06576911
  Manage Sets: The "Add Members to Set" job always displayed "Completed with warnings" when creating an itemized set from an Excel file that consists of an ISBNs list and the codes containing hyphens separating the digits. This was fixed. Now both cases (ISBN keys with or without hyphens) are processed properly.

- **July 2023 Fulfillment** SF:05299388 06330261
  When an item owned by institution A was requested to be picked up at institution B and then returned at institution C, the transit slip letter set the destination to the owning library, A, instead of the pickup library, B. This was fixed. The destination in the slip now specifies the correct pickup library.

- **July 2023 Fulfillment** SF:06667853 06400058 06444012
  Previously, when multiple items were scanned using the RFID, the Destination field sometimes incorrectly displayed the same destination for all of the items. This was fixed. The correct destination is now displayed for each item.

- **July 2023 Fulfillment** SF:06330303 06511139
  Primo Get It is supposed to show a list of inventory items related to a search item if the search item itself is not found. Previously, lists of related items in Primo Get It did not include items that met the requirements to be considered "related" if certain fields in their bibliographic records were blank. This was fixed, and now all related items are shown when no matched item is found.

- **July 2023 Fulfillment** SF:06555418
  Previously, the XML of the Courtesy Letter and the Borrowing Activity Letter did not contain the name of the circulation desk where the loan took place. This was fixed. The name of this circulation desk (loan_circ_desk_name) has been added to these letters.

- **July 2023 Fulfillment** SF:06568772
  Previously, the list of electronic collections in the Online Service Order dropdown menu was not sorted alphabetically. This was fixed, and the list is now arranged in alphabetical order.

- **July 2023 Fulfillment** SF:06769768 06765523
  Creating a general request from primo failed if the customer parameter ';item_level_requesting'; = true. This was fixed.

- **July 2023 Fulfillment** SF:06479254
  Previously, in the XML of fulfillment letters, the country element in notification_data/user_for_printing contained the 3-digit country code, but not the name of the country. This was fixed. A country_display element was added to the XML of multiple fulfillment letters (e.g. FulPlaceOnHoldShelfLetter), making this information available for inclusion in these letters.

- **July 2023 Fulfillment** SF:06722342
  Previously, in the XML of the Resource Request Shipping Slip Letter, the country element in owning_library_details contained the 3-digit country code, but not the name of the country. This was fixed. A country_display element was added to the XML of the letter, making this information available for inclusion in this letter.

- **July 2023 Fulfillment** SF:06610811
  Previously, processing resources failed when their bibliographic records had very long titles (more than 4000 characters) and also contained special characters. This was fixed. Resources with bibliographic records that have these properties can now now be processed as they should be.

- **July 2023 Fulfillment** SF:06544063 05302781
  Items were sometimes missing from the Expired Hold Shelf list. This happened when the next request for the expired item was for pickup in a different institution. This was fixed. Now these items appear as they should, in the Send to Institution tab of the Expired Hold Shelf page.

- **July 2023 Fulfillment** SF:06696145
  The names that appeared in the persistent search for two of the search fields for Requests were not clear enough, causing confusion among users. These names have been modified to make them clearer. The "Requester" field is now called "Requester name," and the "Identifier" field is now called "Requester Id."

- **July 2023 Fulfillment** SF:06380361
  Previously, when booking requests were opened in Calendar view in Catalan, dates appeared in an incorrect format, with the day of the month after the name of the month. This is appropriate for English, but not for Catalan. This was fixed. The date now appears in Catalan with the month first and then the day.

- **July 2023 Fulfillment** SF:06023747 06503091 05313703 06695160
  In certain cases, the link resolver changed the genre of an article to unknown if the request was sent with no identifiers. This was fixed. The genre is now sent correctly in these cases.

- **July 2023 Fulfillment - Resource Sharing** SF:06566953 06553928
  Previously, when a borrowing request was created from an external search, if the search text consisted of a phrase with several words, the creation of the borrowing request would sometimes fail. This was fixed. Borrowing requests are now successfully created from search texts containing multiple words in these types of cases.

- **July 2023 Fulfillment - Resource Sharing** SF:06635716 06577003

Previously, when an item from a borrowing request was received, and the format of the item was changed during the receive process (e.g., from "Digital" to "Physical non-returnable"), the sliding panel did not close as it should have. As a result, an error message appeared. This was fixed. The sliding panel now closes after the receive process is completed, and no error messages appear.

- **July 2023 Fulfillment - Resource Sharing** SF:06653445
Previously, labels did not appear in a number of Resource Sharing letters when they should have. This was fixed, and now the labels appear in these letters as they should. The following letters were affected by this issue: DocumentDeliveryNotificationItemLetter, FulDigitizationNotificationItemLetter, FulOutgoingEmailLetter, BorrowerClaimEmailLetter, FulRenewEmailLetter, FulCancelEmailLetter, BorrowerOverdueEmailLetter, LendingRecallEmailLetter, QueryToPatrontLetter, ExternallyObtainedLetter, BorrowerReturnEmailLetter, BorrowerReceiveEmailLetter, GeneralMessageEmailLetter, LostEmailLetter, DamagedEmailLetter

- **July 2023 Fulfillment - Resource Sharing** SF:06572510
Previously, when a borrowing request was sent from Alma to RapidILL, and the publication date it specified contained more than just the year (i.e., more than four characters - for example, "202010" or "20201022" instead of "2020"), RapidILL rejected the request, because it could not process it with the long date. This was corrected. When the publication date contains more than four characters, Alma now extracts the first four characters of the date, and sends them to RapidILL as the publication date.

- **July 2023 Physical Resource Management** SF:06648528
In Analytics, the bibliographic record resource type "Analytic (Component Part)" was shown as "Unknown". This is fixed. The deployment of this fix is gradual, depending on the record';s update or full inventory indexing (the next job is planned for November).

- **July 2023 Resource Management** SF:06669754
Physical Items advanced search on "Storage Location ID" finds items that start with another number. This was fixed. The "Contains exact phrase starting with" search operator has been added to the Physical Items index "Storage Location ID" in Advanced Search. Note that for this functionality to take effect, full inventory indexing is required.

- **July 2023 Resource Management** SF:06719229
In certain instances, users were unable to create an itemized set after a simple search. This was fixed.

- **July 2023 Resource Management** SF:06545551
External Search Resources > Search via SRU, the Leading spaces in the leader field (LDR) are removed when the record is imported to Alma. This was fixed.

- **July 2023 Resource Management** SF:06581549
Previously, the Download button was not translated for digital article requests filled by RapidILL. This was fixed.

- **July 2023 Resource Management** SF:06618064
UNIMARC - Field 300 was missing. This was fixed by adding the ';General Note'; field to Alma analytics under the Bibliographic Details. The deployment of this fix is gradual, depending on the record';s update or full inventory indexing (the next job is planned for November).

- **July 2023 Resource Management** SF:06653029
Metadata Editor: The 008 pos. 22-23 are blank when it is edited from the "Open from the editor" option. This was fixed.

- **July 2023 Resource Management** SF:05302909
When linking (with F3) a MARC21 bib heading of the non-Latin alternate representation of field 711 to an authority record and both contain subfield $e, subfield $e is duplicated. This was fixed.

- **July 2023 Resource Management** SF:06737534 06626607 06682034
The "Copy and Overlay" functionality, when working with records from the SBN central catalog was using the truncated SBN record from the search results for the overlay. This resulted in missing fields in the Alma record (Most "Search Resources" targets return full records, but not SBN.) This was fixed by retrieving the full record from SBN when doing "Copy and Overlay" from the SBN central catalog.

- **July 2023 Resource Management** SF:06749419
CNMARC - When the ';subfield_separator'; customer parameter is defined as one character, updating 1XX fields via the metadata editor shifted the character';s positions by one character. This was fixed.

- **July 2023 Resource Management** SF:06223114
SBN contribution: The contribution of Uniform Titles sometimes failed due to a wrong SBN sequence number generated. This was fixed.

- **July 2023 Resource Management** SF:06583015 06533571
SBN integration: When records are merged (manually or during batch alignment), the localization is not updated. An

automated localization process was needed after the merge. This was fixed by adding functionality to the "merge" portion of the SBN authority and bibliographic alignment jobs. This new functionality looks for any localizations in the non-preferred record that belong to the institution (based on the Pole code in the SBN central catalog configuration) and if any exist, a localization request is performed to add them to the preferred record.

- **July 2023 Resource Management** SF:06490665
  Alma contributing records to NACSIS: 084 subfield 2 caused errors, preventing the upload of the record to NACSIS. This was fixed with additional classification codes that have been implemented.

- **July 2023 Resource Management** SF:06569129
  NACSIS App > Central catalog contribution: The punctuation in tag 264 is incorrectly duplicated in the central catalog. This was fixed by correcting the punctuation handling for 264 > PUB crosswalk.

- **July 2023 Resource Management** SF:06572043
  Cloud App > NACSIS-CAT: When a colon delimits the VT, the string after the colon is not copied to 246$b. This was fixed by checking for the colon used as a delimiter when crosswalking VT to MARC field 246 subfields a and b. Use colon as a delimiter when crosswalking MARC field 246 subfields a and b to VT.