Alma June 2023 Release

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

Alma June 2023

Release Notes

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Alma June 2023 Upcoming Issues to Note

New SAML Certificate

The current DigiCert SAML Certificate will expire on June 8th. If your institution uses this certificate, Ex Libris recommends that you consult with the IT dept. in your institution, and if required, replace the certificate for Alma and/or Primo VE. If replacing the certificate, this must be done in coordination with your IDP. For more information, see Replacing a Signed Certificate.

Note

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

No immediate action is needed. Replacing the certificate can be done at any time until its expiry on June 8th.
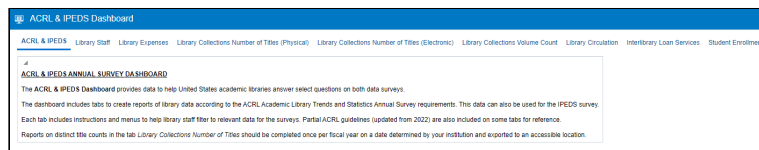
Alma June 2023 Main Stories

ACRL and IPEDS Dashboard

June 2023 Analytics

Idea Exchange

A new dashboard is now available that assists you in obtaining the information that you need to submit to ACRL and IPEDS. The dashboard is located under Alma > Shared Folders > Industry Standard Reports.

ACRL and IPEDS Dashboard

The dashboard has the following tabs that you can use to provide you with information for various reports, as required by ACRL and IPEDS:
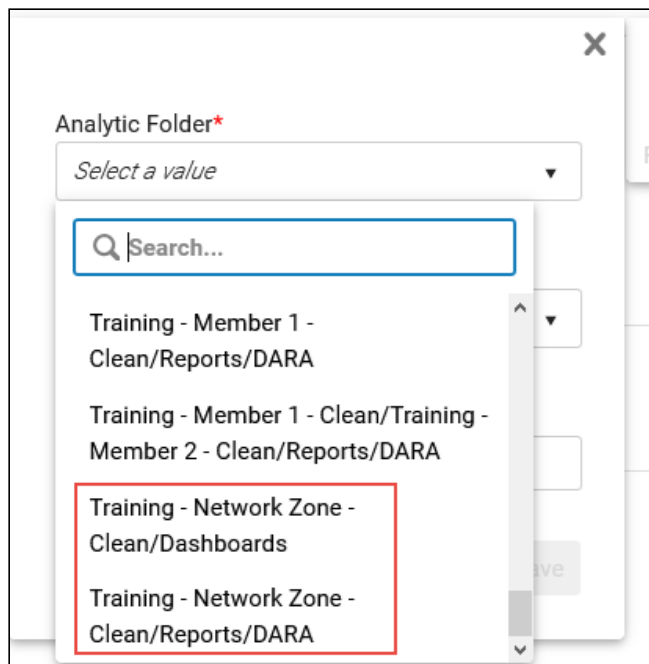
- Library Staff
- Library Expenses
- Library Collections Number of Titles (Physical)
- Library Collections Number of Titles (Electronic) – applies to digital resources as well
- Library Collections Volume Count
- Library Circulation
- Interlibrary Loan Services
- Student Enrollment

Select the filters you require in each tab to produce the relevant data.

Create Analytics Objects from Network Reports Folder

June 2023 Analytics SF: 06677249

Members of a Network Zone can now create analytics objects and create itemized sets from reports located in the network folder. The folder now appears when creating new analytics objects and when creating itemized sets from analytics:

Network Folder for Analytics Objects

To access this feature, the following parameters must be set to `true`:

- For the Network: `analytics_catalog_available_for_members`
- For the member: `analytics_catalog_available_for_my_institution`

Alma June 2023 Additional Enhancements

- **June 2023 Analytics**

  The **Request Creator** field was added to Requests > Request Details. It displays the original creator of the request. This is opposed to the **Creator** field which, after a request is completed or cancelled, displays the user that completed or cancelled the request.

- **June 2023 Analytics** SF: 06640142

  The **PO Line Inventory Active Library Code** field was added to the PO Line dimension of the Funds Expenditure, Physical Items, and Purchase Requests subject areas. It displays the inventory linked to PO Lines from active (non-deleted) libraries. This is in contrast to the PO Line Inventory Library Code, which displays the inventory linked to PO Lines from both active and deleted libraries.

- **June 2023 Analytics**

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

  - Query Details > Error Code – the code of the error
  - Query Details > Error Text – the text of the error message
  - Query Details > Report Duration – the time the report took to run
  - Usage Tracking Measures > Average Time in Secs – the average time to run the report
  - Query Date > Query Year Month Key – the year and month, in format 2023-02

- **June 2023 Analytics** SF:06611746 06611742 06611744

  The possible values for the Analytics Usage Tracking > Usage > Object Type field were expanded. They are now:

  - Dashboard
  - Report
  - Data Visualization
  - Workbook
  - Embedded Reports

Alma June 2023 Resolved Issues

- **June 2023 Analytics** SF:06661672
  Permissions functionality for databases for data visualization dashboards was fixed.

- **June 2023 Analytics** SF:06665709
  The analytics object had the wrong path for the API Usage and Purchase Requests out-of-the-box dashboards. This was fixed.

- **June 2023 Analytics** SF:06748842
  Previously, the fields of the date dimensions in Alma Analytics reported on data going 30 years back 20 years ahead. Now, Alma Analytics reports on data from 01/01/1980 and 30 years ahead.

- **June 2023 Analytics** SF:06696281
  When changing the schedule of an object, the modified date of the object was updated but not the operator name. Now, the modification information is updated immediately.

- **June 2023 Acquisitions** SF:06592482 06636916
  In the Manage Purchase Requests page, when the Unassigned tab and the "In Review" status filter were selected, if the "Assign To" row action was performed, the "In Review" filter was removed and the Unassigned tab was not highlighted (even though it was still active). This was fixed. After "Assign To" is performed, the Unassigned tab and the "In Review" status filter are once again selected in the page.

- **June 2023 Acquisitions** SF:06520112
  When an item's barcode was updated via API, it was not updated in all of the relevant fields. This has been fixed. All the fields are updated as they should be.

- **June 2023 Acquisitions** SF:06634551
  The New Order API was generating an error when Rialto sent a POL to Alma if the "Upon no match field" was not configured in the Alma integration profile. This issue was fixed. Now, if the "Upon no match" field is null when the New Order API sends a POL to Alma, a default value, "import," is assigned to the field.

- **June 2023 Acquisitions** SF:06290435
  Previously, the Data Corrector did not change the Material Type of certain PO lines to Mixed Material Package as it should have. This was fixed and now works correctly.

- **June 2023 Acquisitions** SF:06681325 06679722
  Previously, it was not possible to create invoice numbers with certain Chinese characters in them. This was caused by a redundant encoding of the invoice number, which has now been removed. It is now possible to include all Chinese characters in invoice numbers.

- **June 2023 Acquisitions** SF:06538626
  Previously, the Data Corrector Correct Invoice Task failed to delete invoices that did not have invoice lines or whose invoice lines did not have PO lines. This was fixed. The procedure now deletes invoices as it should.

- **June 2023 Acquisitions** SF:06599349
  A typo in an "Invoice - Create From Spreadsheet" job error message was fixed. The message now reads "mandatory fields are missing," as it should.

- **June 2023 Acquisitions** SF:06442252 06727692 05307598
  Previously, when certain special characters were included in the name of a license, selecting the license for a PO line in the Purchase Order Line Details page generated an error. This was fixed. Names of licenses are now normalized to remove unsupported characters before they are passed to this page.

- **June 2023 APIs** SF:06465855
  Previously, when an item that was located in place was scanned via RFID, Alma displayed "RFID Security Status: Checked Out." This was fixed. Alma now displays "Available," as expected.

- **June 2023 APIs** SF:06608466
  Previously, the GET API could retrieve a maximum of 50 notes for a single PO line. This limitation was removed. Now all notes attached to a PO line are returned by this API.

- **June 2023 APIs** SF:06667550
Previously, the Update Code-Table API did not check if the codeTableName in the URL was the same as the name in the code_table name XML payload. The API now checks this, and if they are not identical, an error message is sent.

- **June 2023 APIs** SF:06611916
Previously, the Item Policy table was not included in the results of the GET codeTables API. This was fixed. The Item Policy table now appears in the results of this API.

- **June 2023 Administration and Infrastructure** SF:06570629 06057150 06468339 06028016 06261385 06578108
Previously, it was not possible to delete a user account if the user had made any purchase requests, regardless of the statuses of the purchase requests. This was fixed. It is now possible to delete user accounts with purchase requests as long as those requests are not active.

- **June 2023 Administration and Infrastructure** SF:06432268
Previously, operators with the "Can't edit restricted users" parameter could only edit the Statistics tabs of users from restricted groups in a convoluted way. This was fixed. Now editing of user statistics is not limited even for restricted users, just as editing of blocks, notes, and fees is not limited for restricted users.

- **June 2023 Administration and Infrastructure** SF:06536748
Previously, when a new user was registered with the same primary identifier as an existing user, except that the case of the characters in the primary identifier did not match, the new user was created. This should not have occurred, because the check to see if a user with that primary identifier already existed should not have been case-sensitive. This was fixed. Checking whether the primary identifier of a new user already exists is no longer case sensitive.

- **June 2023 Administration and Infrastructure** SF:06667582
Previously, in a specific case, there was a difficulty when a library card was scanned for the "Requester" field during the creation of a Patron Physical Item Request from an Alma repository search. This was fixed.

- **June 2023 Resource Management** SF:06493662
The "reminder creation date" changes to the day after it was created when a reminder is created in China Standard Time. This was fixed and now displays the creation date consistently, and matches the institution's time zone.

- **June 2023 Resource Management** SF:06655063
For Network Repository Search > Held by, the "Public Note (physical items)" was incorrectly displayed for a portfolio with a note. This was fixed and now the "Public Note (electronic portfolios)" is displayed as expected.

- **June 2023 Resource Management** SF:06662018 06424641
When the portfolio loader created local portfolios using existing bibliographic records, the action shown in the downloadable Actions report was "Localize and activate" instead of "Create local portfolio." This was fixed.

- **June 2023 Resource Management** SF:06573106
The portfolio loader could not remove the Access Type if the cell was left empty in the input file. In order to resolve this, the new customer parameter: "delete_access_type_via_portfolio_loader" must be set to 'true'.

- **June 2023 Resource Management** SF:06590749
In the portfolio loader, if 2 portfolios exist in the Community Zone for the same bib record, an error message in the Excel file warns that 2 bib records were found, even though it was actually 2 portfolios for 1 bib. This was fixed and the error message has been updated to indicate the appropriate warning.

- **June 2023 Resource Management** SF:06569232
When changing Electronic Collection Group Settings through the Change Electronic Collection information job, the "Available For" field is not updated. This was fixed.

- **June 2023 Resource Management** SF:06638585
A member MMS bib record, linked to a Network Zone with a linked Community Zone portfolio, is deleted by the Synchronize Changes from the Community Zone job when there is an update on the portfolio. This was fixed.

- **June 2023 Resource Management** SF:06720467
The Overlap and Collection Analysis job got stuck in the finalization process. This was fixed and the job now completes.

- **June 2023 Digital Resource Management** SF:06038275
The data corrector to replace the mmsid was not working for collection inventories. This was fixed.

- **June 2023 Digital Resource Management** SF:06509219
The Alma Digital Universal Viewer displayed an incorrect runtime for large files. This was fixed.

- **June 2023 Digital Resource Management** SF:06647911
The Quick Access feature changed the interface text direction from left-to-right to right-to-left. This was fixed.

- **June 2023 Digital Resource Management** SF:06625280
The subject in the Delivery Registration status letter was not displayed and translated according to the user's preferred language. This was fixed.

- **June 2023 Resource Management** SF:06581528
Network Zone publishing completed with the error: "Failed to retrieve records for institution". This was fixed by adding an exception task to General publishing when trying to retrieve data from members. The exception stipulates that in case of failure, there will be five retries:

- **June 2023 Electronic Resource Management** SF:06573450 06376236
In overlap analysis compare collections, portfolios with complete coverage overlap did not appear in the report because of the system date format "dd-MM-yyy". This was fixed and now the portfolios appear in the complete coverage overlap report.

- **June 2023 Resource Management** SF:06482799 06481305
Sets with a date-based field that are used in advanced search and saved during specific times of the day, the value shifts a day forward. This was fixed with a configuration adjustment to address timezone differences.

- **June 2023 Resource Management** SF:06736029 06697974 06630819
Location search returns results but search query does not display location in results page. This was fixed

- **June 2023 Resource Management** SF:06440276 06246170
Nested parentheses in the search terms caused an error resulting in one or more of the terms being removed from the search. This was fixed.

- **June 2023 Resource Management** SF:06616482
The "Service unavailability" display message appeared as a link in ViewIt. This was fixed and the message now displays as plain text.

- **June 2023 Resource Management** SF:06548942 05298959 05308857
The Due Date and Due Hour continued to be displayed in My Library Card and getIt even when configured to not be displayed. This was fixed.

- **June 2023 Resource Management** SF:06660882 05325090 06230689
When the "How to get it" section was part of the Full View, the first "linktorsrc" link was not translated, since the $$E was removed from the linkDisplay string. This was fixed.

- **June 2023 Resource Management** SF:06535813 06509029
Clicking "Available Online" displayed the getIt section instead of the viewIt section. This was fixed.

- **June 2023 Resource Management** SF:06683389
There was a misspelling in the OTB Journal Search Category labels code table in the Dynamic & Structural Geology label. This was fixed.

- **June 2023 Resource Management** SF:06293336
When configuring multilingual terms to be displayed in the details section, an additional comma was displayed. This was fixed.

- **June 2023 Fulfillment** SF:06470511 06378148 06499507
Previously, when a user record was renewed from the Manage Patron Services pop-up, the expiration date in the user history was not updated. This was fixed. The expiration date is updated as it should be.

- **June 2023 Fulfillment** SF:06629660
Previously, when a digitization request was completed, the requester's name was not displayed for the request in the "Approval Requests List." This was fixed. The requester's name now appears in the list as it should.

- **June 2023 Fulfillment** SF:06593455
Previously, in the Manage Patron Services Loans tab, when a policy code was configured only at the institution level, the Item Policy column displayed the policy code instead of its description. This was fixed. The item-policy description is now displayed in this column, as it should be.

- **June 2023 Fulfillment** SF:06563226
In some cases, Alma allowed more loans per user via Self Check than was permitted in the loan-limit configuration. This was fixed. The Self-Check loan limit is now applied as it should be.

- **June 2023 Fulfillment** SF:06621295 06683694 06701837 06643442
Previously, in the default Fulfillment Unit rule, if the Update Date, Created On, and Updated On fields had no values in the database, they were automatically set to the current date, even if no changes were made to the rule on that date. This was fixed. If any of these fields has no value in the database, it displays as "-".

- **June 2023 Fulfillment** SF:06576151
A typo in a patron-block message was corrected. It now says, "Patron's card has expired".

- **June 2023 Fulfillment** SF:06472125
In the Request Queue screen, the "Activate" row action appeared even when no items were available. This was fixed. Now the "Activate" row action appears only if there is an available item.

- **June 2023 Fulfillment – Resource Sharing** SF:06481727
In some cases, the "Lost" action was not available for Resource Sharing lending requests for some partners. This was fixed. The "Lost" action is now available in these cases.

- **June 2023 Fulfillment – Resource Sharing** SF:06518901
In some cases, when a Resource Sharing borrowing request was assigned to a fund, a disencumbrance transaction would be created incorrectly. This was fixed. Incorrect disencumbrances are no longer created in these cases.

- **June 2023 Fulfillment – Resource Sharing** SF:06699233 06577200
In certain cases, when a lending request was cancelled by the borrower, its status changed to "Cancelled," but then immediately changed to "Will Supply." This has been fixed. In these cases, the status of the lending request now remains "Cancelled."

- **June 2023 Fulfillment – Resource Sharing** SF:06520499
When a digitization request was converted to a Resource Sharing request, some of the metadata fields were mapped incorrectly. This was fixed. The fields are now mapped correctly.

- **June 2023 Fulfillment – Resource Sharing** SF:06623286
When an "Available For" group was added to an electronic resource, locating the resource for a Resource Sharing borrowing request did not work. This has been fixed by creating a customer parameter, ignore_group_filter_in_rs_locate, which can be enabled or disabled by the lending institution. By default, the customer parameter is set to false, and the previous behavior, in which locating an electronic resource for a borrowing request does not work when an "Available For" group is added to the resource, is implemented. When the customer parameter is set to true, Resource Sharing resource locating works even for resources to which an "Available For" group is added.

- **June 2023 Fulfillment – Resource Sharing** SF:06536306
Previously, when notes attached to a Resource Sharing request contained quotation marks, the notes could not be exported to ILLiad. This was fixed. Notes containing quotation marks can now be exported to ILLiad.

- **June 2023 Fulfillment – Resource Sharing** SF:06308317
Previously, when a ZFL server sent a Shipped message to a Resource Sharing borrower, and the message was delayed and not sent immediately, if the message arrived at the borrowing institution after the resource was already on loan to the patron or placed on the hold shelf for the patron, the status of the borrowing request was set incorrectly in Alma, and problems processing the return of the resource also arose. This has been fixed. Now, when a ZFL server sends an update to a borrowing request after the resource was received by the borrower, the message is ignored. Note that this scenario is only relevant when the NCIP partner is defined with System Type=ZFL.

- **June 2023 Resource Management** SF:06629702
Misleading entries for MARC21 controlled 008 field that holds the 'Place' of publication in position 15-17. This was fixed. The description of code 'gau' was changed from 'Georgia' to 'Georgia (U.S. State)' for better differentiation from 'gs=Georgia (Republic)'.

- **June 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.

- **June 2023 Resource Management** SF:06542477
When utilizing the Cloud App "NACSIS-CAT copy-cataloging", the price is not copied to the Alma record for serials. This was fixed. When a NACSIS serial record has a PRICE field, copy the value to MARC field 020 $c.

- **June 2023 Resource Management** SF:06541198
In the Cloud App: "NACSIS-CAT", contributions to Central Catalog fails for serials if there is a price in 020 $c. This was fixed. When an Alma serial record has 020 $c, copy the value to the PRICE field in the NACSIS record.

- **June 2023 Resource Management** SF:06589279
The Cloud App "NACSIS-CAT" incorrectly handles records for multiple publishers. This was fixed.
If the PUBL= field in a NACSIS record has multiple publishers delimited by " : " then the Alma 260 field will contain multiple $b, one for each publisher. If the Alma 260 field has multiple $b, then they will be concatenated into a single PUBL= field in the NACSIS record, delimited by " : ".

- **June 2023 Resource Management** SF:06681438
  Search external resources - When searching via SRU target by system number field, Alma greys out all other fields but sends all the keywords filled to the target instead of sending only the system number. This was fixed and now the search is done on the system number only.

- **June 2023 Resource Management** SF:06659093
  Values of NACSIS records that have the field IDENT were not imported. This was fixed by adding a mapping request: map IDENT to 856$u. Now the NACSIS field IDENT= is imported to Alma 856 $u.

- **June 2023 Resource Management** SF:06671913
  NACSIS Central Catalog contribution, the mapping for tag 016 needed to be corrected depending on the resource type. This was fixed as follows:
  When exporting or contributing to NACSIS a serial record (LDR07 contains b or s) with field 016 ind1=7 and $2 JTNDL, the NACSIS record contains field NDLPN= with the value of 016 $a.
  When exporting or contributing to NACSIS a monograph record with field 016 ind1=7 and $2 JTNDL, the NACSIS record contains field NDLCN= with the value of 016 $a.

- **June 2023 Administration and Infrastructure** SF:06562717
  There were multiple Hebrew interface issues in Alma. All issues were fixed.

- **June 2023 Administration and Infrastructure** SF:06650705
  The Feature Rollout Configuration option was labeled the same in Admin Configuration and in User Preferences. This made it difficult for users to differentiate whether the option was for administrators to configure the option for the institution or individual users to turn the option On and Off for their account. This has been fixed. The option for User Preferences (Persistent menu > User icon > Feature Rollout Configuration) has now been relabeled to "Feature Rollout Preferences".

- **June 2023 Administration and Infrastructure** SF:06725442
  In the Printouts Queue screen, the button 'Print Selected' does not work in the Polish user interface. This was fixed by updating the translations.

- **June 2023 Administration and Infrastructure** SF:06698316 06695467
  Error message displayed when clicking on some configuration options. This was fixed and users have access to all configuration menu options.

- **June 2023 Administration and Infrastructure** SF:06641361
  When pressing the 'Add Titles' pickup in the Collection Editor and running a search, the result was that it corrupted the recent search. This was fixed.

- **June 2023 Digital Resource Management** SF:06677665 06652163 06658669
  The Digital Representation viewer time remaining pop-up was obstructed by the PDF tool bar. This was fixed.

- **June 2023 Fulfillment – Resource Sharing** SF:06560321 06594021 06556629
  When receiving an item for a borrowing request, when Enable quick printing was not checked, the confirmation message Quick print included the text op:Quickprint:op instead of a hyperlink to quick print. This was fixed.

- **June 2023 Fulfillment – Resource Sharing** SF:06611851
  In some cases, the borrowing request Volume field was populated with incorrect data. This was fixed.