



Alma March 2023 Release

The Galaxy
February 1930 - The discovery of Pluto
by astronomer Clyde Tombaugh

Alma March 2023

Release Notes

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Alma March 2023 Additional Enhancements

- **March 2023 Analytics**

The **Partner Institution** field was added to Borrowing Requests > Partner. This field displays the partner institution, which enables better reporting of borrowing requests per the supplying institution.

- **March 2023 Analytics**

The **Statistical Category Type** field was added to Users > Statistics. It displays the statistical category type, which provides additional information about statistical categories in addition to the Statistical Category field.

For more information on configuring statistical categories for analytics, see [Configuring Statistical Categories for Analytics](#).

In addition, for the Borrowing Requests, Fines and Fees, Fulfillment, and Requests subject areas, the Statistical Categories 1 - 10 fields now display library level data, since their user data can be anonymized, while for all other subject areas they display institution level data.

- **March 2023 Analytics SF: 06434690**

When Alma attempts to match electronic resource usage from COUNTER reports with the resource in Alma, Alma now first attempts to match with the Online ISSN (called the Normalized EISSN in Alma Analytics) and if that is unsuccessful with the Print ISSN (called the Normalized ISSN in Analytics) and not the opposite as was the case previously. For more information, see [Matching the resource from COUNTER report to the resource in Alma for cost per use](#).

- **March 2023 Analytics**

The values of the E-Inventory > Service URL Information > **Service Is Free** and **Service Is Free (override)** fields were changed from 1/0 to Yes/No.

- **March 2023 Analytics**

The **Borrowing Requests** and **Lending Requests** subject areas were renamed to **Borrowing Requests (Resource Sharing)** and **Lending Requests (Resource Sharing)** respectively. This is to clarify that these subject areas report on resource sharing borrowing and lending requests and not general Alma requests, which are reported on from the **Requests** subject area.

In addition, the **Usage** subject area was renamed to **Usage (COUNTER)** to indicate that it reports on electronic resource usage derived from COUNTER reports.

- **March 2023 Analytics**

The **Statistical Category** field (Users > Statistics) was restored to display the statistical category code as was the case before the February release.

Alma March 2023 Resolved Issues

- **March 2023 Acquisitions SF: 06446126 05299957 06054826 05316646 05318675**
When a hold request from an interested user was added to the queue, it was incorrectly added at the end of the queue, because other requests which should have had a lower priority had already been activated in the queue. The order in which these processes are performed was reversed, so that interested users are entered into the queue before activation takes place, and thus are given the correct priority in the queue.
- **March 2023 Acquisitions SF: 06469629**
Previously, the **Rejection reason** field was displayed under Request Attributes for all purchase requests, regardless of their actual status, and if its value was not set manually, its default value appeared there. This has been corrected; the **Rejection reason** field is now only displayed in rejected purchase requests.
- **March 2023 Acquisitions SF: 06567338 06565694 06354457 06486696**
In certain cases, when an API call failed after it changed some fields, the fields that were changed were not restored to their previous states as they should have been. This was fixed; if an API call fails, all changes it made before the failure are reversed.
- **March 2023 Acquisitions SF: 06502702**
Previously, the Purchase Requests task widget sometimes included requests that were not within the user's scope and role. This has been fixed; the Purchase Requests task widget now only includes purchase requests that belong to the user's scope and role.
- **March 2023 Acquisitions SF: 06560540**
Previously, in some cases, the advanced search for POs with status **Sent** also retrieved **Closed** and **Cancelled** POs, and did not retrieve all of the 'Sent' POs. This has been fixed; the advanced search for 'Sent' POs now returns the correct data.
- **March 2023 Acquisitions SF: 06531640**
Previously, the API documentation incorrectly labeled some of the fields of invoice-payment information (payment_identifier, payment_date, payment_currency, and payment_amount should have been voucher_number, voucher_date, voucher_currency, and voucher_amount, respectively). The API documentation has been corrected.
- **March 2023 Acquisitions SF: 06650647 06651897 06651167 06651744 06651036 06650849 06651924 06651074**
License Terms types were unexpectedly updated to have (explicit) and (interpreted) added without any other option. This was corrected and the new license terms were added on top of the existing ones.
- **March 2023 Acquisitions SF: 06483876 06614826 06464579 06653718 06501977 06446915**
When the **Update PO Lines Transactions** job was used to transfer PO Lines to new funds, the encumbrances on the old funds were not removed as they should have been. This was fixed; when this job runs, encumbrances on old funds are updated as they should be.
- **March 2023 Acquisitions SF: 05316533 06530746 06411285 06544103**
When the automatic SUSHI harvesting job returned with No valid report items found in the file, the job did not run automatically at later dates as it should have. This has been fixed; the job runs on schedule even after it returns with 'No valid report items found in the file'.
- **March 2023 Acquisitions SF: 06397850 06327433 06409812**
When the automatic SUSHI harvesting job returned with No Usage Available for Requested Dates - indicating that the data was not yet available for harvesting - the job did not try to harvest the data again for the same dates the next time it ran, as it should have. This has been fixed; the job now retries its data harvesting the next time it runs when this situation arises.
- **March 2023 Acquisitions SF: 06404212**
Previously, when an import profile was used to import EOD and create a PO line from it if the creation of the inventory failed, the PO line was skipped, but no error message was returned. This was fixed; an error message is now returned when an EOD import fails.
- **March 2023 Administration and Infrastructure SF: 06235884 06340126**
Previously, if a patron's account had a credit and a fine that were both for the same amount, both the credit and the fine appeared on the **User Details** page in the **Fines/Fees** tab, and the patron was sent a letter asking them to pay

their outstanding debt. This behavior has been improved: if the credit and fine are both from the same library, they now cancel one another out and are both removed from the **Fines/Fees** tab. A letter is sent to the patron only if the patron has a non-zero balance at one or more of the libraries in the institution, and the letter lists all the libraries at which the patron has a non-zero balance. Libraries at which the patron's balance is zero are not mentioned in the letter.

- **March 2023 Administration and Infrastructure SF: 05323949 06283816**
Previously, when a **Purge User Records** job was being configured (**Admin > Purge User Records > Add a Job**), the **User Group** field was always included in the **Add Job** window, regardless of what type of record was chosen under **Record Type**. Since the 'User Group' field is not relevant to the job when the job's 'Record Type' is 'Contact,' the dropdown list of options for the 'User Group' field contained no values when either 'Contact' or 'All' (which includes the 'Contact' record type) were selected under 'Record Type.' This field is now removed from the window when 'Contact' or 'All' are selected as the record type.
- **March 2023 Administration and Infrastructure SF: 06509612 06490383**
Previously, whenever a fine was added or waived in a user account, the user history was unnecessarily modified. This was fixed; adding or waiving a user fine no longer generates inappropriate additions to the user history.
- **March 2023 Administration and Infrastructure SF: 06314657**
Code Tables opened with a Non-English Language in the filter were incorrectly displaying the **Description** column in English. This was fixed.
- **March 2023 Administration and Infrastructure SF: 06487046**
Alma mashup included in Primo (classic), the Work Order type was not translated (appeared in English, even when translation existed). This was fixed.
- **March 2023 Administration and Infrastructure SF: 06518738**
The tooltip for the **Locations Ordering Profile** is misleading (regarding 'Locations' instead of 'Libraries') and needed to be modified. This was fixed and the tooltip now reads, 'When selected, locations will be ordered according to discovery priority for each **library** in the custom Libraries Order page.'
- **March 2023 Administration and Infrastructure SF: N/A**
Many ghost records appear in SOLR but not in the Database. This was fixed by the SOLR / DB Diff job that is triggered twice a year following the semi-annual indexing. This task's aim is to handle PA jobs to ignore such ghost records.
- **March 2023 Analytics SF: 06318005**
Classification Code field in Analytics appears as unknown for codes that appear to be Library of Congress classifications. This was fixed and new LC classification codes were added.
- **March 2023 Analytics SF: 06595378**
Adding address fields to reports in the **Users subject** area did not display results if the reports were filtered by Primary ID. This was fixed.
- **March 2023 Analytics SF: 06591380**
When exporting reports as a formatted Excel after a filter is applied an error message is displayed. This was fixed.
- **March 2023 Analytics SF: 06588655**
The **Users > User Details > Primary Identifier** field did not work properly when reports were retrieved by API. This was fixed by adding the User Primary Identifier alias to the field.
- **March 2023 Analytics SF: 06574963**
Reports created with the **campusM Home Page > Menu Clicks** field displayed only the 15 most clicked menu options. This was fixed and now all menu options are displayed.
- **March 2023 Analytics SF: 06584946 06588233 06653911 06650698 06585834 06596765 06611366**
Adding the **Retention Reason** field to a report caused it to fail. This was fixed.
- **March 2023 API SF: 06529480**
Previously, the **Manage Members** API could not populate a set with PO lines, although it should have been able to do so. Now, this API can populate a set with PO lines as expected.
- **March 2023 API SF: 06503140**
Previously, the **Update Electronic Collections** API was not working properly. This was fixed; it now works as it should.
- **March 2023 API SF: 06442929**
Previously, when the API for deleting a bibliographic record encountered a record that could not be deleted because it had objects attached to it (such as physical items, electronic portfolios, digital representations, and/or orders) if the attachments were of multiple types, the API returned the error message, **Record has attachment**. This message was too vague, and also was only returned in English and was not translatable. The message has been made clearer:

Record has attached entities of various types. In addition, it is now translatable.

- **March 2023 API SF: 06564938**
Previously, updating the **Vendor Reference Number Type** field of PO lines via the API did not work. This has been fixed, and now works properly.
- **March 2023 API SF: N/A**
Previously, updating authority records via the API failed under certain conditions, with the error, "Authority creation failed." This has been corrected; updating authority records via the API no longer fails in these cases.
- **March 2023 Digital SF: 06497820 05310252**
Thumbnail images were created in the wrong orientation. This was fixed.
- **March 2023 Digital SF: 05301453**
The job to generate thumbnails did not function properly. This was fixed.
- **March 2023 Digital SF: 05321628**
If a title had quotes and the metadata is from Primo VE, the title in the Alma Viewer was displayed with backslashes. This was fixed.
- **March 2023 Digital SF: 06527577**
If the **Representation Type** was changed to Auxiliary with a job, the representation link was not hidden in View IT / Primo VE by the 'Hide service Representation Delivery Service with Usage Type = Auxiliary' display logic rule until the representation is re-saved.
- **March 2023 Digital SF: 06623522**
The Registered access rights rule does not work if the user is not a member of a user group. This was fixed.
- **March 2023 Electronic Resource Management SF: 06348753**
The **Extended Export of Electronic Portfolios** job took a lengthy amount of time to complete. This issue was fixed.
- **March 2023 Electronic Resource Management SF: 06585389 06549871**
Export Context object to BX completes with FTP Error. This was fixed with an update to the FTP server URL.
- **March 2023 Fulfillment SF: 05323777**
In some cases, the Requests - Recalculate after Inventory Update did not process all the relevant requests. This was fixed; it now processes all the relevant requests.
- **March 2023 Fulfillment SF: 06509469**
Previously, when a loan was renewed, if there were no opening hours defined in the library's calendar for the maximum renew date and onward, and the **Closed Library Due Date Management** policy was set to **Move to next open day**, the **Maximum Renewal Period** policy was ignored when the renewal date was calculated. This was fixed; the renewal date in this situation is now calculated correctly.
- **March 2023 Fulfillment SF: 06543395**
In GetIt, for a serial record, if there were multiple identical items with the same description in the same location, the digitization link appeared only for one of them even when all were digitizable. This was fixed; the digitization link now appears for all of the items.
- **March 2023 Fulfillment - Resource Sharing SF: 06483633 06510321 06506077 06625640 06444602 06453568 06505811 06559829**
In certain situations, borrowing requests located items at lending institutions even when these items were unavailable. A problem with the search query on the lender's side was identified as the cause of the issue, and was fixed.
- **March 2023 Fulfillment - Resource Sharing SF: 06585537 06593389 06570823**
Previously, in resource-sharing task lists, selecting **Edit** for an item caused the selected search index in the persistent search to change to **All Titles** instead of remaining unchanged, as it should have. This has been fixed; selecting 'Edit' in a resource-sharing task list no longer resets the search index in the persistent search.
- **March 2023 Fulfillment - Resource Sharing SF: 06501226**
Previously, if a resource-sharing lending library had multiple physical copies of a requested item, some of which could be shipped and some of which could not - depending on their TOUs - no warning message about this was displayed in the New Layout of the Lending Requests task list. Now, a warning message does appear in this situation.
- **March 2023 Fulfillment - Resource Sharing SF: 06478000**
Previously, if a borrowing request for a book contained chapter or page information when the request was sent to Iliad, it was sent as a request with the document type **Book Chapter**. This should not have occurred when the number of pages in the request was identical to the number of pages in the book, unless the requested format was 'digital.' The process has been fixed, and the document type is now set as it should be.

- **March 2023 Fulfillment - Resource Sharing SF: N/A**
In the **Details** pane of resource-sharing borrowing-request and lending-request task lists (in the New Layout), the interface of the Request form section has been improved. It now provides enhanced responsiveness and better support for non-English text.
- **March 2023 Physical Resource Management SF: 06582282 06268546**
Repository Search: When exporting to Excel logical physical holdings set with thousands of results, not all results were exported. This was fixed, and now the exact results' number is exported.
- **March 2023 Resource Management SF: 06250626 06571814**
A process containing two normalization rules, if the first rule was copying a field and the second was editing the field created (for example, by adding to it a subfield), only the first rule was applied. This was fixed.
- **March 2023 Resource Management SF: 06570917 06340092 06584795**
For network members, the publishing to Primo jobs completed with errors in certain cases. This was fixed with some code changes that were implemented to reduce the number of errors.
- **March 2023 Resource Management SF: 06606249**
Publishing Platform jobs fail with a deadlock detected while waiting for a resource. This was fixed by adding a technical change when running the job in republishing mode with **Rebuild Entire Index** to avoid deadlock errors.
- **March 2023 Resource Management SF: 06590744**
There was a small typo ('were', instead of 'where') in the report of the **Change Holdings Information** job. This was fixed.
- **March 2023 Resource Management SF: 06570558 06589399**
The file extension is not appearing in advanced searches for digital files. This was fixed and the file extension is displayed.
- **March 2023 Resource Management SF: 05304893**
Authorities keywords search was not preserved when switching from Simple Search to Advanced Search. This was fixed.
- **March 2023 Resource Management SF: 06584778 06498190 06529336**
Search by **Country of Publication** is not working as expected when the Alma interface language is not English. This was fixed
- **March 2023 Resource Management SF: 06302842 06427237**
Itemizing a logical set of users based on expiry date does not include all results. This was fixed and now the itemized set has the same number of results as the logical set upon creation.
- **March 2023 Resource Management SF: 06430080**
The holding accession number in Get It Hebrew UI was displayed in left to right (instead of, right to left) direction when including Hebrew letters and numbers. This was fixed.
- **March 2023 Resource Management SF: 05319695 05310115**
FRBR group resource type did not match the preferred record. This was fixed. When FRBR preferred criteria is configured, the FRBR group resource type matches the configured type.
- **March 2023 Resource Management SF: 05333316 05326859**
Primo VE - Mendeley export - only the first subject is sent; repeated occurrences are omitted. This was fixed and now all subject fields are sent to Mendeley export.
- **March 2023 Resource Management SF: 05312658 06539347 06529124**
Times Cited link to WoS was not proxied when a record is open access. This was fixed. Time Cited links are now always proxied when the proxy configuration is enabled.
- **March 2023 Resource Management SF: 06308710 05318593**
The Browse Search Label > ""nui.browseGap_message"" is disabled, but the message is displayed in the Browse Search results. A temporary workaround solution is available from the March 2023 release (and Classic Primo May 2023 release). Ex Libris added the following id=""browseGapAlertBar"" to the mentioned toast bar <prm-alert-bar> element that overrides the control of the displayed message: "Note: Some records are not displayed since they are restricted/suppressed from display". To disable the message from displaying, use CSS customization by adding the following to the custom1.css file in the customization package: #browseGapAlertBar { display: none; }
- **March 2023 Resource Management SF: 05306677**
Labels are missing in Primo VE for many Language codes included in Alma, causing codes to display in Primo UI. This was fixed by adding labels for the following languages so their labels will be presented in the Primo VE interface languages list and not their code: Arabic, Catalan; Valencian, Czech, Basque, Finnish, Irish, Japanese, Lithuanian,

Bokmal Norwegian, Norwegian Nynorsk, Northern Sami, Traditional Chinese, Hawaiian, Maori, Ukrainian

- **March 2023 Resource Management SF: 06303196**
Primo VE - Sorting continues to be based on **Location** name rather than **Library** name even when Display Library name in Location facet is enabled. This was fixed.
- **March 2023 Resource Management SF: 06502342 06611885**
The alphabetical sorting of subjects in the **Record's Full Details** was incorrectly sorted for letters with accents. This was fixed and now the sorting of subjects is correctly displayed in the **Record's Full Details** for letters with accents.
- **March 2023 Resource Management SF: 06609576**
Primo VE: the Move Up/Down keys that control the order of the fields in the **View Configuration > Brief Record Display** tab are ineffective in controlling the order of fields. This was fixed and the Up/Down keys now enable users to set their preferred field order.
- **March 2023 Resource Management SF: 05332924 05303436 06503970**
The **Controlled Vocabulary Registry** list order can not be sorted. A functional limitation assessment rendered that this option is removed.
- **March 2023 Resource Management SF: 06219940 06314750**
When pushing multiple records to the Metadata Editor (MDE) at the same time, and the list of records in the MDE is sorted by entry time, clicking any record in the list caused it to jump up and change its place in the list. This was fixed and now the record stays in its place.
- **March 2023 Resource Management SF: 06368453**
In the Metadata Editor, the displayed user names are not affected by the Alma user name display configuration. This was fixed, and now the lists of users in the **assign record to another cataloger** and **release all records for user** pop-ups are according to the configured format.
- **March 2023 Resource Management SF: 06406322**
MODS: The **Date** part of Subject Heading is duplicated in **Operational Record**. This was fixed. The subject displays a single 'Date' part in the operational record that can be viewed from the mms debug screen link for the title list resulting from all titles search.
- **March 2023 Resource Management SF: 06418310**
When cataloging fields **210 \$d** and **\$h**, Alma changes the field **100 d** to **h** in pos.8 and adds the Publication Date '2' to pos.13-16. The contribution fails because of **h** in pos.8. This was fixed.
- **March 2023 Resource Management SF: 06490656**
Cloud App NACSIS-CAT copy cataloging, some fields do not have a romanized transliteration in **880**. This was fixed by adding the following missing transliterations:
 - When NACSIS record contains <AL>AHDNGR field with Hiragana or Katakana content and <AL>AHDNGVR does not exist or does not contain latin text, then <AL>AHDNGR is transliterated to latin and added to **880** field linked to **700** field.
 - When NACSIS record contains <SH>SHR field with Hiragana or Katakana content and <SH>SHVR does not exist or does not contain latin text, then <SH>SHR is transliterated to latin and added to **880** field linked to **600/610/611/630/650/651/653** field (Actual field depends on subject heading code in <SH>SHK).
- **March 2023 Resource Management SF: 06494876**
Cloud App - NACSIS-CAT copy cataloging, fields **730** and **130** do not have a romanized transliteration. This was fixed by adding the following missing transliteration:
 - When NACSIS record contains <UTL>UTHDNGR field with Hiragana or Katakana content and <UTL>UTHDNGVR does not exist or does not contain latin text, then <UTL>UTHDNGR is transliterated to latin and added to **880** field linked to **130** or **730** field. (130 field if <UTL>UTFLG = *, otherwise **730** field.)
- **March 2023 Resource Management SF: 05754607 05317872 06558134**
When signing out from the Deposit link (self-deposit page), users were redirected incorrectly to an irrelevant URL. This was fixed.