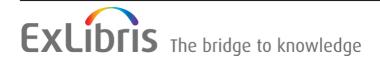


Alma January 2022

Release Notes



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Alma January 2022 Make the Most

Make the Most of January's Release

Action Items

INN-Reach API Integration - InnReach and Alma can now be integrated directly (no DCB component) using the InnReach APIs (a.k.a. D2IR).

<u>'Will Supply' Message Sent Automatically</u> - It is now possible to set Alma (as lender) to automatically notify a borrower that a request is in process ('will supply') when the internal 'ship physically' request is triggered.

Library Level Patron Notifications - It is now possible to set notifications that aggregate multiple fulfillment actions so that they be sent per library.

Upcoming Issues to Note

Sandbox Refresh

As a reminder, premium sandboxes will be updated in February according to Alma's premium sandbox refresh policy.

TLS Cryptographic Protocol Support

Read the following to avoid service disruptions.

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

As announced in the latest security update, to avoid security vulnerabilities and to align with industry standards, Ex Libris will block TLS 1.0 and 1.1 traffic for Alma API in production environments and will support only TLS 1.2. The deprecation plan which was communicated will begin by October 2021 and will be concluded by May 2022:

- Canada October 17, 2021
- APAC February 20, 2022
- Europe March 10, 2022
- America May 15, 2022

For practical steps to be taken, see Ex Libris Higher Education Platform API - deprecation of TLS 1.0 and TLS 1.1.

You can find additional information on TLS at:

- Security Update Deprecation of TLS 1.0 and TLS 1.1 Versions for Higher Education Platform API (July 8, 2021)
- <u>Transport Security Layer (TLS) Support</u>
- https://en.wikipedia.org/wiki/Transport_Layer_Security

SAML Certificate Workflow Update

Starting in August 2021, to accommodate the updated expiration policy of the certificate vendors, the signed certificate will be issued twice yearly.

For example, the certificate made available in August 2021 will expire in June 2022 and the certificate made available in February 2022 will expire in December 2022. This means that institutions that wish to use the signed certificate must update it twice a year.

Ex Libris highly recommends using the provided self-signed certificate to reduce the frequency of certificate updates.

Alma Roadmap Highlights

The next version of the Alma Roadmap Highlights document will be published in January 2022.

Next Release Sneak Preview

Select February 2022 Sneak Preview to view the next release sneak preview.



Alma January 2022 Main Stories

New "Owner" column in the "Manage EDI Tasks" page

January 2022 Acquisitions



Idea Exchange

A new "Owner" column is added to the EDI task list. This column, which is sortable, displays the owning library for each PO line. The added column enables institutions working with the EDI task list to review the PO lines by their owning library. In addition, the existing "Vendor" column was added with a sort option.

Mana	ge EDI Tasks										Dismiss Se	lected		E
niew	Al													
	Response date range	01/11/2021 -	30/11/2021 X	Apply Filter										
1 - 4 of	4										0 10	ows selected	0-	C
-	Response Type : All +													
	response type : All *													
•		Order Number	Order Description	. Vendor	Response Summary	Response Type	Ordered Items	Discrete Rems		Backordered Hems	Pieces Delivered	Expected Delivery		

Managing EDI Tasks

Extended Export in Users List

January 2022 Administration and Infrastructure



Idea Exchange

It is now possible to include primary identifiers as part of the exported list when using Alma's Export option from the user list. An **Extended Export** option will generate an Excel file similar to the existing "all fields" export, adding the primary ID as a column.

d and Manag	ge Users	;							() Sa
Staff P	ublic	Contact A	JI.						
1 - 100 of 581							(🕽 Add User 🗸	₿
 Account 	: All 👻	Role : All 👻	Status : All 👻					Extended Exp	
	Active	▲ Name	\$ Account Type	\$ Record Type	\$ Job Category	User Group	Expiration date	Excel (cur Excel (all 1	
1		123, 123 🔊	Internal	Contact					
2		565, 235 🔊	Internal	Contact	-				

Extended Export

Note

The **Extended Export** contains private data and is only available to users with access to this data, such as users with "user manager update" privileges.

Library-level Logos for Letters

January 2022 Administration and Infrastructure



Now libraries can upload logos to be displayed on letters when a single library is selected in the Configuration menu (Configuration Menu > General > User Interface Settings > Alma Logo and Color Scheme). Previously this was available only when the institution was selected in the Configuration menu.

Configuring: Art Library 🔻			10
Branding Management			Save
Logo Upload			~
Load your new email logo file:	-	ExLibris	

When logos are defined on both the institution and the library levels, the logo displayed on the letter is determined as follows:

a. If the organization unit is Library, and a library logo exists for that library, the library logo is displayed.

- b. If organization unit is Library and no library logo exists for that library, the institution logo is displayed.
- c. If organization unit is Institution, the Institution logo is displayed.

See Configuring the Alma Logos, Color Scheme, and Privacy Policy.

Configuring the Link Institution Zone Users to Centralized Network Zone Users Job

January 2022 Fulfillment

It is now possible to configure the **Link Institution Zone Users to Centralized Network Zone Users** job from the Fulfillment Jobs configuration menu. The job can only be configured and run in the Network Zone.

Library Level Patron Notifications

January 2022 Fulfillment



Institutions can now configure Alma so that letters that aggregate information from multiple libraries, such as Borrowing Activity Letter, Courtesy Letter, Requests Report Letter, Overdue And Lost Loan Notification Letter will be aggregated and sent per library. This can be done by enabling the separate_patron_notifications_by_library customer parameter. The resulting letters will be sent from the specific library.

Note

• When a notification is triggered, if divided by libraries, multiple notifications will be sent. For example, when sending an activity report from the patron workbench, if the patron has loans or fines in more than one library, an activity report will be sent for each such library.

- For Fulfillment entities that are not owned by a specific library (such as a fine or fee that is owned by the institution, or a request that may be served by multiple libraries) a letter will be sent by the institution.
- If an overdue and lost loan profile is configured to generate a notification fee, and several notifications are sent by this profile for different libraries, a fee will be charged for each notification.

In addition, the owner of short loans' Courtesy Letter has been changed to be the owning library.

Watch the Library Level Patron Notifications video (7:14 minutes).

'Will Supply' Message Sent Automatically

January 2022 Fulfillment-Resource Sharing



Idea Exchange

When an internal 'ship digitally/physically' request is placed for a lending request (automatically OR manually), a 'Will Supply' message is automatically sent (and status changed accordingly) to reflect that. This is only possible if the partner type supports a 'Will Supply' notification (ISO, ISO 18626 and Emails). This action is enabled by selecting the newly added step **Automatically Will Supply** in the borrowing workflow profile (disabled by default).

Workflow Profile *		Type Borrowing -
Steps *	Automatic renew	Automatic will supply
	Cancel request not accepted	Cancelled By Patron
	Cancelled by partner	Cancelled by staff
	Conditional	Damaged communicated
	Declared lost by partner	Externally Obtained
	Lender check in	Lost communicated
	Manual renew	Mediated Patron Renewal
	Reactivated	Recalled by partner
	Reject	Renew requested
	Request accepted	Waiting for cancel response
	Waiting for receive digitally	Will Supply

Add Workflow Profile

Will Supply Reason will be: "In process".

New labels were added to the 'Will Supply' email and the "ISO General Messages", to allow libraries to configure a note to be sent if there are items available or not.

- AutoWillSupplyAvailable sent when the will supply email is sent automatically and there are available items to fill the ship request. Default value is empty.
- AutoWillSupplyUnavailable sent when the will supply email is sent automatically and there are no available items to fill the ship request. Default value is "Your request will be supplied when an item becomes available, items are due back on {0)."

INN-Reach API Integration

January 2022 Fulfillment-Resource Sharing



Alma now supports an API based integration with INN-Reach (also know as D2IR). For more information, see the InnReach API Implementation Guide.

Libraries currently integrated with InnReach using NCIP and the InnReach DCB should contact Innovative in order to set up an implementation project with Innovative.

Derive New Record - Support of External Identifier for Linking Related Bibliographic Records

January 2022 Resource Management

The **Derive New Record** functionality in the Alma Metadata Editor now supports selecting whether to use the MMS ID or an external system identifier located in the 035 field for matching between related bibliographic records. When you select the 'Other System Number (035)' and specify the System Identifier Prefix (e.g., SBN), the ID from the 035 field with the specific prefix is placed in the connecting field.

To support this, the **Derive New Record** dialog (**Record Actions > Derive New Record**) now supports the following options to select the field from which the connecting ID is taken:

- MMS ID (001) This is the default option for UNIMARC profile.
- Other System Number (035)
- MMS ID (001) and Other System Number (035) This is the default option for MARC21/KORMARC profiles.

In addition, this dialog now support the option to specify the System Identifier Prefix. The prefix is optional. When it is not set, all 035 fields are used.

Derive New F	Record
Choose Record Type	Host Item (461) 🗸 🗸
Record Identifier	MMS ID (001)
System Identifier Prefix	
Ok	Cancel

See Deriving a New Bibliographic Record.

Support for Traditional Chinese Authority URI Enrichment

January 2022 Resource Management

The following Authority Linked Data databases are now supported as linked-data URIs:

- · List of Chinese subject terms (LCSTT)
- Taiwan Name Authority File (TWNAF)
- New Classification scheme for Chinese literature (NCSCLT)

Now these linked data sources can be used for bibliographic record enrichment, similarly to other linked data sources in Alma (such as LoC, Getty, VIAF, Wikidata). They can be selected in the Metadata Editor and used as part of the publishing. For more information, see https://developers.exlibrisgroup.com/alma/integrations/linked_data/ in the Developer Network.

Watch the Traditional Chinese Authority URI enrichment to Linked Data video (8:33 minutes).

Extending Authority Fields to be Used for an Authorized Bibliographic Field

January 2022 Resource Management

When catalogers press F3 on one of the authority-enabled fields in the Metadata Editor, a list of headings coming from the relevant authority field appears. Now you can extend this functionality, so that pressing F3 displays the list of headings from several authority fields. Catalogers can then select any of the terms in the list, and have the preferred one copied to the bibliographic record.

For example: Pressing F3 on MARC field 650 with the second indicator '7' for vocabulary DBN displays a list of headings from either 150/450 or 155/455 fields. This is done by combining the authority headings from 150, 450, 155, and 455 fields into one list.



Note

Authority fields 180,181,182,185 are not supported by this functionality, as they are not part of the authority control mechanism.

This functionality fully supports authority control:

- · Linking to global and local authorities
- All bibliographic record formats
- Preferred Term Correction (PTC) job The preferred term is copied from the Authority record to the Bibliographic record
- · Authority enrichment in general publishing and publishing to Primo
- Search by Non preferred terms in Alma and in Primo VE

Note

To set up this functionality for your institution, please contact Ex Libris Customer Support.

See Working with Authority Records.

Display Collection Path in Alma Viewer

January 2022 Digital Resource Management



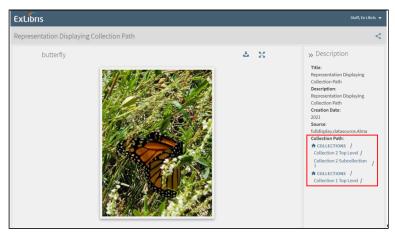
Idea Exchange

You can now configure the Alma Viewer to display the collection path at the bottom of the Descriptive Information pane. To configure this feature, select **Display Collection Path** when configuring the Alma Viewer (**Configuration > Discovery Interface Display Logic >Viewer Services > Alma Viewer**):

Alma Viewer		>
Service Details	Service Availability Rules Customization	
Active	Active -	
Service Code	* AlmaViewer	
Service Name	* Alma Viewer	
Service Description	Digital Version(s)	
Hide Repeated Labels		
Use New Viewer		
Hide Fulltext		
Display Collection Path		

Display Collection Path

For example:



Collection Path

Selecting the path opens Primo's collection page in a new tab.

API for Running Import Profile on a Single Authority Record

January 2022 API

The "Create Authority Record" API now supports importing a single authority record based on a configured import profile:

- Receive an import profile ID as a parameter.
- · Receive AUTH record metadata as payload.
- Run the import profile on that AUTH and will return the resulting AUTH record.

Note

In order to run the API you will need to have a defined import profile.

For more information, see: Create Authority Record in the Developer Network.



Alma January 2022 Additional Stories

January 2022 Resource Management

Alma Link Resolver now attempts to match on both ISSN and eISSN that are in the OpenURL and returns the services for all matches.

January 2022 Digital Resource Management

The user experience was improved when moving selected titles from the Title List tab for collections. A pop-up now appears with a list of the collections to which you can move the titles. Watch the <u>Move Titles Between Collections</u> video (0:39 seconds).

January 2022 Digital Resource Management



Idea Exchange

The functionality to prevent downloads of digital images that is configured by clearing the **Allow Downloads** checkbox when creating digital access rights rules (**Configuration > Fulfillment > Copyright Management > Access Rights > Add Access Rights > Add Rule**) was enhanced. The user cannot save images using the Save As function of the browser.

January 2022 Analytics

The new **Resource Sharing Borrowing Requests** and **Resource Sharing Lending** dashboards are now available. They display reports such as Average Time to Material Arrival, Resource Sharing Borrowing Requests Year-Over-Year, and Resource Sharing Lending Requests List Per Lending Request Status Graph. For more information, see <u>Out-of-the-Box Reports</u>.

January 2022 Analytics

The **Num of Digital Accesses** field was added to Borrowing Requests > Borrowing Request Details. It indicates how many requested digital files were actually accessed by patrons.

January 2022 Analytics

The **electronic collection name** filter was added to the P&E tab of the Title level Overlap Analysis dashboard. You can use it to display titles that are part of a specific electronic collection and also have physical inventory.

January 2022 Analytics

The **Year of Publication** field was added to the Usage Data > Usage Data Details - Release 5 dimension in addition to its current location in the Usage Data Details - JR5 dimension to make it more accessible when creating reports.



Alma January 2022 Resolved Issues

- January 2022 Acquisitions SF: 05300632 05317908 05318832 05326140
 A report was re-harvested multiple times but the usage data was not overwritten, resulting in the report being duplicated in Analytics. This was fixed.
- January 2022 Acquisitions SF: 05303591 05330696 05331242 06041721
 The translation is not saved when switching languages in the Access Model tables. This was fixed.
- January 2022 Acquisitions SF: 05318083
 Changes to PO Line Summary tab field Cancellation restriction and Cancellation note not recorded in PO Line History tab. This was fixed.
- January 2022 Acquisitions SF: 05302590 05306385 05314407 05320861 05323386 06047208 Unable to receive items when there are items on loan of the same Bib record. This was fixed.
- January 2022 Acquisitions SF: 05300329
 Staff users are unable to successfully receive PO Lines and receive the following error message "Receiving process failed for the selected Purchase Order lines please contact your System Administrator." This was fixed.
- January 2022 Acquisitions SF: 05304465
 When assigning an E-Activation Task, an incorrect value for the 'assigned_object' appeared in the letter XML of the "General Assign To" letter. This was fixed.
- January 2022 Acquisitions SF: 05321448 Funds with Japanese characters in Fund name could not be found. This was fixed.
- January 2022 Acquisitions SF: 05300568 05310820 05319334 05322395 Incorrect year values in the Monthly Usage Data tab. This was fixed.
- January 2022 Acquisitions SF: When removing a PO line from a PO and the PO is empty (has no POL in it) the PO would be stand-alone. This was fixed and now the PO is deleted in these scenarios.
- January 2022 Administration and Infrastructure SF: 05299507
 The Convert to Resource Sharing privilege did not affect users that had the Requests Operator role defined at the library level. This was fixed.
- January 2022 Administration and Infrastructure SF: 05319371
 Date fields under the Invoice Lines tab of Purchase Order Lines were restricted to 10 characters. Date field size limit was removed.
- January 2022 Administration and Infrastructure SF: 05304847 Announcements didn't appear from within China. This was fixed.
- January 2022 Administration and Infrastructure SF: 05303413 05319591 In Letters Configuration XMLs with the same name could not be added to the XML list. This was fixed.
- January 2022 Administration and Infrastructure SF: 05325912
 When an email logo wasn't uploaded (only a header logo) when sending a letter, it was sent with the default Ex Libris Alma logo, instead of the header logo. This was fixed.
- January 2022 Administration and Infrastructure SF: 05321553 Selecting the quick access link to open the viewer in a new window displays an error message. This was fixed.
- January 2022 Administration and Infrastructure SF: 05300426 When exporting search results to Excel the header of the "title" column wasn't translated. This was fixed.
- January 2022 Administration and Infrastructure SF: 00956530
 Various linked accounts with different primary Identifiers for users with the same first name, last name, and birth date. This was fixed.
- January 2022 Fulfillment SF: 05314898 05316383 05317131 05325924 05803032 Searching for requests in the Manage In Process Items page by MMS ID did not work. This was fixed.

- January 2022 Fulfillment SF: 05309020 05324025 05324058
 The Request/Process Type label in Scan in items did not translate. This was fixed.
- January 2022 Fulfillment SF: 05302626 05302771 When using the Register New User flow with a registration fee, the user's password was not saved. This was fixed.
- January 2022 Fulfillment SF: 05317430
 Scanning a loaned item generates a message, "Item is already on loan and has been renewed", even though it was not renewed. This was fixed.
- January 2022 Fulfillment SF: 05326236
 There was no limit to requests for linked accounts in an AFN. This was fixed and is now determined by patron limits (Max. physical item).
- January 2022 Fulfillment SF: 05326309
 When using Return Items at a desk with hold shelf processing and then at a pickup location without hold shelf processing, the item was not placed on the hold shelf. This was fixed.
- January 2022 Fulfillment SF: 05319670
 Special characters in Work Order Type Statuses page Owner column appeared garbled when the institution name contained special characters. This was fixed.
- January 2022 Fulfillment SF: 05303566
 The Date Needed By fields (date selection elements) in Primo CLASSIC Getit forms could not be navigated with tab and arrow keys. This was fixed.
- January 2022 Fulfillment SF: 05300550 05302017
 When a loan is made at another institution, this information is not always recorded at the owning institution. This was fixed.
- January 2022 Fulfillment SF: Linked accounts are being created in other OpenURL scenarios. This has been fixed.
- January 2022 Fulfillment-Resource Sharing SF: 05298898
 Lender Renew Response Email letter sent to a partner had the English value "Yes" as the renewal response for non-English interfaces. This was fixed and the value is now translated.
- January 2022 Fulfillment-Resource Sharing SF: 05301461 05301963 05322747
 In specific cases when searching for a keyword in partners, duplicate results per partner were presented. This was fixed.
- January 2022 Fulfillment-Resource Sharing SF: 05333106
 Unable to edit a request when it is a duplicated active borrowing request. This was fixed.
- January 2022 Fulfillment-Resource Sharing SF: 05320715
 The Reason value in the Lender Will Supply Email letter was not translated. This was fixed.
- January 2022 Fulfillment-Resource Sharing SF: 05324765 An error occurs when rejecting specific lending requests. This was fixed.
- January 2022 Fulfillment-Resource Sharing SF: 05320517 Cannot request multiple volumes to fulfill Resource Sharing Lending Request. This was fixed.
- January 2022 Resource Management SF: 05324339
 Items List: When withdrawing selected items, and the last item in a holdings record is deleted, a popup message with several available options was displayed. The user should select an option and click the Go button. However, if the user pressed "Enter" instead of clicking the Go button, the selected option was not performed and the popup message appeared without reason in other Bib record's items lists. This was fixed. Pressing "Enter" instead of clicking Go performs the selected option.
- January 2022 Resource Management SF: 05319175
 When the Items of Related Records list (accessed from a link in the Physical Drawer Physical Titles or All Titles search results) contained more than one page, all pages showed the first page. This was fixed.
- January 2022 Resource Management SF: 05311474
 Electronic Holdings Upload Multiple coverage lines existed in KBART but only one was imported. This was fixed. Support for multi coverages for the multi campus was added. This is controlled by a customer parameter temp_multi_coverage_multi_campus.
- January 2022 Resource Management SF: 05328555 05421657 05364758

The update inventory process didn't consider the indication rule that filtered out some records and caused these records to fail the process. This was fixed.

- January 2022 Resource Management SF: 05299021
 Changes in Access Type were not tracked in the History tab. This was fixed. The fields that were previously not tracked were added.
- January 2022 Resource Management SF: 05301925 The Recent Entities panel did not include Electronic Portfolios which were activated. This was fixed.
- January 2022 Resource Management SF: 05308776
 The IDs of the copyright statements changed so that no representation had a copyright statement associated with them. This was fixed.
- January 2022 Resource Management SF: 05321806
 General publishing > Bib converted to Dublin Core (Simple) > Creator did not appear; description and date appeared twice. This was fixed. The MARC2DC converter now exports dc:creator from field 720 and removes dc:description duplication.
- January 2022 Resource Management SF: 05301580
 Repository Search: In some cases when searching for an expression containing both a hyphen and an apostrophe (specifically in Hebrew) omitting the hyphen from the search by replacing it with a space yielded no results. This was fixed.
- January 2022 Resource Management SF: 05314946 05318202 05321775
 Add members to set job completed with warnings when the input file has barcodes that match only case-insensitive.
 This was fixed.
- January 2022 Resource Management SF: 05319244 05329966 05747863
 There were some Resource Type code errors. This was fixed. The label facets.facet_rtype.collection was added to PrimaFacetResourceTypeLabels with value 'Collections'.
- January 2022 Resource Management SF: 05301663
 Primo VE Withdraw items job did not update PrimoVE index. This was fixed. A change tracker was added when deleting items for their MMS IDs since sending the item PIDs will not work after they were deleted.
- January 2022 Resource Management SF: 05300177 05300849 05300856 05301927 05303214 05305041 05306715 05306791 05307820 05308462 05312758 05316861 05320520 05320699 05324950 05325184 05325992 05326615 05327331 06035371 06037835 06044909 06052766 06054578 06057645 Browse Bib headings (Alma PrimoVE): Browse by "Subjects (with MARC21 600/610/611)" (Alma) and Primo Subject Browse returned wrong results in some cases. This was fixed.
- January 2022 Resource Management SF: 05319047 05758162
 RTA and GetIt displayed library name instead of location name when library code and location name were identical. This was fixed.
- January 2022 Resource Management SF: 05330918 05332893
 New Metadata Editor > Add Holding > Save > Add Item > Cancel > View Items > Back arrow in Alma [to MDE automatically] > Holdings tab showed 0. This was fixed view inventory shows the correct number of holdings.
- January 2022 Resource Management SF: 05302620 New Metadata Editor was not loading for specific users. This was fixed.
- January 2022 Resource Management SF: 05299220
 Metadata Editor selecting an authority to link (F3): when the 711 field heading was linked and subfield j was added this subfield should not be considered for matching in the linking (full or partial) because 711\$j is not a subdivision. This was fixed.
- January 2022 Resource Management SF: 05302121 05302329 05303472 05316515 05316670 05318177 05319080 05326254 05326423 05355281
 In Firefox the left panel in the MDE hid part of the MARC21 Bib records for some users. This was fixed.
- January 2022 Resource Management SF: 05326815
 Under some circumstances, the requests recalculation failed and prevented moving items/merging holdings from one bib to another. This was fixed.
- January 2022 Resource Management SF: 05333205
 Update Inventory MD Import profile: Existing item fields were deleted even when there was no mapping in the profile (for example Fulfillment Note). This was fixed.

- January 2022 Analytics SF: 05332724 An analytics scheduled report email contains no data. This was fixed.
- January 2022 Analytics SF: 05324090
 The Total Digital Space Usage report displayed both active and inactive inventory. This was fixed by setting the File Lifecycle filter to Active.
- January 2022 Analytics SF: 05322750
 The Holding Record Modification Date displayed an incorrect value after an indexing job was run. This was fixed.
- January 2022 Analytics SF: 05326893 The Portfolio Details for Consortia Members folder was not working properly. This was fixed.
- January 2022 Analytics SF: 05304911 Local authorities records were not updated in Alma Analytics. This was fixed and they are now updated daily.
- January 2022 Analytics SF: 05309618 Digitization requests cancelled by patrons appear in analytics as cancelled by the library. This was fixed.
- January 2022 API SF: 05316501 Alma's API did not enable updating a Technical PO Line Price to 0. This was fixed.
- January 2022 API SF: 05299102
 The PO-Line APIs (Get PO Line and Update PO Line) were missing the "additional_order_reference" field. This was fixed and the field added.
- January 2022 API SF: 05324928 06055882
 Using the Update-User API it was not possible to modify the type of an existing additional identifier. This was fixed.
- January 2022 API SF: 06023007 User cannot be updated via API when two identifiers have the same value. This was fixed.
- January 2022 API SF: 05324096 It was not possible to activate Cloud Apps on FedRAMP environments. This was fixed.