2021 RN 02 Main

Associate a PO Line Created via the Import Profile to an Existing Portfolio

February 2021 Acquisitions

When a PO line is created via the "New order" import profile, Alma can now locate and use existing inventory and associate the newly created PO line to it. Once matching inventory is found, a PO line is created and associated to that inventory item, instead of creating a new resource for each order.

To support this, a new checkbox "Locate Existing Resource" was added to the "New Order" import profile > PO Line Information tab. This checkbox is only visible for electronic type of inventory (import types Electronic/Mix).

See [Creating/Editing and Import Profile: PO Line Information](#).

PO Line Infrastructure Upgrade

February 2021 Acquisitions

In upcoming releases, technical upgrades to the PO Line infrastructure will take place, which will not result in any functional changes.

View Invoice when Editing a PO Line

February 2021 Acquisitions

Idea Exchange

NERS Enhancement (ID #7049)

Now, when editing PO lines, and accessing the **Invoice Lines** tab, the invoice numbers on invoice lines are clickable and linkable to the invoice. The invoice opens in a view mode. Note that only users with roles that allow viewing/editing invoices can view the invoice via this link. Click "Back" from the invoice page to be directed back to the location from which you clicked the invoice line.

This was done in the following locations:

- On invoice lines in the **Purchase Order Line Details** page > **Invoice Line** tab

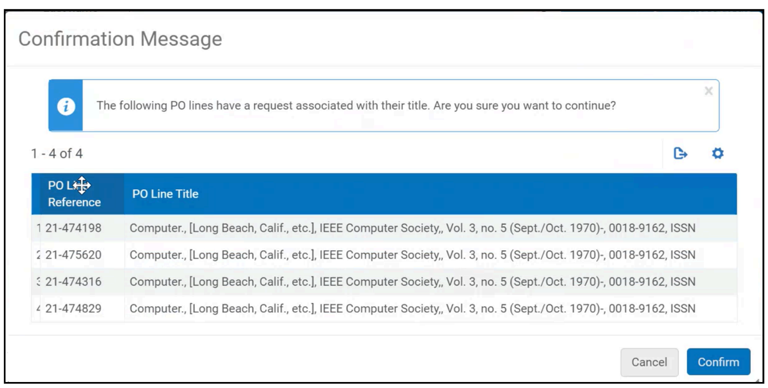
- On the **Invoice Line Details** page > **Summary** pane was made clickable and linkable to the invoice as well.

Watch the [View Invoice when Editing a PO Line](#) video (0:40 seconds).

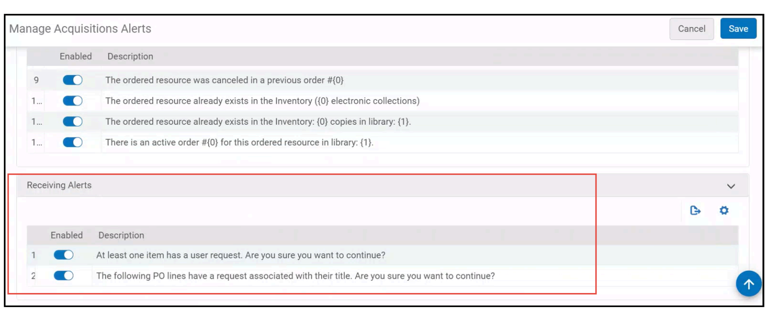
See Orders Associated with Requests When Receiving Multiple Orders

February 2021 Acquisitions

In the **Receive** page, when receiving one or more PO lines from the main receiving screen, the existing pop-up message (which indicated that one of the orders has a user request associated with the order) was enhanced to present the users with a clear indication of the PO line that is associated with a user request:



This enhanced message can be disabled from the **Manage Acquisitions Alerts** configuration page. Another message, which was also added to the "Receiving Alerts" section, is the confirmation message that appears when receiving items from the **Receiving** > **Manage Items** page (item that has a request associated to it).



See [Managing Acquisitions Alerts](#).

Assign Holding Records to Another Cataloger by Scope

February 2021 Resource Management

Now when assigning a holding record to another cataloger using the **Assign Record to Another Cataloger** dialog, you can only assign it to users who have the privilege to work with holdings in the scope of the record (Physical Inventory Manage privilege).

For details on the scope of holdings records, see the following presentation: [Holdings record management on the library level.]()

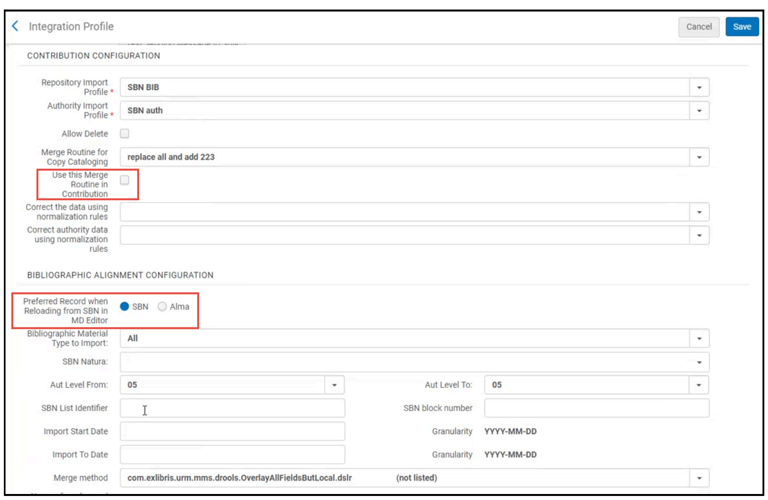
See [Navigating the MD Editor Page]().

Reload Record from the SBN Central Catalog

February 2021 Resource Management

The following enhancements were done in the SBN Integration profile:

- **Ability to select the desired merge routine when contributing records to SBN** - A checkbox "Use this Merge Routine in Contribution" was added to the Contribution Configuration section of the SBN Integration Profile. This determines how the SBN record will be merged with the existing one when contributing a record to SBN:
    - When this checkbox is selected, then the merge routine for copy cataloging is used during contribution as well.
    - When this checkbox is clear, then the merge routine defined in the repository import profile that is configured on the Integration profile is used in contribution.
- **Preferred Record when Reloading from SBN in MD Editor**- A checkbox "Preferred Record when Reloading from SBN in MD Editor" was added to the Bibliographic Alignment Configuration section of the SBN Integration Profile. This allows you to select which is primary record during reloading from SBN ('SBN' is the default option).



See [Integrating the SBN Italian Union Catalogue]().

Merge and Combine Process

February 2021 Resource Management

The **Merge Records and Combine Inventory** tool was added under **Resource Management > Advanced Tools**. The **Merge Records and Combine Inventory** tool allows you to handle duplicate titles by merging them and combining their inventory.

The duplicate records to be merged are taken from the report file (.csv) of your Duplicate Title Analysis job (see Using Duplicate Title Analysis).

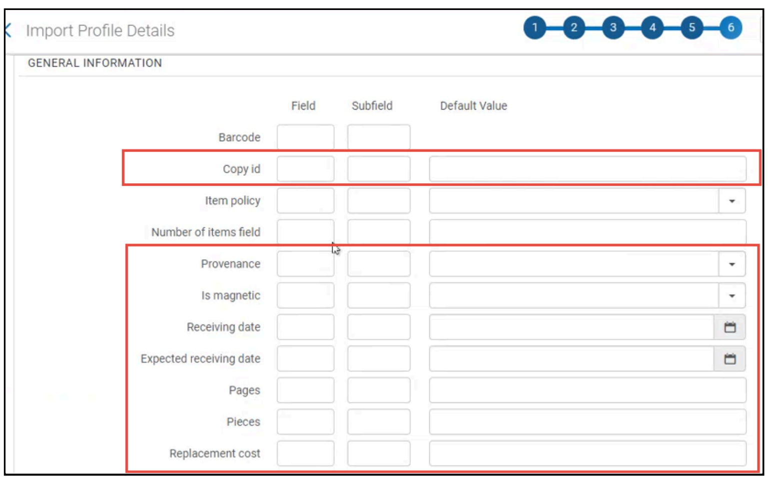
See Using Merge Records and Combine Inventory and Using Duplicate Title Analysis.

Additional Fields for Inventory Import

February 2021 Resource Management

Idea Exchange

Additional fields were added to the **Import Profile** page > **Inventory Operations** tab for physical inventory. You can map item-level information from these fields in the input file, or indicate a value to be placed in the imported records.



See Creating/Editing an Import Profile: Inventory Information.

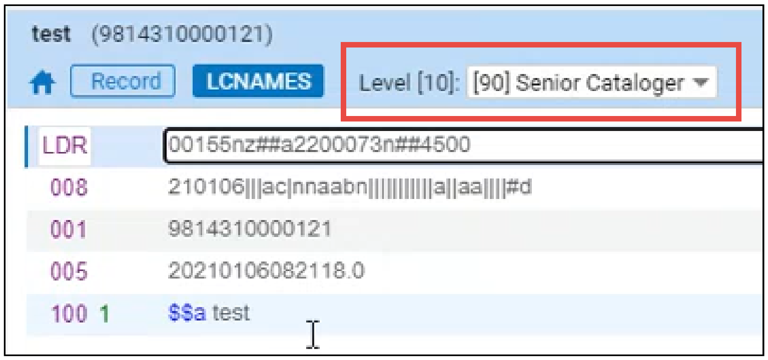
Watch the Additional Fields for Inventory Import video (1:32 minutes).

Support for Cataloger Level in Authorities (New MDE)

February 2021 Resource Management

Now the Cataloger Level is displayed in the new Metadata Editor for authorities. For this to display, you need to have cataloging levels configured for your institution (see Configuring Cataloging Levels for Contribution to Externally Managed Authorities).

When Cataloger Level is displayed in the Metadata Editor, and your cataloging level is lower than the authority record you are trying to edit, a message is displayed providing you insight as to why you cannot edit the record.



Note

This functionality is available only in the new Metadata Editor layout.

See Assigning Cataloging Levels Upon Save and New Metadata Editor Functionality.

Support for Czech Alphabet

February 2021 Resource Management

Alma now supports special Czech language characters for staff searches in the following areas: repository search, user search, purchase and fulfillment requests, and deposits. It also applies to browse bibliographic headings, using F3, and sorting results. If you are interested in this capability, contact Ex Libris Support to configure this for your institution.

Note

To apply the above changes for Bibliographic/Authority/Inventory data, the following indexing jobs must be run for Czech institutions:

- Full Indexing Job
- Full Inventory Indexing Job

A more detailed explanation of this process can be found here.

See Czech Characters and Configuring Institution Languages.

Accurate Partial Linking Indication

February 2021 Resource Management

In some cases, the MDE showed a partial linking icon

instead of the full linking icon

. During the February release, Ex Libris will run a data correction job that will fix the data, to align the data with the actual link in all these cases.

New Alma Hot Key

February 2021 Resource Management

The following hot key was added to Alma, to allow you to work faster.

- **Alt+M** - Press to toggle the Metadata Editor open/closed.

See Global Alma Hot Keys.

Shared MD Import Profiles in the Community Zone are Now Published to the Developer Network

February 2021 Resource Management

To help users share Metadata Import profiles in the Community Zone, Ex Libris now publishes the list of shared Metadata import profiles in the Developer Network: https://developers.exlibrisgroup.com/alma/integrations/sharedmdimpprof/.

This is the same list that can be viewed from **Import Profiles** page > **Community** tab. Publishing this list in the Developer Network enables both Alma users and others who cannot log in to Alma to see the sharing that is done within the system. The list updates automatically whenever new MD Import profiles are shared in the Community Zone.

See Sharing Import Profiles in the Community Zone.

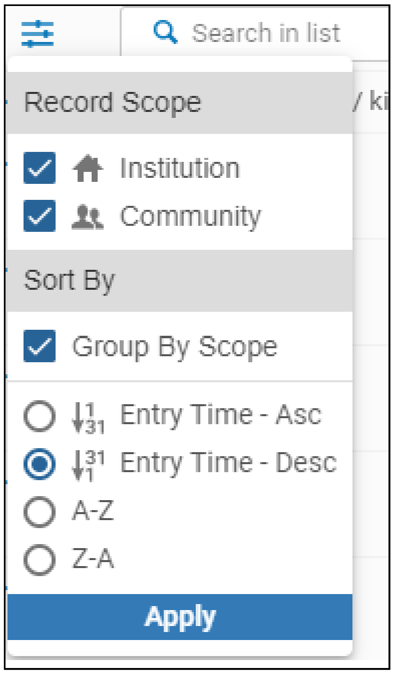
New Metadata Editor - Accessibility Improvements

February 2021 Resource Management

The improvements were done in the new MDEditor with the purpose of making it compliant with the Americans with Disabilities Act (ADA). The improvements include addition of labels and tooltips where they were missing, and in the the ability of screen readers to convey the state of elements to the reader. This was done in the following areas of the MDEditor:

- Tabs:

- Filter and sort:



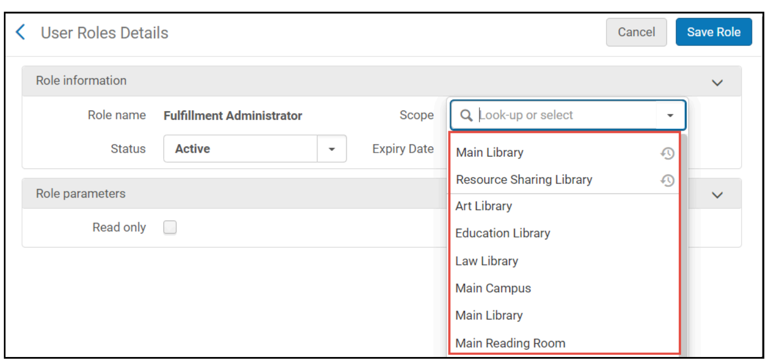
- Buttons on the Navigation panel header:

- Item list (records/templates/rules)
- Record validation

Fulfillment Administrator Role Support for Library-Level Scoping

February 2021 Fulfillment

The Fulfillment Administrator role can now be scoped to a specific library within an institution. This affects the Alma links that are accessible to the user with this role. To support this feature, you can now select a library from the **Scope** drop-down list when configuring the Fulfillment Administrator role for a user:



Scope Drop-Down List

For a user whose role is scoped to a specific library:

- In the Fulfillment menu:
  - The following links are not visible:
    - Distribute Fulfillment Network Configuration (only for network institutions)

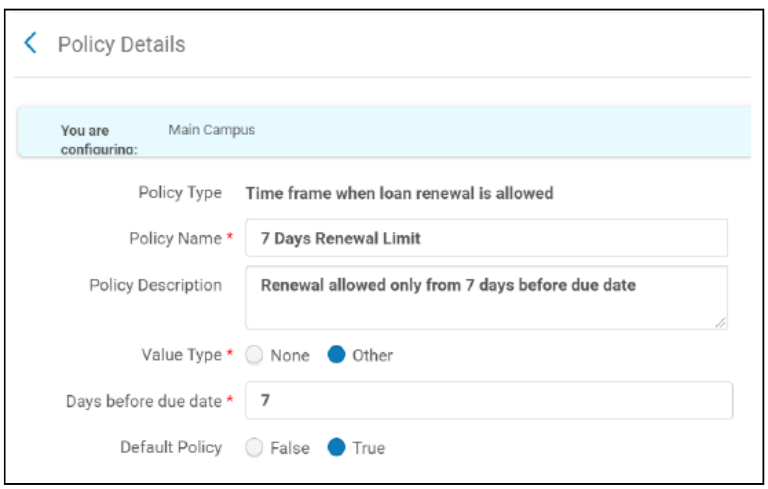
        - Distribute Resource Sharing Network Configuration (only for network institutions)
        - Resend Printouts/Emails
        - Loans Overdue Notification Status Update
        - View Overdue and Lost Loan Jobs
    - The following links remain visible:
        - Create Fines and Fees Report (The Received by Library drop-down list and the Fine Owner drop-down list are not limited to libraries in the role's scope)
        - Create Fulfillment Sets
        - Citation Alternate Suggestions
    - Pages that currently enable library level management remain visible.
- In the Fulfillment configuration menu:
    - The **Configuring** drop-down list displays the library for which the configuration links are displayed.
    - If the user has another role besides the Fulfillment Administrator role that allows access to all of the Fulfillment links (for example, the General Admin role), all the menu options appear.

For more information on User Roles, see Managing User Roles.

Limit Loan Renewal Time Frame

February 2021 Fulfillment

You can now limit the time period during which a user can renew a loan to a specific number of days before the loan is due. You do this with the new **Time frame when loan renewal is allowed** policy type.



Limit Loan Renewal Time Frame

When selecting a Value Type of **Other**, the **Days before due date** field appears. Enter the number of days before the loan is due that you want users to be able to renew the loan.

Note

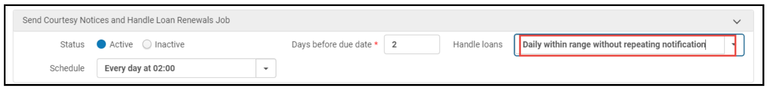
The limit applies as well to any automatic renewal configurations.

For more information on Fulfillment policies, see Adding Fulfillment Policies.

Limit Courtesy Notifications for Daily Renewal Attempt to Once Per Loan

February 2021 Fulfillment

A new Handle loans option, **Daily within range without repeating notification**, was added to the Send Courtesy Notices and Handle Loan Renewals Fulfillment job:



Daily Within Range Without Repeating Notification

It allows the job to run multiple times if the loan cannot be automatically renewed, but only sends one courtesy notification to the patron.

Note

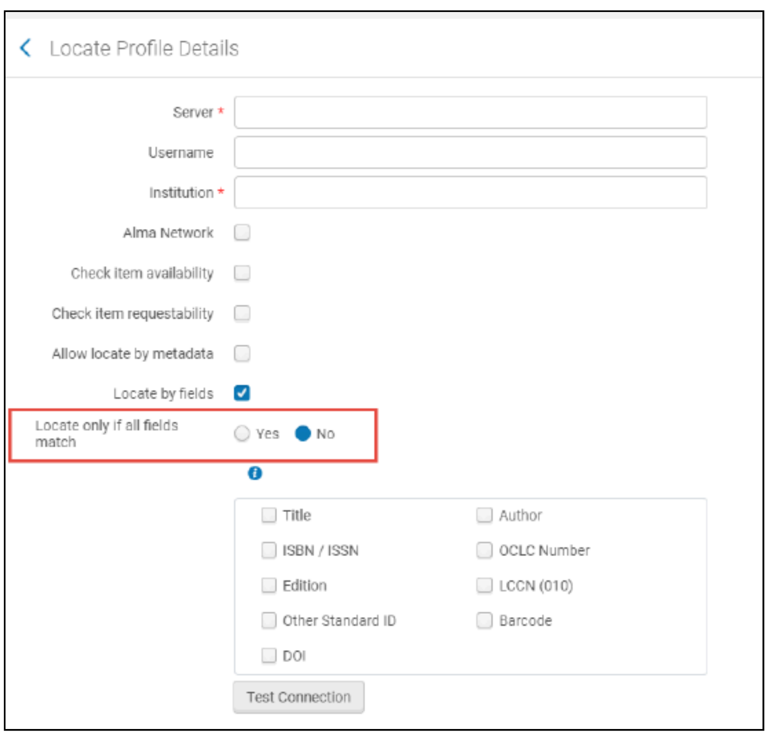
If the due date is changed after the courtesy notice is sent, this function is reset and an additional notification may be sent for the loan.

For more information on configuring fulfillment jobs, see Configuring Fulfillment Jobs.

Identifier Based Locate

February 2021 Fulfillment-Resource Sharing

You can configure Alma's locate by fields from both the borrower side (Configuration > Fulfillment > Resource Sharing > Locate Profiles) and the Lender side (Configuration > Fulfillment > Library Management > Library Details) to find a matching record by matching one of the selected identifier fields. The new **Locate only if all fields match** option was added to allow this.



Locate Only if All Fields Match

If set to **Yes**, the existing behavior of successful locate only when **all** selected fields match is maintained. If set to **No**, then:

- If the request has identifiers (such as ISBN, OCLC number or LCCN), locate is successful if **any** of the selected identifier fields finds a match. Other fields such as Title and Author are not used for the match.
- If no identifier fields exist on the request, locate is only successful if **all** of the other selected fields match.

Note

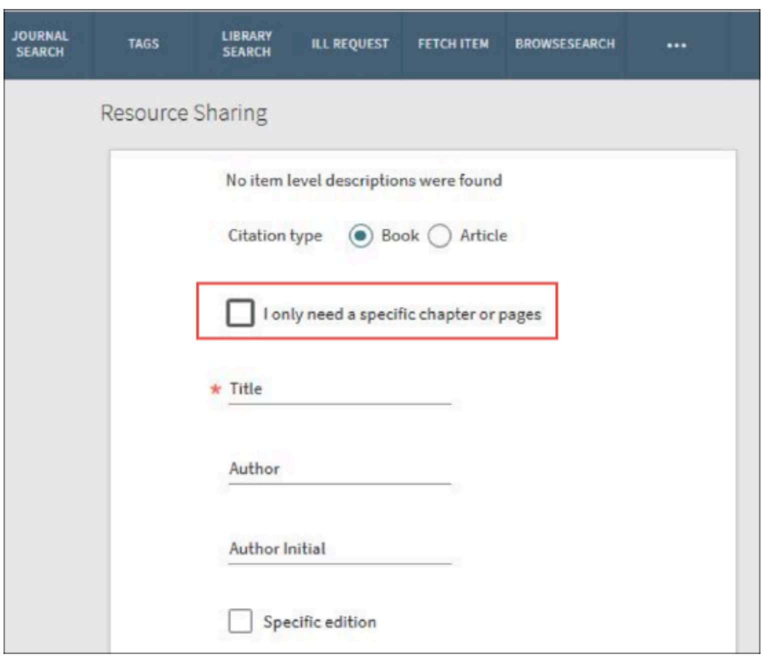
Customers already using the locate by fields functionality have the **Yes** option selected by default to maintain their current behavior.

For more information concerning Resource Sharing Locate by Fields, for the borrowing library side, see Adding Locate Profiles and for the lending library side, see Configuring Parameters of a Resource Sharing Library.

New Checkbox to Display Chapter Fields in Primo VE Request Form

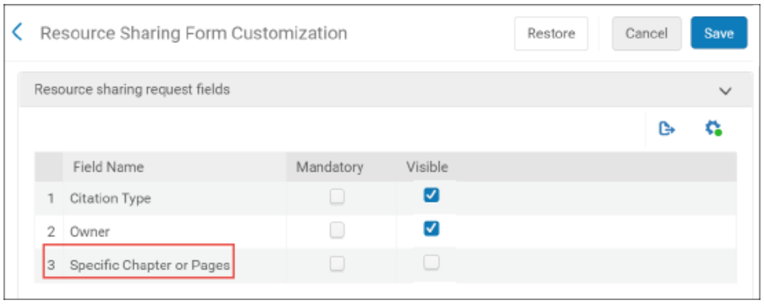
February 2021 Fulfillment-Resource Sharing

A new checkbox appears at the top of the Primo VE book request form that allows you to indicate that you only need a specific chapter or pages. Selecting this checkbox displays fields for requesting book chapters (Chapter and Pages). In this way you can display these fields only when they are relevant.



Chapter Fields Checkbox

To configure the checkbox to appear, select a checkbox next to the new **Specific Chapter or Pages** option from the Resource Sharing Form Customization page (**Configuration > Discovery > GetIt Configuration > Resource Sharing Request**). If the **Specific Chapter or Pages** option is not selected, there is no change in the behavior of the request form, and the chapter fields always appear if activated for the book request form.



Specific Chapter or Pages

For more information, see [Primo Book Chapter Request](#).

Allow automation of branch requesting for RS serial requests

February 2021 Fulfillment-Resource Sharing

The process for automatically creating an internal ship physically/digitally request for a serial/multi volume resource was enhanced. Before, when the lending request was for a serial/multi volume resource, Alma supported either mediating the request or have a title level request created automatically. A new option was added which will automatically create requests with a manual description containing the relevant metadata from the lending request (if exists), providing the librarian picking the item from the shelf with information to help select the required volume/issue.

This can be done by setting the values of the **rs_auto_request_lending_with_serials** and **rs_auto_request_lending_with_volume_issue** parameters to 'general'.

SIP2 Certificate Updated to SHA-256

February 2021 Administration and Infrastructure

In order to provide improved security and integrate with the latest versions of Stunnel, the certificate used to integrate between Alma and Stunnel was updated to the SHA-256 standard. If you would like to upgrade to the latest Stunnel version, you can now download a new certificate from Alma which is compatible with this version.

Stunnel is software used as a proxy between self-check machines and Alma (for details, see Stunnel). It is configured to listen on a defined port (e.g. 5003) over TCP/IP and routes the request to Alma port 6443 over SSL using a pem file used as key&cert download from the Self-check integration profile.

See Self-check - Stunnel.

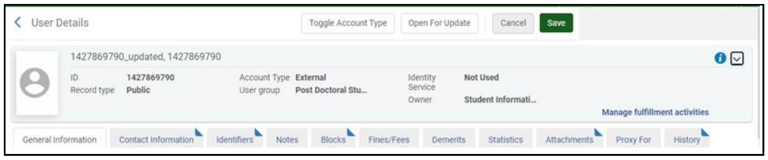
Accessibility Improvements

February 2021 Administration and Infrastructure

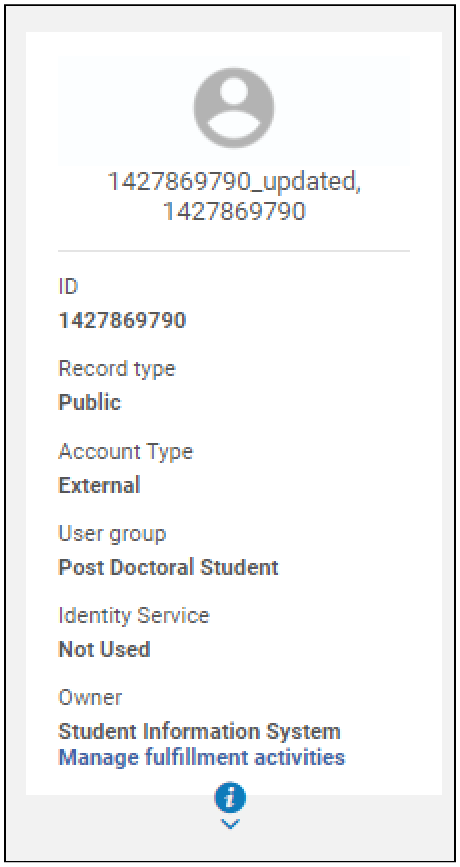
The following improvements were done with the purpose of making it compliant with the Americans with Disabilities Act (ADA):

- In the Summary section (that appears above the page when viewing on small-sized window):
  - "More Info" button is now available by keyboard
  - **More Info** popup (after clicking) is now available by keyboard

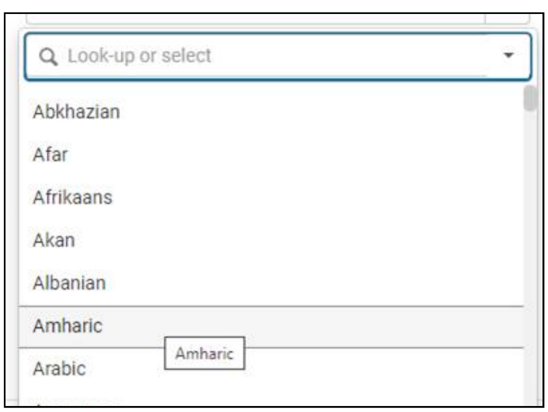
- The "Close" button of the **More Info** popup is now available by keyboard
- The user card that opens from the **More Info** popup is now available by keyboard
- "Collapse" button now indicates the real meaning and the expanded/collapsed state of the section.



- In the Summary panel (that appears to the right of the page when viewing on normal-size window):
  - "More info" button is now available by keyboard, and describes the real meaning and the current state of section (expanded/collapsed).
  - "Collapse" button now indicates the real meaning and the expanded/collapsed of the section.



- Correct contrast was added to dropdown hover:



Enhanced Code Table API

February 2021 API

Idea Exchange

The Code Table API now privies support for updating code-tables, in addition to the existing ability to retrieve this configuration entity. In addition, the GET-Code-Table API now supports the parameter "scope" that can receive as a value a particular library within the institution. Thus supports the ability to retrieve tables that are specific to a library.
See Developer Network.