March 2019 Release - Harvard Highlights

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Ex Libris Documentation

Harvard Alma Working Groups have summarized key changes below. A full list of changes for the release can be found in the official Ex Libris Release Notes:


General enhancements

- DARA (Data Analysis Recommendation Assistant) is a new service for Alma that provides you with recommendations to improve your workflows and better optimize your usage of Alma. Currently, DARA is ONLY available to optimize your SUSHI vendors. DARA can determine when it is beneficial for you to create a SUSHI account and have usage information harvested automatically from the vendor. DARA guides you through the steps to implement the recommendation. In future releases, additional recommendation types will be added. For more information, see DARA.

Analytics & Reporting

Enhancements

- New fields added to the shared PO Line dimension in every subject area in which it appears:
  - PO Line Owner Library Code
  - PO Line Owner Library Name
  - PO Line Identifier
  - PO Line Vendor Title Number
  - PO Line Manual Packaging
  - PO Line Routing During Receiving
  - PO Line Binding During Receiving
  - PO Line Title

- In Fulfillment > Loan, the Loan field was replaced by the following fields to allow you to create more detailed reports:
  - Num of Loans (In house + Not In House)
  - Num of Loans (In House)
  - Num of Loans (Not In House)

- New fields added to the sharedBibliographic Details dimension in all subject areas in which it appears. These fields allow you to display in a report all of the collections to which a title belongs:
  - Collection Name
  - Collection ID

- The Service Details dimension with the Service ID field was added to the E-Inventory subject area.
- The Related Record field was added to Funds Expenditure > Fund Transaction Details. It indicates the related resource sharing record.
Resolved

- When Anonymize item loans was selected, Alma Analytics reports did not correctly indicate the number of users. This was corrected.
- Creating a report from an Analytics set did not work properly. This was fixed.

Acquisitions/Finance

Enhancements

- Check availability and pricing - (This feature is currently available for OASIS only; Ex Libris plans to add additional vendors in the future.) The Check availability and pricing page enables Purchase Request Operators/Managers and Purchasing Operators/Managers to search ProQuest OASIS for resources, view pricing information for the retrieved records, and—for purchasing operators/managers—place orders. See this video for additional information.
- Include an Item Description in the Subject of the PO Line Claim Letter - The subject of the PO Line Claim letter can now be configured. For all PO line types, the PO line number and title can be included in the email subject. If the PO line type is physical continuous, the item description can also be included. For non-predicted continuous orders, the expected received date can be included.
- Managing Vendor Accounts at the Library Level - It is now possible to assign users a Vendor Account Manager role, allowing them to manage only the vendor accounts and not the entire vendor record.
- The Order Line and Order Line Type labels are now PO Line and PO Line Type throughout the Acquisitions area.

Resolved

- Job to Change POL Owner - The job failed if you attempted to change POL owner to match the inventory owner (e.g., change POL owner from ITS 625 Acquisitions to Harvard Yenching Library, if the inventory was owned by Harvard Yenching Library). This was fixed.
- Acquisition Administrators can now delete PO line templates they did not create.
- The Is Empty option was removed from the Fund Name list of options in an order lines advanced search since this capability is not supported by the infrastructure.

Course Reserves/Leganto

Note: Reading List Set Changes

In the February release notes, we announced that a significant infrastructure change will be applied to reading lists that will greatly improve the reading list search function. This change was initially announced in the March release notes, but there were issues with it and it has been removed from the March release. It will be reinstated in one of the upcoming releases.

Enhancements

- Citation Tasks: Citations is a new top-level category for citation-related tasks. Some reading list tasks were moved to this new category. When you select any citation task, the Edit Citation page appears with the relevant tab and/or filter pre-selected (see Managing Citations).
- Multiple Courses for Reading Lists: 1) When course instructors are automatically added as reading list owners, all course's owners are now added, instead of just the first course's. 2) The Instructors pane in Leganto now shows instructors from all courses, not just the first one. 3) The Bulk Citation Enrichment job now finds all reading lists associated with a course (not just the reading lists for which the course was the first course associated with the list). 4) In the Find Lists tab of Leganto, searching by academic department now searches for all academic departments of all courses associated with the list, not just the first. 5) When scanning in an item and associating the item with a reading list, the due date for the item is now taken from the reading list instead of the first course associated with the list.
- An orange dot in the Alerts tab on the Edit Citations and Edit Reading List pages indicates that there are alerts for the citation.
- When an instructor views a reading list in student view, and the reading list is still in draft mode, a prominent notice about the fact that the list is in draft mode appears at the top of the list. The text in the notice can be configured using the alert.draft.student.title and alert.draft.student.des labels. For details, see Configuring Headings and Text in Leganto.
- When viewing a reading list you can now filter by section(s): You can configure whether, when arriving to Leganto using a section permalink, the other sections are collapsed or the relevant section is pre-selected using a filter by setting the on_section_permalink_use_filter parameter. See Configuring Section Behavior.
- You can now filter by material type in My Collection.

Resolved

- In some cases, the reading list facets did not display the correct results after selecting the facet. This was fixed.
- An error message appeared on the Edit Reading List screen, in some cases, after a rollover. This was fixed.
- Drag handles did not appear for newly created sections. This was fixed.
- The date assigned as Due Date in a citation was not saved correctly sometimes. This was fixed.
- Changing a course date in Leganto did not actually update the date in Leganto or Alma. This was fixed.
- When creating a new list in Leganto, the Enter key did not work in the Description box in IE or Firefox. This was fixed.
- After performing an instructor rollover, student discussions that were hidden in the old list were no longer hidden in the new list. This was
In Leganto, instructors were able to manually enter end dates that were earlier than start dates. This was fixed.

For some institutions the Other Format and Editions feature did not work as expected. This was fixed.

For citations that Leganto used the uResolver to find their links, these links did not appear when exporting the reading list. This was fixed.

In Leganto, the Back button and My Lists did not work after editing a citation in a reading list. This was fixed.

**Fulfillment**

**Enhancements**

- Item-level GES Rules: Library and location parameters are now available to be added to the availability rules for item and title level general electronic services.
- A new weekly job, Resource Sharing Completed Request Cleanup, allows you to remove requests from the resource sharing task list based on the request status and the number of days since the request reached a final status.
- When returning an item on the Return Items page, if the next step is a locally managed work order, the next step now displays both the next step and the work order type—for example, Manage Locally - Preservation. See Scanning Items.
- The loan status labels and renewal messages that appear on the Primo My Account page can now be configured on the Labels page, Fulfillment > Discovery Interface Display Logic > Labels.
- When you are at a location which has multiple printers, you can now check which printer you are currently connected to by hovering with the mouse above the Currently At icon.

**Resolved**

- The borrower name on the Loan Audit Trail page did not appear in the Contact Information pop-up window. This was fixed.
- When placing a title-level request for an item in a temporary location, the request slip did not contain the permanent call number. This was fixed.
- In some cases, when editing or deleting a requested item, an incorrect warning message was displayed or no warning was displayed at all. This was fixed.
- When a hold request was canceled for an item in On Hold Shelf status, and an item was returned from the Manage Patron Services page instead of the Scan In Items page, the item disappeared from the hold shelf, but the process remained On Hold. This was fixed. The item is now moved to the next step.

**Resource Management**

**Enhancements**

- 006 Field in the MD Editor: The MD Editor form for the 006 field now correctly displays the options that correspond to the form of material that you select from the Add form of material for 006 pop-up that appears when you create the 006 field. REMINDER: Harvard best practice is to catalog in Connexion.
- When displaying related record information in the MD Editor, the PO line title is used when it is available. When no PO line title is available, the display of related record information remains the same.
- There is a new report type available for the Authority Control Task List called Preferred term correction – Multiple matching AUT headings with same Originating System ID (ambiguous). This option references cases where more than one authority record with the same Originating System ID was found (e.g. duplicate LCSH authorities)
- Government Document was added as an Electronic Material Type.
- Alternative Call Number Label: The alternative call number label was changed to item call number throughout Alma.

**Resolved**

- If field 830 containing subfield $$v was linked to an authority using F3 > Select, subfield $$v was duplicated. This was fixed.
- In the MD Editor when editing field 260 $$a, the pop-up displayed incorrect information. This was fixed.
- The months for prediction patterns were only in English although they should be according to the holdings language. This was fixed.
- On the Item Edit page, when selecting the PO line pickup field, the Back button did not go back to the Purchase Order Line Details page. This was fixed.
- For physical item sets, the Change Holdings Information job erroneously used the set criteria of the physical title level. This was fixed.
- An itemized set created from a shelf report job analysis disappeared when creating the next set. This was fixed.
- The Subject and Series fields were not displayed in the search results for physical, electronic, and digital titles. This was fixed.
- During preferred term correction, when subfields were updated from the authority record, the subfields from the the bibliographic record heading were retained as well. This caused duplication of these subfields. This has been fixed, and now subfields from the bibliographic record heading are retained only if they are not corrected from the authority record.
- Invalid characters in an XML caused an error when creating a MARC record. This was fixed and now the invalid characters are removed.
- When the MD Editor released a record in split mode and the focus was on the left record, it froze. This was fixed.
- When subfield 6 in the authority field was in linkage information format (for example 100-01 or 880-02), it was copied to the bibliographic record field in the correction job. This was fixed.
- The new MARC country codes for Guernsey (gg), Isle of Man (im), and Jersey (je) were not available in the drop-down list for 008 field.
positions 15-17. This was fixed.

- The authority control task list operated slowly. This was fixed.
- The maximum number of records that could be opened in the MD Editor with a catalog set was 100. This was increased to 200.