April 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

- Limit DARA recommendation types - You can now limit the types of recommendations that DARA displays. This is useful if you know that certain types of recommendations are not relevant for your institution. (Note: DARA was introduced last month and is currently ONLY available to optimize SUSHI vendors.)
- Bulk update Calendar hours: An import action is now available on the Calendar Management page to allow you to bulk update calendars using an Excel spreadsheet.
- Selecting F2 opened the Main Menu but did not put the browser focus on the menu. This was fixed.
- When searching in a CJK language, searching for keywords only found records with adjacent terms. This was fixed.
- Alt + number shortcuts worked only on Google Chrome. The shortcuts now also work on Mozilla Firefox and Microsoft Edge.

Analytics & Reporting

Enhancements

- Local Param Subfield Delimiters - For fields that are added as local parameter fields (local param) in Alma Analytics, subfields can be maintained. When enabled for your institution, fields/subfields appear in Alma Analytics with the Alma subfield delimiter (either $$ or ‡) used to delimit the subfield content. Harvard has requested this feature be enabled once the April release is installed, and specified delimiter $$.
- New fields in Funds Expenditure:
  - To Funds Expenditure > Invoice Line:
    - Invoice-Owner Name
    - Invoice-Owner Code
  - To Funds Expenditure, Physical Items, E-Inventory > Fund Ledger:
    - Fund Ledger Owner Name
    - Fund Ledger Owner Code
- Price Note field was added to Funds Expenditure > Invoice Line
- Open URL field was added to Link Resolver Usage > Open URL Context Details. It contains the entire OpenURL.
- Expenditure trends for physical and electronic resources tab was added to the Acquisitions Analytics dashboard. It reports on expenditures for physical and electronic resources for the previous 10 years starting from the last closed fiscal year.
- For Fulfillment and Course Reserves
  - Additional support for reading lists associated with multiple courses:
    - When rolling over courses using the course loading integration profile, if you roll over multiple courses associated with the same reading list, the new reading list is associated with all of the new courses.
• (Leganto only) Instructors can now roll over reading lists associated with multiple courses.
• The Reading List Bulk Update job now removes the course association from reading lists associated with multiple courses.
• The Citation Alternate Suggestions job now finds all reading lists associated with the course, including reading lists associated with multiple courses.
• Alma Analytics now displays all of the course information for a reading list with multiple courses.
• The following event types can now be displayed by the Event Type field in Leganto Instructor Usage > Instructor Usage Events:
  • Remove citation
  • Add section
  • Remove section

Resolved

• There is a problem with data in Physical Items > Holding Details > Holding Local Params that affected the extract from repeated fields. Data was not retained from subsequent instances of a field if the text was present in the first field.
• Sometimes dragging a field to a report caused rows to drop.
• In the Fulfillment subject area under the Loan Details folder, the Loan Note field contained no data even when the loan had a note.
• Some Analytics data was missing from the Course Reserves Subject Area/Citation Metadata Details for migrated items.
• The file name of a digital representation did not appear in Analytics. This was fixed, and now Citation Digital Files Name, Citation Digital Files Date Added, and Citation Representation URL are updated when the citation is related to a digital representation.
• In the Leganto Student Usage subject area, when Usage Level was not equal to Citation, student type displayed ALL in the report. This was fixed, and now when Usage Level is not equal to Citation, student type is empty.

Acquisitions/Finance

Enhancements

• Change funds in invoice lines - It is now possible to select one, many, or all invoice lines on the Invoice Details page and add or replace funds for the selected invoice lines. When you select one or more invoice line and select Add/Replace Selected Fund, a pop-up window enables you to pick the fund to add/replace to all selected invoice lines. If the invoice line does not have a fund, Alma adds the fund. If the invoice line already has a fund, Alma replaces the existing fund with the selected fund. Alma checks the fund to make sure it has enough money and is from the relevant fiscal period. If it is not eligible to be added, Alma displays an error message.
  • NOTE: You may need to apply the Restore list defaults function to the Invoice Lines tab for the checkbox to appear for each invoice line:

![Image showing the invoice lines with the Restore list defaults button]

• Importing different inventory types - When you import records with a single match, you can now configure the import profile to use inventory type as a criteria for a match. This enables you to maintain separate bibliographic records for electronic and physical inventory types of the same title. See Single match - match only record with the same inventory type (electronic/physical) for more information.
Check availability and pricing - (This feature is currently available for OASIS only; Ex Libris plans to add additional vendors in the future.) Creating a PO line from the Check Pricing and Availability page now automatically copies the price and currency of the relevant item into the PO line. If the PO line is created in another currency, an exchange rate is calculated using the current date as an exchange rate date. In addition, the vendor information is automatically copied into the new PO Line.

Resolved

- When attempting to view PO line items from a title search, there was an error. This was fixed.
- When using a template to create a PO line, if the template was created from a different type of inventory (electronic or physical), an error appeared. This was fixed.

Course Reserves/Leganto

Enhancements

- Bag It Copy: Simply select Copy instead of Move when hovering your mouse under the citation under which you want to copy the items in your bag. The items are copied to this location and continue to remain in their original locations. The items are also removed from My Bag.
- Instructors, librarians, and course operators can now add suggestions from the Leganto search.
- Searching in Find Lists was improved to be quicker, more flexible, and more accurate. For example, previously a search for Smith John did not return the instructor John Smith. This search now works.
- You can now automatically set the status of a reading list after a librarian manually sets the last citation in the list to Complete. Note that this feature will not trigger if the last citation is set to Complete automatically. Set the parameter reading_list_citations_complete. For more information, see Configuring Default Statuses for Citations/Reading Lists.
- Informit videos (http://www.informit.org/tv-news) is now a supported Cite It! site.
- Embedded content in Leganto: When enabled by your library, you can select to embed electronic citations directly in Leganto. The embedded item appears below the links that enable the student to open the citation in another tab or download the file. You can embed images, web sites, PDFs, and supported HTML5 audio and video (access to these contents depends on the viewer's browser; see https://www.w3schools.com/html/html5_audio.asp and https://www.w3schools.com/html/html5_video.asp). You cannot embed Microsoft files.
- Accessibility improvements: Leganto continues to make accessibility improvements as listed in the VPAT amendment plan.
- You can now add additional reading list subjects. See Configuring List Subjects.
- Additional support for reading lists associated with multiple courses:
  - When rolling over courses using the course loading integration profile, if you roll over multiple courses associated with the same reading list, the new reading list is associated with all of the new courses.
  - In Leganto only) Instructors can now roll over reading lists associated with multiple courses.
  - The Citation Alternate Suggestions job now finds all reading lists associated with the course, including reading lists associated with multiple courses.
  - Alma Analytics now displays all of the course information for a reading list with multiple courses.
- The following event types can now be displayed by the Event Type field in Leganto Instructor Usage > Instructor Usage Events:
  - Remove citation
  - Add section
  - Remove section

Resolved

- In Analytics, in the Leganto Student Usage subject area, when Usage Level was not equal to Citation, student type displayed ALL in the report. This was fixed, and now when Usage Level is not equal to Citation, student type is empty.
- Assigned reading lists appeared in the Reading Lists - Unassigned task entry. This was fixed.
- On the Edit Citations page, some duplicates appeared. This was fixed.
- Cite It did not properly populate data from some areas of ProQuest. This was fixed.
- In the File Upload Copyright Options table, selecting the same status for multiple options caused problems. This was fixed, and you can now select the same status for multiple options without causing problems.
- When a citation was set to be restricted to certain dates, or some digital material was selected to be not viewable, a student could see all digital materials on any dates by copying the citation to My Collection. This was fixed.
- When editing a section note, the button was labeled Discard instead of Cancel. This was fixed.
- When viewing a file after a creative commons license was selected for the citation, the creative commons license was overridden. This was fixed.
- After editing a citation, copying it to My Collection, and copying it back to a reading list, the changes made by the edit were lost. This was fixed.
- When exporting from Leganto to Word, non-numeric values in publication date changed to N/A. This was fixed by removing these values.

E-Resources

Enhancements
• **Retry SUSHI harvesting** - When the SUSHI Harvesting job receives a response that indicates that the report will be available at a later time, Alma now automatically retries a random amount of time later. If the error persists, Alma retries a number of such iterations, increasing the retry interval each time, until the attempt is successful or reaches a maximum number of retries.

• **Importing different inventory types** - When you import records with a single match, you can now configure the import profile to use inventory type as a criteria for a match. This enables you to maintain separate bibliographic records for electronic and physical inventory types of the same title. See Single match - match only record with the same inventory type (electronic/physical) for more information.

• **Global success rates in the Usage Data Loader** - The Usage Data Loader page now includes a column that indicates the global success rate of the report type for that month. The number is a link to the relevant SUSHI Account Details page.

**Resolved**

• An error occurred when loading MR1 reports using SUSHI harvest. This was fixed.

**Fulfillment**

**Enhancements**

• A new ID, Additional ID, is now available for requests in order to assist with hold shelf sorting. It can be added in the following places:
  • Pick from shelf task list - The ID is hidden by default and can be added in the manage column display menu.
  • Pick from shelf slips
  • Hold shelf slips
  • Hold shelf email to the patron
  • Circulation desk - When defining the circulation desk, Additional ID appears as one of the values on the Hold shelf sorting dropdown list.
  • Active and Expired Hold Shelf task lists - The Additional ID is hidden by default and can be added in the manage column display menu. The Sort by option includes Additional ID. When selected, the whole list is sorted based on this ID. Otherwise, the Additional ID is used as a secondary sort to the primary sort order. So if two or more records have the same primary value, those records then sort on the Additional ID value.

• Resource sharing: The cancellation reason and cancellation note are now included on the resource sharing request history tab.

**Resolved**

• In Analytics, in the Fulfillment subject area under the Loan Details folder, the Loan Note field contained no data even when the loan had a note. This was fixed.
• The auto-renew loan job report sometimes contained the wrong reason for a loan not being auto-renewed. This was fixed.
• You could not copy text from the On Hold pop-up. This was fixed.
• Sometimes when circulation desk configurations were changed, when connecting to Alma from a different computer, the new configurations were not reflected. This was fixed.
• When a requested item was scanned in to the hold shelf, the patron received a Hold Shelf notification each time the item was scanned in. This was fixed and now the letter is sent only once.
• Resource Sharing: Trying to change the status of a completed lending request to Request Completed resulted in an error. This was fixed.
• Resource Sharing: When an item was lost on the borrowing request and then later found and returned to the lender scanning the item on the Scan In or Return Item pages caused the request status to be Shipped Physically with multiple barcodes instead of Returned by partner. This was fixed.

**Resource Management**

**Enhancements**

• **Importing Different Inventory Types**
  • When you import records with a single match, you can now configure the import profile to use inventory type as a criteria for a match. This enables you to maintain separate bibliographic records for electronic and physical inventory types of the same title. See Single match - match only record with the same inventory type (electronic/physical) for more information.

• **Local Authority Record Edit Option**
  • When you use F3 in the MD Editor and view a local authority record, there is a new action Edit to edit the local authority record. Edit is also available when viewing a local authority record using Browse Bibliographic Headings. See Viewing and Linking to an Authority Record for more information.
Resolved

- When using Scan in Items to change a permanent location for a holdings with one remaining item, the Alma internal process for handling this change was updated. Previously, the version history, PO line, and notes were lost/not maintained with the creation of the new holdings record for the location change. Now, instead, the existing holdings record is maintained with these details, and only the location in the holdings record is changed.

- When scanning in an item (using the Scan In or Return Items pages), field 245 subfield c did not appear. This was fixed, and now the title includes subfield c. In addition, for all requests, the title now includes subfield c. In the MD Editor, clearer visual feedback for fields with errors was added in the following cases: when saving the record, the alert now specifies the field with the error; when removing focus from the field with the error.

- In the MD Editor, in the Form Editor for control fields (006,007), the empty form fields were not filled automatically with '# (- undefined). This was fixed. The # is now added after editing and saving the control field.

- When moving an item with a loan from one holdings to another, the original holdings could not be deleted in the MD Editor. This was fixed.

- Bibliographic records related to database electronic collections incorrectly appeared with an active icon in the Community tab of the search results, even when the bibliographic records were not activated in the Institution tab. This was fixed.

- The bibliographic record resource types Digital File - Audio, Digital File - Data, Digital File - Image, Digital File - Text, and Digital File - Video (based on the MARC21 field 347 subfield $a) were removed. This change will take effect after a full inventory indexing is run.

- In the MD Editor, the 008 field form editor did not have drop-down menus for positions 22, 23, 26, and 28 when Type of Record = Computer File. This was fixed. The drop-downs in these positions are now populated in this case.

- When creating a new MARC21 bibliographic record and an item using the Quick Cataloging form (Resources > Add Physical Item), the data entered in Series title number was mapped to the obsolete field 440, instead of field 490 (first indicator '0') subfield $a. This was fixed.

- When the bibliographic record linked to the portfolio contained a cancelled ISBN (020$z) or a cancelled ISSN (022$z), Alma attempted to find matches in the Community Zone according to these invalid identifiers. This was fixed.

- In the MD Editor when a controlled vocabulary popup appeared and the user wanted to close the popup using the Escape key, the popup did not close. This was fixed.