July 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

- **Search/Display changes as part of semi-annual reindexing**: Numerous changes will be implemented during the July reindexing, scheduled to be complete here within the first few days of July.
  - Implementation of changed language configuration option to improve searching **Chinese** / **Korean** characters.
  - Sort of call numbers for the type NLM and SUDOC was improved.
  - The MARC 21 775 $x and $z are now indexed under the ISSN and ISBN indexes, and the MARC 21 775 $u, $x, $y, and $z are now indexed under the Standard number index.
  - **Apostrophe handling**: The various UNICODE forms of an apostrophe are now normalized to the standard ASCII apostrophe for Alma Repository Search when searching text fields such as Subject and Title.
  - Subfields of MARC authority record fields used to create display, sorting, and search elements, were extracted in alphabetical order rather than in cataloging order. This was fixed.
  - **Advanced Search Options for Subjects Index**: For an **All titles** searches using the Subjects index, the following matching criteria were added to the Advanced search options: Is Empty, Not Contains Keywords, Not Equals, Not Contains Phrase, and Is Not Empty. Note that this requires reindexing and will be fully functional with the completion of the July reindexing. See **Performing an Advanced Search** for more information.

- **Search Indexes for Authority Records**:
  - **040 $a and $d**
  - Genre form (auth_genre_form). Previously, the 155, 455, and 555 fields were mapped to the Subject search index. Now, these fields are instead mapped to the Genre form index.
  - LCCN prefix (lccn_prefix). The alphabetic characters that begin the 010 $a such as no, sh, or sj are indexed. With this index, you can restrict an authorities subject search to a **certain type**.

- **Agency and Language Search Indexes for Bibliographic Records**: **040 $b**
  - The display of series statements in repository search results and other places was modified. For the details regarding these changes, see **Series Statements**.

- **Publishing** - **Fields Added to Electronic Inventory Enrichment**. The published data for electronic inventory enrichment was extended to include the following information: **URL** Type, **Proxy** Selected, **Proxy** Enabled, **Authentication** Note, and **Internal Description**. These publishing changes are available when using the **General Profile** for publishing. See **Publishing and Inventory Enrichment (General Publishing)** for more information.

  - On the **Process Items page**, selecting all items did not affect all pages, and checked items did not remain checked when navigating to the next page. This was fixed.

- **New DARA recommendations**
  - **Unavailable Portfolios** – Using an Alma Analytics report, DARA can identify unavailable electronic portfolios and recommend that you activate them.
  - **Validate Order Information for Orders Created by API** – DARA identifies when you have the New Order Integration profile configured in your institution and you have PO lines created by an API, but you did not select any of the Validation of Order Information options for the New Order API integration profile. These options prevent the API from creating new orders without proper funding.
Analytics & Reporting

Enhancements

- The name of the Alternative Call Number field was changed to Item Call Number and the name of the Alternative Call Number Type field was changed to Item Call Number Type in Physical Items > Physical Item Details.
- Alma Analytics fields in Fines and Fees > Transaction Date are no longer marked as to be deprecated.
- The out-of-the-box Industry Standard Reports were enhanced by adding to the top of the reports the date the report was run and the value selected from the prompt.
- The shared DARA folder was added that contains reports used by DARA.
- The Original Cataloging Agency and Language of Cataloging fields were added to the Bibliographic Details dimension in all subject areas in which it appears.
- The Citation ID field was added to Leganto Instructor Usage Events > Citation Metadata Details.
- Searchable ID fields 4-10 were added to Course Reserves > Courses in Analytics.

Resolved

- Creating a report from an Analytics set did not work properly. This was fixed.
- In the User subject area, in the Note folder, User Viewable did not contain the correct value. This was fixed.
- In the E-Inventory subject area, in the Portfolio folder, Is Free did not have the correct value. This was fixed.
- Data was not returned for roles in the Events subject area. This was fixed.
- Analytics sometimes removed leading 0s for Network Number, which resulted in display and duplication problems. This was fixed.
- Sometimes the shared folder for Leganto Analytics did not appear. This was fixed.
- Not all citations from a list appeared in Leganto Analytics. This was fixed.

Acquisitions/Finance

Enhancements

- Add Items to the Claim Task List. The Claim Task List now includes a new collapsible section, Claiming Information. This section, which is only available for physical PO lines, lists the items or holdings and their claim status. For physical one time orders, the list displays all unreceived items linked to this PO Line. The Go to inventory link displays the item editor. For physical continuous orders, the list displays all unreceived items that are under the holdings linking to this PO line, based on the prediction pattern. In this case, if there are items, the Go to inventory link goes to the item editor, otherwise it goes to the holdings item lists. Watch the View Unreceived Items for Order Lines with Claims video (1:17 min). See Processing Claims.
- A new parameter, update_inventory, is available on the PO Line API. When the parameter is true, which is the default, the API updates the material type for the PO line inventory. When the parameter is false, the inventory is not updated by the API.
- The Available For field on the Vendor Details page is now a mandatory field.

Resolved

- When editing import profiles, on the mapping tab, the vendor mapping listed only the first 20 vendor accounts. This was fixed.
- Trying to save a continuous PO line that did not have a payment acquisition method and was in status Waiting for Manual Renewal resulted in an error. This was fixed.
- When receiving new material, the sort order was incorrect. This was fixed.
- When sending the Query to requester letter the email address of the first letter was reused when sending the second and subsequent queries to requester for different records when managing purchase requests. This was fixed.
- The interested In letter was sent twice: once when activating a resource using the Update Inventory import profile and again after selecting Done in the resource activation task list. This was fixed, and now the letter is sent only once.
- The History tab for PO lines presented a Has New Contents icon even when there were no contents. This was fixed.

Course Reserves/Leganto

Enhancements

- On the Process Items page, selecting all items did not affect all pages, and checked items did not remain checked when navigating to the next page. This was fixed. (Cross-posted under General)
- The Additional Information column for Invoice Line Details was empty when exported to Excel. This was fixed.
- Invoice approval rules with multiple values in any input parameter did not work. This was fixed.
- When deleting a vendor that is also a licensor, the vendor code remained in the license list for the related licenses. This was fixed.
- When receiving items, the filter on the Manage Items page only contained options that corresponded to items currently visible on the page, not all options. This was fixed.
- When releasing a record from In Process Items, the notification listed the title of the first record on the list, not the records that were released. This was fixed.
- When receiving items on the receiving page the Barcode generation skipped every second number in the sequence. This was fixed.
- When changing the fund of a PO line that had an expenditure and a disencumbrance, a redundant disencumbrance was created. This was fixed.
- Vendors whose names include diacritic marks do not appear in the search results. This was fixed.
• List Analysis: when enabled by your library you can now view Analytics information about your reading lists and citations. This feature, called List Analysis, can be enabled for instructors (and librarians) only or also for students. The Analytics information is updated daily. When this feature is enabled, the View lists analysis icon appears at the top of My Lists and every reading list. If you select the icon on the My Lists page, Analytics information appears instead of the reading list descriptions. To return to the standard view of My Lists, select the icon again or the at the right of the bottom status bar that appears while analysis is visible. View data on Weekly Active Students, student engagement, citation views, etc.
  • To enable disable List Analysis (see above Leganto feature), set the parameter list_analysis to all or instructors. Leave blank to disable. For more information, see Enabling Reading List / Citation Analytics Information (List Analysis).

• Changes to Cite It! supported sites:
  • Law Trove was changed to Oxford Law Trove.
  • OER Commons, OpenStax, and The Open Textbook Library were added as supported sites.
  • The entry for Taylor & Francis was fixed.

• To enable disable display of Primo availability restriction information in Leganto, set the parameter display_primo_restriction_label to true or false. For more information, see Configuring Primo Availability for Citations Added from Primo.

• You can enable disable student's ability to "like" citations using the like parameter (true/false). See Configuring Whether Students Can "Like" Citations.

• You can enable disable the library discussion using the library_discussion parameter (true/false). See Configuring Discussions in Leganto.

• You can enable disable users' ability to suggestion citations for reading lists using the suggestions parameter. See Configuring Reading List Suggestions.

• You have a new option when configuring instructors' ability to mark links as broken.
  • Set mark_as_broken to links to enable Leganto users to report broken links when there is at least one available electronic resource, or all (formerly alert) to enable Leganto users to report broken links in all cases (including when there are no available electronic resources but there are, for example, available physical or digital resources or an uploaded file). Leave blank to disable the ability to mark links as broken. See Enabling Broken Link Reporting.

• When deleting a citation, the confirmation dialog box now contains information about the citation.
  • The alert List was published/unpublished now appears on the reading list level, only.
  • Filtering by a search string in a reading list was enhanced to support several features, including a) search for John Smith finds Smith, John, and b) support for double quoted phrases.
  • In the Primo Integration mapping table, if you are using Leganto and primo_default_search_scope doesn't include your local Primo repository items, you can now configure local_repository_scope with a scope that contains your local repository items. See Configuring Search Repository.

• When arriving to Leganto from the CMS using a course link, the fact that My Lists is filtered by the course is now highlighted.

• You can now configure and normalize the information that is taken from a bibliographic record and copied to a citation when a) a repository citation is created or b) a resource locate succeeds for the citation. For more information, see Mapping Bibliographic Record Fields to Citation Fields.

• The Citation ID field was added to Leganto Instructor Usage Events > Citation Metadata Details.

• Searchable ID fields 4-10 were added to Course Reserves > Courses in Analytics.

Resolved

• Sometimes the shared folder for Leganto Analytics did not appear. This was fixed.
• In some cases, the reading list facets did not display the correct results after selecting the facet. This was fixed.
• The list configuration feature Select List Size disappeared from the Edit Citations page. It was restored.
• Sometimes when adding a citation in Alma, the Citation Default Copyright Status did not work. This was fixed.
• The course end date was sometimes off one day for a course uploaded by the course loading integration profile. This was fixed.
• The Activate/Deactivate Courses job sometimes considered course start/end dates as though they were one day before or after the configured date. This was fixed.
• Not all citations from a list appeared in Leganto Student Usage Analytics. This was fixed.
• A librarian could not see student discussions or likes associated with a citation unless he or she was the owner of the list. This was fixed.
• When doing an instructor rollover, the copyrights were not recalculated properly for articles. This was fixed.
• The citation alerts date format did not match the system_date_format. This was fixed.
• When primo_getit was true, then, after logging into Primo and returning to Leganto, a user was signed out of Leganto. This was fixed.
• A librarian could not see student discussions or likes associated with a citation unless he or she was the owner of the list. This was fixed.

E-Resources

Enhancements

• Override URL for SUSHI Vendors. The Vendor SUSHI Account page now includes an Override URL in addition to the Vendor URL. Either the Override URL or the Vendor URL must be populated. If the Vendor URL for a SUSHI account changes in the list of SUSHI-certified vendors, the Vendor URL is updated. The Override URL is not changed by the update. When the SUSHI harvest job runs, the Override URL is checked first, and then the Vendor URL if the Override URL doesn't connect successfully. See Managing SUSHI Accounts.

• Link Resolver View It - Show All Option. The Link Resolver View It (which presents context-sensitive electronic services) can now show more than 25 services using a new Show All option. See View It and enable_view_it_show_all_results for more information.

• Local Portfolio Language. You can now specify the portfolio language when creating new portfolios. Previously, English (en) was specified by default. The language information can be entered on the New Portfolio page (when creating a new portfolio) or from the Portfolio Loader spreadsheet and is placed in the new bibliographic record's 008 (positions 35-37) for MARC. Once entered, the
A weekly scheduling option was added to the existing monthly scheduling option for the Springer Upload Electronic Holdings job.

In cases where the OpenURL contains rft.aufirst and rft.au.last elements indicating who the first author is, but the CTO does not list that author first, there is a fix for this. Contact Support to implement this fix (set the parameter) for your system.

Resolved

- Harvesting from a SUSHI vendor was not supported when the requester was null (or only whitespaces). This was fixed.
- SUSHI harvesting for MR1 did not work. This was fixed.
- A user with the Electronic Inventory Operator role (and not Electronic Inventory Operator Extended) could delete an electronic collection. This was fixed.
- When using split_values_in_display_license, the license label and content were split into two different labels but had the same name, so they could not be configured separately. This was fixed, and now the first tag is firstRow and the second tag is secondRow.

Fulfillment

Enhancements

- Define user notes as Pop-up notes:
  - User notes can now be defined to appear as pop-up notes in Manage Patron Services so that the librarian can inform the patron of any important messages. When a user note is created, a new check-box is available, Pop up note. When selected, the note will display as a pop-up window when the operator enters Manage Patron Users. If a block message also exists for the user, both messages will display in the same pop-up window. See Managing User Notes.
- Select Request Locations:
  - Using Transit Time Rules configuration, Alma can be configured to automatically place title-level holds on items in closer proximity to the requested pick-up location. A new Manual Skip Location feature is also available on circ picklists which provides a list of locations where the request can be fulfilled if it cannot be fulfilled at the initial library.

Resolved

- Notes containing special characters did not appear in the Patron Services page. This was fixed.
- On the Manage Patron Services page, when selecting Submit Request, then selecting Enter without entering anything, and then selecting a recent title, the relevant buttons did not appear. This was fixed.
- The Payment Reference Number link for Fine/Fees Receipt sometimes displayed the wrong user’s payment information. This was fixed.
- Holdings availability for Primo was slow when there were many holdings. The performance was improved.
- The user information pop-up window in the borrowing request page did not display the user details as configured in the Contact Information Popup mapping table. This was fixed.
- Editing an item in the Item Editor page sometimes failed with an Updating DNX Failed error. This was fixed.
- On the Manage In Process Items page, the All option was not always first in the filters. This was fixed.
- Resource Sharing: When calculating the due date of loans for resource sharing borrowed items, after taking the delivery delay into consideration the due date was sometimes in the past. This was fixed and now the due date is never earlier than the current time.
- When close_paid_lost_loan was set to true, it was impossible to return an item in Lost and Paid status after the Anonymization job ran. This was fixed.
- When a title level request was fulfilled without an item ID associated with the request before being fulfilled (in other words, the item was never put on the hold shelf, or moved or sent in any way before being checked out), the item ID did not appear in the request history. This was fixed.
- On the Monitor Requests page, when a request was not yet activated, the material type in the facet was Undefined. This was fixed and the correct material type now appears.
- A non-preferred remote storage item was given preference over a local item. This was fixed. And now a non-preferred remote storage location is given the lowest priority for selection, even if it is in the same library as the pickup location.
- When searching for requests by patron identifiers, barcode was not matched when searching All. This was fixed.
- Resource Sharing: On the Patron Services page, in the Returns tab, in the Owned By Library column, the library was wrong for items that were already returned to the partner. This was fixed.
- There was a display issue with the autocomplete options on the Patron Identification page. This was fixed.
- In some cases, Alma performed slowly and displayed a blank screen, especially for fulfillment activities. We took several steps to address this (without being able to identify the root cause: 1) These activities now display an error message with information about the event. 2) You can continue with your flow in the meantime.

Resource Management

Enhancements

- A new action is available for indication rules: recordHasDuplicateFields "([fields])". Also a new normalization rule is available: correctDuplicateFields "([fields])". See List of Actions for more information.
- If a bibliographic record has either 022a or 776x Alma puts the only ISSN in both the print identifier and online identifier fields. (The same is also true for the ISBN.) This was fixed. The e-ISSN is mapped to the online identifier and the print ISSN is mapped to the print identifier with no duplication.
• A new row action, Rerun, was added to the Import Job Details page for Repository, New Order, and Update Inventory profile type import jobs that use the Upload file or FTP import protocol, and specify XML or Binary for the physical source format. For situations where an import job failed (such as Failed in Commit after calling NZ) that is not due to a data error, this new action enables you to easily run the import job again with the file that is specified in the row from which you select Rerun. See Viewing File Details for more information.

• The scheduled job Authorities - Preferred Term Correction will now run daily at 04:00 A.M. instead of 03:00 A.M. to enable the previous job Authorities - Link BIB Headings enough time to complete.

**Resolved**

• Alt-S did not select the Save button on the Physical Item Editor page in all tabs. This was fixed.
• In the MD Editor, when editing a record using Browse Bibliographic Headings, the navigation pane did not display the record. This was fixed, and now Alma refreshes the pane and adds the edited record to the list.
• Changing your library location after withdrawing an item automatically withdrew another item from the same holdings. This was fixed.
• In rare cases, it was possible to delete items that were loaned. This was fixed. Some items that were deleted still had the status Loan. This was fixed.
• The unique titles report in Overlap and Collection Analysis was sometimes missing titles that should have been included. This was fixed.
• Non-filing text was not ignored when browsing by 222 or 242
• When a user edited a holdings record, selected Expand from Template, and selected a template that is a prediction pattern (such as Serial prediction quarterly months), subfield 8 was always 0 but should have been 1. This was fixed.