August 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**

- A reminder that the premium sandbox will be refreshed on **August 11, 2019**.
- Search results now display all 035 $a values. Click on the new multiple values icon ![icon](https://example.com/icon.png) to see all 035 $a content. Values will also be exported when the Export function is used.
- The Add Members to Set job could be slow. Its performance was improved.
- **Number of requests column** now displays in List of Items page
- **Published record feature**: you can now see the version of the record published to Primo, OCLC, etc.
- **Search by Bib Heading (Access point)**: in Advanced Search you can now choose Heading Information as a search option. You will be prompted to choose Heading Type, Source Code, Format, and Value. This is analogous to using the Browse Bib Heading feature.

Example:

![Advanced Search](https://example.com/image.png)

**Analytics & Reporting**

- Enhancements
1. To improve the nightly data extract from Alma to Analytics, Auto Renewals will be handled differently in the Fulfillment subject area.

   Before this change, regardless of the renewal method:
   
   • The Last Renewal Date field in the Last Renewal Date folder displayed the last renewal date.
   • The Renewal Date field in the Renewal Date folder displayed the renewal date.

   After this change:
   
   • When the renewal type is Auto Renewal, the Renewal Date field is empty, so there is only one line for all of the auto renewals, and the Number of Auto Renewals field in this line displays the total number of auto renewals. Note that the the Last Renewal Date field will not change and will display the date regardless of renewal type. There is no Last Auto Renewal Date field.
   • When the renewal type is not auto renewal, there is no change.

2. The Vendor Access Provider field was added to E-Inventory > Portfolio PO Line and to Funds Expenditure > PO Line. It displays the access provider of the vendor.

3. The following fields were added to the E-Inventory subject area. You can use them to match the journal title in Alma to the COUNTER report data and create useful reports when the same resource appears in different COUNTER reports for different platforms.

   • Portfolio COUNTER Platform (in the Portfolio dimension) – the platform of the portfolio
   • Electronic Collection COUNTER Platform (in the Electronic Collection dimension) – the platform of the collection
   • COUNTER Platform (defined in E-Resource of UI Alma) (in Cost Usage > Cost Usage Details) – the platform for calculating cost usage, defined in the Alma e-resource
   • Normalized Platform (from COUNTER report) field was added to Cost Usage > Cost Usage Details. It contains the normalized name of the platform.

Resolved

• Holdings records without items were not updated when there was a change in the Physical Items subject area. This was fixed.
• Running a report on more than one fiscal year produced incorrect expenditure values. This was fixed.
• Duplicate portfolios were returned after adding the field Availability. This was fixed.
• The 010 field could not be used for local param in Bibliographic Details. This was fixed.

Acquisitions/Finance

Resolved

• A user with the Physical Inventory Operator role was able to view and edit funds, even though the user did not have the Update Funds privilege. This was fixed.
• In the MD Editor, a user with the Purchasing Operator or Purchasing Manager role did not have access to the action Tools > MARC Bibliographic > Create PO Line & Edit. This was fixed.
• For a PO that had more than 1000 PO lines, the PO Summary page could not be loaded. This was fixed.
• When an invoice was set to Ready to be Paid, the assignment was not removed and the invoice could only be updated by the assignee. This was fixed, and now the invoice can be edited by any Invoice Manager.
• The VAT code drop-down list displayed enabled and disabled values. This was fixed, and now the drop-down list displays only enabled values.
• After rolling over a ledger, the allocated transaction appeared without the amount. This was fixed.

Course Reserves/Leganto

Enhancements

• In any persistent or secondary search, unlike other searches, a search for course code, course name, reading list code, or reading list name a) also searches for special characters (such as commas and dashes), and b) is limited to a search string of 40 characters, regardless of the size of the entity being searched
• Previously, when exporting a reading list to Word (not Expanded Reading List Style), the citations were sorted in the order of the list. Set the new parameter citation_export_style_order to natural to export the citations in the order determined by the style definition (either citation title, citation author, or as otherwise defined for the style). Set the parameter to list to export the citations in the same order as they appear in the list. See Configuring the Default Reading List Sort Order for Instructors and Students.
• After duplicating a list, Leganto now displays the new list. Previously, Leganto continued to display the old list.
• My Lists was sometimes slow to load. My Lists now uses pagination. If you have more than 10 lists, the next ten reading lists are not loaded until you scroll down. Note that sorting, searching, and filtering still operates over the entire list of reading lists, and not only the reading lists that are currently visible.
• The Publication Date, Publisher, and Place of Publication fields were move to the top section when manually adding a book chapter citation in Leganto.
• Until now, you could only edit course information at the time that you were associating the course to the reading list. An instructor can now edit the existing course's information from the Manage Course Association pane. (Note that the ability for an instructor to modify course information must be enabled for the institution, as usual.)
• When configuring self-registration for an LTI profile, you can now select which user ID is used by the users who are logging in. See Configuring Learning Tools Interoperability (LTI). Note that, when you want to mark an LTI profile as "open course", you no longer select For non institution users. Instead, select LTI id of self registered as the user ID type (this option must be enabled by Ex Libris).
• You can disable the Welcome screen that appears when a user first logs into Leganto using the welcome_screen parameter. You can also disable the Quick Start Welcome screen when an instructor logs in from the CMS using a course link to a course that does not exist in Alma or does not have any reading lists using the quickstart_screen_instructor parameter. See Enabling or Disabling the Welcome Screen.
• Rolling over reading lists from the Quick Start Welcome Screen: When enabled by your library, then when an instructor logs into Leganto using a course link to a course that does not exist in Alma, or that exists but does not have reading lists, the instructor can now roll over all reading lists from another course to this one, directly from the Quick Start Welcome Screen. This rollover operates like the usual instructor rollover, but rolls over all reading lists, instead of just one. (If the course does not yet exist, the instructor is first offered the opportunity to create it.)
  • After the instructor selects Roll Over, the instructor can select the course from which to copy reading lists and select Continue.
  • The instructor continues with the instructor rollover as usual, except that all reading lists of the source course are rolled over. For more information, see Rolling Over Courses and Leganto Course Rollover.
  • To enable instructors to roll over a course's reading lists on the Quick Start Welcome screen, set the parameter cms_entity_actions to all or include the (new for this release) value rollover. See Enabling Instructor Rollover.
• Leganto Analytics:
  • Course association and remove course association are now two separate events. The remove from course association event contains <removed course>-<course section>- "Reassociate" is no longer an event. See Instructor Usage Events.
  • Leganto Citation Library discussion last update was added to the Course Reserves subject area.

Resolved

• When exporting the Citation Alternate Suggestion job report, the column Reading List Code should have been Reading List Name. This was fixed for all new job reports. Note that old job reports continue to have this error.
• The Edit Citations page was slow to load. This was fixed.
• When a reading list was deleted, a notification was not sent to collaborators. This was fixed.
• When a user arrived at Leganto from a CMS using a course link, and reset the course filter, the filter was reset to the course when reloading the My Lists page. This was fixed.
• There were some display issues in specific browsers and screen sizes. These were fixed.
• Leganto sometimes displayed incorrect holdings. This was fixed.
• Leganto displayed expired users when searching for collaborators. This was fixed.
• Related Items sometimes appeared for an item in one course, but not for the same item in a different course. This was fixed.
• When exporting to Word APA format, an author (other than the first) with a hyphen in the name was exported incorrectly. This was fixed.
• Export to PDF did not handle special characters well. This was fixed.
• In My Lists the order of the reading lists when filtering by a course was unexpected. This was fixed, and it is now alphabetical by reading list name.
• When trying to change the list title in Leganto, the change was not saved if Alma was open in another tab in Spanish. This was fixed.
• When the visibility of a list enabled guests to view the list but not the course materials, the guest still had access to the course materials. This was fixed.
• Guest users could not see the course details of a list in the Find Lists screen. This was fixed.
• If you refreshed the page in Leganto, Other Formats and Editions disappeared. This was fixed.
• In Leganto, there was a display issue with the Add Subjects dropdown and the search field. This was fixed.
• When hiding links in Leganto, Leganto only displayed that the link was hidden for the first link. This was fixed.
• In Leganto, if the menu extended below the bottom of the page, you could not scroll down to see the rest of the menu. This was fixed.
• When working with multiple courses associated to a reading list, only the instructors in the first course received the Instructor privilege when arriving from the CMS. This was fixed.

E-Resources

Enhancements

• Provider Subscription Tools - view your subscriptions with providers and their availability status in Alma; activate any resources that you subscribe to but have not activated. See Provider Subscription Tools for more information. (Available for ProQuest platform now; additional providers to be added.)
• New COUNTER Platform feature allows you to specify a specific platform for e-collections/portfolios for Alma Analytics usage data and cost-per-use reports. Full description.
• When a portfolio is activated for the first time in the institution zone (directly from the portfolio list of actions, not the Electronic Resource Activation Tasklist ), the history tab and the Information icon for the portfolio on the Electronic Portfolio Editor page now identifies the operator who activated the portfolio. Previously, the history tab was empty and the Information icon only provided date and role information.
Resolved

- The Manage License Terms table was not sorted properly. It is now sorted by description in alphabetical order.
- A user with the License Viewer role could edit all fields when selecting the license name in the license list. This was fixed and now the license is opened in view mode.
- The Relink to another bibliographic record button was visible when the View action was selected for a portfolio from the Portfolio List of an electronic title. This was fixed.
- The SPRINGER Upload Electronic Holdings job was unable to download vendor files for institutions with reserved and special characters in their institution token. This was fixed. In addition, the job events report included unnecessary warnings. The warnings were refined so that they no longer appear when irrelevant.

Fulfillment

Enhancements

- Time to reshelving (hours) is now available on the Organization Unit Details (when configuring a library), Circulation Desk, and Reshelve Without Transit Rules Editor pages. When configured, items that are marked as reshelved or reshelved without transit, will be displayed as Awaiting Shelving, instead of Item in Place, for the period of time configured. The item is considered as available, but appears as being reshelved in Alma and Primo so students and librarians know not to search for it on the shelf. Alma removes the ‘Awaiting Reshelving’ indication when the configured time since the item return has passed. You can configure Time to reshelve once for the entire library, or override for a specific circulation desk. Watch the Reshelving Items Time video (2:07 min). See Editing a Library, Adding a Reshelve Without Transit Rule, and Adding a Circulation Desk.
- Merge Patron Records: A user with appropriate privileges can now merge one or more user records into another user record. You can select which segments to merge (contacts, identifiers, notes, blocks, demerits, statistics, attachments and proxy for). All fulfillment activities are merged (loans, requests, fines/fees and interested users) to the new user. To enable this feature, contact Ex Libris customer support.
- Campus, Expiration Date, and Blocks are now available to appear in the user information pop-up window. See Configuring User Information for Pop-ups.

Resolved

- Searching for a hyphenated last name did not return any auto-complete results in the Manage Patron Services page. This was fixed.
- In some cases, when creating an item, the title level request was not recalculated. This was fixed.
- On the Active Hold Shelf page for reading room desks, the Edit, Update Expiry, and View Audit Trial actions were removed.
- When an item was received in the Acquisition department, if the title had a patron type request, the item was not added to fill the request. This was fixed.

Resource Sharing:

- When a barcode of a temporary resource sharing item was modified using the item editor page, the barcode was not updated in the borrowing request. This was fixed.
- When using the barcode scanner, some barcodes were attached to incorrect requests. Now a progress bar appears when the current scanning process needs to complete before the next scan can take place.
- The cancelation reason for a borrowing request did not always appear in the Ful Cancel Request Letter. This was fixed.
- When a borrowing request was rejected because of a conditional message, a cancelation letter was not sent to the requester. This was fixed.

Resource Management

Enhancements

- The bib summary at the top of various pages now includes more subfields from 245: a, n, p, h, b, f, g, k, and s. For example, on the List of Items page, the resource summary at the top now include $p from 245.
- New option in Import Profiles: create electronic inventory only for new bibliographic records (not existing records).

Resolved

- Multi-matches were found when the incoming record had multiple ISBNs and the record in Alma also had multiple ISBNs, but there was only one record in Alma. This was fixed.
- In the Browse Shelf Listing’s Call Number Level drop-down list of options, the Alternative call number option was changed to Item call number. This change also appears in the Level column of the Browse Shelf Listing’s results.
- In the MD Editor, re-linking a holdings record did not get picked up when republishing and was not recorded in the history. This was fixed.
- In the MD Editor, in the pop-up list for the 006 field, the list was not sorted. This was fixed, and the list also displays the code and value.
- In the MD Editor, for a MARC 21 bibliographic field, when LDR pos. 6 = m (Computer File), the 008 pos. 23 drop-down menu was missing the values # and |. This was fixed.
In the MD Editor, when using F3 to find matching headings for field 730 with second indicator 2 and selecting any headings from bibliographic records, the following error message appeared: The authority record has no relevant preferred term. The bibliographic record was not updated. This was fixed and now the record is updated with the value from the selected heading.

In the MD Editor, Browse Bibliographic Headings opened the repository search with one of the filters preselected to the wrong condition. This was fixed.