Known Issues

Alma staff login

- Contact your supervisor if you have questions about roles and privileges.
- An Alma shortcut is now provided on Windows desktop machines.
- If you are using both Alma and Franklin Catalog, it is advised to use two different browsers (like IE and Firefox), not two windows/tabs of the same browser. Otherwise you may have problems with the availability iframe where the information doesn't load, or you see an error. This is because of a conflict between the Alma session and Franklin session. Simply closing the window or tab is not sufficient to end the session; you need to quit the browser entirely or just use two different browsers.
- If you wish to bookmark Alma manually, follow these steps:
  - Firefox - click right side of bookmark short cut next to star, highlight toolbar or menu, click organize, the new bookmark, enter URL, add.
  - Chrome - Click 3 horizontal dots, choose Bookmarks, Bookmark manager, organize, add page, enter name/URL.

Accessibility

- Accessibility - from My Library Card, there is no link back to the Catalog or Library home.

Acquisitions

- In some cases serials receiving requires one to change the "currently at" location to match the POL owning library. EXL is working on a fix for this issue.
- We are still working on firm order receiving process for Purchase orders that come over from Voyager. The public display for in process items currently displays confusingly as on order even after the item has been created. One is able to tell the item is in the building with the existence of a barcode in the show availability details box. The request link should appear when one is logged into the service. Various location and public display correlations:

<table>
<thead>
<tr>
<th>Franklin public item display note</th>
<th>location/action taken</th>
</tr>
</thead>
<tbody>
<tr>
<td>On order</td>
<td>unpacked and delivered to Cataloging</td>
</tr>
<tr>
<td>On order (with barcode#)</td>
<td>open order record to be processed in the &quot;Receive&quot; menu (item created)</td>
</tr>
<tr>
<td>On order</td>
<td>cataloging</td>
</tr>
<tr>
<td>In Transit</td>
<td>Receiving (.YAP titles- If the item is received by marking the receiving date on the item record rather than through the receiving page, it still displays as &quot;on order&quot; in Franklin. Receiving through the receiving page moves the item to &quot;in transit.&quot; )</td>
</tr>
<tr>
<td>In Transit</td>
<td>marking</td>
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<td>Shelve to […]</td>
<td>discharged at circ</td>
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</tbody>
</table>

- Current documentation is here: Alma for staff - Acquisitions. Please ask your supervisor or Jeanne Shuttleworth for support if you are unclear.

Discovery

Franklin

- Waiting on Ex Libris: In the course of troubleshooting something else, we have discovered that the non-PennKey ways of logging in (Google/email address) have stopped working—the log-in process stalls at the point the user should be returned to the page they started their log-in from. We didn't get any user reports about this, but we can reproduce it consistently. If you encounter anyone who says they can't log in, find out if they are using a PennKey, and if they're not, there is a (fussy) workaround. When they are on the Articles+ article page (example), click on My Account on the top right to log in before clicking on the PennText link. If they do that, they'll see their name on the top right of the PennText page instead of Guest, and the options will appear. Don't close any tabs while doing this. In short, the user needs to log into a page on the serialssolutions.com domain (not exlibrisgroup.com domain) to make it work, which we think is the root of the problem.
• **RESOLVED:** Many databases were erroneously deleted from Franklin in the data update for 3/5. We think this may be the result of Ex Libris doing a bad job of fixing a bug we had reported (unfortunately). The March release was 3/4. We restored these records manually. There are two open cases w/ Ex Libris about this. While the problem was much less significant the morning of Tuesday 3/6, we will still hold off on processing the overnight changes automatically for now, so that we can inspect them for this problem first. The changes will still be applied, but it will be about a day late and not always at the same time of day.

• **RESOLVED:** We were able to solve the Lucene bug in house! Quoted phrase searches that include apostrophes, CamelCase, etc. should now work as expected.

• **ADDRESSED known cases:** Since the launch, we have had reports of required fields not populating in the request forms (e.g. FacultyExpress), which prevents the user from submitting the form. The dropped info depends on the publication and the path by which the user got to the form. We have fixed the publications and paths (e.g. Journal of XYZ via Google Scholar) as we hear about them and the reports have died down. However, we will continue to make tweaks if we hear about new cases.

• **RESOLVED:** More than 90 days have passed since our data load, so all the "Recently Added" facets are now enabled.

• **RESOLVED:** The diacritics have been fixed by changing the character encoding for data loads that involve records with diacritics.

• **RESOLVED:** We have reverted to the original settings where you have to log in to see fulfillment options (rather than seeing Scan & Deliver before login). We made the change to help Biomed users who don't have Alma accounts, but in practice it was a bit confusing, and there was a bug causing the option to still not appear in one context. Instead, we've come up with a way to create accounts for the Biomed users. Everyone who needs that information should have it; if not, talk to DaVonne.

• **As RESOLVED as it's going to get for now:** The "third-party cookie test" is now hosted on the exlibrisgroup.com domain. This doesn't resolve the fundamental issue of Alma requiring a third-party cookie in order to display availability, but it means that users will see instructions to allow third-party cookies when they need to, and that the instructions will go away when they have permitted cookies from the required domain. We should expect to continue to see users who need to configure their browsers, as new users come to campus, users get new computers, and cookies expire and need to be reset.

• **RESOLVED:** Both suppressed bibs and suppressed holdings are being properly suppressed now, after the August Alma update.

• **RESOLVED:** The issue where brief records and the full records that were supposed to replace them (matching on OCLC number) both appeared in the catalog has been fixed.

• **RESOLVED:** On Tuesday, 8/1, we did a major upgrade of a piece of infrastructure that manages the containers. After a couple days of observation, we believe this resolves the 503 errors and necessity of being "under maintenance" while we restart parts of the system. The major problem may have obscured some smaller ones, which we'll iron out as we find them.

• **RESOLVED:** Some of the sort settings are naive—for example periods are sorted after spaces and other punctuation, and title prefix fields (e.g. "A ") are being included in the sort. Fixing this required a reindex, night of 6/29-30.

• **RESOLVED:** If you are seeing certificate warnings in your browser, you may be trying to access Franklin by the wrong URL (which doesn't exactly match the certificate). Use franklin.library.upenn.edu, not www.franklin.library.upenn.edu. References to the wrong version have been fixed on library websites and redirects put in place.

**Summon / Articles+**

• We are working on troubleshooting reports of users getting a "white screen of nothing" when accessing electronic resources. A few users have provided a lot of very helpful details on this. The most important detail we need for further troubleshooting is the URL on which the request failed and the exact message (so we can distinguish between errors coming from the browser and those coming from the journal/database website). A screenshot of the entire browser window including the address bar would do the trick.

• If a user gets to the Articles+ search result listing without having logged in on Franklin, the login link at the top of the Summon page logs you in but loses your search terms. This is a bug in Summon that we will report.

• Users have been confused by seeing "Guest" at the top right of the Services page. (It is an awfully oblique way to suggest where you can log in; it is also not necessary to log in there to use EZproxy, although it is necessary to log in to see some fulfillment options. This is redundant because Summon will display a yellow log-in banner lower on the page if it needs you to log in to see fulfillment options.) This page is controlled by Ex Libris but we have requested a change to a simpler "My Library Account" labeling that either shows you your account or prompts you to log in.

• **RESOLVED:** Summon was not proxying results properly if the user comes from the "bento box" on the Franklin results page. This has been fixed.

• **RESOLVED:** The Citation Linker seems not to be resolving DOIs. You can search DOIs from the main search bar or Articles+ search bar. We are investigating issues with the Citation Linker.

• **RESOLVED:** Google scholar: Library link. Users need to change their settings so that they point to Alma. - "University of Pennsylvania Libraries - Fulltext via PennText", but otherwise should be working. Linking to 360 in Scholar (the old PennText menu) has been disabled. Users may need to change their settings so that they point to Alma - "University of Pennsylvania Libraries - Fulltext via PennText". Selecting a library is available under Google/scholar settings/library links.

**E-Resources**

• We continue to work on data and service gaps caused by the migration.

**Fulfillment - Circulation and Request**

• Requests on unavailable items - Ex Libris is currently investigating why requests for an unavailable title are not being placed on other available copies of that title. The System is configured to do so, but is not performing properly. If you are made aware of this happening, please cancel the request on the unavailable copy and replace it on an available copy. If there are no copies available, please direct the patron to BorrowDirect and E-ZBorrow. Note: There is no alert or immediate indication that this has happened. We are only made
aware if we are placing the request on behalf of the patron.

**UPDATE:** We have configured Franklin to hide the "request" option if all copies of an item are unavailable. The only available request options will be Resource Sharing choices.

- **ALMA is not automatically forgiving lost item replacement fees for lost loans migrated from Voyager. It is also not giving any indication that the item in hand was lost in the system. Remedy: Please pay close attention to due date to determine whether an item should have been in the library system. Manually forgive the fines in the patron's account. As far as we can tell, there is no action needed for the item returned. Note: There is no way to tell an item was lost once it is disconnected from the user. Lost item replacement fees generated in ALMA should be forgiven automatically upon return.
- **RESOLVED:** BorrowDirect and E-ZBorrow item are not loaning for the standard 12 weeks. Remedy: Please manually change due date to reflect the 12 week loan period.
- **RESOLVED:** Any BorrowDirect and E-ZBorrow request or loan that was processed on Voyager is going to return with an error message. This is because the item record does not exist in ALMA. We are working on remedying this situation. Until we do, please do the following:
  - Returned by patron: No further action needed. Send to Van Pelt Circulation for processing.
  - **RESOLVED:** On hold for a patron: Through your hold shelf and gather the barcodes, titles, and Patron names for the items waiting for pick up if they are not expired. Contact davonne@upenn.edu with the information you've gathered.
- **ONGOING:** Unable to renew BorrowDirect and E-ZBorrow loans currently existing in a patron's record. BorrowDirect and E-ZBorrow items in ALMA have a loan period of 12 weeks and no renewal permitted. Because of this you cannot renew these items in the patron record by clicking the renew button. You must manually update the due date by clicking "Change Due Date" in the loan's action menu.
- **ONGOING:** Patrons without library accounts in Alma may not be able to access certain Resource Sharing options which check for an active library account: Borrow Direct, EZ Borrow or logging in to the main Resource Sharing page: [https://franklin.library.upenn.edu/forms/resourcesharing](https://franklin.library.upenn.edu/forms/resourcesharing). Patrons should be strongly encouraged to contact the Circulation Desk of their preferred Penn library, by phone or in person, in order to set up a library account (as that should solve the issue permanently and would also be required for them to check out Borrow Direct and EZ Borrow loans upon arrival).

- **RESOLVED:** New Interlibrary Loan patron records for first time users (when patron's use the Interlibrary Loan, Faculty Express or Scan & Deliver forms) may not have all email preferences set correctly, resulting in notification problems. The immediate work around when this problem is encountered is to manually check all Email Notification check boxes in the patron's ILL account record and then manually send a notification email to the patron. Future notifications for that patron should work properly.
- **RESOLVED:** Resource Sharing request forms (Interlibrary Loan, Faculty Express, Scan & Deliver) now capture accurate citation information and successfully transmit that data to Illiad.
- **RESOLVED:** Scan and Deliver request confirmation email notifications to patrons successfully include the article title as entered by the patron.
- **RESOLVED:** Loan Periods for Faculty and Library Staff are incorrect in ALMA for STEM Libraries. Please use the "Change due date" function to adjust the loan period. This should be fixed by tomorrow morning.
- **RESOLVED:** Patrons in the Faculty Express User Group in Alma are being prevented from submitting a request in BorrowDirect or EZBorrow. They can log in and select a book but can't submit the request – they get a message that they are not eligible. We believe that this is a communication issue between Alma and Relais since this is a user group that didn't exist in Voyager. Patrons should submit an interlibrary loan request or send their citation information directly to ILL at Interlib@pobox.upenn.edu.

### Resource Management

- **RESOLVED:** Publishing to OCLC (think Voyager's "OK to Export") has been finalized. Following in-house manipulation, files are sent to OCLC on a weekly basis.
- New and updated documentation can be found on the Resource Management tab of the Alma Training Documentation for Staff LibGuide.
- Merge rules for overlaying an existing record while retaining fields (also referred to in Alma as "merging") have been established. The merge rule used when importing a record via the Search External Resources method is called "OCLC merge-Keep local values." The merge rule used when importing a record via Connexion is called "Connexion Gateway merge-Keeplocal values." Following are issues related to these processes:
  - **RESOLVED:** 6XX and 7XX fields not being imported.
  - **RESOLVED:** 505 retained after a Connexion Gateway merge.
  - **RESOLVED:** 505 retained after a Connexion Gateway merge.
  - **RESOLVED:** Order of fields in merged record changed. Both the Connexion Gateway and the External Resource merge methods use a normalization process called: Marc21 Bib normalize on save. This process is made up of 2 tasks: Marc21BibResequenceTask and Marc21BibClearEmptyFieldsTask. If the resequence task is removed, the fields are even more out of order, especially when merging in our locally retained fields. With the resequence task in place, some fields appear in a different order depending on whether one is using the Connexion Gateway method or the Search External Resources merge method. With the Connexion method, locally retained fields seem to group together at the top of a number range (e.g., retained 590 & 599 appear before 500 & 504). With Search External Resources, they group together at the end of a number range (e.g., retained 590 & 599 appear after 500 & 504). An ExL Support case about field resequencing has been in "Pending Work Plan" status since Mar. 2017. Quoting from the case comment: "It is a known issue and we have a development task for this, however a solution will not be part of the current Alma work plan. The decision not to include this case was taken after examining the severity and the number of institutions affected by the problem. This decision includes consideration of the risks involved in implementing the required change. All decisions are taken as part of a prioritization process which includes a comparison to other issues on the pipeline."
- **Reported to Ex Libris:** Connexion Gateway merge retains 650 .4 and 710 $5 PU in the existing record but other 6XXs and 7XXs are not removed as instructed in the rule. Scheduled to be resolved by Ex Libris in the May 2018 release.
- **RESOLVED:** When repeatedly manipulating a record, the browser cache may need to be cleared to see the final version of the record.
- "Technical - Migration" process type: Item records with this process type also have the status: Item not in place. Various Voyager item record statuses migrated with this process type (e.g., Missing; Lost-Library applied; Withdrawn). We continue to address this status as part of the post-migration clean-up. Please do not update these records until procedures are finalized and distributed.
- **Work Orders:** Procedures for using Alma Work Orders can be found on the Resource Management tab of the Alma Training Documentation for Staff LibGuide. Work orders are also referenced in workflow-specific documents, e.g., Periodicals Binding for Departmental Libraries (on the Binding tab).