



*Welcome!*

The feature release webinar will start at 11am and run until 12pm.

Please mute your microphone.

As time permits, we will respond to questions typed in the chat box, and offline afterwards, as needed.

This session will be recorded and made available on the CARLI website.

Slides and release notes links are available on our event page: <https://www.carli.illinois.edu/alma/primo-ve-quarterly-feature-release-update-1>



CARLI

I-SHARE QUARTERLY ALMA PRIMO VE UPDATE:  
MAY 2025 FEATURE RELEASE HIGHLIGHTS  
MAY 2, 2025

# Today's Agenda

- Announcements and Reminders
- May Quarterly Release Features
  - Alma
  - Primo VE
- Q&A



- Today at 5pm is the deadline to [volunteer for a CARLI Committee](#) to start July 1, 2025!
- Sign up for [CARLI Email Lists](#) to get the latest news, discuss topics and issues, and ask questions of your CARLI member library peers.
- The Technical Services Committee encourages submissions to the [Shared Documentation Depository](#), a vital resource for the I-Share community, providing accessible and collaborative documentation to support library operations and services.

- Upcoming CARLI Events are listed on the [CARLI Calendar](#) including:
  - May 14-15 – Building Digital Archives with Minimal Staffing webinars
  - May 21 – CARLI Instruction Committee Annual Showcase webinar
  - May 30 – CARLI Resource Sharing Committee In-Person Discussion, Harper College (WRH) and College of DuPage (COD)
  - June 6 – Behind the Scenes: an Introduction to Archive Processing in-person workshop
  - Several Professional Development Alliance (PDA) events on various topics every month
- [CARLI News, April 30, 2025](#) – CARLI's monthly newsletter

- CARLI Staff are sharing the updates we feel are most important to the I-Share environment.
- Staff at I-Share libraries can review the full set of release notes available from the Alma and Primo VE Support Pages:
  - [Alma Release Notes](#)
  - [Primo VE Release Notes](#)



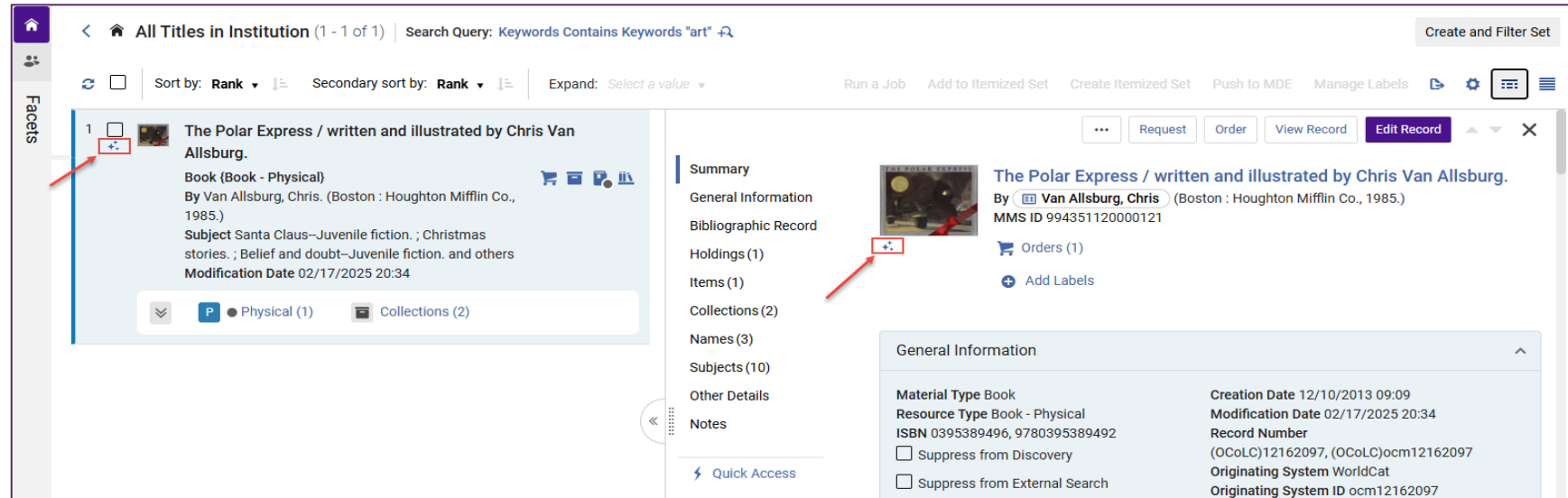


# User Interface Updates

- The new user interface for Manage Patron Services and Return Items will now be the default with no opt-out
- There are the following enhancements to the Title Searches page:
  - You can now save multiple facet combinations and apply them to your searches
  - In title and holdings searches catalogers can now view, add, edit, and delete notes directly without opening the Metadata Editor.
  - The new title search UX includes single-click links to additional related entities, such as Related Records, Courses, Licenses, and Reminders
- The old Title Search interface will be sunset in August
- The text appearance in the record view and sections of the new user interface across Alma was updated. Labels now have bold font, and values appear as regular text rather than bold.



# AI Indication for Community Zone Enriched Records



New title search user interface with a red arrows pointing to the AI indication icons that identify that this Community Zone record was enriched by AI. The AI indication icon is a square with sparkles.

In the new title search user interface, the AI Indication (a square with sparkles) is now displayed for Community Zone records enriched by the Community Zone AI generator.





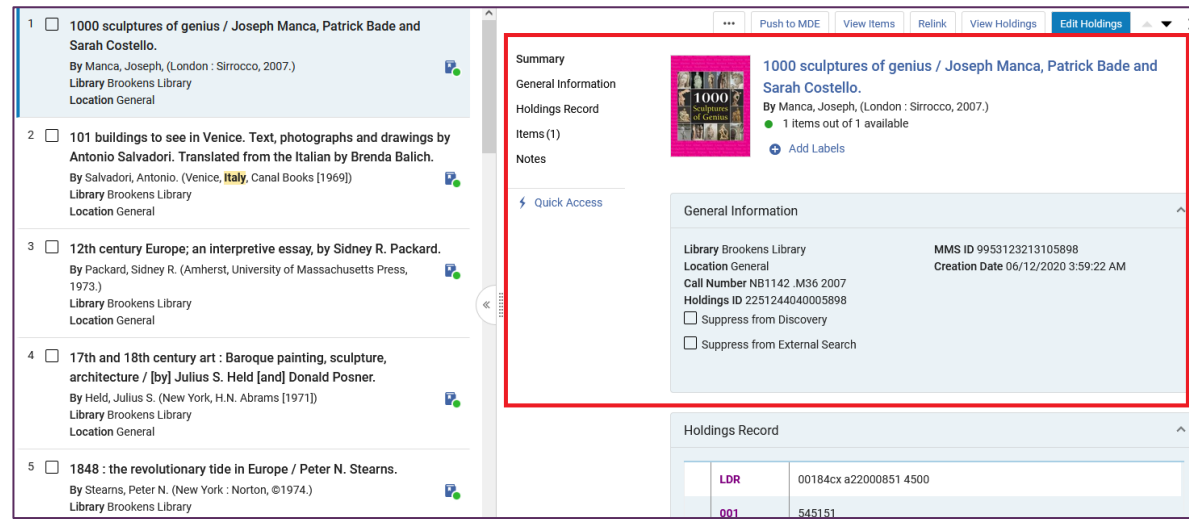
# Search Queries

[<](#) [🏠](#) **All Titles in Institution** (1 - 20 of 10,395) | **Search Query:** Keywords Contains Keywords "italy" and (Has Inventory Equals "Yes") 🔍

After an advance search is performed, the search query keywords are displayed near the top of the screen along with a magnifying glass icon, which can be clicked on to quickly update the query.

Ex Libris has introduced a new search query design with an updated interface to improve the visibility and usability of search options across different workflows. The new design includes a refreshed search query display and a magnifying glass icon for quick access to update the query via the Advanced Search.





**1** ☐ **1000 sculptures of genius / Joseph Manca, Patrick Bade and Sarah Costello.**  
By Manca, Joseph, (London : Sirrocco, 2007.)  
Library Brookens Library  
Location General

**2** ☐ **101 buildings to see in Venice. Text, photographs and drawings by Antonio Salvadori. Translated from the Italian by Brenda Balich.**  
By Salvadori, Antonio. (Venice, Italy, Canal Books [1969])  
Library Brookens Library  
Location General

**3** ☐ **12th century Europe; an interpretive essay, by Sidney R. Packard.**  
By Packard, Sidney R. (Amherst, University of Massachusetts Press, 1973.)  
Library Brookens Library  
Location General

**4** ☐ **17th and 18th century art : Baroque painting, sculpture, architecture / [by] Julius S. Held [and] Donald Posner.**  
By Held, Julius S. (New York, H.N. Abrams [1971])  
Library Brookens Library  
Location General

**5** ☐ **1848 : the revolutionary tide in Europe / Peter N. Stearns.**  
By Stearns, Peter N. (New York : Norton, ©1974.)  
Library Brookens Library

**Summary**  
General Information  
Holdings Record  
Items (1)  
Notes

**1000 sculptures of genius / Joseph Manca, Patrick Bade and Sarah Costello.**  
By Manca, Joseph, (London : Sirrocco, 2007.)  
1 items out of 1 available  
Add Labels

**Quick Access**

**General Information**

Library Brookens Library	MMS ID 9953123213105898
Location General	Creation Date 06/12/2020 3:59:22 AM
Call Number NB1142 .M36 2007	
Holdings ID 2251244040005898	
<input type="checkbox"/> Suppress from Discovery	
<input type="checkbox"/> Suppress from External Search	

**Holdings Record**

LDR	00184cx a22000851 4500
001	545151

The Physical Holdings Search view, showing the full title details on the right-hand side after clicking to view the title information (on the left-hand side).

- In the physical holdings search, viewing title information now opens the full title details instead of just the bibliographic record. The screen capture shows an example of the title details.
- In a previous release, Alma gave users the capability to add local repository search labels to records. Previously, a single privilege controlled label management for both the physical holdings search and the new title searches. Now, separate privileges exist for bibliographic and physical holdings search labels.

Physical items ▾ Keywords ▾ garden X Home Q

Facets << < Physical Items (1 - 20 of 2,128 ) garden Save Query

Library Scope: All

Item Material Type ▾  
Book (1891)  
DVD (1)  
ELEC (2)  
+ More (7)

Library ▾  
Brookens Library (2127)  
Resource Sharing Lib... (1)

Collection ▾  
Games (1)

☐ Select All Sort by : Call Number - Asc Secondary Sort by : Rank 0 rows selected Manage Selected

☐ The Illinois garden guide & other nature sites / Grace E. Lisa McKennedy. Withdraw Edit Item

**Book (Manuscripts - Physical)** By McKennedy, Grace E. Lisa. (Springfield, Illinois : University of Illinois Springfield, [1999])  
**Barcode:** -  
**Library:** Brookens Library  
**Creation Date:** 12/09/2013 6:00:00 PM  
**Modification Date:** 10/17/2023 1:36:36 PM  
**Expected Arrival Time:** -  
**On Hold Expiration Date:** -

**Call Number:** J54/20/3443  
**Call Number Type:** No information provided  
**Status:** Item in place  
**Due back:** -  
**Item Policy:** BookN  
**Material Type:** Manuscript

**Item ID:** 2365791000005898  
**Holdings ID:** 2265791010005898  
**MMS ID:** 9960689913105898

A red rectangle is highlighting the selected sort method on the search result list for a Physical Items search.

## Persistent Sorting Routine for Physical Items List

When users select a sort method different from the default, their choice will now be saved. The selected sorting will persist the next time they view a physical items list.

# NZ Records Can Be Added to Reading List

You can now add NZ records to a Course Reserves Reading List!

[Edit Reading List](#)

Print SlipPrint Slip ReportBackSave

☐

**Adolescence and emerging adulthood : a cultural approach**  
**Book** By Arnett, Jeffrey Jensen, (Pearson [2013])  
**ISBN:** 9780205892495; 0205892493; 9780205916801; 0205916805; 9780205899517; 020589951X  
**Subject:** Adolescence--Cross-cultural studies. -- Teenagers--Cross-cultural studies. -- Young adults--Cross-cultural studies. and others

**Citation Status:** Complete  
**Resource Locate Status:** Resource Located  
**Copyright Status:** Not Determined

**Created By:** 656570262 01/30/2024 17:28:35 CST  
**Modified By:** 656570262 01/30/2024 17:28:38 CST

● Physical (2)ElectronicDigitalOther

Citation DetailsAlertsMore Info

EditSet Complete...

☐

**APA handbook of adolescent and young adult development**  
**Book** (American Psychological Association [2023])  
**ISBN:** 9781433833144; 143383314X  
**Series:** APA handbooks in psychology.  
**Subject:** Psychology, Adolescent -- Adolescents--Psychologie. -- Jeunesse--Développement. and others

**Citation Status:** Complete  
**Resource Locate Status:** Resource Located  
**Copyright Status:** Not Determined

**Created By:** 655295702 01/21/2024 13:49:39 CST  
**Modified By:** 655295702 01/21/2024 13:49:40 CST

● Physical (3)ElectronicDigitalOther

Citation DetailsAlertsMore Info

EditSet Complete...

☐

**Handbook of adolescent psychology**  
**Book** (John Wiley & Sons c2004.)  
**ISBN:** 0-471-72674-5; 1-280-34632-9; 9786610346325; 0-471-69044-9  
**Subject:** Adolescent psychology.

**Citation Status:** Being Prepared  
**Resource Locate Status:** Resource Located  
**Copyright Status:** Not Determined

**Created By:** Radzickas (CARLI Account), Adrienne 04/29/2025 10:46:53 CDT  
**Modified By:** Radzickas (CARLI Account), Adrienne 04/29/2025 10:47:04 CDT

Physical● Electronic (1)DigitalOther

Citation DetailsAlertsMore Info

EditSet Complete...

A red rectangle highlights a Network Zone record that has been added to a Course Reserves Reading List.



# Metadata Editor Enhancements

Delete portfolios from View Inventory list

AI Metadata Assistant developments

- Enrich portions of a record using AI assistant and data files.
- Administrator control of types of metadata that the assistant may provide
- Accept more file types as uploads: PDF, Word, JPG/JPEG, PNG

New Titles Search Indexes for AI application

- Processed with Alma AI tools
- Enriched with AI metadata by CZ





# Enhancement of Availability Information

Rainbows / Daniel MacCannell.

Book {Book - Electronic} text; computer; online resource

By MacCannell, Daniel, (London, UK : Reaktion Books, 2018.)

Subject Rainbows. ; Rainbows--History. ; Rainbows--Mythology. and others

Series Earth series (Reaktion Books (Firm))

Modification Date 04/05/2025 11:16:56 CDT

Edition First edition

Language English

Creation Date 07/11/2018 24:04:39 CDT

ISBN 9781803163574 and others

Bibliographic Rank 103

Edit Record

Electronic Portfolios (2)

E

Electronic (2)

	Interface Name	Collection Name	Service Type	Availability	Portfolio ID
1	CREDoreference	Credo Reference Backfile (CREDoreference Academic Core Backfile)	Full Text (Available)	Active	
2	CREDoreference	Credo Reference (Credo Reference Academic Core)	Full Text (Available)	Active	

Electronic expanded tab

Summary

General Information

Bibliographic Record

Electronic Portfolios (2)

Names (1)

Subjects (5)

Other Details

Quick Access

Electronic Portfolios (1 - 2 of 2)

1

Active

Portfolio ID

Electronic Material Type Book

Interface CREDoreference

Service Type Full Text (Available)

Collection Name Credo Reference Backfile (CREDoreference Academic Core Backfile)

2

Active

Portfolio ID

Electronic Material Type Book

Interface CREDoreference

Service Type Full Text (Available)

Collection Name Credo Reference (Credo Reference Academic Core)

The black rectangles show where the availability and service type display when viewing portfolios from the title search results.

Electronic portfolios - view section

There are two new settings when activating electronic collections

## ACTIVATION WIZARD

Full Text Service

Activate this electronic  
collection service ☐

Make service available ☐

Automatically activate new  
portfolios ☐

Automatically delete  
portfolios removed from  
service ☐

### AUTOMATICALLY ACTIVATE NEW PORTFOLIOS

If selected, newly added portfolios will be automatically activated. If unselected, all activations should be done manually.

### AUTOMATICALLY DELETE PORTFOLIOS REMOVED FROM SERVICE

If selected, portfolios removed from the CZ service will be automatically deleted from the localized collection. If unselected, portfolios removed from the CZ service will be unlinked and deactivated but will not be deleted.

Two new full text service options in the Activation Wizard



# Perpetual Access Titles

There is now a “Has Perpetual Electronic Access” field available in Titles > Title Details that now includes perpetual electronic access!

For more information on Title Details, see:

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/080Analytics/Alma\\_Analytics\\_Subject\\_Areas/Titles#Title\\_Details](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/Alma_Analytics_Subject_Areas/Titles#Title_Details)





< User Details

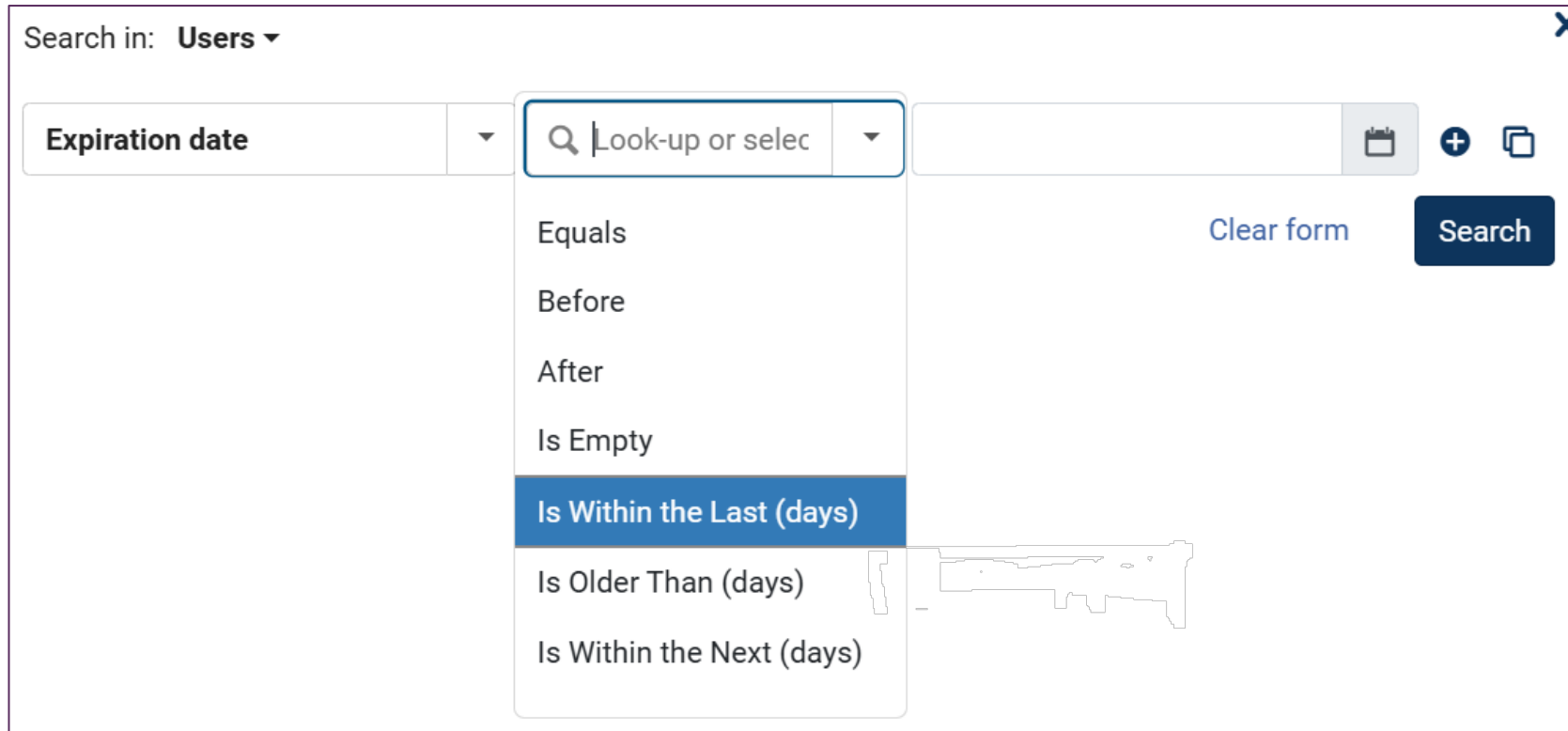
Toggle Account Type Cancel Save

User Information

First name *	Deborah	Middle name	
Last name *	Campbell	Preferred first name	Debbie
Preferred middle name		Preferred last name	Campbell (CARLI Account)
Primary identifier *	carli_dmcmpbll	Title	
PIN number		Job category	CARLI Office Staff
Job description		Gender	

A red rectangle highlights the Gender data field on the User Details screen for a patron.

- With the August release, Ex Libris will remove all Gender data recorded in user records and will no longer permit the addition of Gender field data.



Search in: **Users** ▾

Expiration date ▾

🔍 Look-up or selec ▾

- Equals
- Before
- After
- Is Empty
- Is Within the Last (days)**
- Is Older Than (days)
- Is Within the Next (days)

Clear form

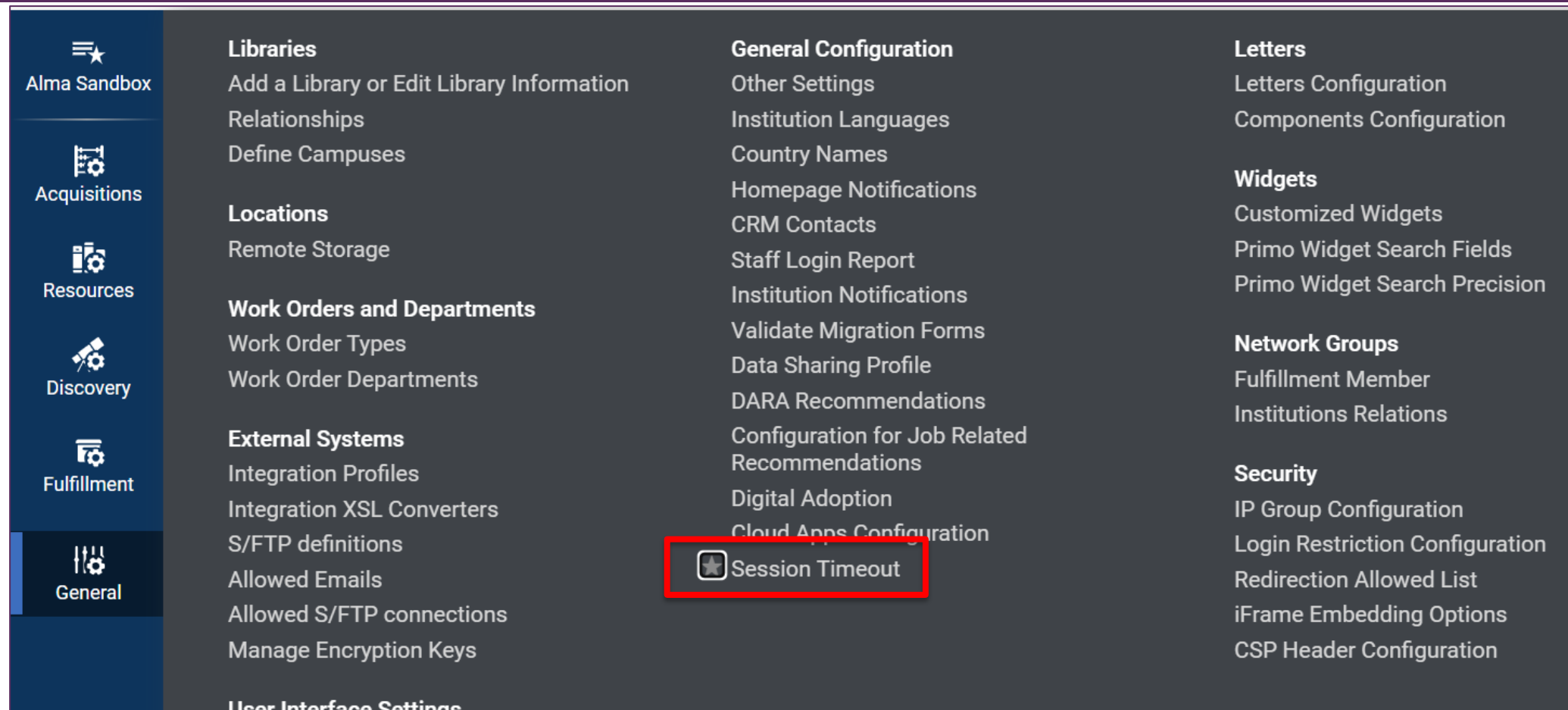
Search

Alma Advanced Search for Users, with the new Expiration date search options shown.

- Date-related user searches now include relative searches:
  - Is Within the Last (days)
  - Is Older Than (days)
  - Is Within the Next (days)
- Allows for Logical Sets to be saved with a moving date range.



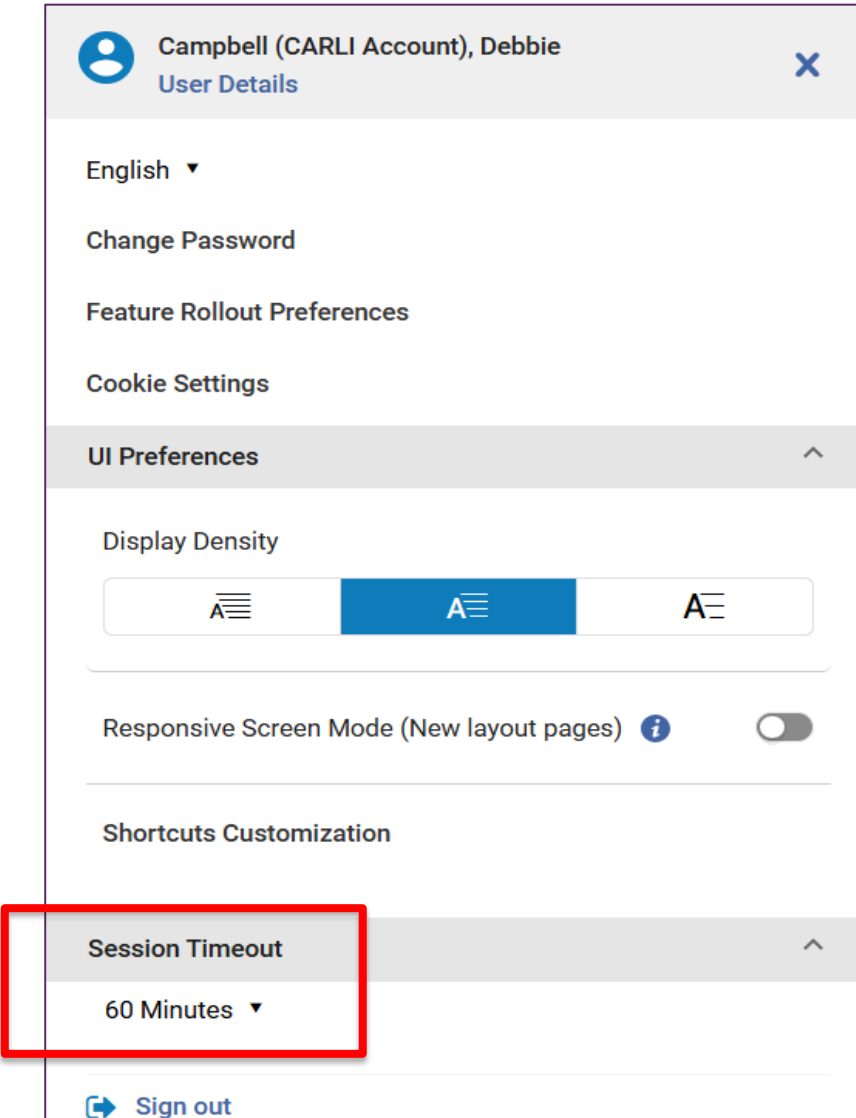
## ALMA – CONFIGURABLE DEFAULT SESSION TIME OUT



Alma > Configuration > General Screen with a red rectangle highlighting “Session Timeout”

- Institutions can now set a default session timeout duration ranging from 15 to 150 minutes (the default remains 60 minutes).

- Institutions can decide whether to allow individual users to override the default.
  - Option is listed under the logged in user details> UI Preferences> Session Timeout.
  - If your institution allows the default to be changed, and you do not see the option, adjust your screen's zoom.



The screenshot displays the user profile for 'Campbell (CARLI Account), Debbie'. The 'User Details' section is expanded, showing options like 'English', 'Change Password', 'Feature Rollout Preferences', and 'Cookie Settings'. The 'UI Preferences' section is also expanded, showing 'Display Density' (with three icons) and 'Responsive Screen Mode (New layout pages)' (with a toggle switch). The 'Shortcuts Customization' section is visible below. The 'Session Timeout' section is highlighted with a red rectangle, showing a dropdown menu with '60 Minutes' selected. A 'Sign out' button is located at the bottom of the user details panel.

A user's Session Timeout setting preference is shown, highlighted with a red rectangle.



## ALMA – I-SHARE REQUESTS IN THE NEW UI- REMINDER

**My Institution - Requests** (1 - 2 of 2)

Sort by: **Expiry Date** ▾

**Request 1:** The complete container garden / MMS ID 99495332435205897  
By Joyce, David, Year ©1996.  
Patron physical item request (resource sharing)  
Workflow step Undefined  
Resource sharing information Status: Request sent to partner, External Id: 01CARLIUIC0240834  
Ready  
Request date 03/21/2025 13:19:59 CDT  
Place in queue (1)

**Request 2:** The super simple guide to container garden ponds / MMS ID 99495332635405897  
By Lambert, Derek. Year ©2004.  
Patron physical item request (resource sharing)  
Workflow step Undefined  
Resource sharing information Status: Request sent to partner, External Id: 01CARLIUIC0240839  
Ready  
Request date 05/01/2025 13:32:25 CDT  
Place in queue (1)

On the left-hand side, the user's local/Institutional/home tab is highlighted with a red rectangle. On the right-hand side, red rectangles are highlighting the place in the queue and also that the request status is not updated and is still showing as "Request sent"

- Directions under “Determining the current status of your patron's request”: [https://www.carli.illinois.edu/products-services/i-share/alma/fulfillment/how-to\\_AFN](https://www.carli.illinois.edu/products-services/i-share/alma/fulfillment/how-to_AFN)



## ALMA – I-SHARE REQUESTS IN THE NEW UI- REMINDER – SLIDE 2

Done ...

**Campbell (CARLI Account), Debbie**  
ID carli\_dmcmpbll

Loans (0)

**Requests (2)**

Fines and Fees

Return to institution view for notes and user information

**All Network - Requests** (1 - 2 of 2)

Sort by: **Expiry Date**

1

**The complete container garden / David Joyce.**  
Year ©1996.  
 **Patron physical item request**  
**Workflow step** Pickup From Shelf  
 Active

Institution University of Illinois at Urbana-Champaign (UIU) – Champaign and Urbana, IL  
**Request date** 03/21/2025 13:22:09 CDT  
**Process date** 03/21/2025 13:22:25 CDT  
**Managed by** Funk ACES Library - Funk ACES Library  
**Expiry date** 03/28/2025  

**Place in queue (0)**

Expired

2

**The super simple guide to container garden ponds / Derek Lambert.**  
Year ©2004.  
 **Patron physical item request**  
**Workflow step** Transit Item  
 Active

Institution University of Illinois at Urbana-Champaign (UIU) – Champaign and Urbana, IL  
**Request date** 05/01/2025 13:33:01 CDT  
**Process date** 05/01/2025 13:38:00 CDT  
**Managed by** Main Stacks - Main Stacks  
**Expiry date** 05/08/2025  

**Place in queue (0)**

On the left-hand side, the user's Network/I-Share activity tab is highlighted with a red rectangle. On the right-hand side, red rectangles are highlighting the place in the queue and also that the request status is updated to reflect the current status in Alma.



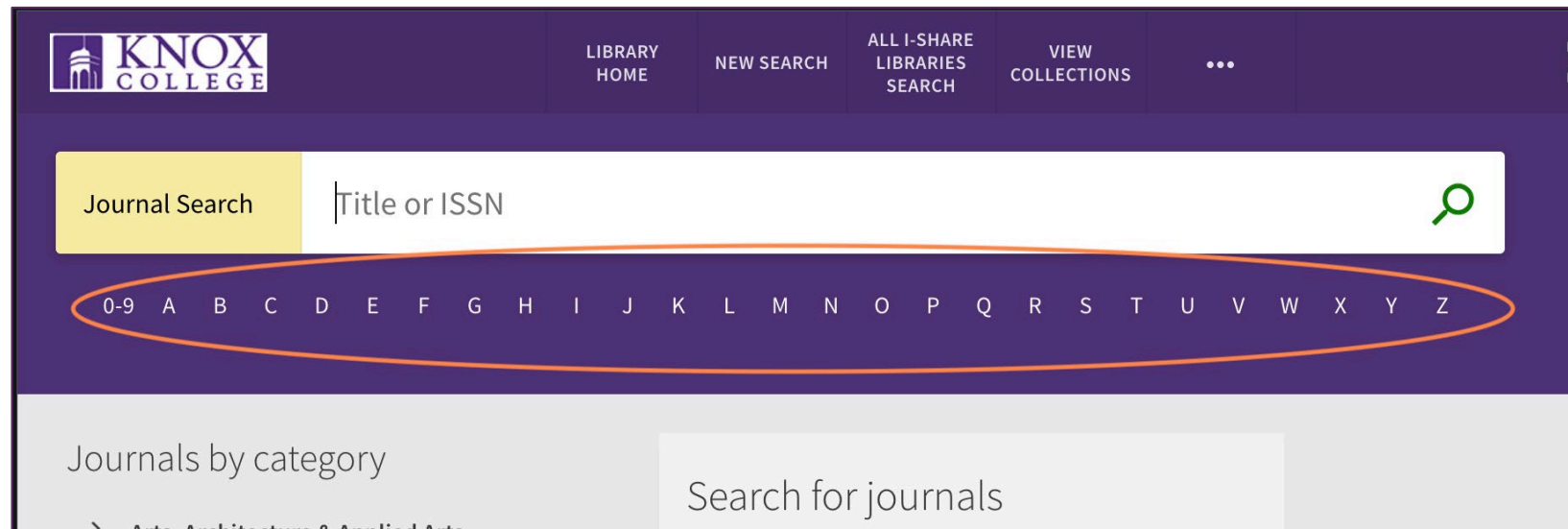
# Adding Titles from Network Zone to IZ Collections

- You can now add titles from the Network Zone to your local Institution Zone Collections!
- This will enable libraries to add resources shared centrally from the NZ.
- Two methods:
  - From a Title search of the Network > on a title in the Results list > ellipsis button > Add to Collection
  - From the Collection itself, do a search of the Network and select title(s) to add.
  - [Ex Libris video provides a demo of both methods](#) (1:37)



# New A-Z List available for Database and Journal Searches

- Libraries can now display an A-Z list for the Journal Search and Database Search pages enabling users to search titles by a specific leading character or number (excluding non-filing characters)
- Disabled by default and [requires configuration](#) in Alma Configuration > Discovery > Other > AZ DB and Journal Search Configuration



Primo VE Journal Search Box with A-Z list



# Primo VE Next Discovery Experience (NDE) Background

- In 2023, Ex Libris announced it had started development on the [Next Discovery Experience](#) or NDE project. It has four components:
  - “A new, sleek, intuitive user interface”
  - More integration of Linked Open Data to “reveal connections” between topics
  - AI-based Research Assistant to guide users - available now in Primo VE and continuing into the NDE UI
  - A new user engagement analytics tool for libraries (Mixpanel) coming with the NDE UI to help libraries “track and optimize the discovery experience”





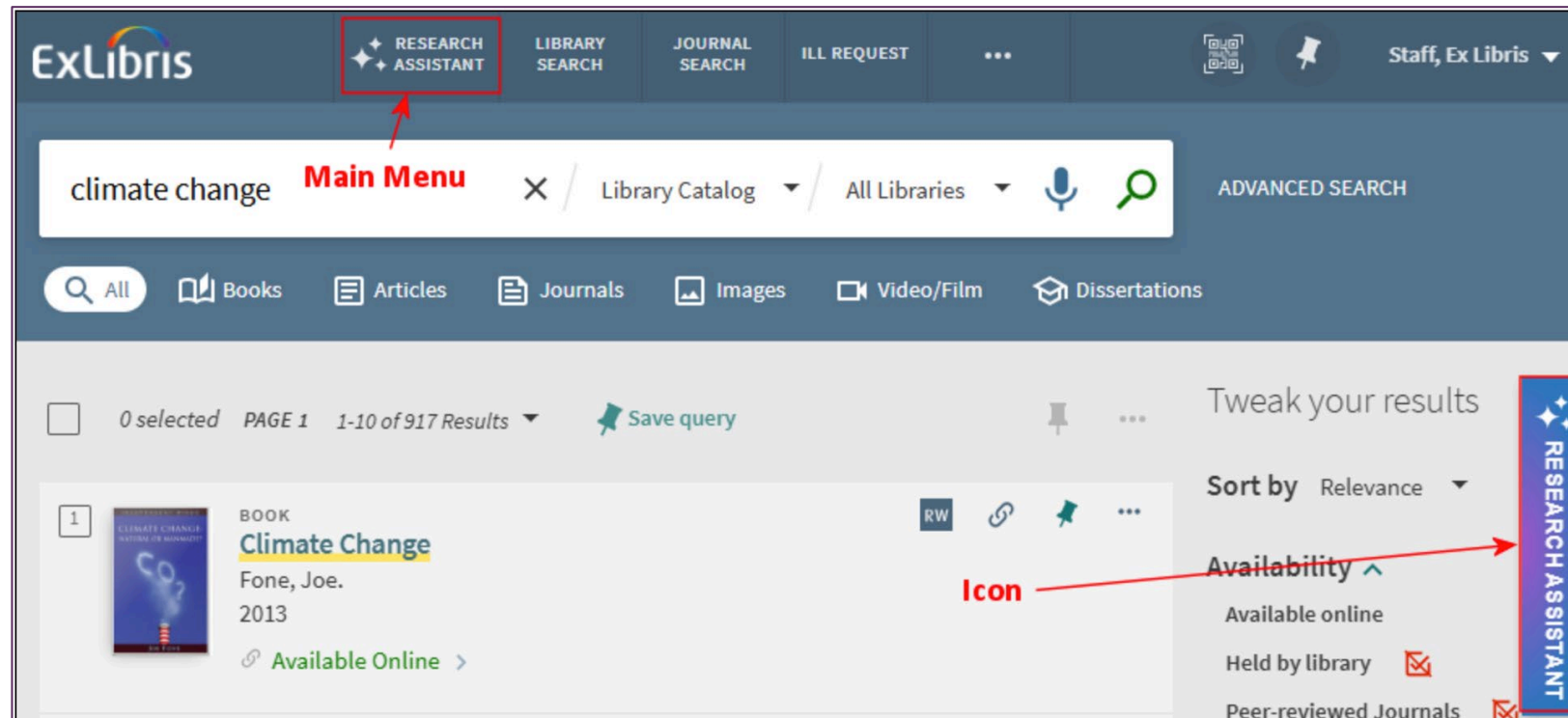
# Primo VE Next Discovery Experience UI (NDE UI)

- I-Share libraries should **not** have signed up for “Managed General Release” with Ex Libris.
- I-Share libraries will be able to switch to [Primo NDE UI](#) in summer 2026 or later!
  - NDE UI scheduled to be ready for consortia in late 2025 but will require testing before switching.
  - CARLI will provide more guidance, documentation, and training beginning in spring 2026.
  - I-Share libraries may choose when to go live with Primo NDE, e.g. summer 2026, Jan. 2027, or summer 2027.
  - If your library would like to be in the summer 2026 “cohort,” please email CARLI Support to let us know!



# Primo VE Research Assistant Improvements in May

1. The [May 2025 Primo VE Release Notes](#) list many accessibility improvements for the Research Assistant in this update!
2. Ex Libris is removing the word “Beta” from the Research Assistant icon and widget:



Research Assistant without Beta label in Primo VE interface



# Primo VE Research Assistant Improvements in May

3. **Beginning May 7:** New option to Filter by Online Availability allowing users to refine the results of search queries in the Research Assistant to only those that they have access to.

The screenshot shows the Primo Research Assistant interface. At the top, there is a logo with three blue stars and the text "Primo Research Assistant". Below this is a tagline: "Ask research questions. Explore new topics. Discover credible sources." The main search area features a large input field with the placeholder text "What is your research question?" and a blue search button with a right-pointing arrow. Below the search field, there are three filter options: "All types" with a dropdown arrow, "All dates" with a dropdown arrow, and "Available online" with an unchecked checkbox. The "Available online" checkbox is highlighted with a red rectangular border.

Primo Research Assistant search box



# Primo VE Research Assistant Improvements in May

4. **Beginning May 7:** New Institutional-level option and a new User-level option to allow users to save Research Assistant search history.

- Enabled by default (that is, set to true)
  - The new **save\_users\_RA\_search\_history** parameter controls whether Research Assistant search history can be saved between sessions for signed-in users at the *institution* level.
  - When **save\_users\_RA\_search\_history** parameter and the new **display\_user\_setting** parameters are both set to **true**, users can enable/disable the ability to save their Research Assistant search history between sessions in their My Account settings in Primo VE
  - If disabled at the institutional or user level, existing RA search history is still displayed, but no new history will be recorded.
- Previously, Research Assistant searches were always saved automatically between sessions.






## “A Second Look at Primo VE Research Assistant”

**Tuesday, June 10, 2025 from 11am-noon**

[Register to attend](#) from the CARLI Calendar.

Join the CARLI Discovery Primo VE Committee to explore how the tool has evolved since its initial September 2024 release, revisit [takeaways from the committee's Primo VE Research Assistant: First Impressions webinar](#), and discuss how I-Share libraries are approaching the tool. This webinar will not be recorded to encourage open discussion.





# Questions & Answers



This is a decorative image of a long-haired black cat resting inside a cardboard box

