

Welcome!

Office Hours will start at 1pm and run until 2pm.

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.

CARLI

I-SHARE QUARTERLY ALMA PRIMO VE UPDATE: AUGUST 2025 FEATURE RELEASE HIGHLIGHTS JULY 31, 2025

Today's Agenda

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

- The August Alma and Primo VE Quarterly Release Update will take place on Sunday, August 3, 2025.
- The semiannual Alma and Primo VE sandbox refresh occurs on Sunday, August 10, 2025.
- On Monday, July 28, loans to I-Share patrons were enabled for auto-renewals.
 - More information is available on the "Alma- Automatic Renewals for Local and I-Share Patrons" webpage: https://www.carli.illinois.edu/products-services/i-share/alma-config/alma-auto-renew

 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:

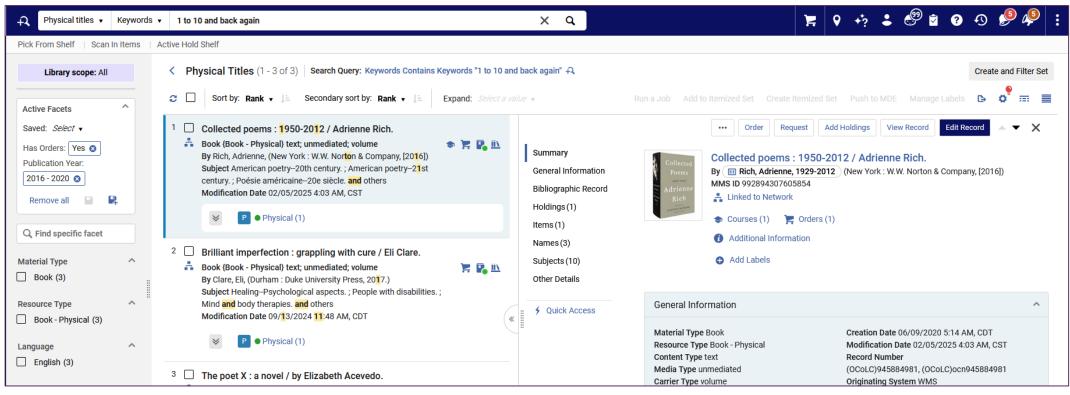
- Alma Release Notes:

 https://knowledge.exlibrisgroup.com/Alma/Release_Notes/2025/Alma_2025_Release_Notes?mon=202508B

 ASE
- Primo VE Release Notes:
 https://knowledge.exlibrisgroup.com/Primo/Release_Notes/002Primo_VE/2025/010Primo_VE_2025_Release_Notes?mon=202508BASE

Title Search New UI

In this release, the new UI for title searches is automatically set as the default for all users, with no option to opt-out.



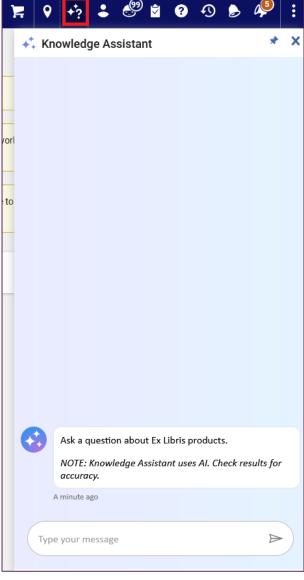
Physical titles search in Alma with the new user interface.



Knowledge Assistant

Alma's AI Assistant, the Knowledge Assistant, is available from the top menu

Click the icon with the question mark and stars

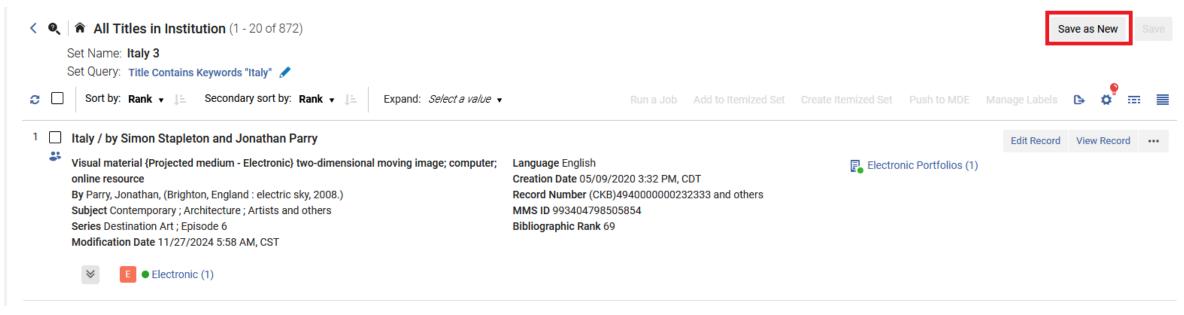


Clicking on the "sparkles" icon highlighted with the red square will open Alma's Knowledge Assistant.



Save as New

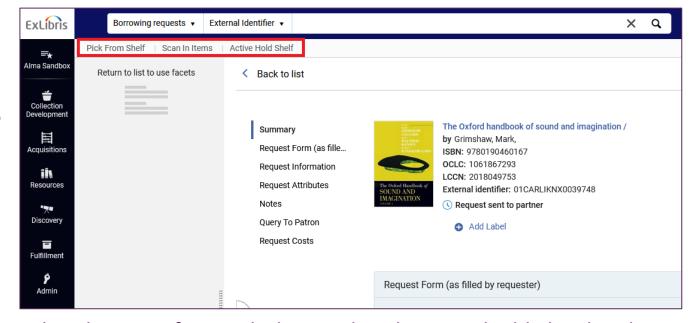
You can create a new set from a logical set by using the Save as New button



An example of the contents of a logical set with the new "Save As New" button highlighted with a red rectangle.

Quick Links Menu Remains Visible When Displaying Sliding Pane

If your Quick Links menu is pinned, it will remain visible when you display a sliding pane



The Alma interface with the Quick Links menu highlighted with a red rectangle.

Improved Digital Adoption Pop-ups

Previously, when users enabled functional cookies, Alma guides and new feature pop-ups showed repeatedly when clearing the browser cookies. Now, notifications will not show again after the user dismisses them, even if cookies were cleared.

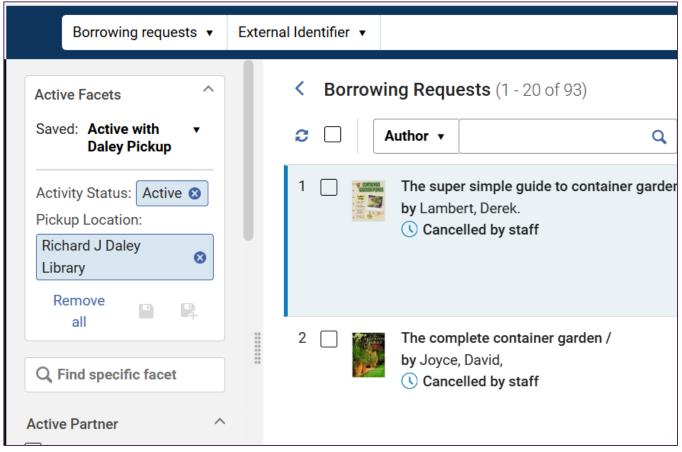
Additional UI Changes

- The Has Orders facet in Alma has been enhanced from a single-select to a multi-select facet through the addition of checkboxes.
- The label indicating that there are no items in a holding now reads No items.
- The Additional Information button available in the record view is now included in the title and holdings details pane in the new search UI.
- The add and duplicate rule buttons in the new UI advanced search and the Metadata Editor's indication rule form now always show.



Save Facets Option in Resource Sharing Task Lists

- Resource Sharing related pages now include the ability to save facets for easy re-application.
 - This enhancement is in:
 Fulfillment>
 Resource Sharing>
 Borrowing Requests



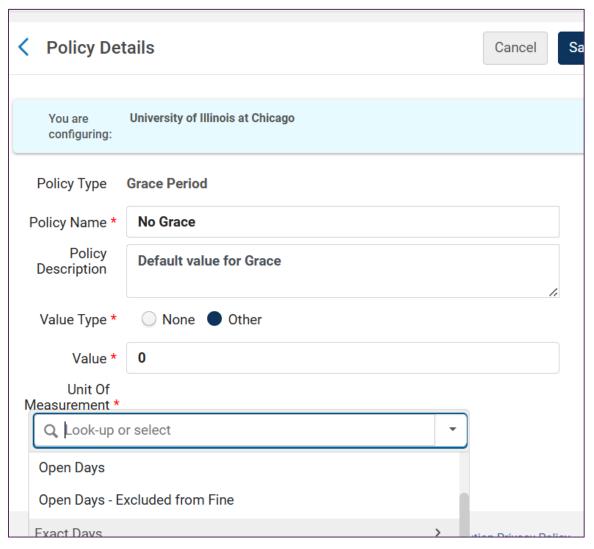
Caption: Image shows the Fulfillment> Resource Sharing> Borrowing Requests area, with a sample saved facet set.





Grace Period for Open Days

- If your library charges overdue fines, Alma now offers more options on whether closed days should be included in the grace period, or not.
- Remember, overdue fines may only be assessed on specialized collections, such as reserves.



Caption: Image shows a sample Advanced Policy Definition for the policy type of "Grace Period", with the new units of measurement field selected and showing "Open Days".





Additional Options for Bulk Fine Waiving

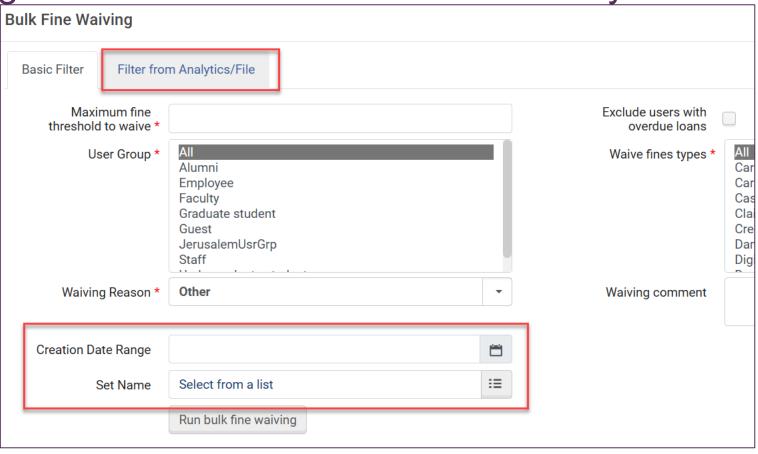
Alma has the ability for staff to waive user fines in bulk.

New functionality in the August release includes additional ability

to waive:

By fine creation date

- Using an Alma User set
- From Analytics report
- Using a User file



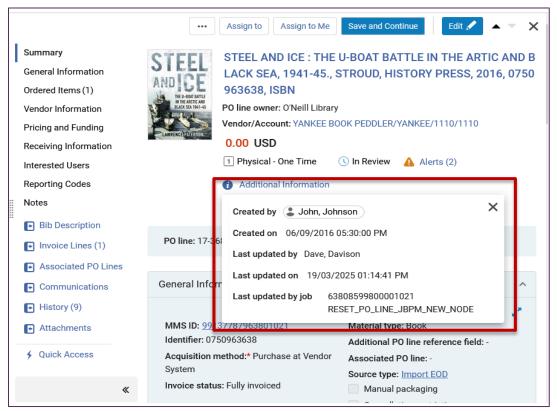
Caption: Image shows the "Bulk Fine Waving" screen, with the new developments highlighted with red rectangles.





Acquisitions Workflow Improvements

- PO Line Information
 - Link to Additional Information from PO Lines.



Example PO Line with direct link to Additional Information, highlighted with a red rectangle.





Acquisitions Workflow Improvements – PO Lines List

- Exclude Facets Allows the use of facets to exclude criteria
 - "Not equals" option added to search
- Set options added to PO Lines:
 - Create Itemized Set, Add to Itemized Set, Run a Job Run a job on the list of results.

• Indications for Success and Failure of Bulk Actions (Change Expected Date and Assign Selected)



An example of Purchase Order lines with the display of indications of Success (with a green rectangular box) and Failure (with a red rectangular box) of Bulk Actions.



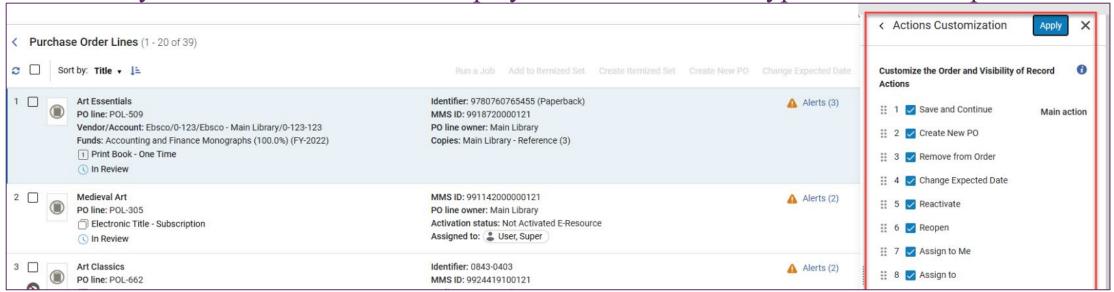


Acquisitions Workflow Improvements

Customization for Actions on the Customize Menu

- In the Actions Customization area, users can now re-order the actions of the PO lines and hide irrelevant actions (select Customize > Action Customization)
 - Users will see actions in the customization menu per their roles/privileges.

• Only the relevant actions are displayed for each PO line type/workflow step.



[&]quot;Purchase Order Lines" screen with the Actions Customization menu pane on the right highlighted with a red rectangle.



Acquisitions

Bulk Deletion of Purchase Orders

• It is now possible to delete multiple Purchase Orders (PO) at once. You can delete a PO when it does not contain PO lines that have been received, activated, or linked to an invoice. When deleting a PO, all of its associated PO lines are also deleted. The full list of POs that were successfully deleted or not can be found in the job report.

PO Lines Information - Advanced Job

- Additional enhancements to February 2025 where cross-continuity and cross-inventory type options were added.
 - changes the PO line type cross inventory and/or cross continuity, even when the PO line is linked with an invoice in status "In Review" or "Closed".
 - Option to not send a cancellation letter to a vendor in cases where the POL is cancelled
 - When updating the 'Standing Order' continuity type to 'Subscription', we now move the PO line out of the PO, as this is not consistent with the packaging rules.



Alma User Record Updates – Removal of Gender field and data

 With the August release, Ex Libris has removed all Gender data recorded in user records and will no longer permit the addition of Gender field data.
 Highlighted here is the space the Gender data used to be stored in the User Record. All Data will be removed from Analytics as well.

User Information				
First name *	J ennifer	Middle name		
Last name *	Masciadrelli	Preferred first name	Jennifer	
Preferred middle name		Preferred last name	Masciadrelli (CARLI Account)	
Primary identifier *	CARLI_jmasciad	Title	-	
PIN number	Generate	Job category	CARLI Office Staff	
Job description				

Example of a user record with a red rectangle highlighting where the now removed Gender field was previously located.





API Security

API keys are defined in the <u>Developer Network</u> for each institution.

API keys unused for a year will be disabled automatically.

Developer Network includes reports on API usage

- Review usage and keys to keep services secure.
- Contact CARLI Support to get an account or review details.



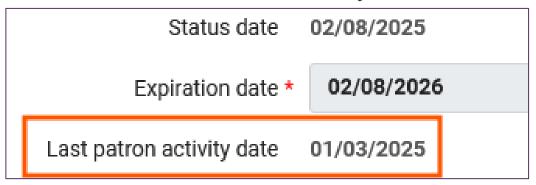
Last Patron Activity Date

Login to Alma or Primo VE updates Last Patron Activity Date

- Other actions that update date: requests, loans, renewals, returns.
- Last patron activity date (below) appears on user record and in Analytics.

Tracking of last patron activity date is <u>configurable</u>.

- Tracking is enabled for most institutions.
- Config > User Management > General > Record Last Patron Activity Date



The "Last patron activity date" field from an Alma user record is highlighted with an orange rectangle.





Metadata Editor Enhancements

View Items

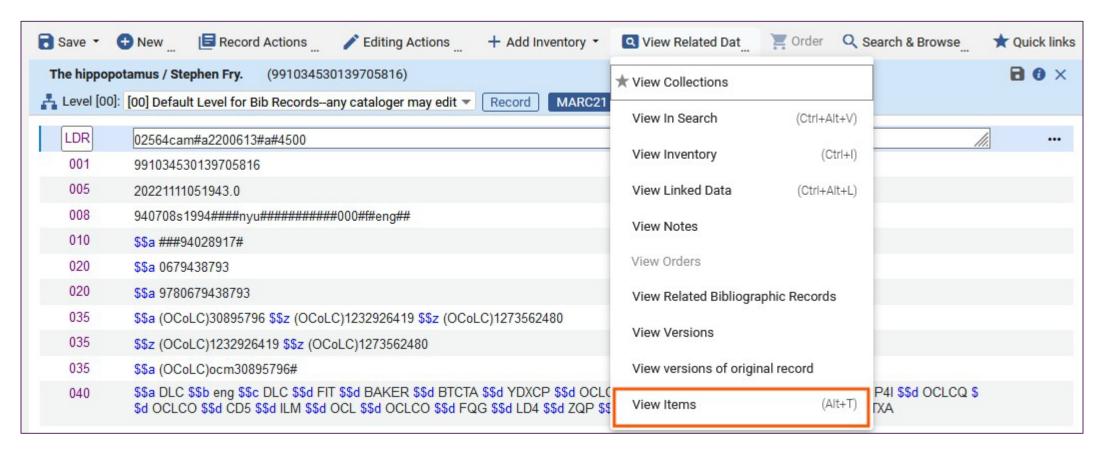
- Added to the View Related Data menu.
- Keyboard shortcut: Alt+T
- Previously required View Inventory, then select Items from list.

Insert Unicode Character

- Added to the Editing Actions menu.
- Keyboard shortcut: Ctrl+Alt+P
- Opens a hovering window for selection of characters.
- Click the character to add to the record.



View Items Menu



The "View Related Data" menu of the Alma metadata editor is displayed, with the "View Items" option highlighted with an orange rectangle.





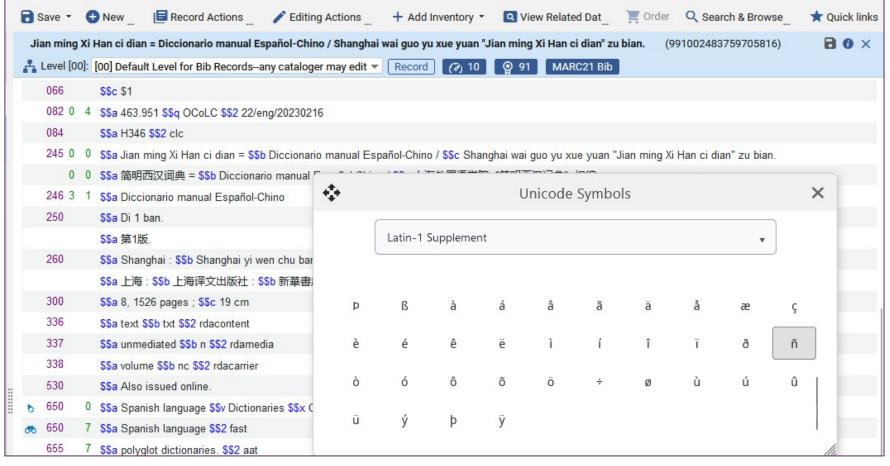
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- Click the character to add to the record.



Metadata Editor Virtual Keyboard



A new Unicode character selection pane is hovering over the MARC record editor of the Alma metadata editor.





Rebuild Physical Item Description Job

Rebuild Physical Item Description job

- Concatenate item enumeration and chronology according to templates.
 - Config > Resources > General > Description Templates
- New options:
 - Delete existing description
 - Set custom description with conditions



Option to run tiered matching on up to three identifiers

Matches run in tiers

- Only records not matched on first identifier considered for second.
- Only records not matched on second identifier considered for third.

Example:

- First: 035 Other System Identifier Match Method
- Second: ISBN Match Method
- Third: Title Match Method



SEARCH FOR ELECTRONIC COLLECTIONS BY PROVIDER COLLECTION NAME

To help simplify the identification of your purchased and subscribed collections in the Community Zone, Alma now has the ability to display a collection's unique name and identifier as provided and maintained by the content provider.

This enhancement introduces two new collection-level parameters:

- Provider Collection ID
- Provider Collection Name

These fields improve collection identification, particularly when the collection appears in the Community Zone under a different name than the one used by the provider.

Once these values are defined for a Community Zone electronic collection, they become searchable in the **Community Zone**, **Institution Zone**, and **Network Zone** tabs.





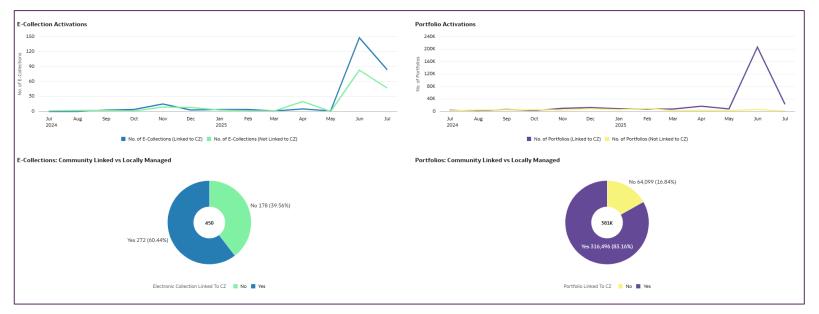
New measures were added to the **Usage Data Details - Release 5** folder in the **Usage Data (COUNTER)** Subject Area.

- 1.DR_D1 Unique Item Investigations
- 2.DR_D1 Unique Item Requests
- 3.IR_M1 Unique Item Requests

For more information, see <u>Usage Data Details - Release 5</u>.



This dashboard displays the electronic collection and portfolio activations over the past year. It also shows a breakdown of electronic resources that are Community linked versus the ones that are locally managed. It highlights the opportunity to increase the usage of Community resources, saving time and lowering costs by reducing the need for local record maintenance.

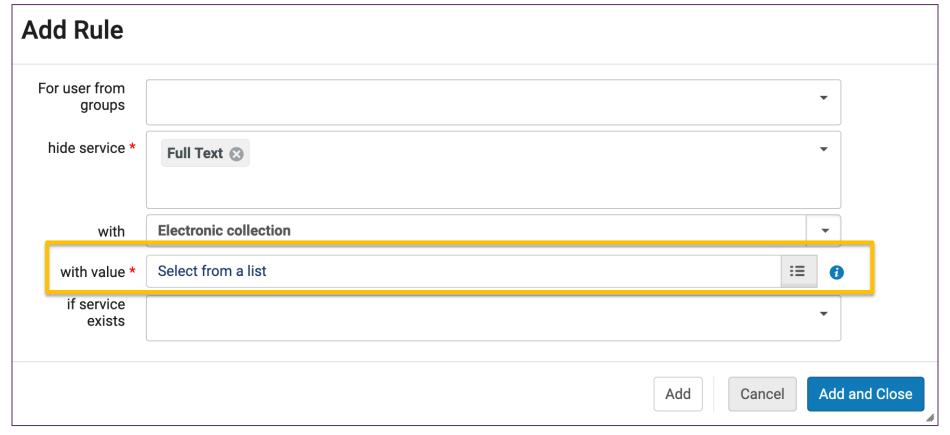


New Electronic Resources Data Visualization Dashboard



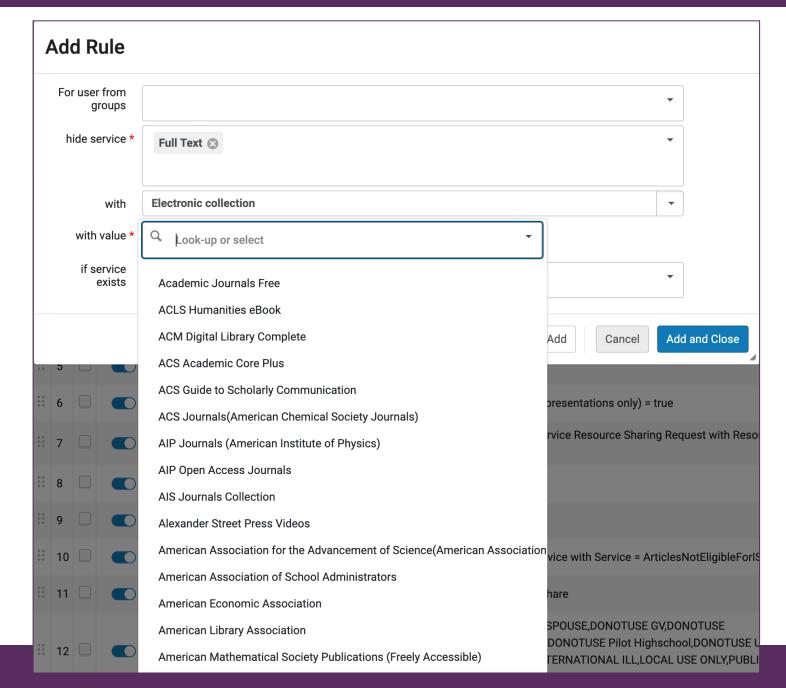


E-collections shared from the Network Zone are now available to be used in Display Logic Rules in your IZ! The "with value" list previously showed the choice of e-collections in the IZ but will now present a search box where you can choose from IZ or NZ.



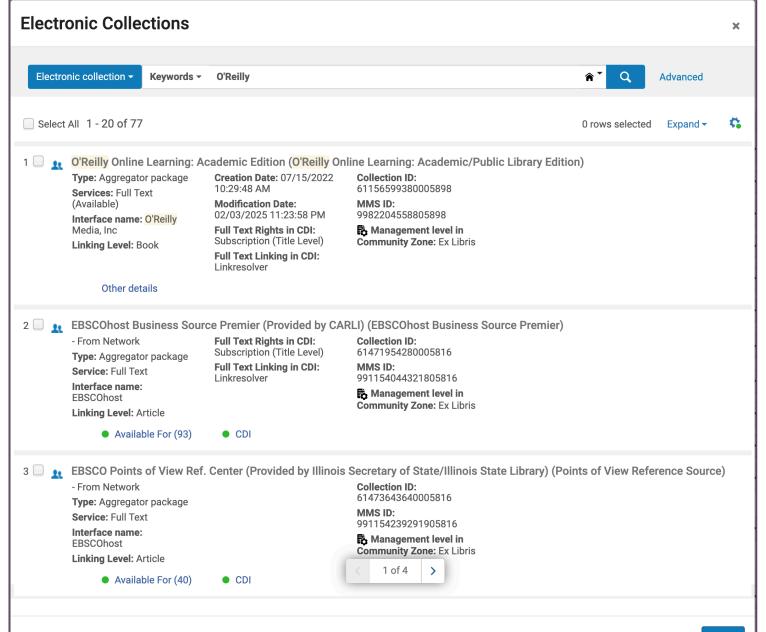
"Add Rule" pop-up in the Display Logic Rule configuration with an orange rectangle highlighting the "with value" field.





The "Add Rule" pop-up showing the existing dropdown menu of "with value" options when adding Display Logic Rules in Alma

NEW AUGUST 2025 DISPLAY LOGIC "WITH VALUE" SEARCH BOX

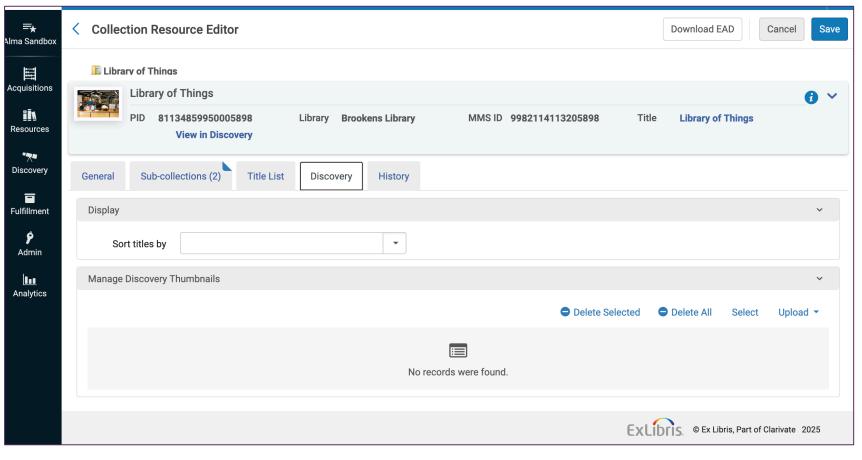


New "Electronic Collections" search box to add e-collections from NZ or IZ to Display Logic Rules in Alma



Cancel

CHANGE IN JANUARY 2026 TO THUMBNAILS FOR COLLECTIONS IN ALMA

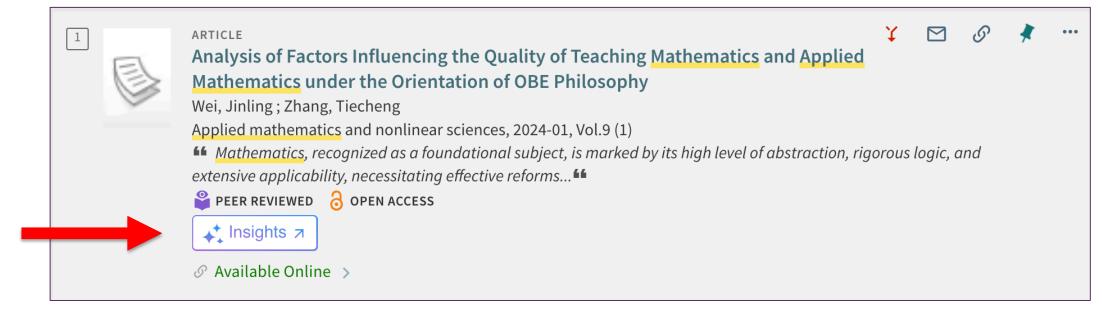


Alma "Collection Resource Editor" with the "Discovery" tab shown.

- Before January 2026: Libraries should add specific thumbnails to Collections and Subcollections in Alma to display in Primo VE.
- Manage thumbnails in the Collection Resource Editor's **Discovery** tab.



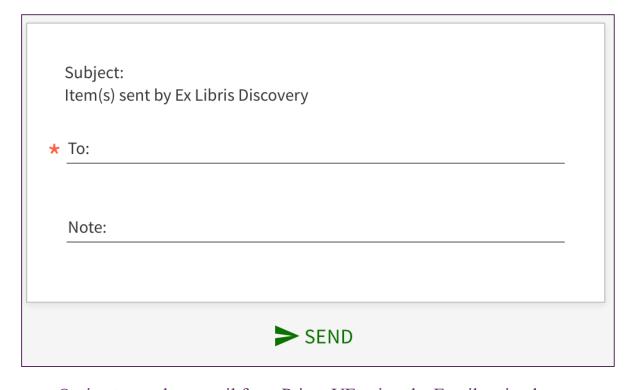
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- Available August 8, 2025: Document Insights, an Al-powered feature that can link users from Primo VE into the ProQuest platform and provide additional information about the resource.
- OPTIONAL; Can be activated per Primo VE View
- Only for active ProQuest subscriptions (see list in <u>EXL documentation</u>)
- See also ProQuest Research Assistant



Search result in Primo VE with red arrow pointing to new "Insights" button

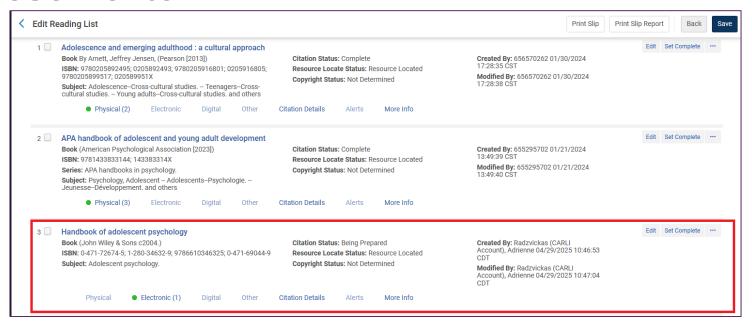


- =
- New customer parameter enable_email_client
- If set to true in Alma Configuration >
 Discovery > Other > Discovery
 Customer Settings in your Alma IZ,
 Primo VE will use the device's
 default email client.
- If there is no default email client, a blank window will open.
- If enabled, the Email action is limited to single records at a time.



Option to send an email from Primo VE using the Email action box.

- =
- In the May 2025 Release Update Webinar, we had shared that NZ Records can now be added to Course Reserves Reading Lists in your IZ.
- This is still true; however, NZ titles will not display in your library's
 Primo VE as a Course Reserve item.



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





Primo VE Next Discovery Experience UI (NDE UI) Reminder

- I-Share libraries will be able to switch to <u>Primo NDE UI</u> 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!

