## Alma/Primo VE May 2025 Feature Release Highlights Agenda

#### Intro/General Updates (Nicole)

* May 4th = Production release
* May 11th = Release update
* User experience & Accessibility
  + Classic Title UX will sunset with the 2025 August release
  + Enhanced Search Query Design
  + Enhanced text appearance
  + Search for Dates within a Specific Range of Days
  + Configurable Session Timeout

### Acquisitions (Ginny)

* Improvements to Ordering from Network Zone
* Improved Performance of ERP Export Invoices Job

### Fulfillment/Resource Sharing (Tina)

* Closed Library Management TOU for Resource Sharing Request
* Borrower/Lender Scanning Twice Fix
* Manage Patron Services and Return Items New UX Now Default Version

### Primo VE (Lynn)

* AZ List for Database and Journal Search pages is back! Disabled by default and requires configuration if you want to use it.
  + **Configuration:**
    - **Enable the journal search**:
* Discovery > Display Configuration > Configure Views > Links Menu
  + - **Configure the A-Z DB option**
* Configuration> Discovery > Other > A-Z DB and Journal Search Configuration
* Add Language – option to include the 0-9
* Note: Display language field is what would display in a “language dropdown” if you have multiple languages configured.
  + - **To customize the labels for search box and contents**:
      * Configuration > Discovery > Display Configuration > Labels > Journal Search Labels
    - **ExLibris documentation link:** <https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/130Configuring_Advanced_Search_Interfaces_for_Primo_VE/Configuring_Journal_Search_for_Primo_VE>
    - Note: this search functions as a BROWSE option.
* Research Assistant improvements
  + Refined Search and ability to filter by Online Availability
  + Beta indicators of RESEARCH ASSISTANT (in main menu and icon along side of page) have been removed.
  + Patrons can opt-out of saving Research Assistant search history.
  + Continued accessibility improvements (12 listed in documentation).
* Resolved Issues
  + Author’s name was repeated in all citation styles for records that had $q.
  + Some results filtered by Publication data were incorrect.
  + Direct linking from brief results did not work for all external records with restricted availability statuses.
  + Unable to test normalization rules for local fields.
  + Facets were not displayed when a new browser tab or window was opened.

### Resource Management (Liz)

* Cataloger notes can now be viewed, added, edited and deleted from the title and holdings searches rather than the metadata editor.
* Export to Excel now includes fields for related records, courses, licenses, reminders and cataloger notes.
* New icon that indicates that a Community Zone record has been enhanced with AI.
* In the new Title UI, portfolio information now includes coverage and availability.
* AI Metadata Assistant:
  + Admins can now configure the AI Metadata Assistant to control which types of metadata are requested from the AI
  + Catalogers can request specific types of AI enrichment, such as table of contents, subjects, or summary.
  + Alma now has the ability to search for records enriched with AI. In the All Titles search, use “Processed with Alma AI tools” created/enriched. For Community Zone records, use “Enriched with AI metadata by CZ” yes/no.
  + Catalogers can now upload PDF and Word documents to the AI assistant in addition to jpeg and png images.
* Catalogers can now delete portfolios from the Metadata Editor inventory screen.
* Normalization rules can now be created using XSL. The configuration “enable\_xsl\_normalization\_rules” is disabled by default.
* A sort method selected for a list of physical items will be saved.
* Two new settings when activating electronic collections from the Community Zone:
  + “Activate new portfolios associated with the service automatically” this used control whether to add and remove portfolios automatically. Now it only controls whether to add portfolios.
  + “Automatically delete portfolios removed from the service” is the new setting to control whether the portfolio will be deleted from the institution zone when it is deleted from the community zone (Selected) or whether the portfolio will be unlinked from the community zone and deactivated (Unselected).

### Discussion/Q&A