
Esploro 2024 Release Notes

Search for what you need

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January 2025 Sneak Preview

The upcoming January release will include features such as:

- Search within a collection
 - Move creators to contributors
-

December 2024 Sneak Preview

The upcoming December release will include features such as:

- Display of related media-mentions in the full asset page in the Portal
- API to update research assets

November 2024 Sneak Preview

The November release will include features such as:

- Allow researchers to edit their research output
 - New Portal facets for “Degree In,” “Degree Awarded,” and “Project Type”
 - Ad-hoc job to send notification to a set of researchers
-

October 2024 Sneak Preview

The upcoming October release is a maintenance release and will not include any new features. The November release will include features such as:

- Allow researchers to edit their research output
- New Portal facets for “Degree In,” “Degree Awarded,” and “Project Type”
- Ad-hoc job to send notification to a set of researchers

September 2024 Sneak Preview

The upcoming September release will include features such as:

- Display a caption and link next to the Organizational Unit name on the Organizational Unit tree in the Portal.
- Enable researchers to include multiple author affiliations in the Researcher Deposit form.
- A new measure will be added to the Assets SA: **File size**. This measure will enable you to quickly see how much file storage is being used by assets.

August 2024 Sneak Preview

The upcoming August release will include features such as:

- New Projects tab in the Organizational Unit tree
- Export Projects and Activities lists from the research information Hub

July 2024 Sneak Preview

The upcoming July release will include features such as:

- Update researchers by CSV
- Display multiple author affiliations in the Portal
- Adding engagement types to the researcher Profile Overview

June 2024 Sneak Preview

The upcoming June release will include features such as:

- POST Grant API
- Add researcher's projects to their CV
- Adding datasets to Smart Harvesting Framework jobs

May 2024 Sneak Preview

The upcoming May release will include features such as:

- Bulk rejection of Smart Harvesting author matching tasks for provisional assets
- Publish researcher's Esploro Profile link to ORCID
- API support for Get Research Grant

April 2024 Sneak Preview

The upcoming April release will include features such as:

- New Organizational Unit homepage sections - Collections and Unit Measures
- Create activities from output using a cloud app

March 2024 Sneak Preview

The upcoming March release will include features such as:

- Adding Open Access status from UnPaywall to research assets
- Support for updating Grants using the grant loader
- Display in research assets in the Portal of SDGs that were added by administrators in the Hub

February 2024 Sneak Preview

The upcoming February release will include features such as:

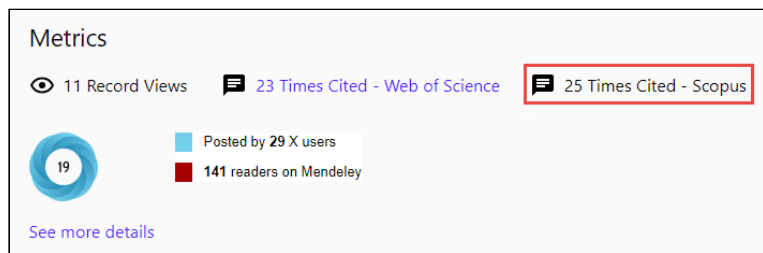
- Enable researchers to control their letter notifications.
- Add Researcher Notes to researchers in the research Hub and for Smart Harvesting.
- Enable Admins to add SDG fields to outputs.

Main Features

Display of Citation-Count Data from Scopus in the Portal

December 2024 Research Portal

Citation-count data from Scopus can now be displayed in full-asset pages in the Portal. Previously, this type of data could be loaded into Esploro, but it was only available for use in analytics and could not be viewed elsewhere.



Scopus Citation Metrics in a Full Asset Page in the Portal

The loading process for Scopus citation data remains unchanged. In addition to a total citation count for an asset, you can optionally also load citation counts for individual years. Only the total citation count is displayed in the Portal, but analytics makes use of the data for individual years when relevant, if it is available. For information about loading citation metrics, see [Working with Research Assets](#).

Scopus citation data can only be loaded into Esploro if Scopus is enabled as a citation source in the configuration and it has been verified there that the organization has a license to use this data (see [Configuring Institution Settings](#)). The data can only be displayed in the Portal if it is activated in the Portal settings (see [Configuring the Research Portal](#)).

Researcher Editing of Local Fields

December 2024 Researcher Profiles

Esploro now enables researchers to edit assets' local fields from their Profiles, in addition to the fields for which this was already possible. The institution can configure which of these fields are made available for editing by researchers, and, of those, which require admin approval before they are implemented in the asset record (see [Configuring Asset Display on the Portal](#)).

Researchers can open an asset record for updating by selecting the **Edit** option for the asset in their Profile's **Outputs** tab, or the **Edit Output** button at the top of the full asset page (see [Adding Output to a Profile](#)).

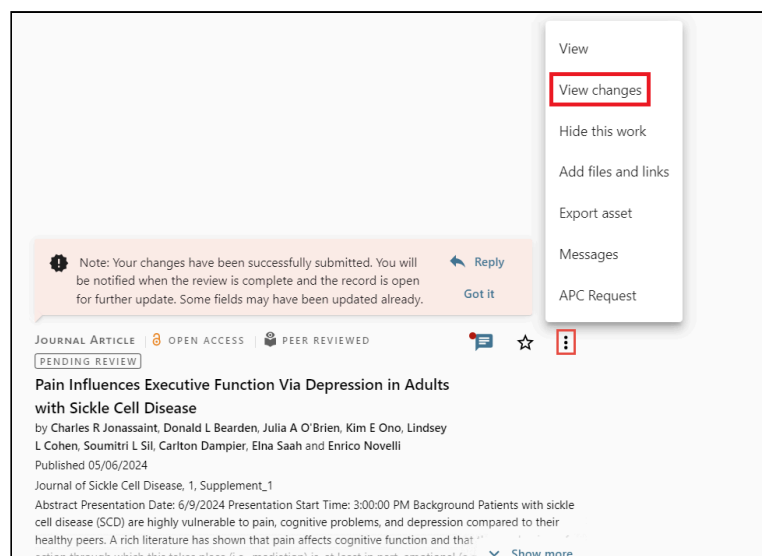
For additional information about managing researcher revisions to assets, see [Working with Research Assets](#).

View Changes Option for Assets in Researcher Profiles

December 2024 Researcher Profiles

Updated 5 December 2024

When a researcher is waiting for admin approval for changes they made to an asset's metadata, a **View changes** option is added to the More Actions menu of the asset. The researcher can select this option to see the changes they proposed. Selecting this option opens the asset record with the researcher's changes included in it.



View Changes Option

Related Assets in Media Mentions

December 2024 Management

Associated assets can now be added to media mentions. In addition, a new section listing all the associated media mentions of an asset can be displayed in the full asset page in the Portal.



Related Media Section in a Full Asset Page in the Portal

For information about managing media mentions, see [Working with Media Mentions](#).

Display Date for Project Files

December 2024 Management

A new field, **Display Date**, has been added to the properties of project files. This optional field allows you to specify a date to associate with the file and display in the Portal. The field can be used to indicate when the contents of the file were downloaded or received, such as for files containing data from websites or blogs, or messages sent by email. For additional information, see [Working with Projects](#).

Job to Update ORCID when Researchers Become Unaffiliated

December 2024 Management

A new ad hoc job, Update ORCID Record for Researcher, is now available. This job receives a set of researchers who have recently left the organization, and updates their ORCID profiles accordingly, by sending an end date to ORCID for their affiliation with the organization. For additional information, see [Running Manual Jobs on Defined Sets](#).

Asset Post API Can Now Update Individual Fields

December 2024 Data

The Asset API can now be used to update individual asset fields. At present, the following fields can be updated individually by specifying the update action – Add or Replace – and providing the new data:

- Grant relations
- Grant notes
- Links
- Dates
- Identifiers

Additional fields will be supported in the future.

For additional information, see [Esploro Assets](#) in the Developer Network.

New Researcher API Parameter to Override Managed-Externally Flag

December 2024 Data



Idea Exchange

A new parameter has been added to the researcher API that can override the **Managed externally** flags of a researcher record. If the value of this parameter is set to `true`, the fields in the researcher record are updated by the API even when **Managed externally** is not selected for them. Normally, when **Managed externally** is not selected for a field, that field can only be modified manually. For additional information about the **Managed externally** flags in researcher records, see [Working with Researchers](#).

This parameter is only available in the API; it is not available in the SIS loader.

For additional information, see [Esploro Researchers](#) in the Developer Network.

Additional Fields for Asset Enrichment from Web of Science

December 2024 Data

Updated 5 December 2024

Metadata from additional fields can now be imported from Web of Science to Esploro asset records by the *Research asset WOS identifier retriever* job (see [Viewing Scheduled Jobs](#)). The following fields are now supported:

- DOI
- Pubmed ID
- Article number
- Series
- Book DOI
- ISBN

The institution can choose which of these fields should be imported and under what conditions. For additional information, see [Configuring Institution Settings](#).

Note

This feature is only available to institutions that subscribe to Web of Science.

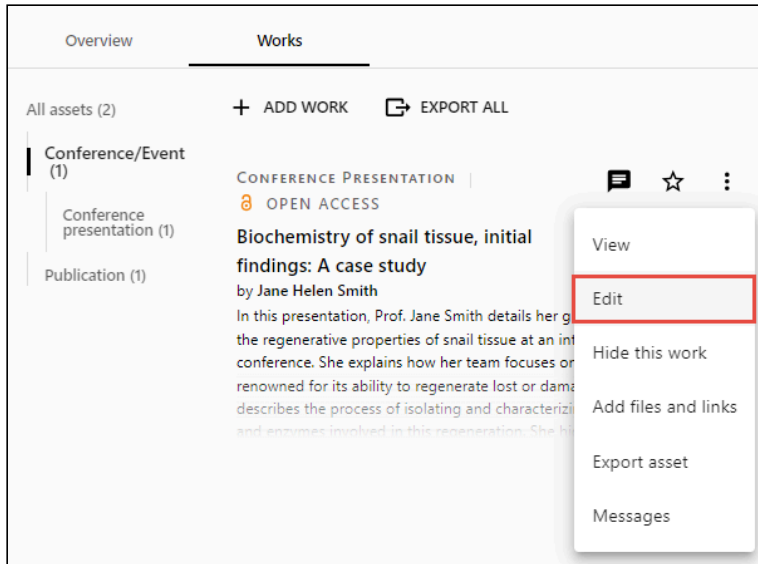
Researcher Updates of Asset Metadata

November 2024 Researcher Profiles

Researchers can now modify certain fields of their assets' records when they are logged into their private Profiles. At present, five fields are available for editing by researchers: **Asset Type**, **Title**, **Subtitle**, **DOI**, and **Sustainable Development Goals (SDGs)**. Additional fields will become available in the future.

The institution can configure which of these fields are made available for editing by researchers in their systems, and, of those, which require admin approval before they are implemented in the asset record (see [Configuring Asset Display on the Portal](#)).

Researchers can open an asset record for updating by selecting the new **Edit** option for the asset in their Profile's **Outputs** tab, or the new **Edit Output** button at the top of the full asset page (see [Adding Output to a Profile](#)).



Edit Option in the Outputs Tab



Edit Output Button in a Full Asset Page

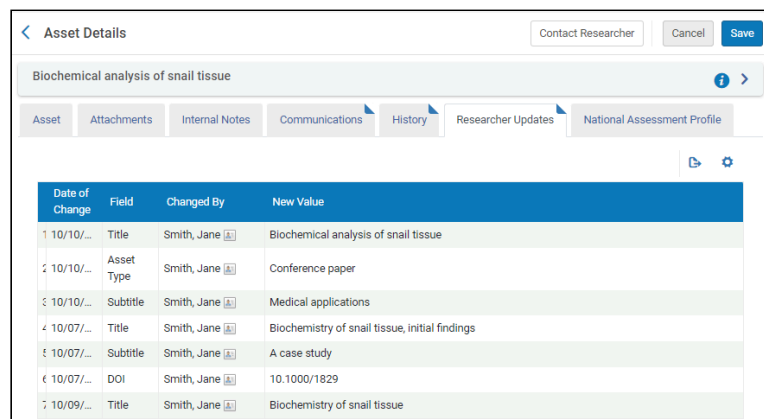
When researchers submit their changes for an asset, the system checks whether changes to those fields require admin approval or not. If admin approval is not required, the changes are implemented in the asset record immediately. If admin approval is required, the option to approve them is made available for the asset in the Hub. Admins can accept or reject each change there. All changes must be accepted or rejected before the review can be submitted.

Asset Field	Current Value	New Value	Action
Asset Type	Conference presentation	Conference paper	<input type="radio"/> Accept <input type="radio"/> Reject
Subtitle	A case study	Medical applications	<input type="radio"/> Accept <input type="radio"/> Reject
Title	Biochemistry of snail tissue	Biochemical analysis of snail tissue	<input type="radio"/> Accept <input type="radio"/> Reject

Reviewing Researcher Updates

Admins can easily locate assets with researcher-initiated updates that require approval by opening the new **Assets with Revisions for Review** task list.

A record of researcher-initiated changes that were implemented for an asset appears in a new tab, **Researcher Updates**.



Date of Change	Field	Changed By	New Value
1 10/10/...	Title	Smith, Jane [A]	Biochemical analysis of snail tissue
2 10/10/...	Asset Type	Smith, Jane [A]	Conference paper
3 10/10/...	Subtitle	Smith, Jane [A]	Medical applications
4 10/07/...	Title	Smith, Jane [A]	Biochemistry of snail tissue, initial findings
5 10/07/...	Subtitle	Smith, Jane [A]	A case study
6 10/07/...	DOI	Smith, Jane [A]	10.1000/1829
7 10/09/...	Title	Smith, Jane [A]	Biochemistry of snail tissue

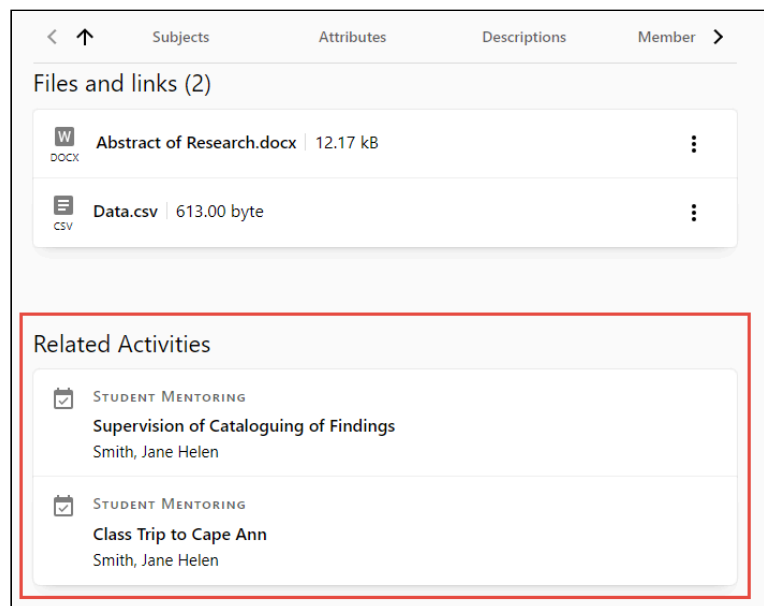
New Researcher Updates Tab in an Asset Record

For additional information about managing researcher revisions to assets, see [Working with Research Assets](#).

Associating Activities with Projects

November 2024 Management

Related activities can now be added to Project records, either by admins editing the project record in the Hub or by researchers who have added the projects to their Profiles.



The screenshot shows a project record with the following sections:

- Files and links (2)**
 - Abstract of Research.docx | 12.17 kB
 - Data.csv | 613.00 byte
- Related Activities**
 - STUDENT MENTORING
Supervision of Cataloguing of Findings
Smith, Jane Helen
 - STUDENT MENTORING
Class Trip to Cape Ann
Smith, Jane Helen

Related Activities in a Project in the Portal

For additional information, see [Working with Projects](#), [Adding Projects to a Profile](#).

New Job to Send Ad Hoc Notifications to Researchers

November 2024 Management

A new job, **Researcher General Notification**, is now available. This job allows you to send an ad hoc message to a set of researchers. The message you enter is sent as the body of a Researcher General Notification Letter, and can be configured using basic HTML coding. Select the Information button (



) to see a list of supported HTML codes. You can choose to include a link to the researcher's Profile and/or a link to the Portal homepage in the message.

Run a Job - Enter Task Parameters

Task Parameters: Researcher General Notification

Custom Message *

Include Profile Link ⓘ

Include Portal Link ⓘ

Creating a Message to Send to a Set of Researchers.

For additional information, see [Running Manual Jobs on Defined Sets](#), [Configuring Esploro Letters](#).

Import of Multiple Affiliations from OpenAlex

November 2024 Smart Harvesting

It has already been possible to add multiple author affiliations manually in mediated and researcher deposits. From the November release, when a call to the OpenAlex API is invoked to enhance author affiliations (in Smart Harvesting Framework jobs and optionally in Import Profiles and SWORD), Esploro now adds multiple author affiliations if they are included in the OpenAlex response. In addition to enriching asset records directly, this additional information about author affiliations is now also used by the Author Matching algorithm to improve the accuracy of its matches.

New Create-Asset API

November 2024 Data

An API for creating new assets is now available. For additional information, see [Esploro Assets](#) in the Developer Network.

Assets Per Parent Organization Report Now Available

November 2024 Analytics and Insights

The **Assets Per Parent Organization** out-of-the-box analytics report is now available (Catalog > Esploro > Reports > Research Assets). It displays a table of the number of assets per parent organization, including all of the assets of its children units.

Table View Now Available for Analytics Objects

November 2024 Analytics and Insights

You can now display the Analytics Object List, the Shared with Me page, and the Out-of-the-Box Analytics page in Table View. To display these pages in Table View, select the Table View icon



at the top right of the page:

Display Name	Type	Subject Areas	Analytic Folder	Object created by	Badges
1 <input type="checkbox"/> acb-recent-non-std-publications-by-dept-name	Report	Esploro Research Assets	Esploro University of Iowa Libraries 0100WA_INST/Reports/WR-Sara/dept-analysis/CCoM/anatomy	on 06/18/2024 05:29:34 PM EDT	Scheduled Report Pinned to me
2 <input type="checkbox"/> all-publications-UOWA OA Agreement	Report	Esploro Research Assets	Esploro University of Iowa Libraries 0100WA_INST/Reports/WR-Sara	on 06/17/2024 10:57:49 PM EDT	Subscribed Scheduled Report
3 <input type="checkbox"/> all-publications-wos-count	Report	Esploro Research Assets	Esploro University of Iowa Libraries 0100WA_INST/Reports/WR-Sara/dept-analysis	on 08/31/2023 08:46:50 PM EDT	Pinned to me
4 <input type="checkbox"/> anesthesia-allpublications	Report	Esploro Research Assets	Esploro University of Iowa Libraries 0100WA_INST/Reports/WR-Sara/dept-analysis/CCoM/anesthesia	on 07/21/2023 12:30:12 AM EDT	
5 <input type="checkbox"/> Books by UI authors	Report	Esploro Research Assets	Esploro University of Iowa Libraries 0100WA_INST/Reports/WR-Sara	on 09/04/2024 11:41:50 PM EDT	Scheduled Report
6 <input type="checkbox"/> Cross Research Assets and Alma Titles Dashboard	Dashboard	Esploro Research Assets	Esploro Dashboards	Object created on 04/02/2023 01:19:10 PM EDT	
7 <input type="checkbox"/> Datasets and Code	Dashboard	Esploro Research Assets	Esploro University of Iowa Libraries 0100WA_INST/Dashboards	on 10/18/2022 08:22:34 AM EDT	
8 <input type="checkbox"/> Engineering DB	Dashboard	Esploro Researchers	Esploro University of Iowa Libraries 0100WA_INST/Reports/WR-Sara	on 07/18/2023 11:57:43 PM EDT	Scheduled Report

Analytics Object List in Table View

From this view, you can view the analytics object information in a clear and organized format.

For more information on the Analytics Object List, see [Working with Analytics Objects](#).

Projects Tab Displaying in Organization Unit Pages in the Portal

September 2024 Research Portal

A **Projects** tab has been added to the Organizational Unit page in the Portal. This tab, which displays information about an Organizational Unit's projects, only appears if projects are in use by the institution and have been activated in the Portal configuration. If projects are active but there are no projects for a particular Organizational Unit, the tab is grayed out. For additional information, see [Working with Projects](#); [Configuring the Research Portal](#)).

Research units / College of Liberal Arts and Sciences

Researchers Output **Projects** Homepage

1-3 of 3 results

RESEARCH
LSB Statistical Analysis Project 1
by Statistics and Actuarial Science
College of Liberal Arts and Sciences
The "LSB Statistical Analysis Project" is an innovative research initiative focused on the intricate field of steganalysis, particularly targeting the detection of Least Significant Bit (LSB) steganographic techniques. This project aims to develop robust statistical models and algorithms capable of identifying and analyzing covert messages within digital media. By leveraging advanced statistical analysis, the project seeks to enhance the security of digital communications.

RESEARCH
LSB Statistical Analysis Project 2
by Statistics and Actuarial Science
College of Liberal Arts and Sciences

Projects Tab Selected in an Organizational Unit Page in the Portal

Researchers Can Add Multiple Affiliations

September 2024 Researcher Profiles

Researchers can now add multiple affiliations to the creators and contributors of assets they deposit through their private Profiles. Up to five affiliations can be added to each creator/contributor. For information about how researchers can deposit assets from the Portal, see [Adding Output to a Profile](#). For information about the display of creator/contributor affiliations in the Portal, see [Working with Research Assets](#).

Related people

First name*
Millie

Middle name
M

Last name*
Schwartz

Suffix

Affiliations

- College of Pharma... X
- Dana-Farber/Harvard Cancer Center (United States, Boston) - DF/H... X

Add affiliation

No more than 5 affiliations allowed 2 / 5 Add

Adding Multiple Affiliations to a Creator in an Asset-Deposit Form

Projects API Expanded

September 2024 Data

The Esploro Projects API has been expanded to include the following features:

- PUT API for updating Projects
- Support for related grants and assets in the GET, POST, and PUT Project APIs

For additional information, see [Esploro Projects](#) in the Developer Network.

Banner Text and Links in Organizational-Unit Portal Page

September 2024 Research Portal

You can now add text and links as banners in the header areas of Organizational Unit pages in the Portal. Text is added in the unit's configuration as a **Banner Description**, while links are added as **Banner Links**. For additional information, see [Working with Organizational Units: Descriptions Section](#); [Working with Organizational Units: Links Section](#).

Research units / College of Liberal Arts and Sciences /

Creative Writing

Guiding students to discover their unique voice

<https://creativewriters.xlu.edu/>

Researchers Output Projects Homepage

The creative writing program at Ex Libris University is designed to nurture and develop the talents of aspiring writers. It offers a comprehensive curriculum that includes courses in fiction, poetry, non-fiction, and playwriting, allowing students to explore various genres and styles. The program emphasizes both the craft of writing and the importance of literary theory, providing a balanced approach to creative expression. Students benefit from workshops, where they receive constructive feedback from peers and experienced faculty, fostering a supportive and collaborative environment. Additionally, the program often features guest lectures from renowned authors, opportunities for publication, and internships in the literary field, preparing students for successful

Show more

Esploro Activities from Alma Courses Cloud App

September 2024 Management

Updated 27 August 2024

A new CloudApp, Esploro Activities from Alma Courses, is now available. This App creates Teaching Activities in Esploro for researchers who are listed as Instructors in active Alma courses.

Once the app is installed and activated, you can open it by selecting the



icon to open the **Cloud App Center** menu, and then selecting **Esploro Activities from Alma Courses Cloud App**. For more information about using this app, see [Esploro Activities from Alma Courses Cloud App](#). For general information about working with Cloud Apps, see [Configuring Cloud Apps](#).

File Size (In Bytes) and File Size (In MBs) Fields Changed to Measure Fields

September 2024 Analytics and Insights

The **File Size (In Bytes)** and **File Size (In MBs)** fields (Esploro Research Assets > File Details) were changed from being attribute fields to measure fields. This means that the values can now be aggregated. For example, you can now display the file size aggregated by file type. Previously, the size of each file was listed separately:

File Size (in MBs)	File Size (in Bytes)	File Type
85,906.68	87,968,440,604	
25.21	25,811,294	Accepted manuscript
54.02	55,318,091	Audio
453.46	464,344,323	Chapter
27.84	28,508,842	Code/Script
0.17	169,953	Codebook
12.72	13,023,797	Correction (Corrected version of record)
0.27	277,629	Data
141.28	144,671,577	Data Dictionary
0.17	175,412	Errata
182.77	187,157,762	Image
874.78	895,772,557	Other
113.93	116,659,938	PDF
16.18	16,571,365	Preprint (Author's original)
2.22	2,277,367	Proof
1,939.26	1,985,805,837	Published (Version of record)
0.90	921,754	README
77.02	78,872,247	Recording
120.10	122,986,068	Slides
60.06	61,501,012	Spreadsheet
0.84	858,674	Submitted
3.73	3,822,154	Submitted Manuscript Under Review
6.91	7,080,015	Text
1,027.72	1,052,389,419	Video
15.61	15,985,855	code/script

File Size Aggregated

Country of Academic Unit Now Taken from Parent Organization

September 2024 Analytics and Insights

If an academic unit has no value for country, it is now taken from the parent organization. This affects the following fields:

- Funder Unit Country (Esploro Research Grants > Grant Funder)
- Project Organization Unit Member Country (Esploro Research Projects > Project Organization Unit Members)
- Funder Agency Unit County (Esploro Research Grants > Grant Funder Agency)
- Unit Organization Country (Esploro Research Grants > Grant Related Organizations)
- Author Affiliation Country (in Asset) (Asset Creators and Contributors dimension in all the subject areas in which it appears)

Add New Researchers Using the CSV Researcher Loader Cloud App

August 2024 Management

The CSV Researcher Loader Cloud App, which simplifies the management of researcher records by enabling operators to import data from CSV files, now supports adding new researchers as well as updating existing researchers. New researchers can be added by the CSV Researcher Loader if they already have existing user records.

The CSV Researcher Loader Cloud App is an efficiency tool that allows the operator to add and update researchers' data quickly and easily from within the Hub. It makes use of the API, but the operator does not have to know anything about the API in order to use it. Using this Cloud App, you create a profile that specifies which fields are being updated via the CSV file, so your CSV file need only contain the researchers' IDs and the values of the fields specified in the profile. You can create multiple profiles, and save them for reuse. To use the app, you select the profile, upload the CSV file containing the data, and run the app.

Once the app is installed and activated, you can open it by selecting the

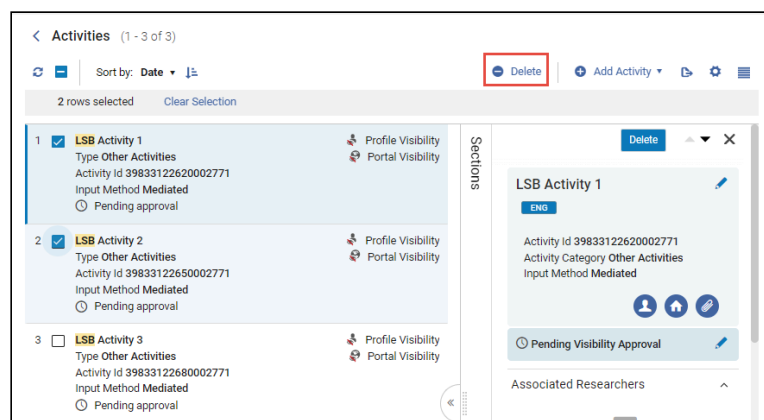


icon to open the **Cloud App Center** menu, and then selecting **CSV Researcher Loader**. For more information about using this app, see [CSV Researcher Loader Cloud App](#). For general information about working with Cloud Apps, see [Configuring Cloud Apps](#).

Delete Activities in Bulk

August 2024 Management

Multiple activities can now be deleted in a single action. Use the search and faceting tools to create a result set, and then select the relevant activities and delete them with one click. For additional information, see [Working with Activities](#).

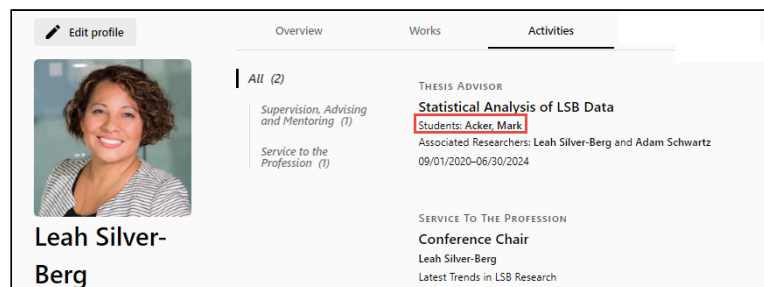


Delete Button for Selected Activities

Student Names Displayed in Advisory Activities

August 2024 Research Portal

For activities in the **Supervision, Advising and Mentoring** category, the names of the student authors now appear in the short form of the activity's display in the Profile. For additional information, see [Working with Activities](#).

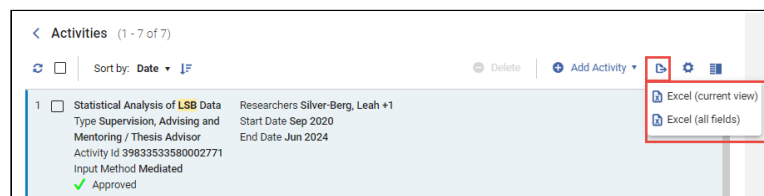


Student Name in the Short Form of a Thesis-Advisor Activity

Export Project and Activity Search Results as Excel Files

August 2024 Management

Results of searches for projects and activities can now be exported as Excel files. For additional information about exporting search results, see [The Research Hub Interface](#).



Option to Export to Excel

Asset Enrichment from Web of Science

August 2024 Data

Updated 5 December 2024

Institutions that subscribe to Web of Science (WOS) can now configure Esploro to automatically import selected metadata fields from WOS to the Esploro asset record. When this option is activated for these institutions, the *Research asset WOS identifier retriever* job (see [Viewing Scheduled Jobs](#)), in addition to importing WOS IDs for all newly added assets that have matching records in Web of Science, also imports metadata from WOS fields, in accordance with the institution's configuration. The institution can choose which of these fields should be imported and under what conditions. For additional information, see [Configuring Institution Settings](#).

Asset Hierarchal Date (Year) Field Added to Esploro Research Assets

August 2024 Analytics and Insights

The **Asset Hierarchal Date (Year)** field was added to Esploro Research Assets > Asset Dates. It displays one of the dates of an asset (year only), selected according to a hierarchy of dates. (For more information on the hierarchy, see [Date Hierarchy](#).) You can use this field to create reports with the same date that is used when Esploro displays, indexes, or facets a single date using the hierarchy.

Researcher Notes Dimension Added to Esploro Researcher Subject Area

August 2024 Analytics and Insights

The **Researcher Notes** dimension was added to the Esploro Researcher subject area. It contains information about notes added by the researcher and contains the following fields:

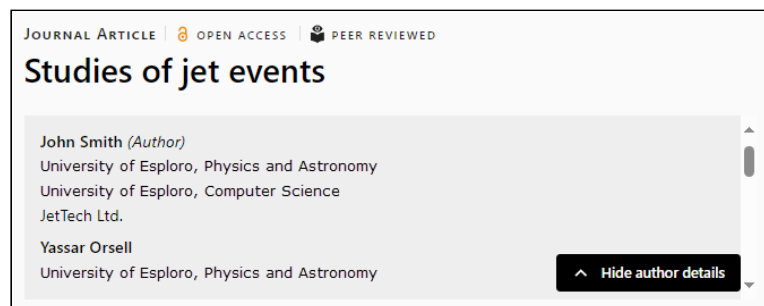
- Created By
- Created Date
- Note Text
- Note Type

For more information, see [Researcher Notes](#).

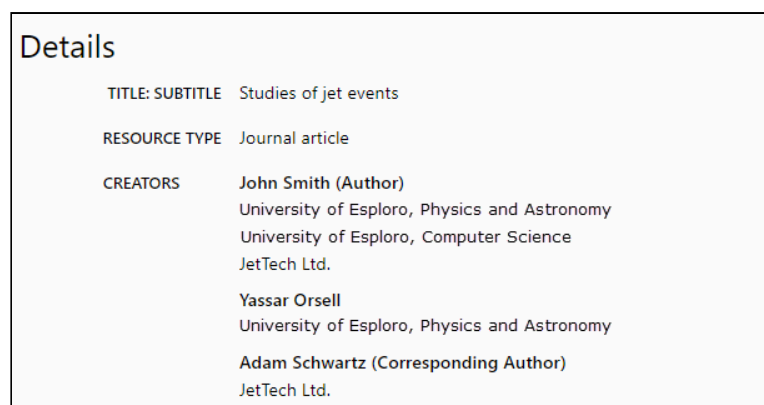
Multiple Creators' Affiliations Displayed in the Portal

July 2024 Research Portal

The author details section of the Portal Landing Page has been enhanced to include the list of creator affiliations. In addition, admins can also choose to add the list of creators to the asset's **Details** section of the Portal page, and can choose whether to display the creators' roles and affiliations there.



List of Asset Creators Expanded to Show Their Roles and Affiliations



List of Creators, with Their Roles and Affiliations, in the Details Section of the Full Asset Page

For additional information, see [Configuring the Research Portal](#).

Researcher Notes Now Shown in User Info Pop-up

July 2024 Management

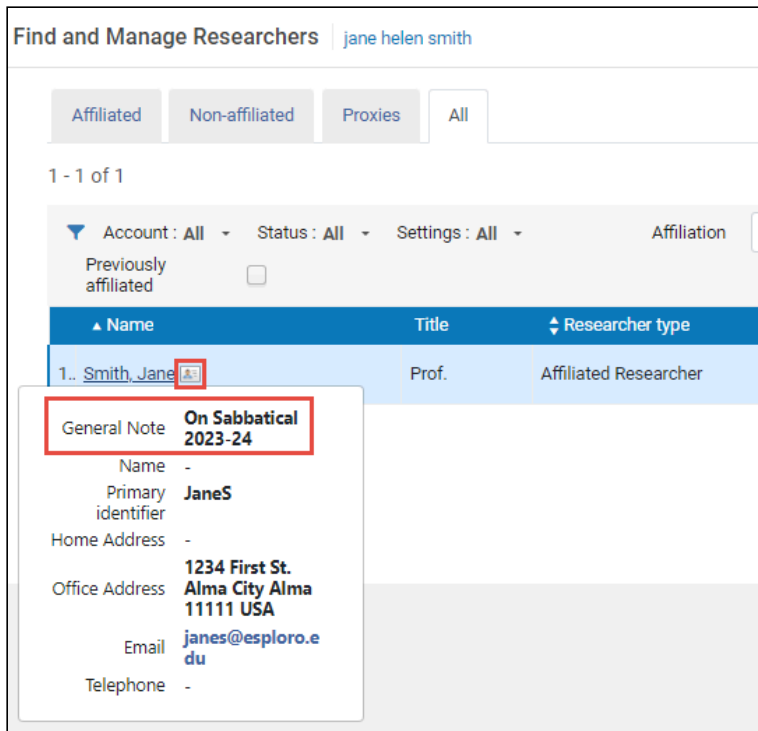


Idea Exchange

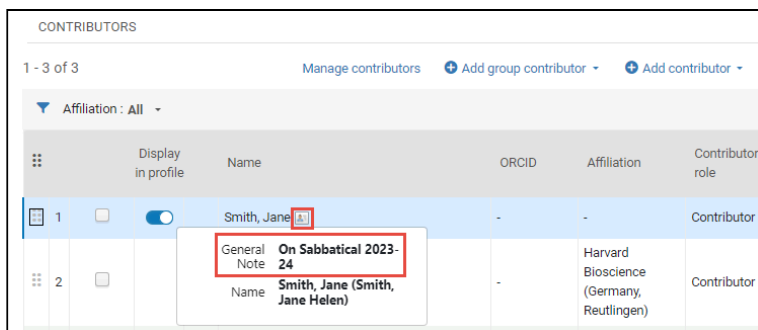
Researcher Notes now appear in **User Information** pop-ups that are available in the Find and Manage Researchers page or in the Asset Details page. (**User Information** pop-ups appear when you select a User Information icon –



.)



Researcher Note in a User Information Pop-up in the Find and Manage Researchers Page



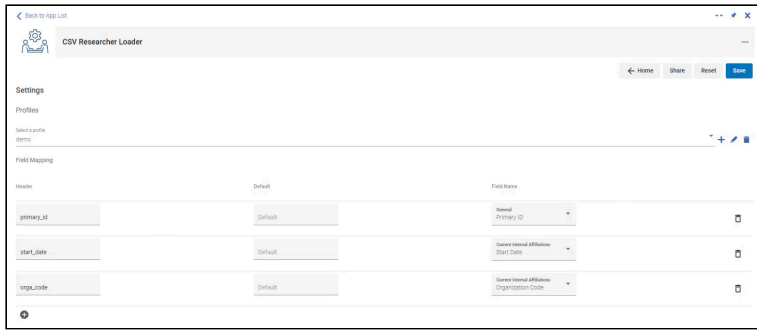
Researcher Note in a User Information Pop-up in the Asset Details Page.

The first one hundred characters of each of the newest three notes are displayed in the pop-up, along with their note types. For additional information, see [Working with Researchers](#).

Cloud App for Updating Researcher Data by CSV

July 2024 Management (Updated July 10, 2024)

A new Cloud App, CSV Researcher Loader, simplifies the process of updating researcher information, making it possible to use a CSV file and initiate the load from inside the Research Information Hub. This efficiency tool allows the operator to add and update researchers' data quickly and easily. It makes use of the API, but the operator does not have to know anything about the API in order to use it. Using the Cloud App, you create a profile that specifies which fields are being updated via the CSV file, so your CSV file need only contain the researchers' IDs and the values of the fields specified in the profile. You can create multiple profiles, and save them for reuse. To use the app, you select the profile, upload the CSV file containing the data, and run the app.



Configuring a Profile in the CSV Researcher Loader Cloud App

To enable the Cloud App framework in your system, open a support ticket. For additional information about working with Cloud Apps, see [Configuring Cloud Apps](#).

For additional information about this cloud app, see [Working with Researchers](#).

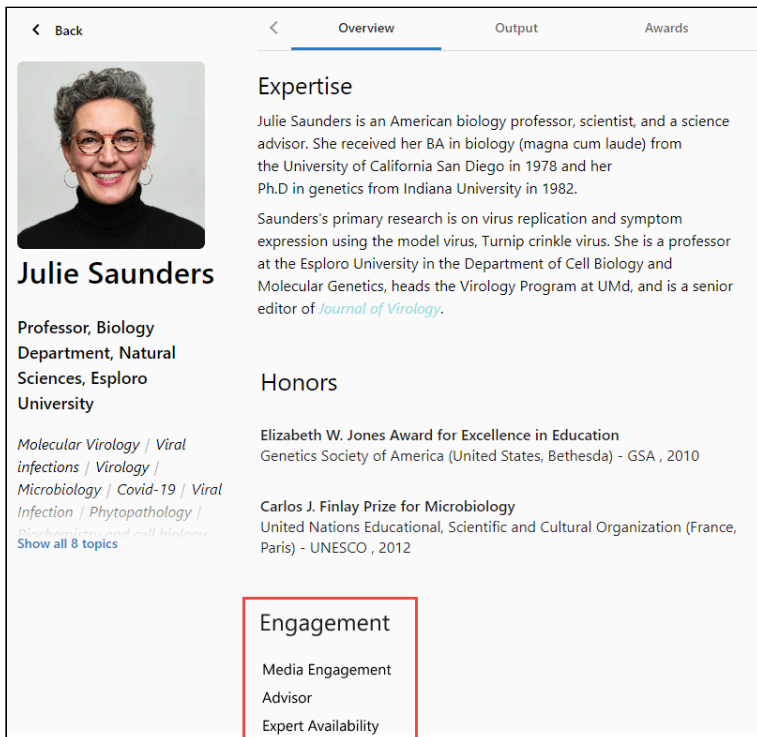
Note

In a future update, this Cloud App will also be able to add new researchers to the database. At present, it can only add or modify the data of existing researchers.

Researcher Engagement Types Can Now Appear in Their Public Profiles

July 2024 Researcher Profiles

Public and Academic Engagement types are used to indicate which forms of engagement a researcher is available for. Some examples of Engagement types are: *media availability* and *expert witness*. Engagement types have been available in the research repository for some time, and now they can be configured to display on the Researcher's public Profile in the research repository (see [Working with Researchers](#)).



Engagement Types in a Researcher's Public Profile

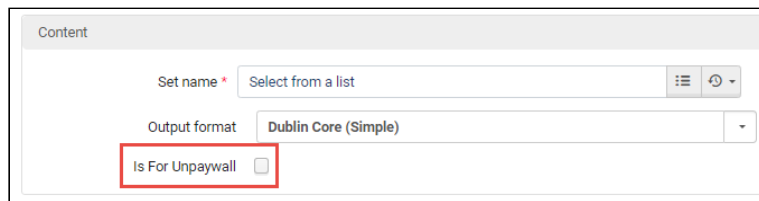
Admins can control whether engagement types can be seen by the public, only by signed-in users, or only in the private Profile; see [Configuring Researcher Profiles](#). They can also choose which engagement types are visible in researcher Profiles; see [Configuring Researcher Details](#).

Researchers can also choose to hide engagement types that are otherwise available for display in their Profiles; see [Managing Researcher Profiles](#).

Publishing Profile Option for Unpaywall

July 2024 Management

A new option has been added to the publishing profiles ([Repository > Publishing > Managing Publishing Profiles](#)) that enables you to create a profile specifically geared to preparing data to send to Unpaywall. Profiles for which the **Is For Unpaywall** option is selected only record information about the fields that are actually used by Unpaywall, streamlining the process of publishing to Unpaywall. For additional information, see [Esploro Publishing to OAI and Exporting to FTP](#).



The screenshot shows a 'Content' management interface. It includes a 'Set name' field with a dropdown menu, an 'Output format' dropdown menu set to 'Dublin Core (Simple)', and a checkbox labeled 'Is For Unpaywall' which is currently unchecked. The checkbox is highlighted with a red rectangular box.

Is For Unpaywall Option

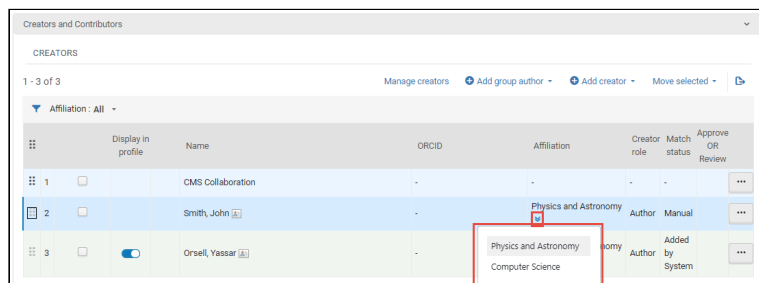
Multiple Affiliations for Creators and Contributors

June 2024 Management

Administrators can now add up to five affiliations to each of the creators and contributors of an asset. This information can be viewed and updated by editing the asset in the Hub. When multiple affiliations are defined for an author, the first one in the list is displayed in the Hub asset page, with an **Expand** button (



) beside it. Select the **Expand** button to open a box in which all of the affiliations are displayed.



The screenshot shows the 'Creators and Contributors' management interface. It features a table with columns for 'Display in profile', 'Name', 'ORCID', 'Affiliation', 'Creator role', 'Match status', and 'Approve or Review'. The table lists three creators. The second creator, 'Smith, John', has two affiliations listed: 'Physics and Astronomy' and 'Physics and Astronomy Computer Science'. A red box highlights the second affiliation, 'Physics and Astronomy Computer Science', which is the one displayed in the asset page.

	Display in profile	Name	ORCID	Affiliation	Creator role	Match status	Approve or Review
1	<input type="checkbox"/>	CMS Collaboration	-	-	-	-	...
2	<input type="checkbox"/>	Smith, John	-	Physics and Astronomy	Author	Manual	...
3	<input checked="" type="checkbox"/>	Orsell, Yassar	-	Physics and Astronomy Computer Science	Author	Added by System	...

Box Showing Multiple Affiliations of an Asset Creator

The first affiliation in each list (Creators and Contributors) appears in the asset page in the Portal. Any additional affiliations are not currently displayed in the Portal. (Display of all affiliations will be added in an upcoming release.)

Details

TITLE: SUBTITLE	Studies of jet events
CREATORS	CMS Collaboration John Smith (Author) - Physics and Astronomy
CONTRIBUTORS	Adam Schwartz (Contributor) - Aberdeen Science Centre
RESOURCE TYPE	Journal article

First Creator and Contributor Affiliations In the Asset Page in the Portal

For additional information, see [Working with Research Assets](#).

Smart Harvesting Now Uses ORCID IDs in Queries to CDI

June 2024 Smart Harvesting (Updated May 22, 2024)

Over time, ORCID IDs have become more prevalent in CDI records, increasing the probability of finding research outputs using an ORCID ID. In light of this, queries to CDI are now based on the researcher's ORCID ID in addition to the researcher's name. For additional information about the Smart Harvesting process, see [General Overview of Smart Harvesting Framework](#).

CVs Can Now Include Projects

June 2024 Researcher Profiles

CVs generated for researchers by Esploro can now include information about the researchers' projects. The fields from the project that are available in the CV are the **Title**, **Project Id**, **Type**, **Start Date**, and **End Date**. For information about generating a researcher CV from the researcher's private Profile, see [Creating a CV](#).

Create CV Save as View Download

TEMPLATE CV INFORMATION **FORMAT**

Edit template - researchers information
 Select information you wish to see in your CV.

- Name
- Title
- Contact information
- Identifiers
- Areas of interest
- Websites
- Languages
- Education
- Work Experience
- Associations
- Honors
- Service ▼
- Publications ▼
- Volunteer work ▼
- Conferences and Events ▼
- Teaching ▼
- Thesis ▼
- Invited Posters ▼
- Awards ▼
- Projects** ▼

Next >

Creating a CV with Information about the Selected Items, Including the Newest Addition to the Options - Information about Projects

Management of Project Description Types

June 2024 Management

You can now enable or disable project description types, change their display names, create additional types, and delete existing types. You can also change the order in which the descriptions of each type appear in the full project page in the Portal. For example, you could choose to display the description of the project's *Objectives* before the description of its *Methods*. For additional information, see [Configuring Project Management on the Research Hub](#).

back to top ↑ **Descriptions**

Descriptions

Members

Member Organizations

Files and links (1)

Related Output

Objectives
 An overarching goal of Project 2 is to determine how airborne PCBs affect the development of metabolic syndrome (MetS), a cluster of conditions that includes obesity, hypertension, dyslipidemia, and hyperglycemia, which increase the risk of heart disease, stroke, and type II diabetes. Project 2 will determine how airborne PCBs affect the development of MetS in adolescence, specifically through their effects on adipose tissue.

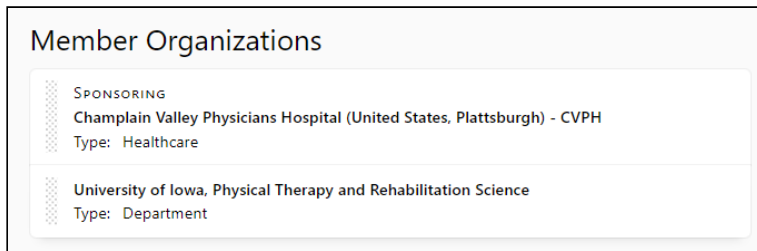
Methods
 We will be doing this by:

1) ELUCIDATING THE FUNCTIONAL CONSEQUENCES OF AIRBORNE PCB EXPOSURE ON ADIPOGENESIS AND ADIPOCYTE FUNCTION
 For aim 1, starting in in 2020 we have begun screening of lower chlorinated airborn: ▼ Show more

Reordering Project Members

June 2024 Research Portal

The order in which Member Researchers and Member Organizations appear in the full project page in the Portal can now be modified by researchers working in their private Profiles. Members in each list can be dragged up and down to change their order. For additional information about managing projects in the Portal, see [Adding Projects to a Profile](#).



Member Organizations in a Project in Edit Mode in the Portal

Smart Harvesting of Datasets from CDI

June 2024 Smart Harvesting

Smart Harvesting now harvests datasets from CDI, in addition to the various publication types it was already harvesting. For additional information, see [General Overview of Smart Harvesting Framework](#).

New Fields in Asset Academic Organization Units

June 2024 Analytics and Insights

The following fields were added to Esploro Research Assets > Asset Academic Organization Units:

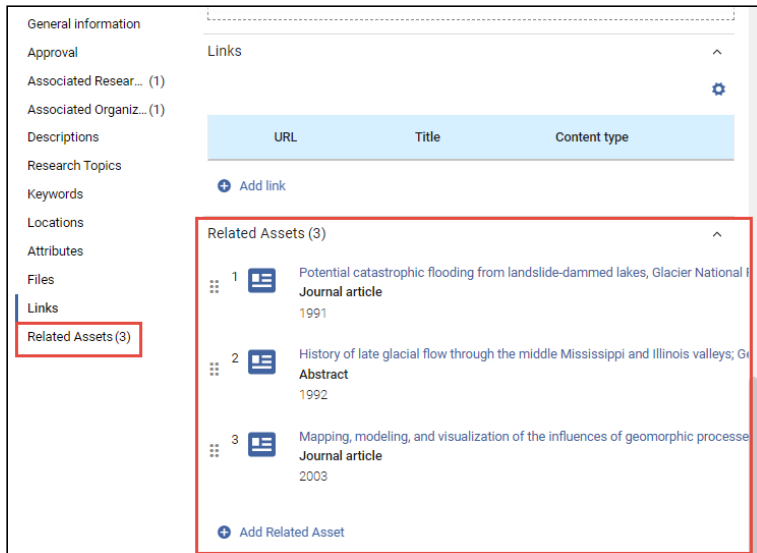
- Organization Acronym
- ROR Identifier
- Grid Identifier
- Fundref Identifier
- Other Identifier
- Organization Contact Name
- Phone
- Email
- Full Location
- Has Homepage
- Display in Portal
- Always Display
- Has Files

For more information, see [Asset Academic Organization Units](#).

Assets Can Now Be Linked to Activities

May 2024 Management

Researcher Activity records now include a Related Assets section, in which assets can be linked to the activities.



Related Assets Section in an Activity Record

For additional information, see [Working with Activities](#).

Bulk Rejection for Smart Harvesting

May 2024 Smart Harvesting

The Author Matching Report for Smart Harvesting has been expanded to include more information and an option to mark matches for automated rejection (in addition to the already available option to mark them for automated approval). For this purpose, three additional columns have been added to the report:

- **Additional AM Tasks** – "Yes" when the asset has two or more authors that were matched to affiliated researchers, resulting in an author matching (AM) task for each. "No" when the asset has only one author that was matched to an affiliated researcher.
- **Provisional Asset** – "Yes" if the asset has not had at least one author-researcher match approved. "No" if at least one author-researcher match has already been approved for the asset. An asset harvested by Smart Harvesting is considered "provisional" until the first author-researcher match is approved, because only then is it clear that the record is relevant to the repository. A provisional asset is not included in the repository of assets, and can only be found in the Author Matching Task list.
- **Rejected** – The column in which you can reject a match (initially blank). When a match is marked for rejection, if the asset to which it is linked has no pending or approved matches to other researchers, or all of its matches are pending and are marked for rejection in the report, all its matches are rejected and the asset is deleted from the database. If these conditions are not met, all rejections for the asset are ignored.

A	B	C	D	E	U	V	W	X
Researcher User ID	Author Type	Asset ID	Researcher Name	Researcher Type	Additional AM Tasks	Provisional Asset	Approved (add X if approved)	Rejected (add X if rejected)
2065395900006991	CREATED	991002922163406991	Smith, Mary Jane	Affiliated Researcher	No	Yes	X	
2065395900006273	CREATED	991002922161506991	Hanson, Earl S.	Affiliated Researcher	No	Yes	X	
2065395900006421	CREATED	991002922161306991	George, Ellen H.	Affiliated Researcher	No	Yes		X
2065395900786432	CREATED	991002922162506991	Henry, John	Affiliated Researcher	No	Yes	X	

Three New Columns in the Author-Matching Report

Note

- These enhancements are only available for *Smart Harvesting* input. When the report is generated for other types of input (i.e., Smart Expansion, Input profile, or SWORD), these columns are not included in the report.
- The name of the menu option for creating the Author Matching Report and uploading updates has been changed from *Author Matching Report / Update Approved Matches* (**Researchers > Author Matching Report / Update Approved Matches**) to *Author Matching Report / Update Author Matches* (**Researches > Author Matching Report / Update Author Matches**).

For additional information, see [Reports and Notifications for the Smart Harvesting Framework](#).

Enhanced Author-Matching Algorithm

May 2024 Smart Harvesting

The Author Matching algorithm has been enhanced. The main change is that an updated embedding feature, which uses improved dictionaries, has been implemented. The embedding feature helps the algorithm detect the research domain of the researcher and of the incoming asset. For additional information about the Author Matching algorithm, see [Author Matching Algorithm](#).

Links to Researchers' Esploro Portal Profiles in Their ORCID Profiles

May 2024 Researcher Profiles

Links to researchers' Esploro Profiles can now be published to ORCID as part of the metadata sent from Esploro to ORCID by the **Update Researcher ORCID** scheduled job (see [Scheduled Jobs](#)). This functionality is implemented for researchers who have approved ORCID updating by Esploro, and for whom Profile data from Esploro is sent to ORCID. When it is activated, the option adds a link to the researcher's ORCID profile that opens their Esploro Profile. This option can be activated for the organization in a new configuration table called **Orcid Record Sections Settings** (**Configuration menu > Repository > Integrations > ORCID Record Sections Settings**). For additional information, see [ORCID in Esploro](#).

New Digital Adoption Tool

May 2024 Management

Starting with the November 2023 release, Ex Libris has been gradually deploying Pendo, a new digital-adoption tool, across Alma and other components of our higher-education back-office suite. Pendo was previously deployed in the Esploro Hub, and has now been deployed in the Esploro Portal.

- Pendo is a Digital Adoption tool used by SAAS (Software as a Service) software companies to identify usage trends and to provide users with an optimized user experience. It provides information on user trends and behavioral analytics to help improve the user experience.
- The implementation of Digital Adoption on the HEP (Higher Education Platform) is designed with our business partners to ensure that no personal data is passed through to Pendo.
- As part of our ongoing effort to improve the user experience, Digital Adoption helps us identify complex workflows where users might be struggling. This gives us the input needed to improve or simplify these workflows. During 2024, we will add a new walkthrough, which provides in-app guidance. In the future, there may be additional capabilities, such as in-app help, messaging, user feedback, and more.
- For more information about Pendo, see the [FAQ](#).

Deployment

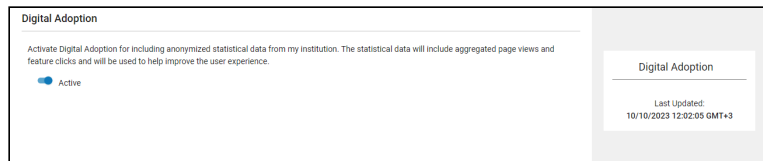
The digital adoption is functional only for users where:

- Pendo is operating based on their country and institution’s policy.
- The Digital Adoption configuration is turned ON (see screen capture below).
- The user accepted functional and targeting cookies.

For more information about data collection, data privacy, and the anonymization process, see [Pendo for Ex Libris: Higher Education Platform \(HEP\)](#).

Configuration

Administrator users can activate or deactivate data collection for Pendo on the Digital Adoption page ([Configuration Menu > General > General Settings > Digital Adoption](#)).



Digital Adoption Activation Page

For more information about configuration, see [Configuring Digital Adoption](#).

Additional Grant-Investigator Roles

April 2024 Management



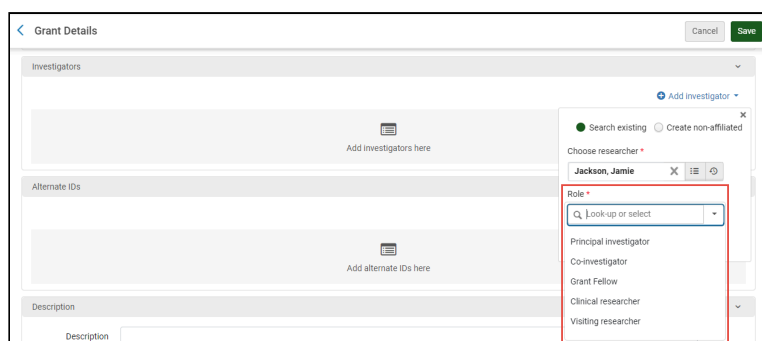
Idea Exchange

It is now possible to assign roles to grant investigators. Previously, grant investigators were assigned *relation types* – either **Principal investigator** or **Co-investigator**. Now, instead of assigning a relation type to each grant investigator, you assign a role to them, and the relation type is automatically assigned as well (all but the **Principal investigator** role have relation type **Co-investigator**). The following roles are now defined:

- Principal investigator
- Co-investigator
- Grant Fellow

- Grant Manager
- Research and innovation associate
- Visiting researcher
- Specialist
- Technician
- Doctoral student
- Professional enabling staff
- Clinical researcher

These roles can be enabled or disabled in the **Research Grant Investigator Roles** table ([Configuration Menu > Research Administration > Grants > Grant Investigator Roles](#)). By default, only **Principal investigator** and **Co-investigator** are enabled. Enabled roles can be selected for a grant investigator in the Grant Details page ([Research Management > Grants > Manage Grants > \[edit an existing grant or select **Add Grant** to add a new grant\]](#)), in the **Investigators** section.



Enabled Grant Investigator Roles Available for Selecting in the Grant Details Page

For additional information, see [Working with Grant Information](#).

Configuration of Project Roles and Types

April 2024 Management

Customers can now manage their own lists of Project Participant Roles, Project Organization Roles, Date Types, and file and link Content Types. Existing values can be enabled or disabled, and their descriptions and translations can be modified. In addition, new values can be added to the Project Participant Roles, Project Organization Roles, and Date Types lists as required.

For additional information, see:

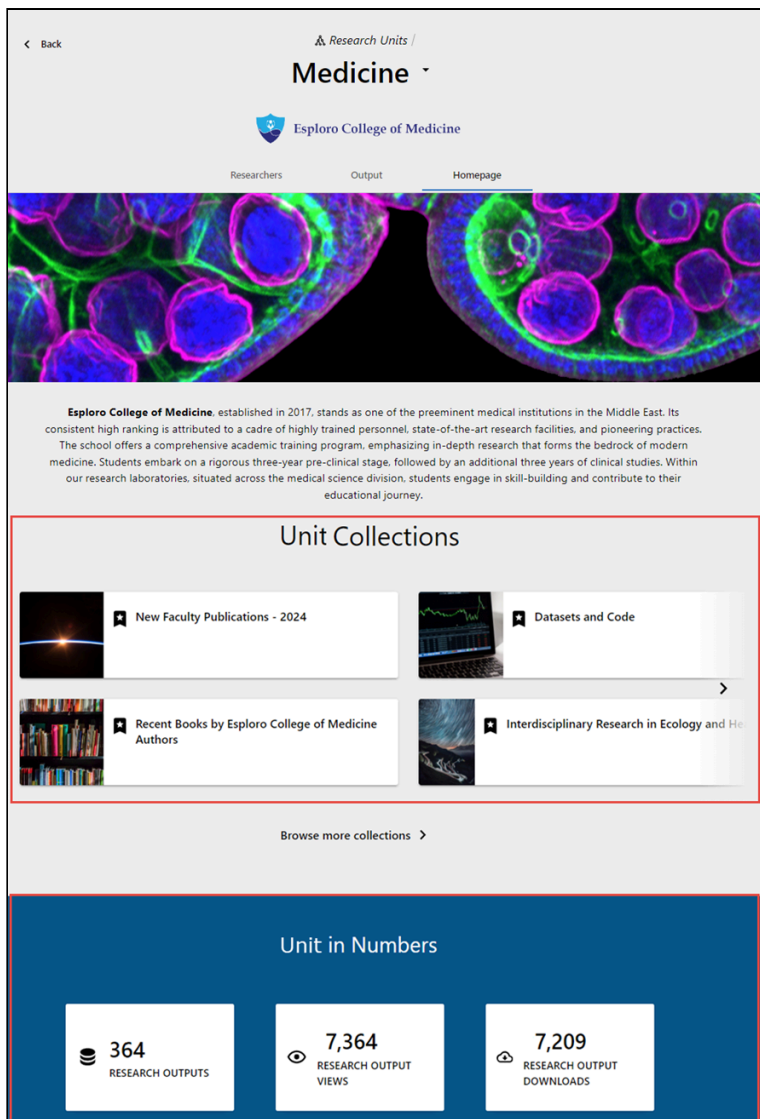
- **Participant Roles** – [Working with Projects: Member Researchers Section](#)
- **Organization Roles** – [Working with Projects: Member Organizations Section](#)
- **Date Types** – [Working with Projects: Dates Section](#)
- **File and Link Content Types** – [Working with Projects: Files Section](#), [Links Section](#)

Collections and Metrics in Organizational Unit Homepages

April 2024 Research Portal

We are continuing to expand the organizational-unit Homepage capabilities and two new sections are now available on the Organizational Unit's **Homepage** tab:

- **Unit Collections** – Links to collections that are associated with the unit
- **Unit in Numbers** – Unit metrics: outputs produced by researchers in the unit, and how many times they were viewed and downloaded



Unit's Collections and Department in Numbers Sections in the Unit's Homepage Tab

In order to enable the **Unit Collections** section to work, a new field, **Academic unit**, was added to the collection settings (**Admin > Collection Configuration**; see [Working with Collections](#)). This field makes it possible to associate collections with Organizational Units.

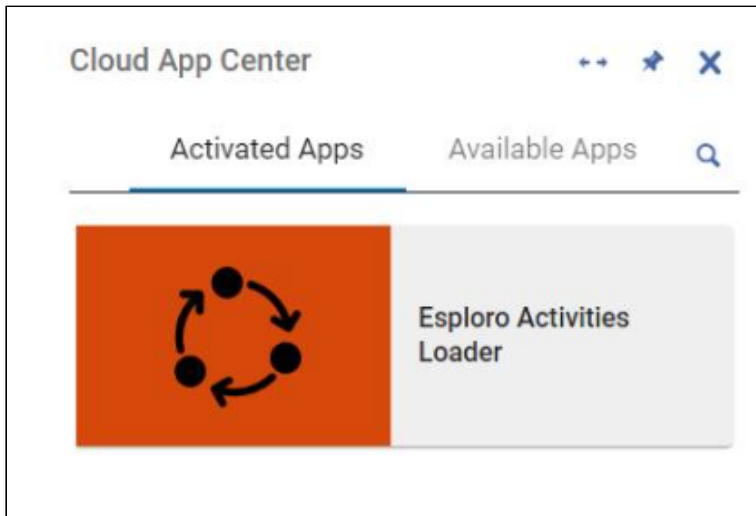
The **Unit in Numbers** section does not require any special configuration, but it does derive its metrics from Esploro's Analytics data, so this data must be available.

For additional information, see [Configuring the Research Portal](#).

Cloud App for Creating Researcher Activities From Research Output

April 2024 Management

A Cloud App, Esploro Activities Loader, which automates the process of creating a researcher activity from an existing research asset, is now available on the Developer Network. This efficiency tool allows the operator to work on a set of assets and copy fields from them to newly created researcher activities. The Esploro Activities Loader Cloud App is easy to configure and can be used to create different activity categories or types.



Esploro Activities Loader in the Cloud App Center Menu

To enable the Cloud App framework in your system, open a support ticket. For additional information about working with Cloud Apps, see [Configuring Cloud Apps](#) (in the Alma Knowledge Center).

Displaying Labels for Activity Additional Fields

April 2024 Analytics and Insights

It is now possible to display labels for the local Activity Additional fields in Esploro Researcher Activities > Activity Additional Fields in analytics reports. Similar to the other local fields in analytics, now, not only the text **Activity Additional Field** appears, but also the label assigned to the Activity Additional field. The Activity Additional field appears as a prefix before the label. This feature makes it easier for analytics designers to choose the correct field to include in analytics reports. Also, users who review reports and dashboards that include Activity Additional fields, can immediately understand the contents of the fields based on the label.

You configure the labels for Activity Additional fields from [Configuration > Researcher Administration > Activities > Activity Additional Fields](#).

SAML and CAS Now Available as Authentication Methods for Analytics Reports

April 2024 Analytics and Insights SF: 06718285 06718883 06793209

You can now configure Analytics to use SAML and CAS as authentication methods when accessing the report URL from analytics objects. To configure SAML or CAS as the authentication method, set the `analytics_auth_method` parameter located in the new Analytics configuration area ([Configuration > Analytics > General Configuration > Analytics Deep Link](#)) to SAML or CAS.

Open-Access Status Field Added to Asset Records

March 2024 Data

A new field, **Open Access Status**, has been created in the records of certain types of assets. The possible statuses are **Green**, **Hybrid**, **Gold**, **Bronze**, and **Closed**. The new field augments the information in the **Open access article (published version)?** field, which is a flag indicating whether an asset is open-access from its publisher. (The value of this latter field would be **Yes** when the **Open Access Status** is **Hybrid**, **Gold**, or **Bronze**.)

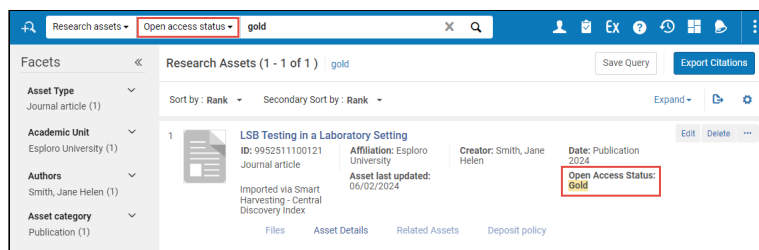
For asset records that include an **Article Information** section (journal articles, reviews, conference proceedings, and generic assets), the new field is in that section (see [Adding Staff-Mediated Research Deposits for Journal Articles](#)). For books and book chapters, the new field is in the **Additional Information** section (see [Adding Staff-Mediated Research Deposits for Books](#)).



New Open Access Status Field

The **Open Access Status** field is filled in automatically when Esploro retrieves information about an asset from Unpaywall by means of the OpenAlex API. This API is invoked when an asset with a DOI is imported into Esploro via Smart Harvesting, Smart Expansion via CSV, or auto-population when the asset is added manually to the database. It may also be invoked for other Smart Expansion and import profiles, as well as SWORD imports, depending on the system settings. When this API is invoked, the value of the **Open access article (published version)?** field is also set automatically, and Esploro also attempts to retrieve Creative Commons license information from OpenAlex along with the open-access information.

The value of the **Open Access Status** field is displayed in asset records in the Hub, and is available as a search index in both the simple and advanced asset search.



Search Results for Assets with Gold Open Access Status, with Open Access Status Shown in the Record

For assets whose **Open Access Status** is **Hybrid**, **Gold**, **Bronze**, a link to the asset is added to the asset metadata. For assets whose status is **Green**, a link may or may not be added, depending on the value of the **esploro_create_link_for_green_oa** parameter. By default, this parameter is set to false, and a link is not added. If the parameter is set to true, a link is added. The value of this parameter can be set in the **Customer Parameters** table (**Configuration menu > General > Institution Settings > Institution Settings**; see [Configuring Institution Settings](#)).

Note

- Esploro does not monitor Unpaywall for changes to the open-access statuses of assets after Smart Harvesting is completed, so these values are not automatically updated if changes are made there.
- Esploro does not invoke the OpenAlex API when the **Open Access Status** is manually changed in Esploro after an asset has been imported. Thus, links to assets are not added to, or removed from, the metadata of the asset when the value of this field is modified.

New Approval Buttons in Author-Matching Task List

March 2024 Smart Harvesting

In the Author-Matching task list, the label on the **Approve** button now specifies what is being approved:

- **Approve Match** – Approves the researcher-author match, but not the asset
- **Approve Match & Asset** – Approves both the researcher-author match and the asset
- **Approve Asset** – Approves the asset, but not the researcher-author match

The screenshot displays the 'Author Matching Approval Task List (1 - 20 of 174)'. It features a search bar with 'Select All' and a status filter set to 'Pending Approval'. Two task entries are visible:

- Task 1:** 'Identification of a short, single site matriglycan that maintains neuromuscular function in the mouse'. The approval button is labeled 'Approve Match & Asset'. Metadata includes: Researcher name: Campbell, Kevin P; Provisional asset ID: 9984543460102771; Status: Pending Approval; Rank: Matched on ID; Author name: Kevin P Campbell; Job ID: 37100703390002771; Job date: 16/01/2024.
- Task 2:** 'Clinical Challenges with Talimogene Laherparepvec: Cured Lymph Nodes Masquerading as Active Melanoma'. The approval button is labeled 'Approve Match'. Metadata includes: Researcher name: Swick, Brian L; Asset ID: 9984548381102771; Status: Pending Approval; Rank: Matched on ID; Author name: Brian Swick; Author affiliation: University of Iowa Hospitals and Clinics; Job ID: 37214562910002771; Job date: 24/01/2024.

Different Types of Approve Buttons

Which buttons appear for a given task depends on the settings in the Smart Harvesting Profile (**Repository > Smart Harvesting > Manage Profiles**; see [Working with Smart Harvesting](#)) as well as the current statuses of the asset and of the match in the database. Note that the **Edit Asset** button has also been moved after the approval buttons.

Smart Harvesting Profile

ASSET APPROVAL

Asset Approval Never automatically approve the asset ?

Always approve the asset when first author match is approved

Conditionally approve the asset when the first author match is approved

AUTHOR MATCHING APPROVAL CONFIGURATION

Matched on ID Automatic Administrator Selected Researchers ?

Very Strong Automatic Administrator Selected Researchers ?

Strong Automatic Administrator Selected Researchers ?

Uncertain Automatic Administrator Selected Researchers ?

Suppress automatic approval for asset types

Smart Harvesting Profile Settings that Affect which Approval Buttons Appear for Each Task

For additional information, see [Author Matching Approval Task List](#).

Manually Added Sustainable Development Goals (SDGs) Now Displayed in the Portal

March 2024 Data

Sustainable Development Goals (SDGs) that are manually added to asset records are now displayed in the full asset page in the Portal.



SDGs Displayed in an Asset Page in the Portal

SDGs can be added by the admin to a deposit or an asset in the **Sustainability Goals** field, which appears in the **Description and Research Topics** section of the record. In this field, you can select one or more of the 17 SDGs that are currently defined by the UN.

Description and Research Topics

Abstract have three properties, drawing upon theories from the field of environmental education, to clarify the objectives of Ecological Civilization Education, perspectives on program design, and learning outcomes. ?

Research topics Look-up or select

Ecology Education

Additional subjects

Sustainability Goals

04 Quality education 15 Life on Land 06 Clean water & sanitation

11 Sustainable cities & communities

Sustainability Goals Field with Some SDGs Selected

In the Portal display, SDG information that is added manually is given preference over imported data from InCites (see [Configuring the Research Portal](#)). That is, if any manually added information exists, it is displayed in the Portal. If no manually added information exists, but InCites data does exist, the InCites data is displayed in the Portal. In the latter case, a note, **Source: InCites** appears below the data.

Manually added SDG information is also now incorporated in analytics reports (see [Additional Enhancements](#), below).

Translation of Collection Names and Descriptions

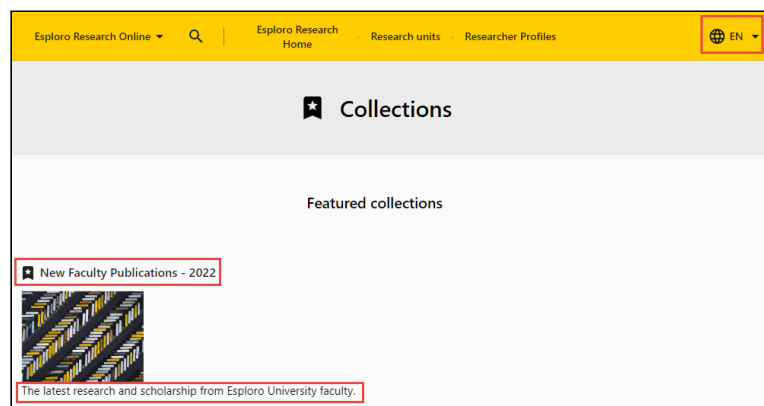
March 2024 Research Portal

For multilingual Portal interfaces, it is now possible to configure collection names and descriptions for each activated interface language. This can be done, once the collection is saved, in the **Research Collection Labels** table (**Configuration menu > Portal & Profiles > General settings > Labels**). Use the **Filter** to select the language whose labels you want to translate, and then modify the text in the **Translation** column (see [The Research Hub Interface](#)) for that language.

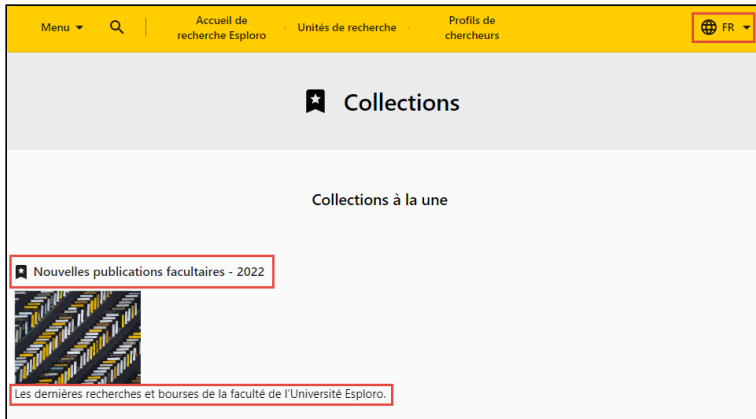
Tip: To find the labels for a particular collection, in the **Search** field, select **Code**, and then search for the name of the collection (e.g., "New" in the illustration below).

Enabled	Code	Description	Translation	Default Value	Updated By	Last Updated
<input checked="" type="checkbox"/>	research.collection.New.desc	The latest research and scho	Les dernières recherches et t	<input type="radio"/>	ext_j...	15/02/2024
<input checked="" type="checkbox"/>	research.collection.New.name	New Faculty Publications - 2022	Nouvelles publications facult	<input type="radio"/>	ext_j...	15/02/2024

Configuring the Translations of Collection Titles and Descriptions



Collection Labels in English



Collection Labels in French

For additional information about managing collections, see [Working with Collections](#).

Bulk Update of Grants

March 2024 Management

It is now possible to update information about existing grants by means of bulk imports of grant data.


The bulk-import job can be configured and run from the *Import research grants* page (**Research Management > Grants > Import Research Grants**). During the process, the system checks whether each grant being imported is already in the Esporo database. An imported grant with the same Grant ID and Funder Code as an existing grant is considered to be a match to the existing grant.

To configure the bulk-import job to update existing grants with new information found in the import source-file, in the job settings, under **Upon match**, select **Overlay**. When this option is selected, existing information about a grant is overwritten by imported information of matching grants. Existing links between the grants and other entities in the system, such as assets and projects, remain unchanged.

Import research grants

Upon match Do not import **Overlay**

Import source: FTP File

Upload file 

Overlay Option in Bulk Import Settings

For additional information, see [Configuring Bulk Imports and Mapping of Assets in Esporo](#).

Displaying Labels for Researcher Engagement Fields

March 2024 Analytics and Insights

It is now possible to display labels for the local Researcher Engagement fields in Esploro Researchers > Researcher Engagement Fields in analytics reports. Similar to the other local fields in analytics, now, not only the text **Researcher Engagement Field** appears, but also the label assigned to the Researcher Engagement field. The Researcher Engagement field appears as a prefix before the label. This feature makes it easier for analytics designers to choose the correct field to include in analytics reports. Also, users who review reports and dashboards that include Researcher Engagement fields, can immediately understand the contents of the fields based on the label.

You configure the labels for Researcher Engagement fields from [Configuration > Researchers > Researchers > Researcher Engagement Types](#). For more information, see [Configuring Researcher Engagement Types](#).

Usage per Organization Unit (API) Report

March 2024 Analytics and Insights

The new new **Usage per Organization Unit (API)** out-of-the-box report is now available. It displays the following information, per Organizational Unit:

- Unit's total approved assets – the number of all assets where the unit appears and the asset is approved
- Unit's total record views – the number of times the record was viewed
- Unit's total file views/downloads – the number of times the file was viewed or downloaded
- Total open access – the number of all assets where the unit appears and the asset is approved and has open access
- % open access – the percentage of the total approved assets from the total number of open access assets
- Total peer reviewed – the number of peer reviewed assets
- % peer reviewed – the percentage of the number of peer reviewed assets from the total number of open access assets
- Total Times Cited – the sum of the times an asset of the unit was cited

Researcher Notes in the Researcher Record

February 2024 Researcher Profiles



Idea Exchange

It is now possible to add researcher notes to researcher records. This makes it possible, for example, to add a note that a researcher has a Doppelganger with the same name and the same research domain at another institution.

Researcher notes can be viewed and edited in a new tab, the **Researcher Notes** tab, in the Researcher Details page ([Researchers > Researchers > Manage Researchers > \[select researcher\]](#)).

Note	Type	Created By	Created Date	
1 Not to be confused with Michael M. Jones.	Smart Harvesting Framework	Staff, Ex Libris	01/03/2024	...

Researcher Notes Tab

Each researcher note must be assigned a type. Four researcher-note types are defined by default: *General Note*, *Smart Harvesting Framework*, *Assessment Notes*, and *Other*. All of the researcher-note types are managed in the **Researcher**

Notes tab of the researcher record. Smart Harvesting Framework notes can also be viewed and edited in the Author Matching Approval Task List (see [Author Matching Approval Task List](#)) when an asset is tentatively linked to a researcher whose record includes researcher notes.



The screenshot shows a task card for the asset "Rare deleterious mutations of HNRNP genes result in shared neurodevelopmental disorders". The card is divided into two tabs: "Asset Details" and "Researcher Notes". The "Asset Details" tab is active, showing the following information:

Researcher name: Jones, Michael B	Provisional asset ID: 9984530558702771	Status: Pending Approval
Name variants: Jones Michael	Journal article	Rank: Uncertain
Affiliations: Otolaryngology	Author name: M. Jones	Additional approval tasks exist
	Publication details: Genome medicine	Job ID: 36586705330002771
	Date: Publication 19/04/2021	Job date: 20/12/2023
	DOI: https://doi.org/10.1186/s13073-021-00870-6	

At the bottom of the card, there is a note: "Notes Not to be confused with Michael M. Jones."

Smart Harvesting Framework Note Displayed in the Author Matching Approval Task List

To manage Smart Harvesting Framework notes from a task in the Author Matching Approval Task List, in the task's **More actions** menu, select **Manage Researcher Notes**.



The screenshot shows the same task card as above, but with the "More actions" menu open. The menu options are:

- Delete asset and reject all matches
- Replace researcher
- Change asset type
- Manage Researcher Notes** (highlighted with a red box)
- Open author matching utility

Manage Researcher Notes Menu Option in Author Matching Approval Task List

Researcher-note types can be added and managed in the Researcher Note Types code table ([Configuration Menu > Researchers > Researchers > Researcher Note Types](#)).

For additional information, see [Working with Researchers](#).

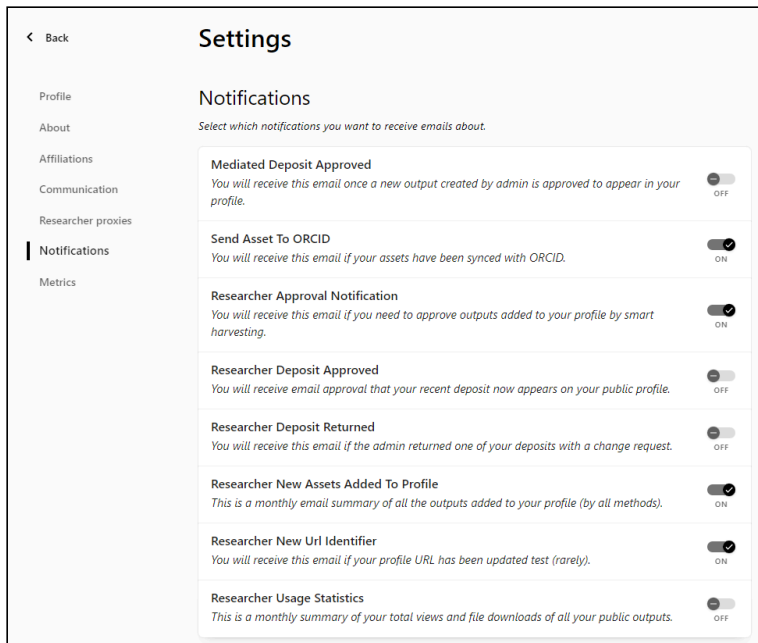
Researcher Notification-Letter Controls

February 2024 Researcher Profiles



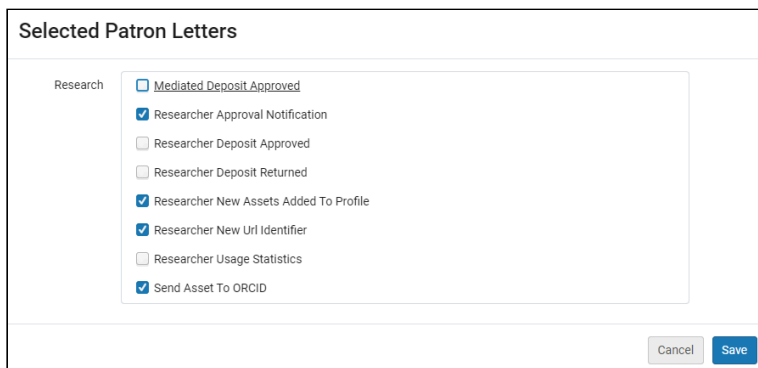
Idea Exchange

Researchers can now directly control which notification letters they want to receive. For this purpose, a new section has been added in the Portal, in the Settings page of the private Profile.



Notifications Section of the Profile Settings Page in the Portal

Changes to notification settings that are made through this option in the Portal are automatically updated in the researcher settings in the Hub, and vice versa. In the Hub, these settings can be seen in the Researcher Details page ([Researchers > Researchers > Manage Researchers > \[select researcher\]](#)), in the **Researcher Profile** tab, under **Researcher Details**, by selecting **Researcher Notifications**.



Notification Settings in the Researcher Details Page in the Hub

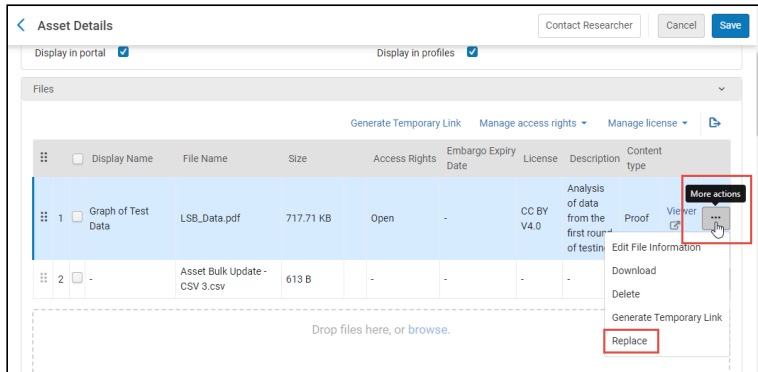
For additional information, see [Managing Researcher Profiles](#).

Asset-File Replacement Without Changing Metadata

February 2024 Management

It is now possible to replace an asset file without changing the file's metadata or link address. This is useful if you want to replace a file, but you want existing links in indexes (such as Google Scholar) and other locations, to continue to work. Deleting a file and adding a new one in its place would cause the file ID to change, which would cause existing links to fail.

To replace an asset file, in the Asset Details page, in the **Files** section, in the **More actions** menu, select **Replace**. The replacement file must be of the same type as the original file. In order to preserve the link, the file name will not be changed in Esporo; the name of the original file will be retained, even if the replacement file has a different name.



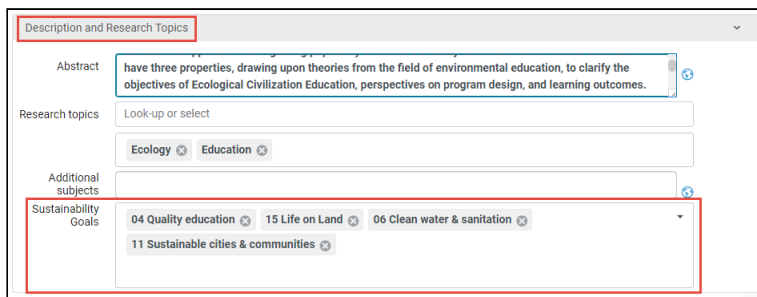
Replacing an Asset File

For additional information, see [Working with Research Assets](#).

New Sustainability Goals Field for Assets

February 2024 Data

It is now possible to manually add UN Sustainable Development Goals (SDGs) to deposit and asset records. The new **Sustainability Goals** field appears in the **Description and Research Topics** section of the record. In it, you can select one or more of the 17 SDGs that are currently defined by the UN.



Sustainability Goals Field with Some SDGs Selected

The new **Sustainability Goals** field augments the existing support for SDG information, which enables subscribers of InCites to automatically import SDG data to Esploro assets (see [Configuring the Research Portal](#)). Manual entry is available to all customers, and SDG information that is added manually is given preference over imported data from InCites.

Manually added SDG information is included in the CSV loader. At present, it cannot be displayed in the Portal, and is not incorporated in analytics reports, but this functionality is expected to be added to Esploro in the next release. When it is, manually added SDG information will be given preference over InCites data in the Portal display.

CSV lists of assets with manually-added SDG data can be exported and imported (see [Working with Research Assets](#)).

Run a Job - Enter Task Parameters

Asset Descriptions

- Abstract (ASSET_ABSTRACT)
- Additional subjects (ASSET_KEYWORDS)
- Audience (ASSET_AUDIENCE)
- Comment (ASSET_COMMENT)
- Format (ASSET_FORMAT)
- Methods (ASSET_METHODS)
- Research topics (ASSET_SUBJECT)
- Series information (ASSET_SERIESINFO)
- Size (ASSET_SIZE)
- Spatial description (ASSET_SPATIALDESC)
- Sustainability Goals (ASSET_SDG)**
- Technical information (ASSET_TECHINFO)
- Temporal description (ASSET_TEMPORALDESC)
- Other description (ASSET_OTHERDESC)

Asset Details

- Edition (ASSET_EDITION)
- Language (ASSET_LANG)
- Number of unpaginated pages (ASSET_PAGESUNPAGINATED)
- Open Access (ASSET_OPENACCESS)
- Pages (ASSET_PAGES)
- Peer reviewed (ASSET_PEEEREVIEW)
- Publication place (ASSET_PUBLICATIONPLACE)
- Publisher (ASSET_PUBLISHER)
- Series (ASSET_SERIES)
- Series number (ASSET_SERIESNUMBER)
- Volume number (ASSET_VOLNUM)

Rights and Licenses

- All Rights and Licenses Fields

SDGs as an Option for a Selective Export of Assets

Advanced searches for assets can also use manually added SDG data in search conditions. (For information about advanced searching, see [Searching in the Esploro Research Hub](#).)

Research assets

Search in: Research assets

Sustainability Goals Equals 01 No poverty

Clear form Search

Advanced Search for Assets by SDG Values

Pop-Up Notifications when Manual Jobs Finish

February 2024 Management

Real-time notification pop-ups are now provided when a manually-run job is completed. These notifications appear regardless of which page in the Esploro Hub UI is currently open. This means it is no longer necessary keep the Monitor Jobs page open, and refresh it manually, in order to see when a manual job completes.

Monitor Jobs

Scheduled SP Scheduled Running History

1 - 1 of 1

Job Category: All

Name	Job Category	Creator	Submit Date	Start Date	Progress	Status	Records processed	Records with exceptions
Update/Notify Users - BT-userset - 14/01/2024 05:40:08 PM IST	Users	ex_lmpl	14/01/2024 05:40:16 PM IST	14/01/2024 05:40:16 PM IST	100.0%	Finalizing	14	0

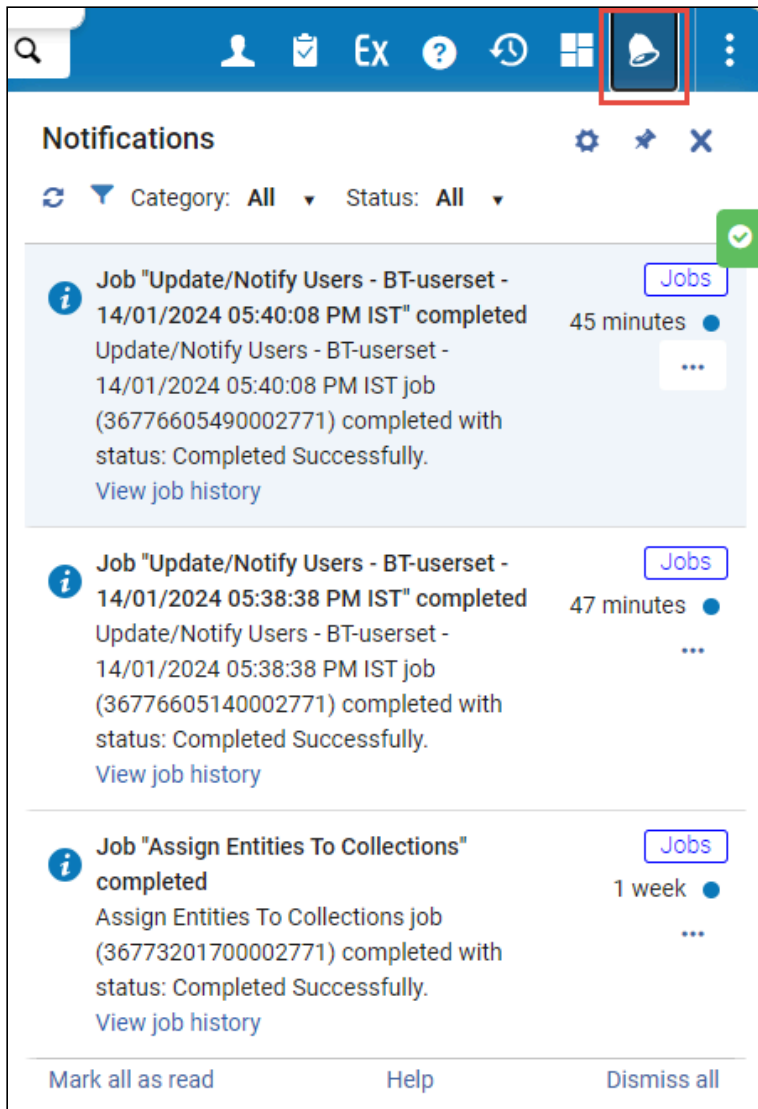
Job "Update/Notify Users - BT-userset - 14/01/2024 05:40:08 PM IST" completed. View job history

Pop-Up Notification of Job Completion

Past notifications of completed jobs can also be viewed in the **Notifications** panel. To open this panel, select the bell icon (



).

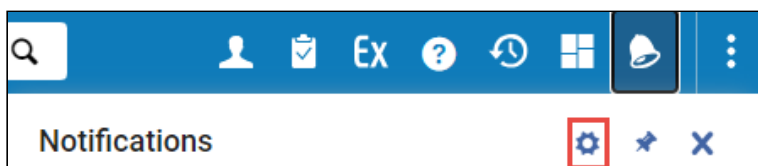


Notifications Panel Open

Users can opt out of these pop-up notifications in the **Notifications** panel's settings. To do so, when the panel is open, select the **Settings** icon (

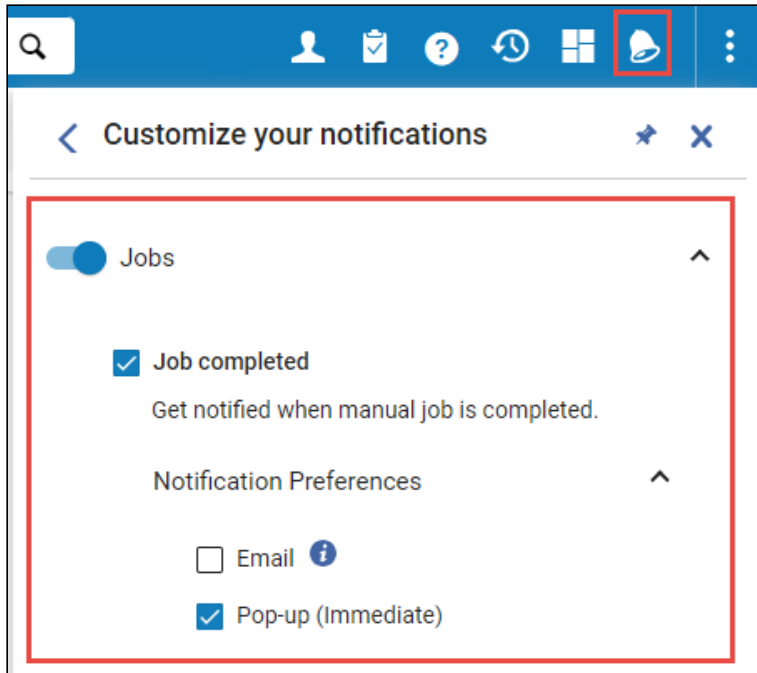


).



Notifications Settings Icon

Then, under **Customize your notifications**, expand **Jobs** and **Notification Preferences**, and clear the **Pop-up (immediate)** checkbox.



Customizing Job Notification Settings

For additional information, see [The Research Hub Interface](#).

Importing of Alma Records via Smart Expansion

January 2024 Smart Harvesting

Smart Expansion via Alma, a form of Smart Expansion in which Alma MARC bibliographic records are copied in bulk into Esploro, is now available. This feature streamlines the process of creating assets in Esploro when their bibliographic records are already included in the Alma repository, and are therefore known to belong to particular researchers. In addition, when Alma has digital copies of these assets, they can also be copied to Esploro as part of the Smart Expansion process. Note that once the bibliographic records are copied from Alma to Esploro, the Alma and Esploro records are managed separately, so changes made in one system have no impact on the records in the other system.

For additional information, see [Smart Expansion via Alma](#).

Display of Researcher Metrics in their Profiles

January 2024 Researcher Profiles

Researcher metrics providing aggregate usage and impact data about all of a researcher's output – the total number of times the researcher's works have been cited, viewed, and/or downloaded – can now be included in researcher Profiles. When enabled, this information appears under **Metrics** in the researcher's Profile.

Researcher Metrics Displayed in their Profile

Each of these metrics must be enabled by the institution, which can choose whether they are enabled for public viewing, only for logged-in users, or only for individual researchers when they are logged into their private Profiles; see [Configuring Researcher Profiles](#). If public display of researcher metrics is enabled in the organization, researchers can choose whether to include each one in their public Profiles or hide them; see [Managing Researcher Profiles](#).

The **Total file downloads** and **Total output views** metrics are from Esploro's records. The **Total times cited** metric is based on Web of Science data and analysis.

Customizable Facets

January 2024 Management

The facet display in the Projects (**Research Management > Manage Projects**) and Activities (**Research Management > Manage Activities**) pages of the Hub can now be customized. The order in which the facets appear can be changed, and individual facets can be hidden from the **Facets** panel. The organization can set default settings for all users, and individual users can modify those defaults as desired.

Facet customization for a page is performed in the **Facets Customization** window, which can be opened from the Projects or Activities pages by selecting the **Customize** button (



– or



if any of the settings are already customized). For additional information, see [Hiding and Reordering Information for Research Management](#).


< Facets Customization Apply X

Choose the Order of Record Facets

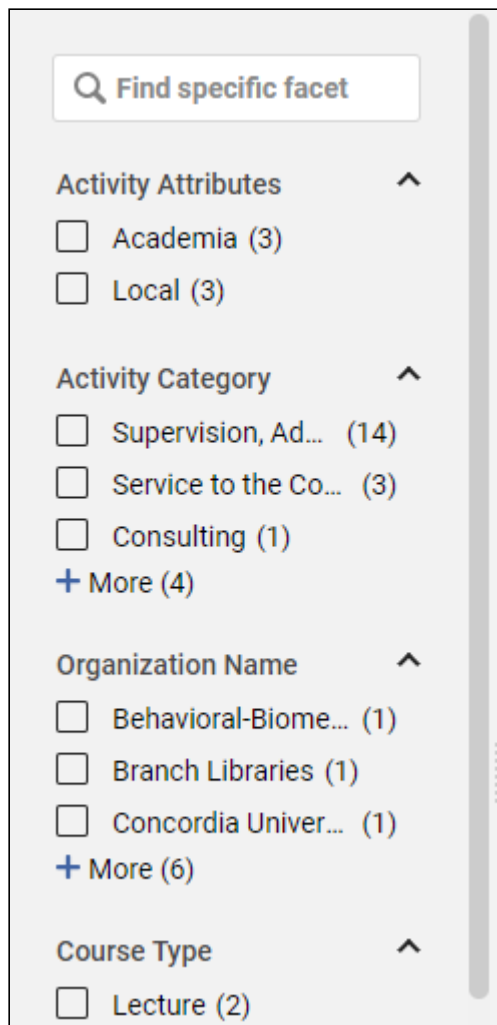
- ☰ 1 Activity Attributes
- ☰ 2 Activity Category
- ☰ 3 Organization Name
- ☰ 4 Course Type
- ☰ 5 Degree Awarded
- ☰ 6 Researcher Affiliation
- ☰ 7 Researcher
- ☰ 8 Activity Type

Hide Facets

- ☰ 1 End Year
- ☰ 2 Start Year

 [Reset to default](#)

Facet Customization Window of the Activities Page



Customized Facets in the Activities Page

Additional Enhancements

- **December 2024 Research Portal**

Updated December 2, 2024

Usage statistics that are displayed in organizational-unit homepages now include data for the unit and all of its subunits. In addition, the performance of this feature has been improved, so that the data loads more quickly. For information about configuring organizational unit homepages, including choosing whether to display usage statistics in them, see [Configuring the Research Portal](#).

- **December 2024 Management**

The OpenAlex Open Access publication status "Diamond" is now supported in Esploro. This status indicates the publication appears in a journal that does not charge authors or institutions for publishing or readers for access. That is, the journal is free for both authors and readers. For additional information, see [Adding Staff-Mediated Research Deposits for Journal Articles](#). See also [OpenAlex Support on this topic](#).

- **December 2024 Management**

When a user is on an asset page and then signs into SAML, they are now returned to the page they were on before the login.

- **December 2024 Researcher Profiles**

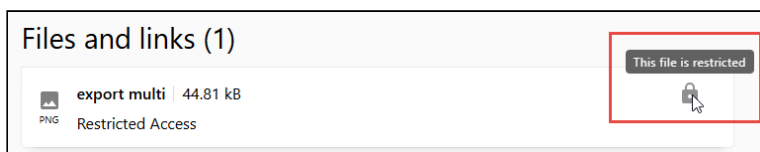
The **Sign in** link in the Portal, which allows researchers to log into their Profiles, has been replaced by a **Sign in** button in order to make it more visible.



New Sign In Button

- **December 2024 Research Portal**

A tooltip now appears on the Restricted icon of restricted asset files when an end user hovers over it. By default, the tooltip says, "This file is restricted." The text can be configured at [Configuration menu > Portal & Profiles > General settings > Labels > Research Portal Full Asset Page](#) under `research.portal.fulldisplay.file.access.restricted`. For additional information about managing these labels, see [General Settings for the Research Portal and Profiles](#).



"Restricted" Icon and Tooltip

- **December 2024 Analytics and Insights**

The field names in the table below were renamed to be more consistent and so the labels align with what is expected in sets management. They are located in the following locations:

- Esploro Researchers > Researcher ORCID Profile
- Esploro Researchers > Researcher Identifiers
- Esploro Researchers > Author Identifiers
- Esploro Research Grants > Investigator Identifiers
- Esploro Smart Harvesting > Researcher Details > Researcher Identifiers

Previous Name	New Name
Scopus ID	Scopus
arXiv ID	arXiv
eRA ID	eRA
Pivot ID	Pivot
Pubmed ID	Pubmed
Wikidata ID	Wikidata

- **November 2024 Management**

You can now delete all the affiliations of selected asset authors in a single command. This option is available in the Manage Creators and Manage Contributors pages (which can be opened from the Asset Details page). For additional information, see [Working with Research Assets](#).

- **November 2024 Research Portal**

Four new facets have been added to the Asset Search Results page in the Portal: **Degree Granted/Awarded**, **Degree In**, **Project Type**, and **Resource Subtype**. The first three facets limit search results to ETDs with certain properties. The **Resource Subtype** facet is for an optional field that can be employed for some or all assets. For additional information about these facets, see [Configuring the Research Portal](#).

The image shows a sidebar titled "Refine the results" with four expandable facets. Each facet has a title with an upward arrow and a list of options with checkboxes and counts.

- Project Type** ^
 - Dissertation 3
 - Essay 2
- Degree Awarded** ^
 - Doctor of Philosophy (PhD) 4
 - Doctor of Arts (DA) 2
 - Bachelor of Arts (BA) 1
 - Bachelor of Science (BS) 1
 - Master of Education (MSEd) 1
- Degree In** ^
 - Education 2
 - Philosophy 1
- Resource Subtype** v

- **November 2024 Smart Harvesting**
Smart Expansion and auto-population (for mediated and researcher deposits) searches CDI based on the title and researcher name if there is no DOI or PMID. Until now, only the preferred researcher name was used in these searches. The system now also makes use of variant names.
- **November 2024 Analytics and Insights**
Esploro analytics now supports 4 additional fields for the countries of the author affiliations of an asset. These new fields, **Author Affiliation (in Asset) #2-5 Country**, display the country of the corresponding **Author Affiliation (in Asset) #2-5** fields. This development completes the support for multiple author affiliations in the Asset Creators and Contributors dimension located in the Esploro Research Assets, Esploro Researchers, and Esploro Smart Harvesting subject areas.
- **November 2024 Analytics and Insights**
The **Course Type** field was added to Esploro Researcher Activities > Activity Courses. It displays the type of course, as configured in the course information for researcher activities. For more information, see [Course Information](#).
- **September 2024 Management**
An Additional Identifiers section has been added to the Hub's ETD deposit form. For additional information, see [Working with ETDs \(Electronic Theses and Dissertations\)](#).

- **September 2024 Research Portal**

Individual facets have been added for all Teaching and Learning resource types, replacing the general **Teaching and Learning** facet. The following are the new facets:

- Assignment
- Workbook
- Flashcards
- Lecture
- Outline
- Course module
- Study guide
- Syllabus
- Activity
- Case study
- Manual
- Question bank
- Textbook
- Tutorial
- Demonstration
- Other

- **August 2024 Management**

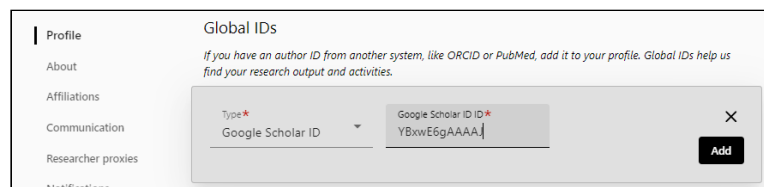
Organizational units that have no associations to other entities in the system can now be deleted. Associations that prevent an Organizational Unit from being deleted are: assets, media mentions, projects, grants, activities, research resources, researchers, or sub-units. For additional information, see [Working with Organizational Units](#).

- **August 2024 Research Portal**

The *Regular update of asset counts for use by the system* job now runs on a daily basis. For additional information, see [Configuring the Research Portal](#).

- **August 2024 Researcher Profiles**

Researchers can now add and display their Google Scholar IDs as Global IDs in their private Profiles. For additional information about managing global IDs, see [Working with User Identifiers](#); [Managing Researcher Profiles](#).



- **August 2024 Smart Harvesting**

When an operator modifies the metadata of an asset by manually replacing a researcher whose status is “Added by system” with an alternative researcher that already exists in the system and is linked to an author in the asset record, the researcher that was “Added by the system” is deleted. This is aligned with how the same scenario is handled by the Bulk Merge Duplicate Researcher job (as of the July 2024 release; see [below](#)) and by manual merging in the list of researchers. See also, [Author Matching Approval Task List](#).

- **August 2024 Smart Harvesting**

The Author Matching report, which is used for bulk approval or rejection of assets that were captured by Smart

Harvesting, can now be generated from the Author Matching task list. When it is, the filters that were applied in the task list are applied to the report as well, allowing you to narrow down the list of tasks included in the report. For additional information, see [Reports and Notifications for the Smart Harvesting Framework](#); [Author Matching Approval Task List](#).

- **August 2024 Management**

Esploro development has moved up to version 18 of Angular.

- **July 2024 Data**

A new job, **Fix author internal affiliation in asset**, is now available. This job enhances Creator and Contributor metadata of research output by replacing internal affiliations that are free-text with links to existing internal Organizational Unit Codes whenever possible. A link to an Organization Unit Code is preferred for analytics and for publishing data. For additional information, see [Running Manual Jobs on Defined Sets](#).

- **July 2024 Smart Harvesting**

The **Bulk Merge Duplicate Researcher** job now handles the scenario in which a duplicate researcher was added to the database as an "Added by System" researcher. This can happen when the Smart Harvesting is unable to match the researcher to any of the existing authors in the database. In this situation, if you use the **Bulk Merge Duplicate Researcher** job to merge a non-affiliated researcher with the researcher that was "Added by System," the merge is performed, and the researcher that was "Added by System" is deleted. For additional information about the **Bulk Merge Duplicate Researcher** job, see [Reports and Notifications for the Smart Harvesting Framework](#).

- **July 2024 Smart Harvesting**

The July release includes modifications to the way that author affiliations are used in author matching. As a result of the adjustments, handling of publications with older publication dates during retrospective Smart Harvesting, and author-matching for authors with the same names and domains but different affiliations, has been improved. The algorithm gives special attention to authors with an affiliation in China. Due to frequency with which researchers with identical Chinese names are found and the very large number of Chinese researchers, a match between an author with an affiliation in China and a researcher with the same name and domain that has no current or previous affiliations in China will be rejected. For additional information about the Smart Harvesting algorithm, see [Author Matching Algorithm](#).

- **July 2024 Researcher Profiles**

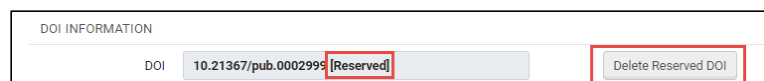
Researchers can now add related assets to their activities from their Profiles. For additional information about how researchers can add and configure activities in their Profiles, see [Adding Activities to a Profile](#).

- **July 2024 Data**

Improvements have been made in the way that Esploro and Primo VE interact, preventing duplicates in Primo search results that in the past appeared when Esploro and Alma records were not matched when they should have been. Matching is now based on the following fields: ISBN, Title, Date, Creators, and researchers' organizational IDs. This change requires a re-indexing of Esploro records, which will take place in customers' systems when the July production release is installed on their servers. No actions on the customers' parts is required.

- **July 2024 Management**

Admins can now delete DOIs that were reserved within Esploro but were not yet registered with a registration agency. When this is possible, [Reserved] appears in the **DOI** field, and a **Delete Reserved DOI** button appears beside it, in the Asset Details page. For additional information about DOI registration through Esploro, see [Esploro Glossary of Terms and Basic Concepts](#).



Delete Reserved DOI Button

- **July 2024 Researcher Profiles**



Idea Exchange

A new API, Get Researcher Profile, has been added to the Esploro Researchers API: Get Researcher Profile. This API retrieves the complete Profile of a single researcher. For additional information, see [Esploro Researchers](#) in the Developer Network.

- **July 2024 Analytics and Insights**

Esploro now supports configuring 5 author affiliations for an asset. To support reporting on these affiliations, 4 additional author affiliation fields were added to the Asset Creators and Contributors dimension located in the Esploro Research Assets, Esploro Researchers, and Esploro Smart Harvesting subject areas.

- **June 2024 Researcher Profiles**

Researchers can now link a grant to their projects from their private Profiles. For additional information, see [Adding Projects to a Profile](#).

- **June 2024 Management**

A new job, **Delete records from ORCID**, is now available. This job deletes all of the records that Esploro added to ORCID for specified researchers. For additional information, see [Running Manual Jobs on Defined Sets](#).

- **June 2024 Researcher Profiles**

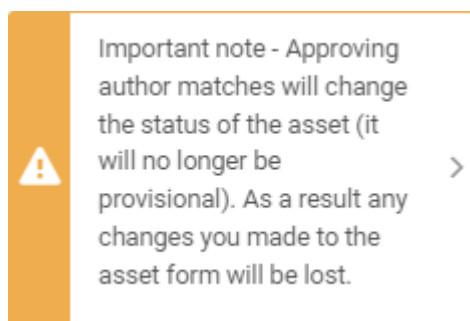
When a researcher makes an asset deposit from their Profile, and chooses to use auto-population to fill in the fields for which Esploro can acquire information, the researcher's affiliation and the asset's DOI and open-access status, are auto-populated when available. For information about the researcher asset-deposit process, see [Adding Output to a Profile](#).

- **June 2024 Researcher Profiles**

Researchers can now add new institutions to the database on the fly when they add honors from those institutions to their Profiles (in the researcher's Profile settings, **About > Honors**).

- **June 2024 Management**

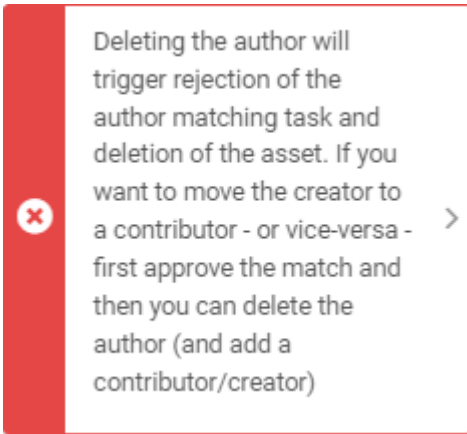
A warning message is now displayed when an admin working in an approval task list selects the **Manage creators** option. The message explains that changes that were made to the asset information and not yet saved will be lost if an author match is approved Manage Asset Creators page. This is because approving a match automatically changes the asset from provisional to approved, which causes the asset page to reload.



Warning Message

- **June 2024 Management**

The system now prevents the deletion of an author from a provisional asset (by editing the asset and deleting the author from the **Creators** list) if that author is the only one linked to an author-matching task for the asset. Deleting such an author would otherwise delete the task, which would effectively delete the asset from the system. If an admin attempts to delete a lone author from a provisional asset, the action is blocked, and an error message appears:



Error Message

- **June 2024 Data**

A Grants endpoint has been added to the Esploro section of the Developers Network. There are two actions available, GET Grant and PUT Grant. In addition to adding the grant, PUT adds relations between the grant and affiliated and non-affiliated researchers, and between the grant and the grant funders. For additional information, see [Esploro Grants](#) in the Developer Network.

- **May 2024 Research Portal**

When the system is configured such that the default page for Organizational Units is their homepage, if a particular Organizational Unit does not have a homepage, the Outputs page is automatically opened instead. The process of opening the Outputs in this case has been improved, so that it now opens seamlessly and more quickly. For additional information about configuring organizational-unit display, see [Configuring the Research Portal](#).

- **May 2024 Data**

When assets or grants are moved from one researcher to another, if the original researcher's account had an ORCID token associated with it, the token is now automatically moved as well. ORCID tokens are used for authenticating and gaining access to the researcher's ORCID profile. For additional information, see [Working with Researchers](#)

- **May 2024 Data**

Documentation of the Post API for creating Organizational Units, and the Organizational Unit schema, have been added to the Developer Network. For additional information, see [Esploro API Docs: Create organization](#) in the Developer Network.

- **May 2024 Analytics and Insights**

The **Open Access Status** field was added to Esploro Research Assets > Asset Details. It displays the open-access status of the publication. Possible values are:

- Green
- Hybrid
- Gold
- Bronze
- Closed
- Unknown

For more information, see [Article Information Section](#).

- **May 2024 Analytics and Insights**

The **Esploro Research Projects Active by Year** out-of-the-box report is now available ([Catalog > Shared Folders > Esploro > Reports > Research Projects](#)). It prompts you to enter a project year and displays the projects active during that year.

Note that there must be data in the Start Year and End Year fields for the report to run successfully.

- **May 2024 Analytics and Insights**

In the Analytics Object List, the **Pin to Analytics Menu** button was made more accessible in split-view. Clicking this button adds a direct link to the selected analysis object from the Analytics Menu.

- **April 2024 Research Portal**

The Esploro Portal now complies with the current Voluntary Product Accessibility Template (VPAT) standards. The scope of the test was expanded to cover more Portal pages and sections, and the Portal now complies with the Section 508 standard in addition to the WCAG 2.1 standard to which it applied previously. For additional information, see [Esploro Accessibility Statement](#).

- **April 2024 Data**

To improve performance, asset data required for analytics is now processed in a background job and not in real-time. The job is called “Research Asset Flattening” and runs every 6 hours. For additional information about scheduled jobs, see [Viewing Scheduled Jobs](#).

- **April 2024 Data**

The Activity API now has the ability to create a relation between a new activity and an existing research asset. For additional information, see [Esploro Activities](#) in the Developer Network.

- **April 2024 Analytics and Insights SF: 06870146**

The **Proxy For User Type** field was added to Users > Proxy For. It indicates the area for which the proxy was created – Researchers, Circulation, or Fulfillment. This is useful for customers of both Alma and Esploro to determine if the proxy displayed in a report is relevant for Esploro (Researchers) or Alma (Circulation / Fulfillment).

- **March 2024 Management**

It is now possible to create new Organizational Units – internal or external – via the API (XML or JSON). For additional information, see [Esploro Organizations](#) in the Developer Network.

- **March 2024 Analytics and Insights**

The **SDG Name** field was added to Esploro Research Assets > Asset Details. It displays the UN Sustainable Development Goals (SDGs) configured for an asset, which is an InCites Integration feature. For more information, see [UN Sustainable Development Goals \(SDGs\)](#).

- **March 2024 Analytics and Insights**

In the Usage per Researcher (API) report, the **Total Citation Count** field was renamed to **Total Citation Count from Web of Science** to indicate that the source is Web of Science.

- **March 2024 Management**

In project records, it is now possible to choose the Australian and New Zealand (ANZ) list to use for the **Research Topics** lookup – **FOR** (Fields of Research – the default) or **SEO** (Socio-economic Objective). The choice can be made by selecting a value for the **esploro_project_anz_type** customer parameter at **Configuration Menu > General > Institution Settings > Institution Settings**. For additional information, see [Configuring Institution Settings](#).

- **February 2024 Research Portal**

In the Organizational Unit Tree configuration (**Configuration Menu > Portal & Profiles > Organizational Unit Tree Configuration**), it is now possible to select a unit’s homepage as its default tab. Note that the option to select the default tab has been moved into the **Tabs** section, under the new **Default Tab** column. For additional information, see [Configuring the Research Portal](#).

- **February 2024 Data**

Esploro now integrates with SwePub 4.0.

- **February 2024 Analytics and Insights**

The following Esploro Analytics fields for InCites in the Esploro Research Assets subject area were renamed to better describe the information they display:

New Name	Old Name	Dimension
CNCI	CNCI Average	InCites Metrics Details
Journal Impact Factor (JIF)	Impact Factor	InCites Metrics Details
Category Expected Citations	Normalized Impact	InCites Metrics Details

New Name	Old Name	Dimension
Is Domestic Collaboration	Is Institutional Collaboration	InCites Metrics Details
Number of Domestic Collaborations (InCites)	Number of Institutional Collaborations (InCites)	InCites Metrics Measures
CNCI (category level)	CNRI	InCites Metrics Schema Details

For more information on the InCites fields in analytics, see the [Esploro Research Assets](#) subject area.

- **January 2024 Data**

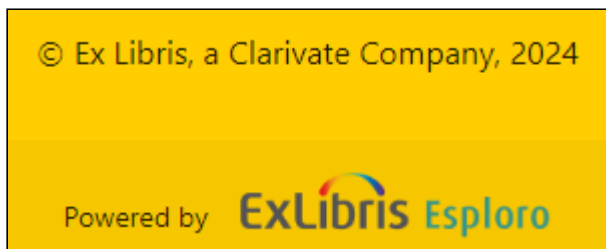
It is now possible to upload files to Esploro from Google Drive.

- **January 2024 Research Portal**

In the InCites Highlights section of an asset page, the name of the collaboration type that was previously called "Institutional Collaboration" has been changed to "Domestic Collaboration." For additional information about InCites Highlights, see [Configuring the Research Portal](#).

- **January 2024 Research Portal**

The copyright year in the default Portal footer has been updated to 2024. This field can be edited in **Configuration menu > Portal and Profiles > Labels > Researcher Footer** under **research.footer.rights**.



- **January 2024 Analytics and Insights**

The new Esploro organizational structure is now reflected in Esploro analytics.

- **January 2024 Analytics and Insights SF: 06864371**

The Number of Deleted Tasks (SH) field was added to Esploro Smart Harvesting > Smart Harvesting Measures. It displays the number of smart harvesting deleted tasks.

- **January 2024 Analytics and Insights**

Previously, when creating analytics reports with local fields, the field labels did not appear in the report. This made it difficult to know the purpose of the field. Now, the labels of local fields appear in the reports, so that the purpose of the field is clear.

Resolved Issues

- **December 2024 Smart Harvesting SF: 07183211**

In the Author Matching Report (SWORD), only the last names of contributors of ETDs that were sourced from ProQuest via SWORD appeared in the report, even though their full names appeared correctly in the Esploro asset records. This was fixed.

- **December 2024 Analytics and Insights SF: 07692700**

When an analytics report of Esploro Researcher Activities was created, if the Description field was included in the criteria, activities lacking descriptions were not listed in the reports. This was fixed.

- **December 2024 Data SF: 07253749**

In some researcher records, no organizational affiliation was shown, even though one was shown for the record when it appeared in a list of researcher records in the Find and Manage Researchers page. This occurred when the organization code did not match any of the ones in the system. Now, when this occurs, the incorrect organization code is displayed in the full researcher record, as it was already in the record list.

- **December 2024 Smart Harvesting SF: 07183211 07183023**

In the Author Matching Report, the names in the Author Name column incorrectly appeared with the first name before the last name, and not space between them. This was fixed. The names in this column now appear correctly, with the last name first, and a comma and a space separating the last name from the first name.

- **December 2024 Analytics and Insights**
A number of labels in Excel files exported by analytics were modified to bring them in line with the set-management system, so that these files can be used to create sets.
- **December 2024 Analytics and Insights SF: 06621632**
When a report was generated in the Research Assets SA for assets that were created by a specific user, some assets that were not created by the author were included in the report. This was fixed.
- **November 2024 Management SF: 07203461**
The **Contact Researcher** link in the **Communications** tab of an asset was not handling the messages correctly. This was fixed.
- **November 2024 Smart Harvesting SF: 07049793**
Previously, approving an author match in the Author Matching task list did not cause the **Approve OR Review** toggle of the author in the asset record to be turned on. This was fixed. The toggle is now turned on when the match is approved.
- **November 2024 Smart Harvesting SF: 07079124**
In certain cases, special characters in names were not normalized properly. As a result, the authors were not matched to records in Open Alex or were matched to incorrect records. The normalization of names has been fixed to prevent this from happening in similar cases in the future.
- **November 2024 Analytics and Insights SF: 07242456**
File-access rights for Activities were missing from Analytics. They were added to the Activity Files dimension in the Researcher Activities SA as **Researcher Activity File Access Right Name**. In addition, the file-access rights field for Projects was misnamed in Analytics. Its name has been corrected to **Project File Access Right Name**.
- **September 2024 Smart Harvesting SF: 07183023**
In the Author Matching Report, the order in which the first and last names of researchers appeared was inconsistent with the order in which the first and last names of authors appeared. This was fixed; the last names are now displayed first for both researchers and authors.
- **September 2024 Research Portal**
In the Projects configuration settings, the names of certain fields could not be translated into multiple languages for UIs that support more than one language. This was fixed.
- **September 2024 Analytics and Insights SF: 06970350**
The ANZ 2020 codes were not supported in Analytics. This was fixed.
- **August 2024 Management SF: 06923385**
Under certain circumstances, the system created a duplicate external Organizational Unit. This was fixed. The system no longer creates duplicate units under these circumstances.
- **August 2024 Management SF: 06929827**
When certain unsupported special characters were included in EROD data that was imported into Esploro, the characters caused issues with searching for and matching the items in which they were found. This was fixed. A script was created to locate and remove unsupported characters during the import process.
- **August 2024 Data**
When the Esploro InCites Metrics job encountered multiple assets with the same Web of Science ID, the job finished with errors, but the nature of the problem was not clearly identified. This was fixed. The Events mechanism now handles errors of this sort; they no longer cause the job to fail, and the error messages produced are clearer.
- **August 2024 Data SF: 07214724 07214137 07213864 07184770 07177284**
The Research Asset Flattening job was running in Alma, when it should only run in Esploro. This was fixed.

- **August 2024 Management SF: 06749968 06845651 07020509 07065482**
Esploro publishing jobs were not displayed in the Esploro job history. This was fixed.
- **August 2024 Data SF: 07125024**
When the Esploro InCites Metrics job encountered multiple deleted assets with the same Web of Science ID in a run, the job failed. This was fixed. The job now removes deleted assets at the beginning of its run.
- **August 2024 Data SF: 06687208**
Some values that were saved in the asset details correctly were not displayed in Analytics or in the database. This was fixed.
- **August 2024 Management SF: 07097172**
When assets were imported from a CSV file, the visibility settings for the Portal and the Profile could not be set individually; the CSV file had to include settings for both of them in order for either of them to be applied. This was fixed.
- **August 2024 Management SF: 06843365**
When letters were generated from the Esploro environment, some of the organization information was taken from the Alma settings instead of the Esploro settings. This was fixed.
- **August 2024 Management**
It was not possible to leave the project **Status** field blank, even though it is not a required field. This was fixed.
- **August 2024 Management SF: 07123576 07124059 07138863**
The Esploro Activities Loader Cloud App was missing some options for ETD assets. In addition, one of the mapping options should have been a general setting. These issues were fixed.
- **August 2024 Research Portal SF: 06753169**
When a rule was configured to give access rights to registered users, the rule was only implemented for downloading; it did not allow registered users to view the files. This was fixed.
- **August 2024 Research Portal SF: 07125024**
When the Esploro InCites Metrics job generated errors, the **UN Sustainable Development Goals (SDGs)** section in the Portal had a broken link, when it should simply not have been shown this section in the asset page. This was fixed.
- **August 2024 Research Portal SF: 07110230**
In the Asset Search Page of the Portal, when the **Other** facet was selected under **Resource Type**, the results included assets of resource types **Other creative work** and **Other**. This was fixed. **Other Creative Work** is now a separate facet under **Resource Type**, and selecting the **Other** facet only returns assets with the resource type **Other**.
- **August 2024 Research Portal SF: 07124211**
The License auto-complete list in the Student deposit form only showed licenses that were set for "all." This was fixed. The auto-complete list now includes all licenses that are active for the asset category and type that is being deposited.
- **August 2024 Management SF: 06993810**
When two researchers were merged, and the ORCID token was moved during the merge, the ORCID status of the remaining researcher incorrectly appeared as Inactive. This was fixed.
- **August 2024 Analytics and Insights SF: 06852805**
The **Author Affiliation Country** of an asset that was used in analytics was incorrectly taken from the asset's country affiliation rather than the author's, and in some cases a state or province displayed instead of the country. This was fixed.
- **August 2024 Data SF: 06977477**
When a GET Organizations API request was sent with the limit parameter, the `total_record_count` showed the number of organizations from the limit, rather than the total number of all the organizations. This was fixed.
- **July 2024 Management**
The **Enable multi-factor authentication** checkbox did not appear in user-account settings when it should have. This was fixed.

- **July 2024 Management SF: 07122982**
If an asset was brought into Esploro from CDI by Smart Harvesting, and the **Update selected author affiliations** option of the asset was used to remove the affiliations of selected creators, the affiliation on the asset was not deleted, but rather changed into the value that appeared in the original CDI record. This was fixed.
- **July 2024 Management SF: 07049793**
In the Author Matching Approval Task List, when an operator selected the **Confirm Reviewed** option for an automatically approved match, status of the task was not changed to **Approved and Reviewed**, as it should have been. This was fixed.
- **July 2024 Research Portal SF: 06680288**
When a PDF file was opened on a mobile device, the viewer did not open the file properly for viewing. This was fixed.
- **July 2024 Research Portal SF: 06656123**
The names of internal organizations were appearing in the Portal facets of projects in English even when the UI language was not English. This was fixed.
- **July 2024 Analytics and Insights SF: 07151994**
The output of scheduled analytics reports could only be sent in PDF format, although options for Excel, Text, and CSV should also have been available. This was fixed.
- **July 2024 Analytics and Insights SF: 07098514**
Some of the tabs in the Research Assets Usage Dashboard were not loading correctly, causing them to either be blank or to display an error message. This was fixed. As part of the repair, the **Number of Asset Shares** measure was removed from two reports: Usage per Asset Category and Type and Usage per Requester Type.
- **July 2024 Analytics and Insights SF: 06870934**
The layout of the email notification containing the t10_newpubs report was formatted in accordance with the Alma layout. This was fixed; the report now uses the Esploro layout.
- **July 2024 Analytics and Insights**
The Ringold Identifier, which is not supported any longer for Organizational Units, was included as an option in analytics. SElecting it caused an error to be generated. This was fixed.
- **July 2024 Analytics and Insights SF: 07160501 07126558 07098294**
When analytics was configured to use SAML and CAS as authentication methods when a report URL was accessed from a link, the user was not redirected to the correct login location. Users could only access these reports if they were already logged from the browser. This was fixed.
- **July 2024 Analytics and Insights**
In multilingual environments, when Organizational Unit names were not defined in the default language, analytics did not use the names defined in the other language, as it should have, and instead left these values blank in reports. The following fields were affected by this problem: **Asset Organization List, Organization Unit Name, Organization Parent Unit Name**. This was fixed.
- **June 2024 Management SF: 06961009**
The descriptions of Academic Unit Description Types could not be updated. This was fixed.
- **June 2024 Smart Harvesting**
In some cases, Smart Expansion via CSV mishandled asset records that were associated with more than one affiliated researcher, such that the asset only appeared in the Profile of one of the researchers. This was fixed.
- **June 2024 Smart Harvesting**
In some cases, the system mistakenly created an Author Matching task for a non-affiliated researcher, which generated an error in the Author Matching task list. This was fixed.
- **May 2024 Data SF: 06553431**
When conference metadata was exported to RiS or BibTeX, the event fields were not included. This was fixed.
- **May 2024 Smart Harvesting SF: 07026089**

An author match that is approved by a researcher creates a task that informs the admins of the approval. These tasks did not appear in the Tasks widget as they should have. This was fixed.

- **May 2024 Smart Harvesting SF: 07015939**
When authors were edited using the Manage Creators option to update or approve author affiliations, asset affiliations were incorrectly added from previously edited provisional assets. This was fixed.
- **May 2024 Management SF: 06737082**
The Research ORCID Letter was sent to researchers after every run of the Update Researchers' ORCID job, even when the job did not attempt to update their ORCID profiles. This was fixed; only researchers for whom the job attempted to update their ORCID profiles now receive the letter.
- **May 2024 Management SF: 07118271 07010404 06937662 06925182**
When operators sent messages to researchers from the Asset Details page, the messages appeared in the **Communications** tab and in the researcher's Profile, but they were not sent as emails to the researchers. This was fixed; these communications are now sent to the researchers by email as well as appearing in the researchers' Profiles.
- **May 2024 Research Portal SF: 06986281**
Files with local access-rights only – such as files that could only be accessed from on campus – appeared with an Open Access label in the Portal when the Portal was accessed from within the specified local area. Now, when a file only has local access-rights, the Open Access label is never displayed – only the name of the license is displayed when the Portal is accessed from within the specified area.
- **May 2024 Research Portal**
Translation of the page and section names of General pages was not working. This was fixed.
- **May 2024 Research Portal SF: 06961952**
Activities on researcher Profiles displayed the researcher member names with the prefix "by." This prefix was removed.
- **May 2024 Management SF: 06989331**
Republishing of a subset of a set of assets republished the entire set. This was fixed; republishing a subset now only republishes the subset.
- **May 2024 Analytics and Insights SF: 06870934**
Scheduled analytics reports were sent out with the Alma layout and logo. This was fixed; these reports are now formatted correctly for Esploro.
- **May 2024 Analytics and Insights SF: 07020946**
In the Research Assets Dashboard, the **Assets per Journal title** tab displayed no data. This was fixed.
- **April 2024 Management SF: 06902142 06797256 06763176 06763176**
Centrally managed external research organizations were not updated when they should have been – changes related to names, acronyms and websites were out of date. This was fixed.
- **April 2024 Management SF: 06961009**
The Description fields of Academic Unit Description Types could not be modified. This was fixed.
- **April 2024 Management SF: 06972404**
The Users Synchronization job report for the SIS integration used for creating and updating researchers showed non-existent identifiers under **primary ID**. This was fixed; the report now displays the correct identifiers.
- **April 2024 Management SF: 06692672**
When no changes were made to any researchers by the Users Synchronization job, the report showed the total number of researchers processed under **Total Researchers updated successfully** rather than under **Total Researchers unchanged**. This was fixed.
- **April 2024 Management**
The **Researcher Notifications** button was mistakenly included in the Researcher Details page for non-affiliated researchers. The button was removed.

- **April 2024 Management**
When a PDF file was added to an asset in the Hub, the system should have extracted metadata from the PDF file and populated the fields of the asset record with it, but it did not do so. In addition, if a PDF file was added after some of the metadata of the asset was already entered, the user should have been prompted to decide how to handle the data coming from the new PDF file, but this prompt did not appear. These problems were fixed.
- **April 2024 Management SF: 06458877**
The message that appears when a user attempts to delete a researcher that has linked assets, deposits, or other entities, has been improved. The message now specifies which entities are linked to the researcher, and gives their IDs. A similar message now appears when a non-affiliated researcher is merged with another researcher and both researchers are linked to the same provisional asset but in different capacities.
- **April 2024 Data**
When a grant was updated via the loader, and **Upon match** was set to **Overlay**, the values in certain fields that were defined in the grant record but were not defined in the XML that was loaded, were deleted from the grant record. This was fixed.
- **April 2024 Data**
When the default Investigator Role was selected for an investigator of a grant, in place of a missing or inactive investigator role, the role appeared in the grant with the note "(not listed)" beside it. This note has been removed.
- **April 2024 Smart Harvesting**
When Smart harvesting imported titles that contained encoded characters, they were not normalized. These characters are now normalized.
- **April 2024 Smart Harvesting SF: 06890890**
When a deposit had no DOI, the Smart Harvesting Researcher Approval Claim Notification included a "link" to the asset's full display. The link should not have been included in the notification, because the deposit was still waiting for approval, so no full display existed yet. This link is no longer included in the notification under these circumstances.
- **April 2024 Management SF: 06737082**
When the Research ORCID Letter was enabled, after every run of the Update Researcher's ORCID job, the letter was sent to all researchers with active ORCID status who had enabled the notification, even if the job did not attempt to synchronize their Esploro research output with ORCID. This was fixed; this letter is now only sent out to researchers when the Update Researcher's ORCID job processed their works.
- **April 2024 Researcher Profiles SF: 06537433**
The **Researcher Notice opt in** option was removed from **Configuration menu > Researcher**, because it sometimes caused conflicts with other settings.
- **April 2024 Management SF: 06621324 06721366**
In certain cases, OpenURL links from the Portal were not resolving correctly because of a missing parameter. This was fixed.
- **April 2024 Management SF: 07042582**
In certain cases, the Esploro publishing job failed with the error "Failed to retrieve records for institution." This was fixed.
- **April 2024 Analytics and Insights SF: 06870934**
Esploro scheduled analytics reports were sent out with the Alma notification logos and layout. This was fixed; the Esploro logo and layout are now used for these notifications.
- **April 2024 Data SF: 06977477**
The XML version of the GET Internal Organizations API output was not formatted correctly. This was fixed.
- **April 2024 Data SF: 06977477**
When the GET Internal Organizations API was called with a limit set for the number of Organizational Units to retrieve, the limit was ignored and the output included all units in the organization. This occurred because the **limit** parameter is not yet supported. Until support for it is implemented, a fixed limit of 100 units has been implemented.

- **March 2024 Data SF: 06902142 06797256 06763176 06645020**
Previously, centrally managed external research organization information was not kept up-to-date from the Research Organization Registry. This was fixed.
- **March 2024 Management**
Previously, when the project visibility settings were updated, the label of the **Approval** section in the project page in the Hub was still "Pending Visibility Approval." This was fixed. When the visibility settings are updated, the label of the section is now, "Project Visibility Settings."
- **March 2024 Researcher Profiles SF: 06836492 06771529**
Previously, when a researcher added a deposit from their private Profile, the researcher's middle name was sometimes taken from their user record instead of from their researcher record, as it should have been. This was fixed.
- **March 2024 Research Portal SF: 06963280**
Previously, when a BibTeX export of all of a researcher's publications was initiated from the researcher's Profile, if the publication data contained multiple contiguous spaces, the export process would fail. This was fixed. The export process works even when the data contains extra spaces.
- **March 2024 Research Portal SF: 06956075**
Previously, the label of the research Portal that appeared in external search results was incorrect. The metadata of the Portal name was corrected, so that this no longer occurs.
- **March 2024 Research Portal SF: 06786932 06503843**
Previously, if an asset had no identifiers (e.g., an ISSN or DOI), the asset page in the Portal contained incorrect links under **Related Links**. This was fixed.
- **March 2024 Researcher Profiles SF: 06873157**
Previously, when a researcher added a deposit from their private Profile, and tried to add related grants, only Pivot grants could be selected; locally managed grants were not included in the lookup list. This was fixed. Local grants are now also included in the lookup list.
- **March 2024 Research Portal SF: 06880146**
Previously, when links to asset pages in the Portal that contained certain special characters, they opened the Portal homepage rather than the asset page. This was fixed.
- **March 2024 Analytics and Insights SF: 06994646**
Previously, the display of the text from an asset's **Grant Note** field in analytics reports was truncated after 255 characters, even though the field could contain up to 4,000 characters. This was fixed. The entire contents of the field are now displayed in reports.
- **March 2024 Analytics and Insights**
Previously, it was not possible to configure Esploro to send notifications to users or researchers about analytics objects, even when they were subscribed to these notifications. This was fixed.
- **March 2024 Research Portal SF: 06964772 06961823**
Previously, the menu in the header of the Portal only included at most two options, even when the Portal was configured to have more than two options there, and there was room for more options. This was fixed. When there are more than two options, those that fit are inserted into the header.
- **March 2024 Research Portal SF: 06480294**
Previously, the order in which member organizations appeared in a project in the Portal could not be changed. It can now be changed by admins in the project page in the Hub.
- **March 2024 Research Portal SF: 06813352**
Previously, the order in which associated researchers appeared in activity records in the Portal was not always the same in the brief view and the full view. This was fixed.
- **March 2024 Data SF: 06948675**
Previously, the InCites Metrics job did not add certain types of SDG metrics, and the job events in these cases showed failures. This was fixed.

- **March 2024 Data SF: 06890866**
Previously, when a researcher was listed as a contributor to an ETD asset with the role of a Supervisor, when the asset was sent to ORCID, the researcher appeared there as an Additional Author. This was fixed. The Supervisor role in Esploro is now mapped to the Supervision role in ORCID.
- **March 2024 Management SF: 07018286 06813610**
Previously, when an ISBN was entered into the **ISBN** field of an asset of type Abstract, the ISBN was not shown after the asset was saved. This was fixed.
- **March 2024 Data**
Previously, if a deleted record was resent to ORCID, ORCID returned error messages. This was fixed. It is now possible to resend records that were previously deleted back to ORCID.
- **March 2024 Analytics and Insights SF: 06263287**
The Esploro Research Assets Usage > Asset Usage Measures > Number of Asset Shares field was not functional. It was removed.
- **March 2024 Management SF: 06843365**
The Author Matching Report did not include the Esploro logo in the email. This was fixed.
- **March 2024 Management SF: 05983734 06442834**
Job History pagination was missing lines in some cases. This was fixed.
- **February 2024 Management SF: 06740247**
When a non-affiliated researcher was merged using the Move Assets and Grants option, if the researcher only had related grants, but no assets, the merge failed. This has been fixed.
- **February 2024 Management SF: 06929929**
When a grant that was related to a project was deleted, the relationship between the grant and the project was not deleted, causing errors in project management. This was fixed.
- **February 2024 Researcher Profiles SF: 06920280**
In some cases, when an asset was deposited, the Open Access (published version) flag added from Unpaywall (via the OpenAlex API) was overridden by the status from the Alma Community Zone. This has been fixed.
- **January 2024 Researcher Profiles SF: 06919659**
Previously, when a media mention included a link, and the link appeared in a researcher's Profile, if the link was marked as restricted in its settings, the fact that it was restricted was not indicated in the Portal. This was fixed. Restricted links are now labeled restricted. (Note that these links still open; restriction is not enforced in this context.)
- **January 2024 Research Portal SF: 06961461**
In the Portal, in the Metrics sections of assets, the spacing between the view count and the citation count was improved.
- **January 2024 Research Portal SF: 06951663**
In some cases, the homepage of an Organizational Unit was unavailable in the Portal even though it existed. This was fixed.