

# Alma 2026 Release Notes

## Main Features

### New Subject Area and Data Visualization Dashboard for Collection Development Workflows Added to Analytics

#### April 2026 Analytics and Insights

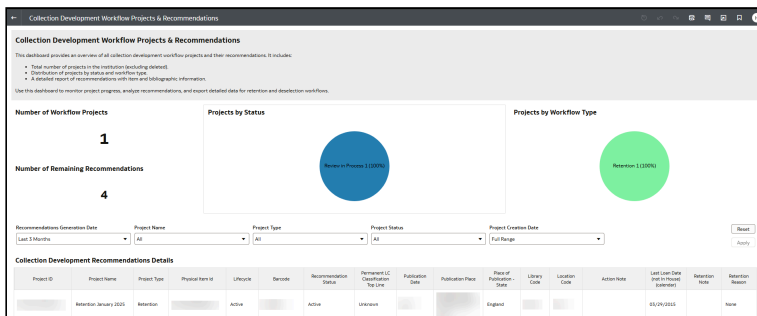
A new subject area, **Rialto Collection Development**, has been added to Alma Analytics. This enhancement introduces support for collection development workflows based on projects and recommendation lists. The subject area includes folders for project details, project measures, recommendation details, bibliographic details, and physical item details. It also incorporates user and date dimensions for comprehensive reporting.

This enhancement empowers institutions to monitor and optimize their collection development efforts with greater precision. Users can track project progress, measure outcomes, and analyze key metrics, including the number of active projects, recommendations acted upon, and overall workflow efficiency. These insights help ensure alignment with institutional priorities and broader strategies, including shared print initiatives.

For more information, see [Rialto Collection Development](#).

Additionally, the new out-of-the-box **Collection Development Workflow Projects & Recommendations Data Visualization** dashboard is now available in **Analytics > Access Analytics > Catalog > Shared Folders > Alma > Rialto Collection Development > Data Visualization**.

It provides an overview of all collection development workflow projects and their associated recommendations. It includes metrics such as the total number of projects, project distribution by status and workflow type, and a detailed recommendations report with item and bibliographic information. This dashboard helps staff monitor project progress, analyze recommendations, and export data for retention and deselection workflows.



#### Collection Development Workflow Projects & Recommendation Dashboard

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## New Resource Sharing Request Fields Available in Borrowing and Lending Requests Subject Areas

### April 2026 Analytics and Insights

New fields, **Tracking Number** and **VAT Fee Amount** are now available in the **Borrowing Requests (Resource Sharing)** and **Lending Requests (Resource Sharing)** Subject Areas. These fields enable reporting on tracking numbers and VAT fees, providing institutions with more complete resource-sharing data.

For more information, see [Borrowing Requests \(Resource Sharing\)](#) and [Lending Requests \(Resource Sharing\)](#).

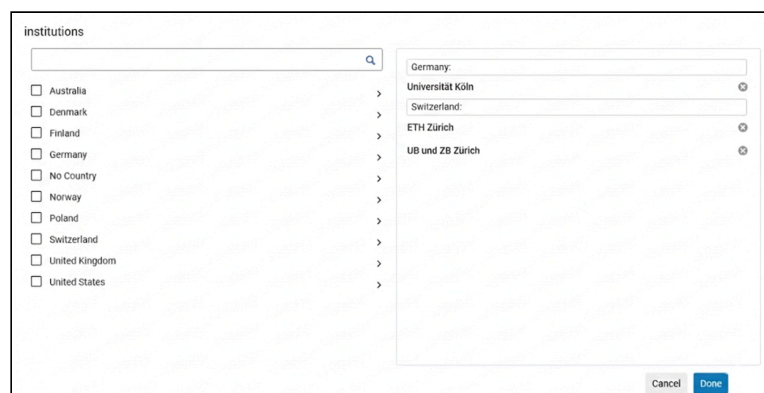
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## Country-Based Selection in the Compare To Section

### April 2026 Resource Management

The **Compare To** section for retention and deselection projects that include comparisons with external institutions has been enhanced to provide a more structured, country-based selection experience.

When creating a new project or editing an existing one, users can now browse comparison institutions using a country tree view. First, select a country to display all available institutions within it. You can then choose specific institutions individually, or select the checkbox next to the country name to automatically include all institutions within that nation.



### New country-based tree view

This enhancement simplifies the process of selecting comparison institutions and makes it easier to locate relevant libraries without having to navigate a long alphabetical list.

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## Deeper Insight into External Holdings

### April 2026 Resource Management

To support deeper cross-institution analysis, Rialto now offers expanded bibliographic details in the **Compare To** section when inspecting individual recommendations in projects with external comparisons.

While the **Compare To** section itself remains unchanged in the main view, the sliding panel under **View full list and additional information** now displays expanded metadata for matching holdings. Newly added fields include:

- Library
- Publication Place
- Edition

- Material Type
- Language
- OCLC

These additional data points provide deeper insight into external holdings, enabling more informed retention and deselection decisions when comparing your collection to other institutions.

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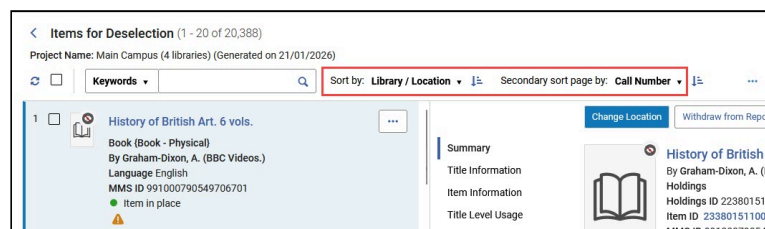
## Enhanced Sorting for Collection Development Recommendations

### March 2026 Resource Management

Rialto now provides more flexible sorting options when viewing recommendations in retention and deselection projects. In addition to sorting by **Title** and **Publication Date**, you can now also arrange recommendations by:

- **Library/Location**
- **Call Number**

You can also apply a secondary sort to further refine the results' order. The secondary sort uses the same set of fields—**Title**, **Publication Date**, **Library / Location**, and **Call Number**—and enables additional ordering when multiple recommendations share the same primary sort value.



#### Primary and secondary Sort by fields

These enhancements make it easier to review, compare, and organize recommendations, especially when working with large result sets that include many items from the same library or publication period.

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## Predictable Title Updates in Analytics

### March 2026 Analytics and Insights

Title updates are now assigned specific run dates, ensuring libraries know when their data is refreshed. In addition, member institutions in a consortium are updated as a group, providing synchronized data across the network. A new out-of-the-box report is also available in **Analytics > Access Analytics > Catalog > Shared Folders > Alma > Titles > Reports > Analytics Titles Subject Area Update**. You can use this report to display a widget in your Alma home page:

1. Copy the report to your institution folder.
2. Create an Analytics Object in Alma pointing to this Report.
3. Define it as a **Widget**.

With this update, libraries can rely on consistent update timing, allowing better planning for internal reporting schedules.

For more information, see [Out-of-the-Box Reports](#) and [Title Details](#).

# New Partner Fields Available in Borrowing and Lending Requests Subject Areas

## March 2026 Analytics and Insights

New fields are available in Borrowing Requests ([Analytics > Create Analysis > Access Analytics > Create > Analysis > Borrowing Requests \(Resource Sharing\) > Partner](#)) and Lending Requests ([Analytics > Create Analysis > Access Analytics > Create > Analysis > Lending Requests \(Resource Sharing\) > Partner](#)) Subject Areas. They can be used for recording additional information on resource-sharing partner records. Libraries can report on partner information to evaluate their resource-sharing service, including fill rates, volume, charges, and request types, in relation to partner parameters. The new fields are:

- Account Allowances
- Alternate Account Number
- Organization Type
- Sector
- Send Communication Allowed

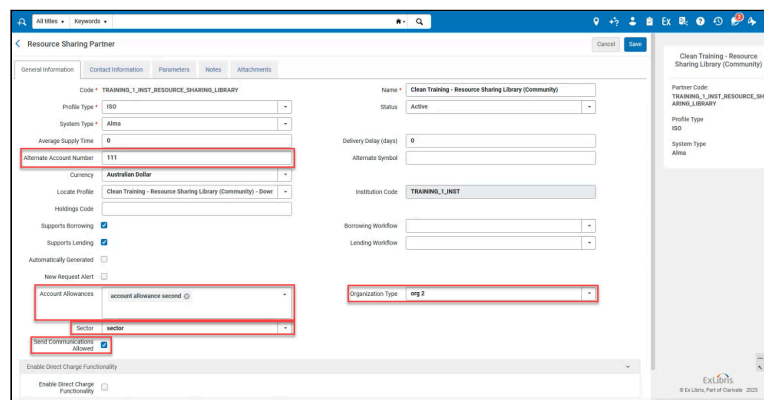
For more information, see [Borrowing Requests \(Resource Sharing\)](#) and [Lending Requests \(Resource Sharing\)](#)

# New Partners Fields in Resource Sharing Partner Record

## February 2026 Fulfillment and Resource Sharing

Additional fields were added to the **Resource Sharing Partner** record ([Fulfillment > Resource Sharing > Partners](#)) to enable further customization. The following fields were added:

- **Alternate Account Number** — Free text field that, in addition to an alternate symbol, enables additional information to be stored on the partner record.
- **Account Allowances** — Populated by customizable drop down options. Multiple selections can be made to designate additional partner information.
- **Sector** — Populated by customizable drop down options to enable additional information to be stored on the partner record.
- **Send Communications Allowed** — The value is checked/unchecked. Some libraries may want to note if marketing materials can be delivered to partners or not.
- **Organization Type** — Populated by customizable drop down options to enable additional information to be stored on the partner record.



## Resource Sharing Partner

For more information, see [Resource Sharing Partners](#).

## Temporarily Deactivate Lending for Different Formats

### February 2026 Fulfillment and Resource Sharing

Lenders now have the ability to selectively deactivate specific lending services rather than deactivate all services. Previously, lenders could only deactivate all lending operations at once. Now they can decide whether to deactivate **Everything**, temporarily deactivate **Physical** lending while keeping digital services active, or temporarily deactivate **Digital from Physical** lending while continuing physical shipping or electronic lending.

This provides lenders with more flexibility to handle temporary disruptions without having to fully stop their lending services.

LENDING SETUP

Automatically locate resource

Ignore electronic resources

Ignore electronic resources for physically requests

Prefer Unresolver locate results

Automatic creation

Temporarily inactive for lending

Turn off lending for

Everything

Physical

Digital from Physical

inactive dates range

Default location

Locate by fields

Default printer

### LENDING SETUP

For more information, see [Configuring Parameters of a Resource Sharing Library](#).

## Details in Alma Metadata History

### February 2026 Fulfillment and Resource Sharing



### Idea Exchange

Alma now tracks the metadata changes made in the **Resource Information** section. They are recorded and viewable in the **History** tab of the request.

Resource Sharing Borrowing Request

Unthinking collaboration : American Nisei in transwar Japan / A. Carly Buxton.

Partner Name: ISO-18626 Partner External Identifier: CLASSIC010000200 Profile Type: ISO 18626

General Information History Rota Parameters General Messages Notes Received Items Attachments Communications Held By

View Mode: Full

Date	Operator	Field Name	Old Value	New Value
1 04/01/2025 14:46:02 IST	System	Partner Related Data	-	ILL request message was sent to ISO-18626
2 04/01/2025 14:46:02 IST	System	Locate Status	Locate Not Run	Resource Located
3 04/01/2026 14:46:02 IST	System	Status	Locate in process	Request sent to partner

### History tab

For more information, see [Managing Borrowing Requests](#).

# Location Level Best Copy for Fulfilling a Request

## February 2026 Fulfillment and Resource Sharing

Currently, transit time rules are used to define both the transit time for items and to determine which is the closest (preferred) item for fulfilling the request. Until now, the transit time was defined at the library level. It is now possible to use the Transit Time rules to also determine the best copy for a request based on its location within the library.

For more information, see [Pickup at Shelf](#) and [Configuring Libraries](#).

# Add Notes in Deliver Digital Documents Page

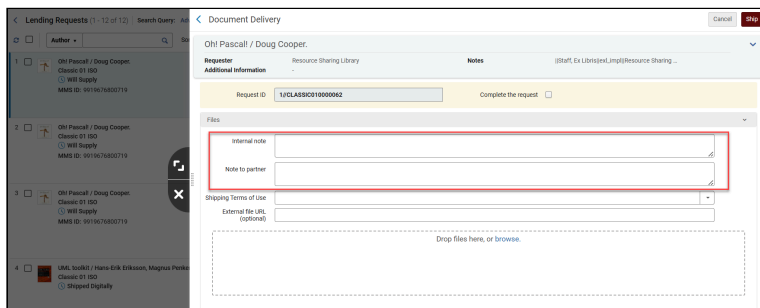
## February 2026 Fulfillment and Resource Sharing



### Idea Exchange

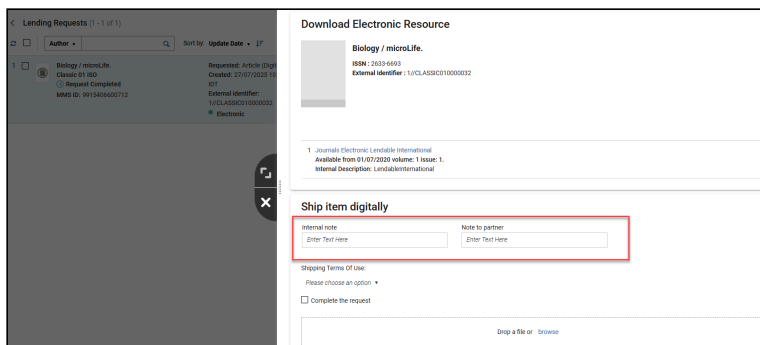
It is now possible to add notes to partner and internal notes when using Deliver Digital Documents to fulfill a document delivery request.

This enhances communication with borrowers and facilitates the recording of internal information when providing a document delivery service.



### Note Fields from Deliver Digital Documents

The two note fields were also added to the Download Electronic Resource page.



### Note Fields from Download Electronic Resources

For more information, see [Managing Lending Requests](#).

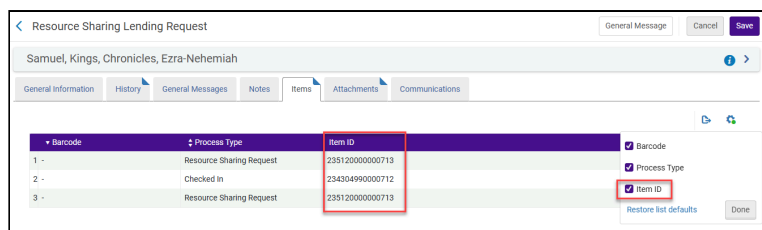
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## Ship Lending Requests Without Barcode

### February 2026 Fulfillment and Resource Sharing

It is now possible to ship items when fulfilling resource sharing lending requests, even when they do not have a barcode. In this case, the ship and check-in actions are used by selecting the items from pickup lists. This impacts the Ship Items page and the Scan-In Items page.

The **Item ID** of shipped items can be added to the displayed information about a lending request's items. When shipping an item without a barcode, this will be the only unique identifier that can be displayed.



Barcode	Process Type	Item ID
1	Resource Sharing Request	23512000000713
2	Checked In	23430499000712
3	Resource Sharing Request	23512000000713

#### Item ID

For more information, see [Peer to Peer Resource Sharing](#) and [Scanning Items](#).

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## Override Hold Policies

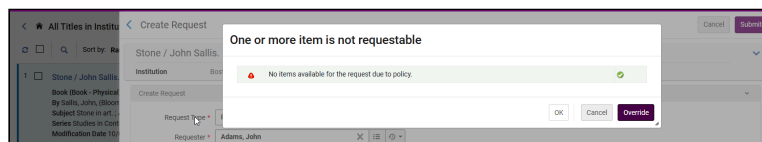
### February 2026 Fulfillment and Resource Sharing



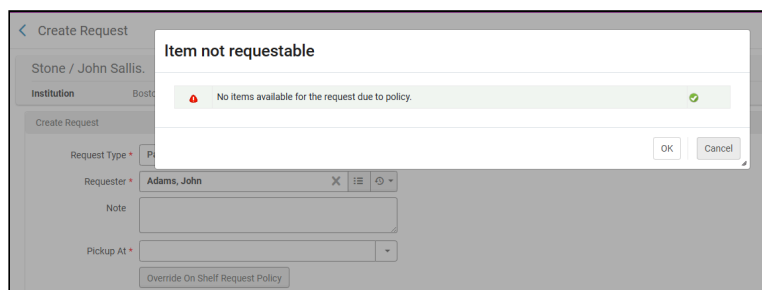
#### Idea Exchange

When placing a hold, booking, or digitization request in Alma, the operator is shown any blocks that may affect the request. Operators with the new **Override Patron Hold Blocks** privilege can override these blocks. If you would like this functionality enabled, please contact the Alma Support team and request that the relevant privilege be activated for your institution.

This provides transparency around blocked requests and enables authorized overrides.



#### Pop-up message to override patron hold blocks



## Pop-up message at physical item level without the override option

### Note

The privilege will appear for all roles that have the **Override Block Request** privilege. For existing customers, the privilege will be disabled. For new customers, the privilege will be enabled by default for the Circulation Desk Manager and Fulfillment Services Manager roles.

For more information, see [Managing Patron Services at a Circulation Desk](#) and [Privileges for Roles in Alma](#).

## View Mode for Courses in Course Reserves

### February 2026 Fulfillment and Resource Sharing

A new privilege was added to the Course Reserves Viewer role, enabling users to view the list of courses in view mode (and not only reading lists and citations).

This impacts Alma users who should not be able to edit courses, reading lists and citations, but should be able to view all of them.

If you would like this functionality enabled, please contact the Alma Support team and request that the relevant privilege be activated for your institution.

For more information, see [Managing User Roles](#), [Privileges for Roles in Alma](#) and [Roles and Registration Configuration](#).

## Automatic Waiver of Overdue Fines for Re-loaned Items

### February 2026 Fulfillment and Resource Sharing



#### Idea Exchange

When an item currently on loan is checked out to a new patron, Alma may automatically check in the previous loan, depending on the configuration (**Configuration > Fulfillment > Physical Fulfillment > Block Preferences**) for the **Item is currently on loan by another patron** action. This automatic check-in can result in overdue fines for the prior borrower. Institutions can now configure Alma to automatically waive these fines or allow circulation staff performing the check-out to decide whether the fines should be waived.

31	Item is currently on loan by another patron	Handle Automatically	Look-up or select
32	A resource Sharing Request must be renewed by the resource sharing library	Block	Return the item and loan to the new patron - Do not waive overdue fines Return the item and loan to the new patron - Message user
33	Item has not been received by resource sharing operator	Handle Automatically	Return the item and loan to the new patron - Waive overdue fines

#### Handle Automatically

For more information, see [Configuring Loans](#) and [Patron Charges Configuration](#).

## Automatic Selection of Library Digitization Department

### February 2026 Fulfillment and Resource Sharing

Alma now intelligently selects the most suitable library-level digitization department for newly created Patron

Digitization Requests and Ship Digitally requests. This enhancement applies in scenarios where the system automatically assigns a digitization department, including:

- Requests submitted via Primo
- Requests automatically generated from incoming resource sharing transactions

In both cases, Alma prioritizes digitization departments that are also configured as circulation desks and are responsible for reshelving the requested items.

For more information, see [Configuring Fulfillment Jobs](#) and [Creating a Request from the Institution](#).

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## Differentiated User Groups in Fulfillment Networks Based on Source Institution

### February 2026 Fulfillment and Resource Sharing



#### Idea Exchange

Alma users in a fulfillment network can now classify patrons from other institutions in the fulfillment network (linked accounts), according to their original User Group from their source institution. This enhancement enables institutions to assign appropriate User Groups to guest patrons based on their original classification, allowing for more accurate fulfillment rules and service levels.

#### Linked Account Rules

The external user groups are configured in Alma from [Configuration > User Management > External User Group](#).

For more information, see [Linking Users in Collaborative Networks](#) and [Configuring External User Groups](#).

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## Pop-Up Notification for Hold Shelf Items

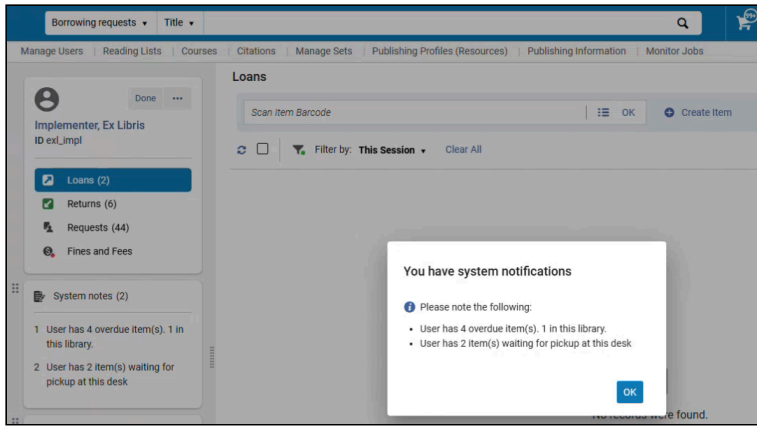
### February 2026 Fulfillment and Resource Sharing



#### CERV Enhancement (ID#247150)

Libraries can now enable a pop-up alert at the circulation desk, upon logging into the Manage Patron Services page, to notify operators when a patron has an associated system note, such as a note about items waiting on a hold shelf. The notification contains the same information as that in the **System notes**.

This feature helps ensure that staff are promptly informed and reduces the risk of missing important hold messages during interactions with patrons. The pop-up can be enabled using the **popup\_message\_system\_notes** parameter in [Configuration > Fulfillment > Other Settings](#).



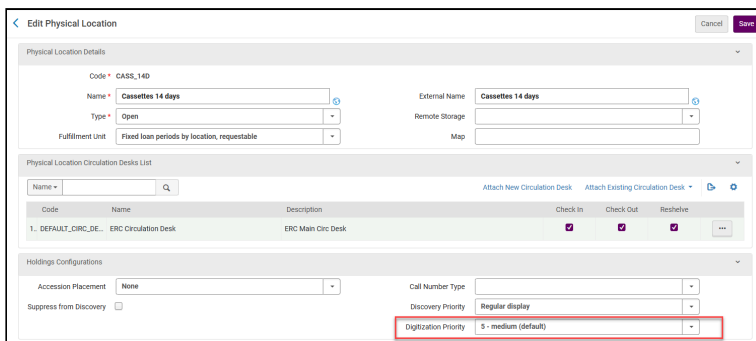
Selecting OK in the pop-up dismisses the message and leaves the user in the Manage Patron Services page.

For more information, see [Configuring Fulfillment Jobs](#) and [Managing Patron Services](#).

## Prioritizing Locations for Fulfilling Digitization Requests

### February 2026 Fulfillment and Resource Sharing

It is now possible to assign a digitization priority level to a location. This way, Alma can be set up to prefer some locations over others when a new digitization request may be fulfilled by different copies from different locations. This adds efficiency and accuracy to the digitization process.



### Digitization Priority

For more information, see [Configuring Physical Locations](#), [Creating a Request from the Institution](#) and [Managing Lending Requests](#).

## New Linked Open Data (LOD) Editor for BIBFRAME Records, Now Available in Alma

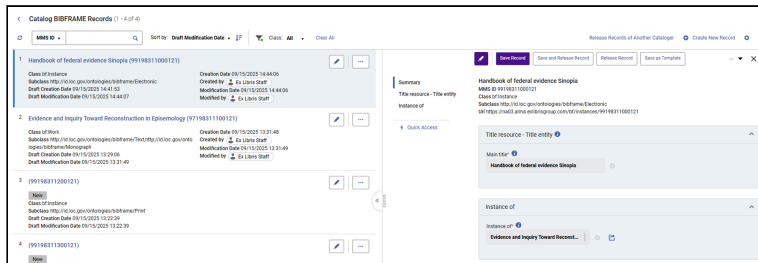
### February 2026 Metadata & Linked Open Data

This is a new world of Linked Open Data cataloging, streamlined and embedded into Alma and Alma workflows, enabling institutions to embrace BIBFRAME within their familiar workflows while maintaining MARC records alongside them within the same environment.

The new LOD editor is now available to all institutions that want to catalog and edit BIBFRAME records directly within Alma. With the new editor, catalogers can create and edit BIBFRAME works and instances in a seamless, navigation-friendly experience, including quick editing from within the search results and a draft management page for those who wish to work

in a separate workflow.

The new editor is guided by the BIBFRAME and BFLC ontologies, enabling users to create entities based on the structure and relationships between properties and classes as defined by the Library of Congress. With the new lookup service, catalogers can query directly external authoritative sources such as the Library of Congress's linked data service ([id.loc.gov](http://id.loc.gov)) and Wikidata. The new editor also provides out-of-the-box templates for works and instances, based on the structures defined by the BIBFRAME interoperability group (BIG) and enables users to create and manage their own templates, with additional functionalities of private and public templates.



### Linked Open Data Editor

For more information, see [Navigating the New Linked Open Data Editor for BIBFRAME](#) and [Enabling BIBFRAME in Your Institution](#).

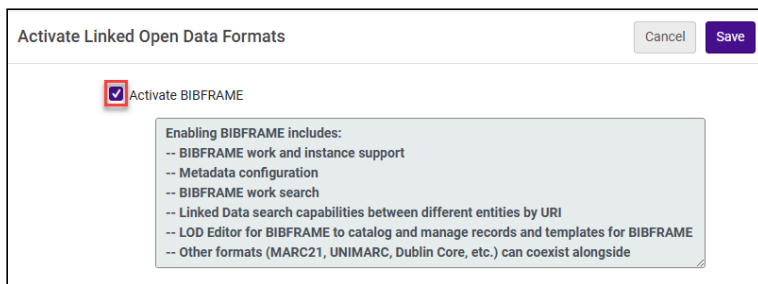
## Configuration for Enabling BIBFRAME

### February 2026 Metadata & Linked Open Data

For users with Cataloging Configuration or Catalog Admin roles, it is now possible to enable (default disabled) support for BIBFRAME works and instances with Alma by using a configuration page rather than needing to open a ticket with the support team.

#### Note

This setup enables the Works search, the BIBFRAME editor link, and templates links within the Resources menu and the metadata configuration for these formats.



### Activate Linked Open Data Formats

For more information, see [Enabling BIBFRAME in Your Institution](#).

## New Merge Option for SBN Authority Contribution and Alignment

### February 2026 Metadata & Linked Open Data

Previously, merge rules were not available for SBN authority alignment or as part of SBN contributions. It is now possible to apply merge logic during both SBN authority alignment and Bibliographic/Authority contributions. Customers can select and apply merge rules in these processes to improve data consistency, reduce duplication, and enhance automation within SBN workflows.

For more information, see [Integrating the SBN Italian Union Catalogue](#).

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## New Search Indexes for Physical Items

### February 2026 Metadata & Linked Open Data

New search indexes were added to physical items:

- Physical item: Has Order = *yes/no*: allows searching for items with/without orders. The index accounts for both orders at the item and the holdings level, similar to the **Order** link in the items search results.
- Physical item: Received = *yes/no*: allows searching for items that were received or not received, similar to the receiving filter in the items list. Items are considered received if they have a receiving date of today or earlier.

These new search options make it easier to find items; for example, items with orders that have not yet been received.

For more information, see [Physical Items Search Indexes](#).

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## Enhanced MARC Bibliographic Index Infrastructure

### February 2026 Metadata & Linked Open Data



#### Idea Exchange

To enable a seamless setup for institution-specific bibliographic search indexes, customers now have the ability to define custom indexes for their institution based on Bibliographic data. This new infrastructure provides the flexibility for each customer to create their own search indexes tailored to their Bibliographic data.

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#### Note

This feature can only be tested in your sandbox environment after the data is cloned on February 8th.

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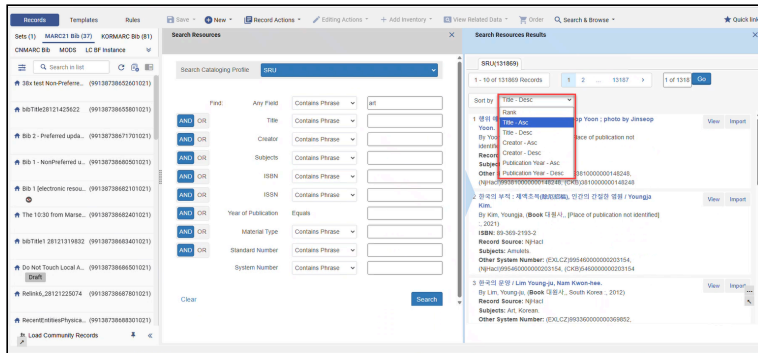
For more information, see [Configuring Search](#).

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## Sorting Option for Alma SRU External Search Resources

### February 2026 Metadata & Linked Open Data

We have introduced a new sorting capability for Alma SRU-based external search resources **only**. Users can sort results in the Metadata Editor by **Rank**, **Title** (default), **Creator**, and **Publication Date**.



## SRU Sort Options

For more information, see [Configuring External Search Resources](#).

## New Controlled Vocabulary List for Language Codes

### February 2026 Metadata & Linked Open Data

A new, merged controlled vocabulary list has been created by combining language codes from the MARC21 standard and the ISO 639-3 list. This enhanced list includes an expanded range of languages, addressing gaps that previously existed when cataloging the MARC 041 \$a field.

#### Note

The list is available only in English. When searching by the language list in subfield 041 \$a, using the **Language** facet, or using the pop-up assistant in the Metadata Editor for subfield 041 \$a, all values are displayed in English.

For more information, see [Combined Language List](#).

## Introducing the Alma AI Assistant for Acquisitions Funds and Ledgers – Preview Mode (Beta)

### February 2026



#### Artificial Intelligence

To improve day-to-day efficiency, the Alma AI Assistant enhances the user experience when interacting with Alma through a chat-based interface. Instead of navigating multiple screens and workflows, staff users can ask questions naturally and receive clear, relevant responses directly within Alma.

The first focus area for the Alma AI Assistant is **Acquisitions - Funds and Ledgers**. Staff users with the Fund/Ledger Manager role (from the institution level) can ask questions about their institution's funds and ledgers and receive immediate, natural-language responses.

Since the Alma AI Assistant was first announced on the Alma roadmap, it has generated significant interest across the community. As part of the November 2025 release, we conducted an Early Access Program with 15 participating institutions. Their hands-on usage and feedback have been invaluable in shaping the next steps of this initiative.

Given the exploratory and evolving nature of this feature, we want to broaden the feedback loop even further. Therefore, as

part of the February 2026 release, we are introducing Alma AI Assistant in Preview Mode (beta) across all Alma environments. Administrators can choose to activate the feature at their discretion.

### Preview Mode (beta) - What to Expect

The Preview Mode (beta) is an early iteration designed to give libraries the opportunity to explore the feature, understand its potential, and actively contribute feedback that will guide future development. Additional enhancements, including the ability to perform actions as part of the Alma AI Assistant flow are planned for upcoming releases.

Libraries are encouraged to try the Alma AI Assistant in their Sandbox or Production environments to gain an initial sense of its capabilities and limitations.

Feedback is critical for this phase. You can share your input directly within the Alma AI Assistant using the thumbs up /thumbs down

options on each response, or by contacting us directly at [tamar.fuches@clarivate.com](mailto:tamar.fuches@clarivate.com).

Watch the [Alma AI Assistant – Funds and Ledgers video](#) (3:20 minutes).

For more information on enabling the feature, how it works, and our planned enhancements, refer to the [Alma AI Assistant – Acquisitions Funds and Ledgers](#) documentation. Also see [Artificial Intelligence in Alma](#).

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## New Collection Development Manager Role

### February 2026 Resource Management

Rialto now has a dedicated **Collection Development Manager** role. This role centralizes collection development workflows, replacing the previous model in which multiple roles could use these workflows.

Users assigned the **Collection Development Manager** role are now the only ones who can:

- Access the **Workflows** menu under **Collection Development**
- Create, edit, and delete collection development projects
- Generate and manage recommendations for retention and deselection projects

**Repository Administrator** and **Rialto Administrator** roles continue to have access to collection development configuration settings, but they no longer have direct access to the workflows themselves. **Collection Development Managers** do not have access to configuration settings.

This change clarifies responsibilities and reduces confusion about which users can view, configure, and run collection development workflows.

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#### Note

On Production (not Sandbox), users who created collection development workflow projects prior to the February release will be automatically assigned the Collection Development Manager role to maintain access to existing workflows.

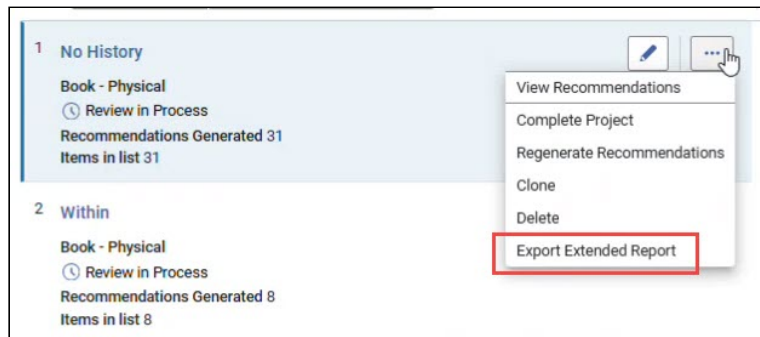
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## Export Comparison Reports for Collection Development Projects

### February 2026 Resource Management

Rialto now enables **Collection Development Managers** to export comprehensive comparison reports for retention and deselection projects. Reports can be generated using the **Export Extended Report** option in the three-dot menu next to a project name.



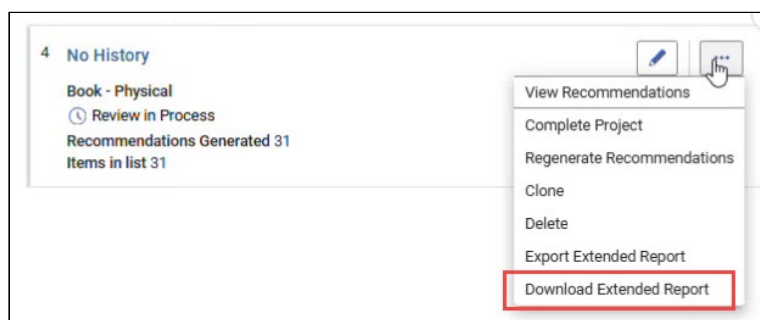
### Export Extended Report option

The export produces an Excel file containing detailed information on all active recommendations from the project, along with comparable data for all matching titles from the selected comparison institutions.

Item ID	Accession	Accession ID	Title	Author	Editor	Publisher Place	Publisher
201718980000002	107986214	99100050979700002	Intervista sulla crisi medievale	Lipari, Robert Sabatino 1910-1985		Basel	Lantern
201718171000002	1071130453	99101080710700002	Jacob Burckhardt als Denker	Grimbach, Oberhard 1880-1945		Bern Leipzig	Pfäfers
201718171000002	1071130453	99101080710700002	Jacob Burckhardt als Denker	Grimbach, Oberhard 1880-1945		Bern Leipzig	Pfäfers
201708180000002	107071805	99100013120700002	Les cultures dans le terrain les villes	Cros, Samuel Isaac 1851-1945		Paris	Payot
201407480000002	107345456	99100013120700002	Historia de Sada. Historia reiros. I Dialogos III Vite	Alvariz de Sada, Rodericus 1170-1247		Tarazona	Brugué
201757470000002	107030320	99100412910700002	Historical information systems Session B-12b - Proceedings of the tenth interna. Meet. Rarner 1955. - International Economic History Congress, Metz, Rarner 1955. - Jour. Rar. von der Rar. C. W. (L. Aasen) [Belgrad]				Przem. univ. de Lodz
201745810000002	107055737	99100710510700002	Western Europe in world affairs: continuity, change, and challenge	Carney, Guy de economiste 1907-1987		New York London [etc.]	Prager
201902171000002	107193840	99100705049700002	Reflections on history and historians	Hermann, Theodor S., 1920-2013		Madison, Wis.	University of Wisconsin Press
201111798400002	107112070	99101000087000002	Initiales de la langue française	Hulst, Louis-L., 1926-1988	Jeanne H. van	Paris	A Colin
201812121000002	107173710	99100455997000002	Thésaurus de ses récapitulations	Enthérens auteur de Arnold Topfsee Corroyla-Salle 1906. Centre culturel international de Corroy-la-Salle Collège St-Paul La Haye			Mouton
201812121000002	107076007	99100455997000002	Thésaurus de ses récapitulations	Enthérens auteur de Arnold Topfsee Corroyla-Salle 1906. Centre culturel international de Corroy-la-Salle Collège St-Paul La Haye			Mouton

### Extended Report example

Once a report is generated, a notification appears in the top-right corner of the interface to let the user know it is ready. The report can then be downloaded using the **Download Extended Report** option in the same three-dot menu. This action is only visible after an extended report has been created. All generated reports can also be viewed or downloaded from the **History** tab in **Admin > Manage Jobs and Sets > Monitor Jobs**.



### Download Extended Report option

This feature delivers a rich, consolidated view of project recommendations, bringing all relevant data together to support confident retention and deselection decisions. For details, see [Creating and Downloading an Extended Report](#).

## Link Resolver Improvement for Video Records in Network Environments

### February 2026 Resource Management



## Collaborative Networks

We have enhanced the link resolver's search mechanism for video records in network environments. It now accurately identifies video records and distinguishes them from book records, reducing false matches and preventing book links from appearing when patrons search for videos.

For more information, see [Alma Link Resolver Workflow](#).

---

## Complete Record of All Changes in History for Electronic Resources

### February 2026 Resource Management



#### Idea Exchange



#### CERV Enhancement (ID#36487)

The e-resources History tab now records changes made by the CZ synchronization, as well as local changes made by system jobs or operators. This applies to electronic collections, electronic services and electronic portfolios.

Updates from the Community Zone will appear with "operator" = "system", as do other system job changes. This development also includes the recording of changes to the general notes and the additional PO lines, which were not previously saved in the history.

For more information, see [Managing Electronic Resources](#).

---

## Autoholdings for Oxford University Press

### February 2026 Resource Management



#### Idea Exchange

Libraries can now automate the management of licensed OUP content by using autoholdings.

Once the integration is set up, Alma automatically retrieves a standardized KBART file containing monographs and serial holdings information from the provider's platform and updates the corresponding collections. This integration removes the need for manual updates, reducing staff workload, saving significant time and enhancing accuracy.

For more information, see [Upload Electronic Holdings from Oxford University Press](#).

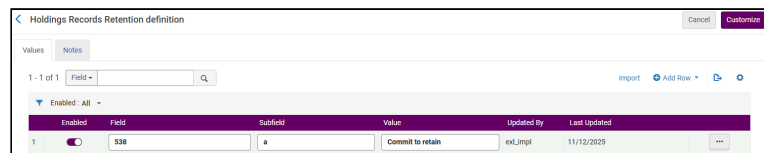
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## Holdings Retention by MARC Fields

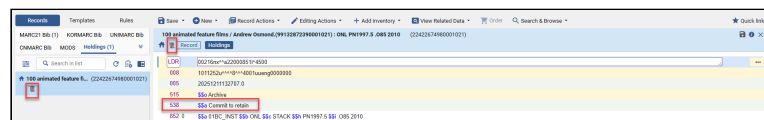
### February 2026 Resource Management

Institutions can now define holdings with specific metadata as "committed to retain", thus protecting them from deletion, even if the holdings do not have items. Retention blocks manual and batch deletion.

Definition rules are defined on the Holdings Records Retention definition page at [Configuration > Resources > Collection Retention > Holdings Records Retention Definition](#).



### Holdings Records Retention definition



### Holdings record committed to retain

The retention indication on the holdings level is also available in analytics in the following fields:

- Holdings Committed to Retain (Physical Items SA)
- Has Holdings Committed to Retain (Titles SA)
- Has P-Inventory Committed to Retain (Titles SA — indicates whether the title has any items/holdings that are committed to retain)

Retention from holdings is not passed on to the items, i.e., items do not inherit the holdings' retention status. To protect items from deletion, you must define the item itself as committed to be retained in the item editor.

Retention indication is applied during indexing. The new logic applies only to newly created or updated holding records. To ensure the logic is also applied to existing records, contact support to request indexing.

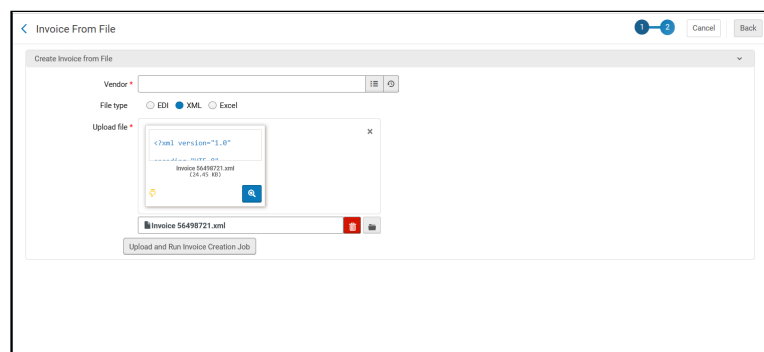
For more information, see [Working with Holdings Records](#), [Physical Items](#) and [Titles](#).

---

## Support for German XRechnung Standard when Creating Invoice from XML

### February 2026 Acquisitions

Users can now create invoices in Alma from XML file, of the German e-invoice standard XRechnung.



### XRechnung German Standard XML

For more information, see [Creating Invoices](#).

---

## Additional Options for EDI Configuration

### February 2026 Acquisitions

Two additional fields were added to the input job parameters at **Vendor > EDI Information > Input Job Parameters**.

1. **Default VAT** — Appears when **Use VAT Code** is set to true. The VAT default will be used (and set for the invoice) when there is no value in the input file for VAT code, or when there is a value which does not match the VAT Codes table. Note that **Default VAT** only applies to the invoice level. Even if the **VAT In Invoice Line Level** field is set to true, the default VAT is ignored.
2. **Internal copy** — When true, the created invoice for this vendor will have the **Internal copy** field checked (meaning it will not be sent to ERP).

---

#### Note

The new fields will not impact the current setup and will have null/false values by default.

---

Input Job Parameters

JOB SCHEDULING

Status  Active  Inactive

Schedule

JOB PARAMETERS

Upload EDI

VAT expended from fund

Use VAT code

Default VAT

VAT type

Do not prorate

Internal copy

#### Default VAT and Internal copy

---

#### Note

Both these fields apply to invoice creation from EDI, XML and Excel.

---

For more information, see [Electronic Data Interchange \(EDI\)](#).

---

## More "Interested In" Letter Fields can be Customized

### February 2026 Acquisitions



#### Idea Exchange

The **Interested In** letter is sent in different scenarios (upon receipt of the item, upon activation of the resource and upon cancellation of the PO line). Previously, the subject and other message labels were the same in all these cases. Now, the

labels can be customized for each of the following use cases, enabling users to write a different subject line and message body depending on the trigger event.

The three main use cases that now have unique customization fields are:

- **Receiving**
  - subject\_received
  - letter\_name\_received
  - details\_received
  - details\_item\_arrival\_time
- **Activation**
  - subject\_activated
  - letter\_name\_activated
  - details\_activated
- **Cancellation**
  - subject\_cancelled
  - letter\_name\_cancelled
  - details\_cancelled

These fields can be customized from the Labels table when editing the letter (**Configuration > General > Letters Configuration > Interested In Letter > Labels**).

Enabled	Code	Description	Translation	Updated By	Last Updated
<input type="checkbox"/>	callNumber	Call Number	Call Number	-	-
<input type="checkbox"/>	details_activated	E-resource was activated.	E-resource was activated.	-	-
<input type="checkbox"/>	details_received	Item was received.	Item was received.	-	-
<input type="checkbox"/>	mmsid	MMS ID	MMS ID	-	-
<input type="checkbox"/>	message	Message	Message	-	-
<input type="checkbox"/>	Bcc	None	None	-	-
<input type="checkbox"/>	Cc	None	None	-	-
<input type="checkbox"/>	letter_name_activated	Order Interested In	Order Interested In	-	-
<input type="checkbox"/>	subject_received	Order Interested In	Order Interested In	-	-
<input type="checkbox"/>	subject_cancelled	Order Interested In	Order Interested In	-	-
<input type="checkbox"/>	subject_activated	Order Interested In	Order Interested In	-	-
<input type="checkbox"/>	subject	Order Interested In	Order Interested In	-	-
<input type="checkbox"/>	letter_name_received	Order Interested In	Order Interested In	-	-
<input type="checkbox"/>	letter_name_cancelled	Order Interested In	Order Interested In	-	-
<input type="checkbox"/>	letterName	Order Interested In	Order Interested In	-	-

### Interested In Letter

For more information, see [Configuring Alma Letters](#).

## PO Line Cancellation: Enable Deletion of Related Inventory Even if Linked to CZ

### February 2026 Acquisitions



#### Idea Exchange

Until now, when cancelling PO line, the portfolio would only be deleted if it was a standalone local portfolio and inactive. A new customer parameter (**delete\_linked\_portfolio\_upon\_pol\_cancellation**) was added. When set to true, inactive portfolios that are linked to Community Zone or that are part of an electronic collection will now also be deleted, in addition to the local portfolio.

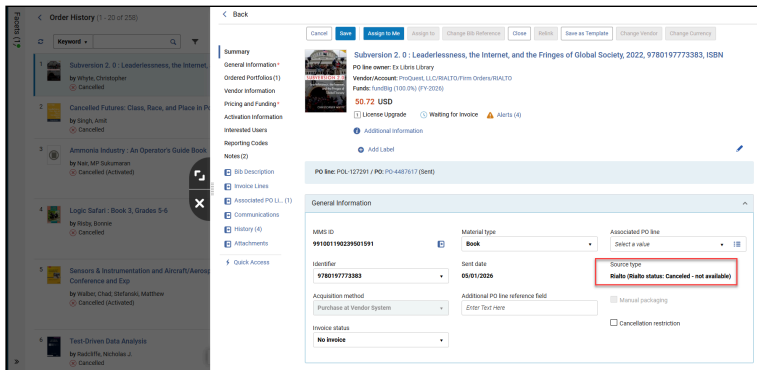
The parameter is set to false by default. It can be accessed from **Configuration > Acquisitions > Other settings**.

For more information, see [Closing, Cancelling, Reopening and Relinking PO Lines](#).

## Rialto Status in PO Line General Information

### February 2026 Acquisitions

When a PO line was created as part of the Rialto workflow, the **Rialto status** is now shown in the PO line General Information section.



### Rialto Status

For more information, see [Manually Creating a PO Line](#).

## Option to Place Requests on Title and Item Level from PO Line

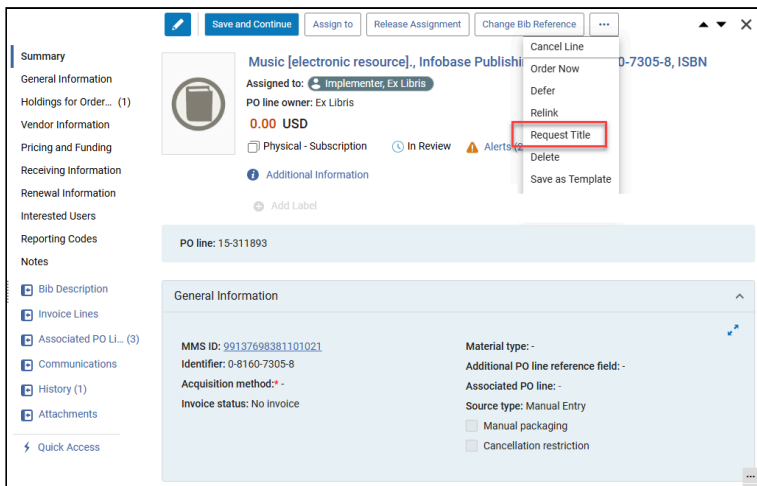
### February 2026 Acquisitions



### Idea Exchange

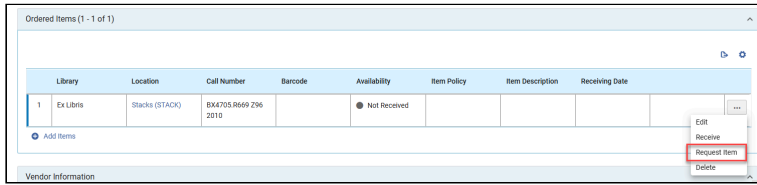
Users can now place requests from the PO line on the title and item level:

**Title level** — Using the **Request Title** action.



## Request title

**Item level** — In the Ordered Items and in the Items in Claim sections, using the **Request Item** action.



Library	Location	Call Number	Barcode	Availability	Item Policy	Item Description	Receiving Date
1	Ex Libris	Stacks (STACK)	8K4705.R669.Z96 2016	● Not Received			

Context menu actions: Edit, Receive, **Request Item**, Delete

## Request item

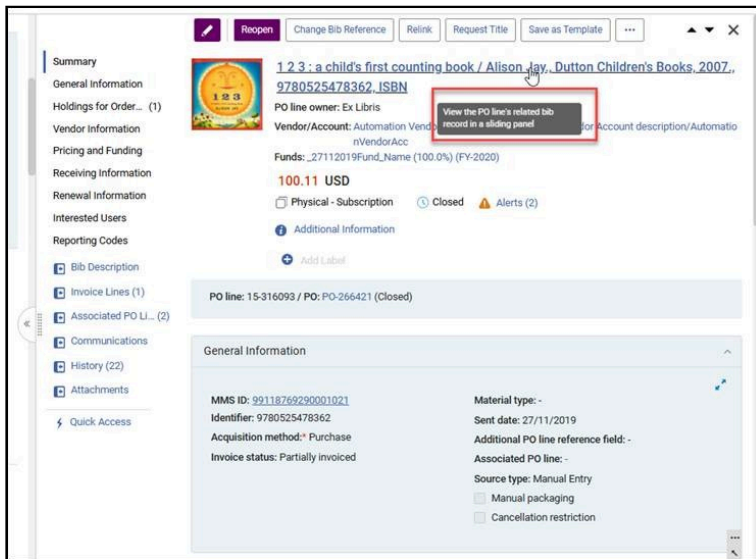
The actions are displayed for physical PO lines. Users will see the available request types according to their user privilege, just as if the request were placed from a list of items or a repository search.

For more information, see [Manually Creating a PO Line](#).

## Link to Holdings Record from PO Line Right Pane

### February 2026 Acquisitions

The PO line title in the right pane now links to the institution record in a sliding panel.



PO line title: [1 2 3 : a child's first counting book / Alison Jay, Dutton Children's Books, 2007, 9780525478362, ISBN](#)

PO line owner: Ex Libris

Vendor/Account: Automation Vendor

Funds: 27112019Fund\_Name (100.0%) (FY-2020)

100.11 USD

Physical - Subscription Closed Alerts (2)

Additional Information

PO line: 15-316093 / PO: PO-266421 (Closed)

General Information

MMS ID: 92118769290001021  
Identifier: 9780525478362  
Acquisition method: Purchase  
Invoice status: Partially invoiced

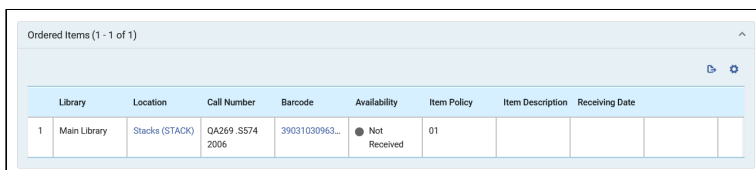
Material type: -  
Sent date: 27/11/2019  
Additional PO line reference field: -  
Associated PO line: -  
Source type: Manual Entry  
 Manual packaging  
 Cancellation restriction

View the PO line's related tab record in a sliding panel

Link to sliding panel

Additionally, the Location column in the following tables will now link to the Holdings record:

- Ordered Items
- Holdings for Ordered Items
- Items in Claim



Library	Location	Call Number	Barcode	Availability	Item Policy	Item Description	Receiving Date
1	Main Library	Stacks (STACK)	0A269 .S574 2006	● Not Received	01		

## Link to Holdings Record

For more information, see [Manually Creating a PO Line](#).

---

## New API for Creation of Allocation and Transfer Fund Transactions

### February 2026 Acquisitions

Users can now use POST in the fund transactions API as follows:

#### POST /almaws/v1/acq/funds/{fund\_id}/transactions

The supported transactions that can be created are:

- Allocation
- Transfer

For more information, see [the Developer Network](#).

---

## Additional COUNTER Report Attributes for SUSHI R5/R5.1. Harvesting

### February 2026 Acquisitions



#### Idea Exchange

Users can now select additional attributes for SUSHI harvesting COUNTER R5/R5.1 reports: DR, IR, PR and TR. This enables the Access type and other attributes to be included in the harvested reports, enhancing the functionality for title (and other) reports.

For the institution-level defaults, the attributes can be selected from [Configuration > Acquisitions > COUNTER R5 Additional Attributes for SUSHI Harvesting](#).

Enabled	Report Type	Attribute	Updated By	Last Updated
<input type="checkbox"/>	DR	access_method	-	-
<input type="checkbox"/>	DR	data_type	-	-
<input type="checkbox"/>	IR	access_method	-	-
<input type="checkbox"/>	IR	access_type	-	-
<input type="checkbox"/>	IR	data_type	-	-
<input type="checkbox"/>	IR	include_parent_fields	-	-
<input type="checkbox"/>	IR	YOP	-	-
<input type="checkbox"/>	PR	access_method	-	-
<input type="checkbox"/>	PR	data_type	-	-
<input type="checkbox"/>	TR	Access_Method	-	-
<input type="checkbox"/>	TR	Access_Type	-	-
<input type="checkbox"/>	TR	Data_Type	-	-
<input type="checkbox"/>	TR	YOP	-	-

#### COUNTER R5 Additional Attributes for SUSHI Harvesting

Attributes can also be selected for the SUSHI account level.

Active	Report Type	Description	COUNTER Release	Access Method Attribute	Access Type Attribute	Data Type Attribute	YOP Attribute	Include Parent Fields
<input checked="" type="checkbox"/>	TR	COUNTER Title Master Report [TR]	RS_1	Default	Default	Q, Loc	Default	-
<input checked="" type="checkbox"/>	DR	COUNTER Database Master Report [DR]	RS_1	Default	-	Default	-	-
<input checked="" type="checkbox"/>	IR	COUNTER Item Master Report [IR]	RS_1	Default	Default	Explicit no	Default	Default
<input checked="" type="checkbox"/>	PR	COUNTER Platform Master Report [PR]	RS_1	Default	-	Explicit yes	-	-
<input checked="" type="checkbox"/>	pr_p1	COUNTER Platform Usage [pr_p1]	RS_1	-	-	-	-	-

## Usage Report Types

The report level options are:

- **Default** — Take the values set in COUNTER R5 Additional Attributes for SUSHI Harvesting
- **Explicit yes** — Send this attribute, no matter what settings are in COUNTER R5 Additional Attributes for SUSHI Harvesting
- **Explicit no** — Don't send this attribute, no matter what settings are in COUNTER R5 Additional Attributes for SUSHI Harvesting

For more information, see [Managing COUNTER - Compliant Usage Data](#).

## Relative Date Search Operators for Order Lines Search

### February 2026 Acquisitions

When searching order lines, users can search by relative dates. This is available for:

- Creation date
  - Is Within the Last (days)
  - Is Older Than (days)
- Sent date
  - Is Within the Last (days)
  - Is Older Than (days)
- Renewal date
  - Is Within the Last (days)
  - Is Older Than (days)
  - Is Within the Next (days)

The screenshot shows a search interface for 'Order lines'. A dropdown menu is open for the 'Renewal Date' field, displaying a list of search operators. The operators listed are: Equals, Not Equals, Before, After, Is Empty, Is Not Empty, Is Within the Last (days), Is Older Than (days), and Is Within the Next (days). The last three operators are highlighted with a red box. The search input field contains the date format 'd5/MM/yyyy'.

### Relative Date Search Operators

For more information, see [Searching for PO Lines and Using Facets to Refine Results](#).

---

## New Order Import Profile: Option to Use Call Number for Holdings Matching

### February 2026 Acquisitions

The New Order Import profile looks for the holding on which the item should be created. This match is based on the library and location.

Institutions can now configure this match to also consider the call number. This can be achieved by setting the

**eod\_match\_holdings\_by\_call\_number** customer parameter

([Configuration > Acquisitions > Other Settings](#)) to True. When the call number is different from that of an existing holding for the matched bibliographic record, a new holding is created.

If more than one matched holding is found, a new holding is created, as the system cannot determine which one to use. This is the existing behavior when multiple matches are found based on library and location.

---

#### Note

- This new feature assumes a mapping to 852h.
- When the parameter is set to true, and the call number has an empty value, the behavior is as follows:
  - When there is one existing holding in the matched bib, the item is created for this holding.
  - When there is more than one existing holding in the matched bib, a new holding is created.

---

For more information, see [Managing Import Profiles](#) and [Other Settings](#).

---

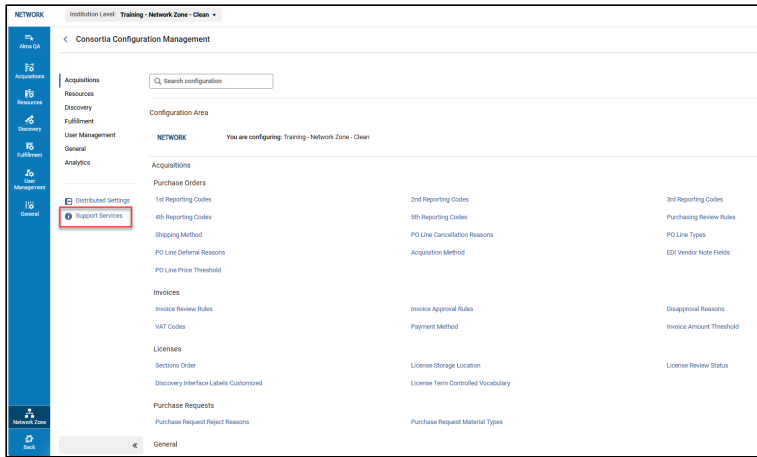
## Support Services for Consortia Central Office

### February 2026 Collaborative Networks

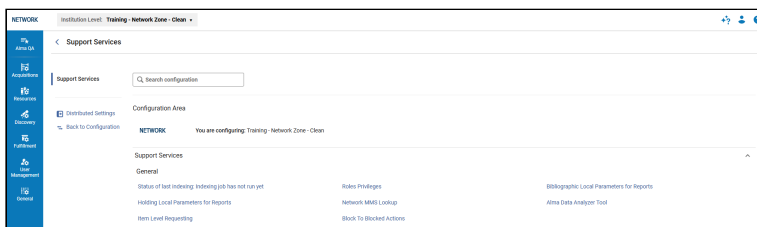


It is now possible for the Network Zone operator, from the Central Configuration Dashboard, to perform a defined set of maintenance and troubleshooting tasks on behalf of its member institutions. These include support services and utilities that were previously handled only by Ex Libris support, enabling faster problem resolution and proactive system management at the consortial level.

This enhancement empowers the Central Office to support its members more effectively by performing direct maintenance and troubleshooting actions. It strengthens the Central Office's role as a service provider, improves response times for member institutions, and reduces reliance on external support for common issues.



## Support Services Button



## Support Services Page

### Note

This new feature is only relevant to Consortia with a Network Zone setup. The Network Zone operator must have the Support Services role in order to access and use these tools.

For more information, see [Support Services](#).

## New Additions to the Central Configuration Dashboard

### February 2026 Collaborative Networks



The following information was added to the new Central Configuration Dashboard:

- [Activate Linked Open Data Formats](#) page to expand the exposure of Linked Open Data across the network.
- [Homepage Notifications](#) for management and distribution.
- [Usage Calculation](#) mapping table in a brand new Collection Development section to offer a central management and distribution across members without the need to opt-in locally in the Data Sharing profile.
- [Partner Sectors, Partner Organization Type and Partner Account Allowances](#) code tables for central management of Resource Sharing and Rapido.

These additions enable the central office to work more efficiently, reducing time spent applying central policies.

---

## Note

These features are relevant only for consortia operating with a Network Zone setup.

---

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## Shared Blocks Across the Fulfillment Network for Network Zone Managed Users

### February 2026 Collaborative Networks



#### Idea Exchange

Previously, in a Network where users are managed at the Network Zone level, patron blocks could only be shared from the Network Zone to the institutions where the patron had local accounts. It is now possible to share blocks from any institution with any other institution where the patron has an active account.

This enables patron blocking more easily and efficiently across the entire network where users are managed in the Network Zone.

For more information, see [Configuring User Blocks](#) and [Managing Users](#).

---

## Combination of Electronic Resources Activated at Network Zone and Institution Zone for Online Services Order

### February 2026 Collaborative Networks



#### Idea Exchange

It is now possible for the Member Administrator to select from a combined list of electronic resources activated at Network Zone and Institution Zone levels in the Online Services Order configuration. At the Network Zone level, the operator (from the dashboard) can still update the order for these services for the Network (only local resources from the network) and for the Members (combined list of local and network resources).

This enhancement improves efficiency by allowing the combination of Network and Institution Zone electronic resources for improved services.



#### Collection from Network at Member Level

---

## Note

This new feature is only relevant to Consortia with a Network Zone setup.

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For more information, see [ViewIt](#).

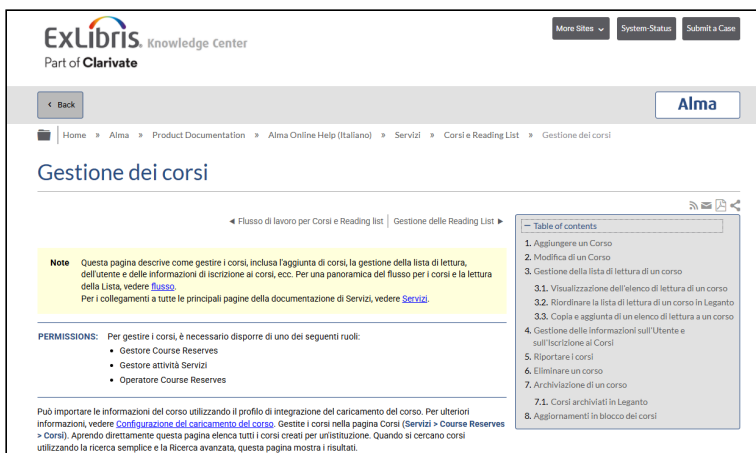
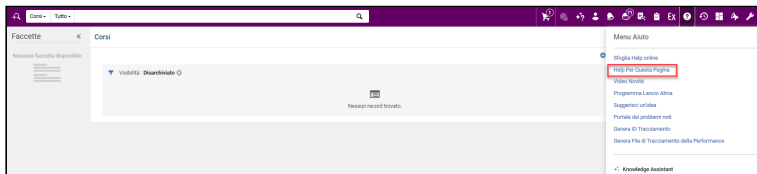
---

## Support for Italian in Online Help

### February 2026 User Experience, Accessibility & Infrastructure

Support for Italian was added to the online help.

When working in the Italian user interface and accessing the online help, it now opens automatically in Italian.



### Online Help in Italian

For more information, see [Alma User Interface](#).

---

## Enhanced Performance for Searching Combo Boxes in New UX

### February 2026 User Experience, Accessibility & Infrastructure

Enhanced functionality was added to support searching combo boxes with long lists of options (above 200) in the Alma new UX, for example, in the Advanced Search. Previously, when opening a combo box list with many options, opening the list caused performance issues. Now, as you scroll down, more options are auto-loaded. The user can now scroll to view all the results, and the general performance was improved without changing the current functionality of searching the combo box.

---

## User ID Appended to System for Manual Jobs

February 2026 User Experience, Accessibility & Infrastructure



### CERV Enhancement (ID#36485)

When running manual jobs, the user ID can now be appended to "System" in Alma entities updated by the job. For example, when the user John\_Branson runs a manual job, instead of "System" appearing in the Physical Item Editor **Modified-By** field, Alma now displays "John\_Branson (System)".

This requires the **detailed\_creator\_and\_modifier\_for\_job\_changes** parameter ([Configuration > General > General Configuration > Other Settings](#)) to be set to true (false by default). Note that enabling this parameter causes a change in the data from this point on, and this data change cannot be modified retroactively. Disabling this parameter again causes a change in the data from that point onwards, and again cannot be modified retroactively.

This feature only applies to:

- Manual jobs (non-scheduled) when the **Run Now** button is used



- Scheduled jobs when the **Run** button is used

---

### Note

**This field** is commonly used in analytics reports (for example, **Modified by** in the Physical Items Subject Area). Upon enabling the new customer parameter, the data will change accordingly from this point forward, and no retrospective data correction is performed. The same applies when this parameter is disabled.

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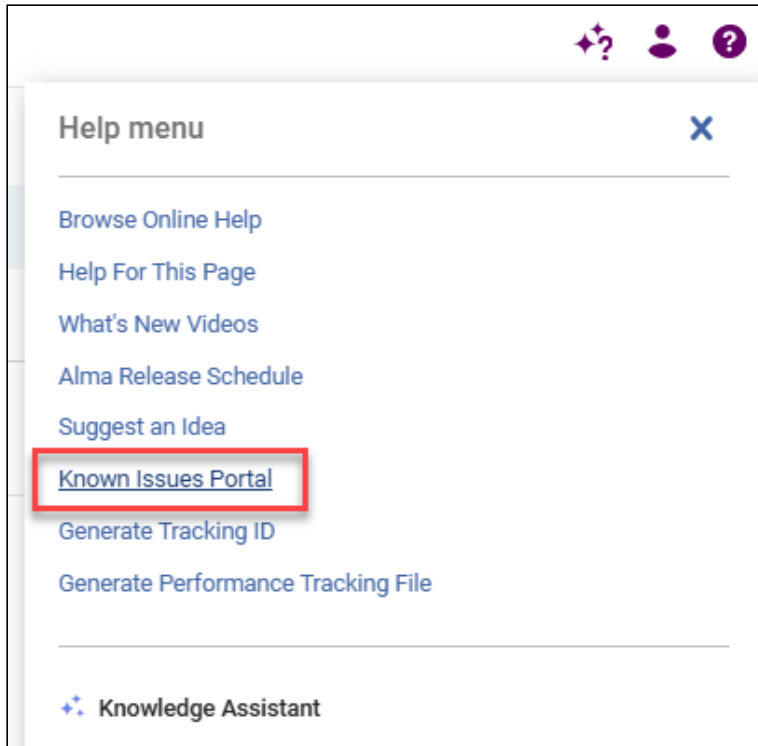
For more information, see [Manual Jobs](#) and [Configuring Other Settings](#).

---

## New Link to Known Issues Portal from Alma Help Menu

February 2026 User Experience, Accessibility & Infrastructure

A new link to the Known Issues Portal was added to Alma's Help menu. This link opens the Known Issues page in a new browser tab. This update improves access to the Known Issues Platform, helping users stay informed about current issues and reducing the need to open support cases for existing known issues.



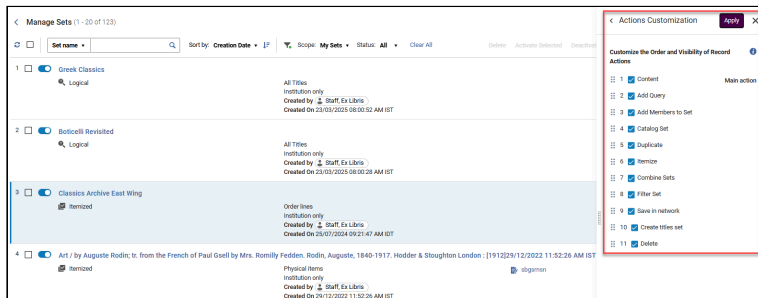
**Link to Known Issues Portal**

For more information, see [Alma User Interface](#).

## Support for Actions Configuration in Manage Sets List

### February 2026 User Experience, Accessibility & Infrastructure

You can now customize the display and order of the actions for the Manage Sets list.



**Actions Customization**

For more information, see [New Layout](#).

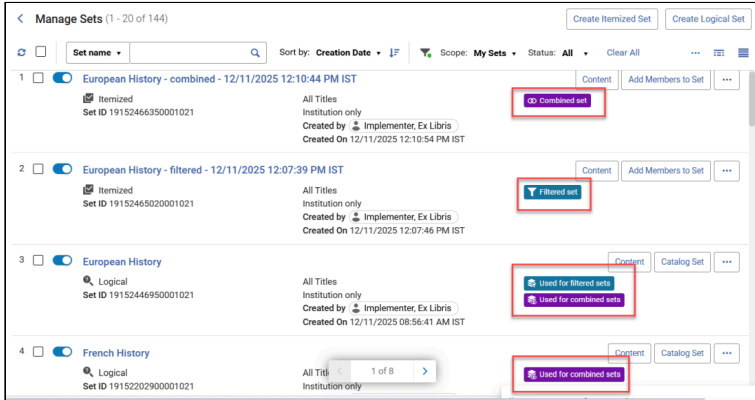
## Enhanced Display and Behavior for Related Sets, Filter and Combine Badges and Set ID Label in Manage Sets List

### February 2026 User Experience, Accessibility & Infrastructure

The Related Sets description in the Related Sets section in the Manage Sets interface was updated to be more meaningful

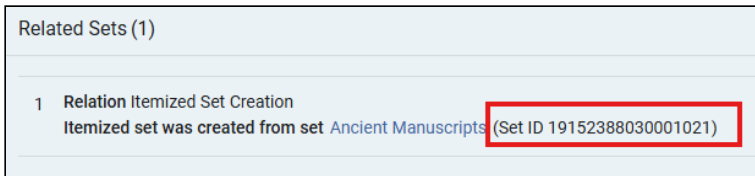
and improve clarity and consistency as follows:

- New badges were introduced to indicate the type of relationship:
  - Used for combined sets
  - Combined set
  - Used for filtered sets
  - Filtered Set



### New Badges

- The Related Sets section in the Manage Sets page was enhanced to be more informative and improve clarity and consistency:
  - Set IDs are now displayed at the end of each set name.



### Set ID in Related Sets

- The related sets display logic has been updated to better handle scenarios where sets are deleted or updated, ensuring an accurate representation of relationships. Filtered sets whose "parent" was deleted are now indicated as such.



### Deleted Parent in Related Sets

- Additional relations are now included, showing related set details for actions like **Create Titles Set** and **Itemize**.

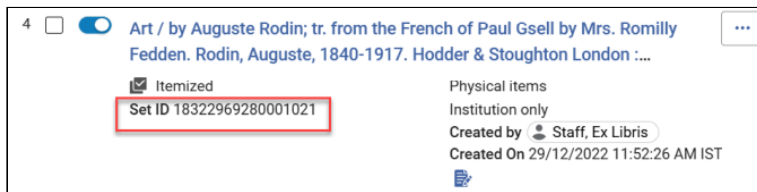


### Itemized and Created Title Sets in Related Sets

#### Note

- Updates/changes to sets (e.g., name change, adding members, etc.) that are part of a relation, no longer affect the display of the badges (for filter or combine operations) or the related set information in the Related Sets section.
- This change will not affect existing sets and existing sets relations and will take effect from this point onwards.

Additionally, the Manage Sets list now includes the Set ID information displayed in the first column of set information in the list, in addition to its current display in the right panel.



#### Set ID in Manage Sets List

For more information, see [Managing Search Queries and Sets](#).

## Support for Plain Text Email

### February 2026 User Experience, Accessibility & Infrastructure



#### Idea Exchange

Alma now provides an option to include plain text on top of the HTML version. This provides patrons with plain-text email clients the ability to view emails from Alma.

This feature can be enabled by setting the `include_plain_text_in_emails` parameter to true ([Configuration > General > Other Settings](#)).

For more information, see [Configuring Other Settings](#).

## User-Controlled Default Collapse State for Success Fly-In Messages

### February 2026 User Experience, Accessibility & Infrastructure

The success fly-in messages checkbox was updated to enable users to set the default display state (collapsed or

expanded) for success messages. Prior to this change, in pages with the new user interface, the default selection was for that specific message. Now, when selected, all similar message types on the same page follow the chosen default behavior. This change aligns the behavior with pages that do not have the new interface, and enables users to reduce visual clutter by collapsing success messages on the same page by default.



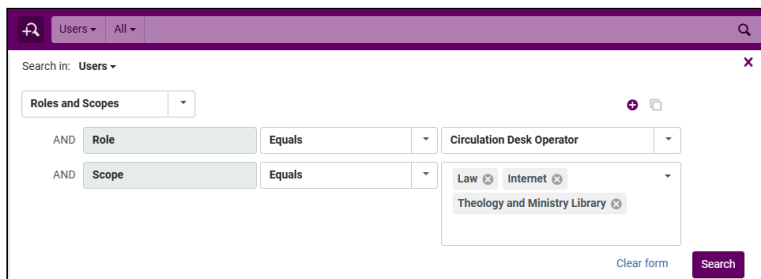
### Collapse by Default

For more information, see [Alma User Interface](#).

## Search Users by Role and Scope

### February 2026 User Experience, Accessibility & Infrastructure

It is now possible to search for user records in the Advanced Search by role and scope, for example, to search for users with a circulation desk operator role in the scope of the Main Library. This new option enhances search options and enables the creation of user sets based on their roles and scopes.



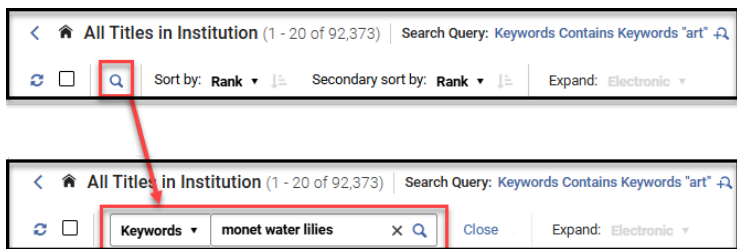
### Roles and Scope

For more information, see [Searching in Alma](#).

## Secondary Search for Titles/Holdings Search Results and PO Lines

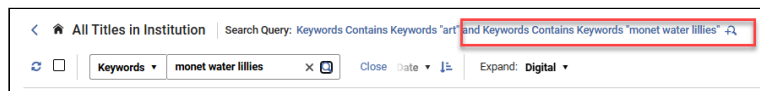
### February 2026 User Experience, Accessibility & Infrastructure

When searching for titles, holdings or PO lines in Alma, it is now possible to perform a secondary search within the search results. This is also available when viewing logical set content, allowing for easy location of specific set members. This is especially useful for users who want to quickly or temporarily refine their search query, without having to update an advanced search with additional search criteria.



## Secondary Search

For pages with a Search Query, the secondary search is added to the search query.



## Secondary Search in Search Query

### Note

After performing a secondary search, it is possible to save the refined results as a logical set. The secondary search is also available when viewing the content of a logical set of any of these search types.

For more information, see [Secondary Search](#).

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## New Encryption for User ID Encryption Field in Fulfillment Subject Area

### February 2026 Analytics and Insights

The **User ID Encryption** field in the Fulfillment Subject Area in Analytics is used to obtain counts by user ID after the anonymization job is run, which deletes the Primary ID. This field is now calculated using a new encryption method.

### Note

Existing reports using a specific value as a filter may need to be reviewed and updated to ensure they continue to function as expected.

For more information, see [Analytics Fulfillment Subject Area](#).

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## Flexible Definition of Local Parameters Being Sent to Analytics

### February 2026 Analytics and Insights

Users can now decide which parts of a MARC field (indicators and subfields) are sent to Analytics through local parameters. This is possible for both bibliographic and holdings information. It provides more control over data granularity in reports, enabling a more accurate and focused analysis.

For more information, see [Holding Details](#) and [Administrative Bibliographic Details](#).

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## Electronic Resource Network Data Accessible in a Single Location in Analytics

### January 2026 Analytics and Insights

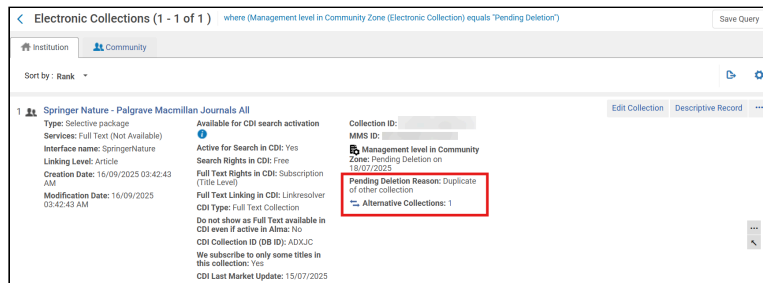
All electronic resource Network fields are now available in a single location within the **Portfolio Details for Consortia Members** folder in the **E-Inventory** Subject Area. Users can easily access all Network-related information in a single place, providing a clear and organized view.

For more information, see [Analytics When Using a Network Zone](#) and [Portfolio Details for Consortia Members](#).

# Electronic Collection Pending Deletion Reason and Alternative Collections CZ ID Fields Now Available in Analytics

## January 2026 Analytics and Insights

Two new fields, **Electronic Collection Pending Deletion Reason** and **Alternative Collections CZ ID**, are now available in the **E-Inventory** Subject Area, specifically in the **Electronic Collection** and **Portfolio Details for Consortia Members > Electronic Collection** folders. Additional information about collections pending deletion in the Community is now available in analytics, making it accessible even after the **Pending Deletion** collection has been deleted in Alma.



### Pending Deletion Reason and Alternative Collections

For more information, see [Electronic Collection](#) and [Portfolio Details for Consortia Members \(Electronic Collection\)](#).

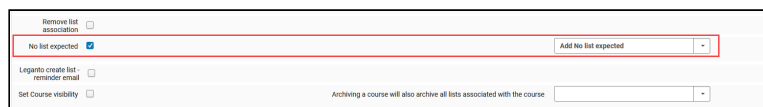
# Set "No List Expected" in Bulk Using Course Bulk Update Task

## January 2026 Fulfillment and Resource Sharing



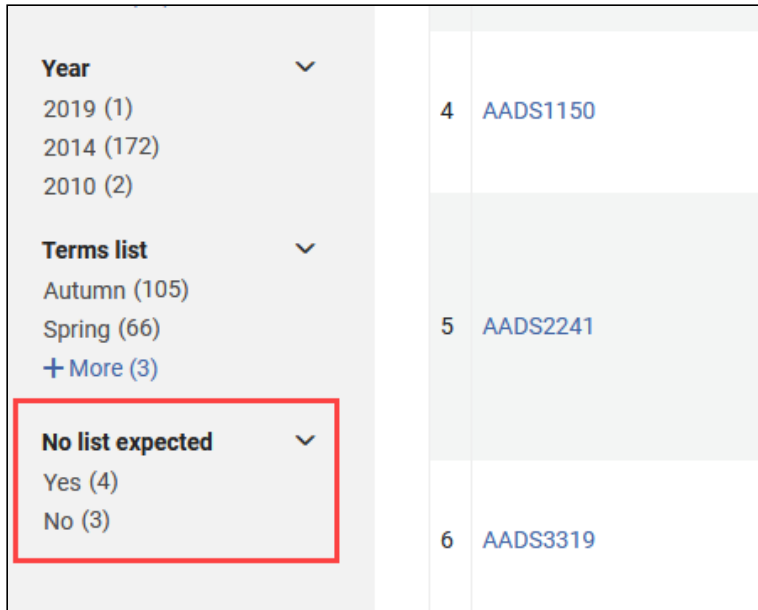
### Idea Exchange

The **Course Bulk Update** job (**Admin > Run a Job > Courses > Course Bulk Update**) now supports the **No list expected** attribute. Staff can select the **No list expected** checkbox in the job and choose either **Add No list expected** or **Remove No list expected** for all courses in the selected set, which enables efficient large-scale updates.



### Course Bulk Update job - No list expected option

A new **No list expected** facet is also available on the **Fulfillment > Courses** page. It enables staff to filter courses based on whether the **No list expected** attribute is selected (**Yes**) or not selected (**No**). This enhancement improves course management by enabling institutions to quickly identify and organize courses that are intentionally not expected to have lists.



#### New No list expected facet

## Related Records from Recommendation Summaries

### January 2026 Resource Management

Rialto now displays a **Related Records** link in the **Summary** section when viewing a retention or deselection recommendation that has associated bibliographic records. The link indicates the number of related records in parentheses.



#### Related Records link

Selecting **Related Records** opens a sliding panel with a list of all bibliographic records associated with the recommendation's MMS ID.

This enhancement makes it easy to find connected records when examining recommendations and helps users understand the broader bibliographic landscape of a title.

## Expanded Details in Item-Level Compare To Sections

### January 2026 Resource Management

Item-level **Compare To** sections for both retention and deselection recommendations now include detailed data for other

institutions' resources. Users can view this data by selecting the **View full list and additional information** link in the **Compare To** sections.

Compare To ^

2 institutions hold the resource.

	Institution Name	Category	Committed to Retain
1	Univ. of North Florida	General	No
2	University of California Berkeley	Network	No

View full list and additional information

This item is not held by any of the selected databases

### View full list and additional information link

Selecting **View full list and additional information** opens a detailed sliding panel that displays various data related to all matching holdings in comparison institutions, such as:

- MMS IDs
- Titles
- Authors
- Publication date
- Publisher name
- ISBNs
- Other system numbers

< Institutions for Reference

Institution Name  Category: All Committed to Retain: All

	Institution Name	Category	Committed to Retain	MMS ID	Title	Author	Publisher	Pub. Date	ISBN
1	Univ. of North Florida	General	No	990201...	Applied ethics : a non-consequ... approach /	Oderberg, David S.	Blackwell Publishers	2000.	0631219048; 97806312190... 0631219056; 9780631219057
2	University of California Berkeley	Network	No	991040...	Applied ethics : a non-consequ... approach /	Oderberg, David S.	Blackwell Publishers	2000.	97806312190... 0631219048; 97806312190... 0631219056

### Sliding panel with detailed holding information

The panel presents **one row per matching MMS ID per institution**. For example, if a single institution holds two matching MMS IDs, the panel lists two rows—one for each match. Additionally, if multiple identifiers exist, the sliding panel displays all of them in the same field.

Some data points are hidden by default; use the panel's configuration button to add additional columns to the sliding panel.

The screenshot shows a table titled "Institutions for Reference" with columns: Institution Name, Category, Committed to Retain, MMS ID, Title, Author, Publisher Name, Publication Date, and ISBN. A modal window is open on the right, allowing users to select or deselect columns. The "Add" column selection icon in the top right of the table is highlighted with a red box.

Institution Name	Category	Committed to Retain	MMS ID	Title	Author	Publisher Name	Publication Date	ISBN
1 Univ. of North Florida	General	No	990201...	Applied ethics : a non-consequ... approach /	Oderberg, David S.	Blackwell Publishers	2000.	0631219048 97806312190631219056 9780631219
2 University of California Berkeley	Network	No	991040...	Applied ethics : a non-consequ... approach /	Oderberg, David S.	Blackwell Publishers	2000.	97806312190631219048 97806312190631219056 0631219056

### Add additional columns to the panel

This update increases transparency across comparison institutions and supports more confident decision-making when assessing items for retention and deselection.

## Create Collection Development Projects from a File

### January 2026 Resource Management

Rialto now enables users to create retention and deselection projects by uploading a file that contains a predefined list of items. Users can upload a tab-delimited text file or an Excel file with item IDs to serve as the project's data source from which Rialto can generate recommendations. The uploaded file must be smaller than 10 MB and include a column named **Item ID** in the header row.

This capability is ideal for libraries that manage curated title lists outside of Rialto—for example, lists exported from previous projects, inventory analyses, or collaborative collection studies.

When creating a new project, a new **Upload Project From File** option is available on the **Add New Project** window (**Collection Development > Workflows > Retention or Deselection**). When selected, the window updates to include a field for uploading a file.

The screenshot shows the "Add Retention Project" form. The "Material Type" is set to "Books". Three radio buttons are present: "Create New Project", "Upload Project From File" (which is selected and highlighted with a red box), and "Create Project from Set". Below the radio buttons is a dashed box containing the text "Drop a file or Upload file". A help icon and text state: "Supported formats are .xls, .xlsx or tab delimited .txt. File must include a column named 'Item ID' with Item IDs. The maximum allowed file size is 10 MB." There are text input fields for "Project Name\*" and "Description". At the bottom, there is a checkbox labeled "Review only within libraries in my institution".

## New Upload Project from File option

This enhancement gives libraries greater flexibility when creating collection development projects. Direct file uploads also reduce manual setup time and improve accuracy when analyzing preselected title lists. For more information, see [Creating a Deselection Project from a File](#) and [Creating a Retention Project from a File](#).

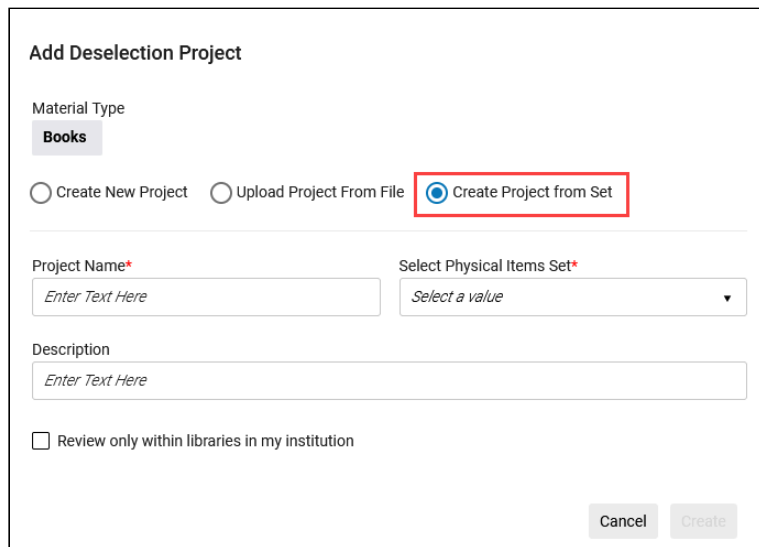
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## Create Collection Development Projects from an Alma Set

### January 2026 Resource Management

In addition to creating a project from a file, users can now also create new projects directly from existing Alma physical item sets. This enhancement applies to both retention and deselection projects.

When creating a new project, a **Create Project from Set** option is now available on the **Add New Project** window (**Collection Development > Workflows > Deselection** or **Retention**). Once selected, users can choose any Alma set containing physical items from the **Select Physical Items Set** dropdown. When generating recommendations for a project created this way, Rialto evaluates only the items included in the selected Alma set.



The screenshot shows a form titled "Add Deselection Project". At the top, "Material Type" is set to "Books". Below this, there are three radio button options: "Create New Project", "Upload Project From File", and "Create Project from Set". The "Create Project from Set" option is selected and highlighted with a red box. Below the radio buttons, there are two required fields: "Project Name\*" with a text input field containing "Enter Text Here", and "Select Physical Items Set\*" with a dropdown menu showing "Select a value". Below these is a "Description" field with a text input field containing "Enter Text Here". At the bottom left, there is a checkbox labeled "Review only within libraries in my institution" which is currently unchecked. At the bottom right, there are "Cancel" and "Create" buttons.

## New Create Project from Set option

This enhancement streamlines project setup and strengthens the connection between Alma's inventory management and Rialto's collection development workflows. For more information, see [Creating a Deselection Project from a Set](#) and [Creating a Retention Project from a Set](#).

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## Define Usage Scope in Retention Projects

### January 2026 Resource Management

Rialto now enables users to include usage criteria when defining the scope of retention projects. Previously, usage filters were available only for deselection projects.

A new **Suggest when total usage per title is more than** field has been added to the **Scope** section of the retention **Criteria form**. This field includes two dropdowns:

- A usage count dropdown (1–10) that specifies the minimum number of uses per title.

- A timeframe dropdown (1–10 years) that defines the period during which usage is calculated.

The field is optional and is blank by default.

### New Suggest when total usage per title is more than field

This enhancement helps libraries preserve high-value materials by basing retention decisions on measurable usage patterns.

## Include Digitization Requests in Usage Calculations

### January 2026 Resource Management

Rialto now enables institutions to account for digitization requests when calculating item usage in retention and deselection projects.

A new configuration option, **DIGITIZATION\_REQUESTS**, is now available in the table found in [Configuration > Collection Development > Workflows > Usage Calculation](#). When enabled, Rialto includes digitization requests in the total usage count used for generating project recommendations.

Usage Type Code	Usage Type	Include in Usage Calculation	Updated By	Last Updated
1	DIGITIZATION_REQUESTS	Digitization requests	True	ex_limpf 11/10/2025
2	IN-HOUSE_USES	In-house uses	False	-
3	LENDING_REQUESTS	Lending requests	True	-
4	LOANS	Loans	True	-
5	MIGRATED	Migrated loans only for TOTAL usage	False	-

### New DIGITIZATION\_REQUESTS option

Digitization requests represent instances where users or staff request the creation of a digital copy of a physical item.

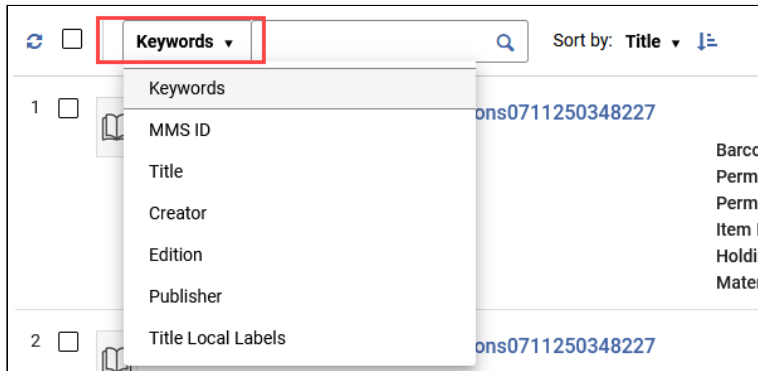
By incorporating digitization requests into the overall usage calculation, libraries gain a more accurate understanding of how their collections are accessed and valued. This helps institutions make better-informed decisions when identifying titles for retention or deselection.

## Search Within Recommendations

### January 2026 Resource Management

Users can now search within the recommendations list in both retention and deselection projects. A new search bar has been added to the **View Recommendations** page, next to the existing sort control. You can search by several indexed fields, including:

- Keywords
- Creator
- Edition
- MMS ID
- Publisher
- Title
- Title Local Labels



#### Search bar

Any selected facets remain applied when running a search. If no titles match the entered keywords, the page displays a message indicating that no results were found.

This improvement makes it easier to locate specific titles among large recommendation sets.

## Additional Enhancements

- **April 2026 Analytics and Insights**

The field **Public Note** has been added to the following Subject Areas:

- Fulfillment > Physical Item Details
- Lending Requests (Resource Sharing) > Physical Item Details
- Physical Items Historical Events > Physical Item Details (Current)
- Requests > Physical Item Details
- Rialto Collection Development > Physical Item Details

For more information, see [Fulfillment](#), [Lending Requests \(Resource Sharing\)](#), [Physical Item Historical Events](#), [Requests](#) and [Rialto Collection Development](#).

- **February 2026 Acquisitions**

In the receiving workbench, when selecting 25 or more PO lines for receiving, or when they have more than 25 items together, the receiving will now be done by a job. This is designed to enhance performance in cases of large selections. When the job has completed, a message is displayed that the job has finished, and the results of the receiving are displayed.

- **January 2026 Fulfillment and Resource Sharing**

Alma now records which user uploaded a file to a citation. When a file is uploaded, the system stores either the uploader username or, if the file was added by a job, the job ID.

In Alma, this information is visible in the **File Upload** component under the label **Uploaded by**. This information will be added to analytics in a future release

File Name	Uploaded by
1 2025 Release.xlsx	Implementer: Ex Libris

Information on who uploaded a file

## Upcoming Issues to Note

### Updated Documentation for Analytics Table

As part of an ongoing project and in alignment with the Analytics Community of Practice, Ex Libris is currently enriching the documentation of analytics field tables with additional information. This initiative aims to assist and support users in comprehending how our Alma data is presented within the realm of Analytics fields. For this month, the following table within the **E-Inventory** Subject Area was updated:

- [E-Inventory > Cost Usage > PO Line Type](#)

### Fulfillment Anonymization Job

Infrastructure enhancements were applied to the Fulfillment Anonymization Job to improve overall performance. As a temporary side effect, the job will appear twice in **Admin > Monitor Jobs > Manage Jobs and Sets** — one entry reflecting the actual processing activity, and a second entry showing 0 records processed.

This duplicate entry is expected and will be removed in an upcoming release.

### Updated Documentation for Analytics Tables

As part of an ongoing project and in alignment with the Analytics Community of Practice, Ex Libris is currently enriching the documentation of analytics field tables with additional information. This initiative aims to assist and support users in comprehending how our Alma data is presented within the realm of Analytics fields. For this month, the following table within the E-Inventory subject area was updated:

- [E-Inventory > Portfolio PO Line](#)

### Updates to OCLC Control Number Indexes

In the May 2026 release, we will be changing the following indexes.

- Other System Number (035a)
- Other System (035a) Exact
- OCLC Control Number (035a)
- Other System Number (035z)
- OCLC Control Number (035z)
- Other System Number (035a+z)
- OCLC Control Number (035a+z)

The indexing of these fields will no longer split the values. For example, searching for SCR will now return values such as

## Enhanced Bibliographic Index Infrastructure

### February 2026 Metadata & Linked Open Data

Empower your institution with fully customizable bibliographic search indexes designed to deliver a smarter, more precise discovery experience. Our enhanced infrastructure lets you define indexes tailored to your institution's unique bibliographic data—giving you greater flexibility, improved search accuracy, and a powerful foundation for more intuitive workflows. With this new capability, you can shape your search experience to match your exact needs and elevate the way your users find and access information.

For more information, see [Configuring Search](#).

## Data Dictionary E-Inventory

### February 2026 Analytics and Insights

As part of an ongoing project and in alignment with the Analytics Community of Practice, Ex Libris is currently enriching the documentation of analytics field tables with additional information. This initiative aims to assist and support users in comprehending how our Alma data is presented within the realm of Analytics fields. For this month, the following tables within the E-Inventory subject area have been updated:

- [E-Inventory - Portfolio License](#)

No issues to note match your criteria.

## Resolved Issues

- **April 2026 Acquisitions SF: 07960448**  
Previously, the **Keep in Department** setting was ignored when receiving more than 20 items. This was fixed.
- **April 2026 Acquisitions SF: 08005526**  
In some cases, an error was generated when creating or saving an invoice from a PO. This was fixed.
- **April 2026 Acquisitions SF: 08271353**  
Previously, selecting the **License Terms** tab for a license generated an error. This was fixed.
- **April 2026 Acquisitions SF: 08351746**  
Previously, the text `Test2` was displayed as the first header in the Purchasing Review Rules configuration (**Configuration Menu > Acquisitions > Purchase Orders > Purchasing Review Rules**) for the rule's basic details. This was fixed.
- **April 2026 User Experience, Accessibility and Infrastructure**  
Long facet labels would wrap to the next line instead of being truncated with an ellipsis. This was fixed. To implement the fix, the `allow_ng_facets_text_wrap_display` parameter (**Configuration > Resources > General > Other Settings**) must be set to `true`.
- **April 2026 User Experience, Accessibility and Infrastructure**  
When text spacing was adjusted, some content was cut off and could not be seen. This was fixed. To implement the fix, the `text_spacing_extension_correction` parameter (**Configuration > Resources > General > Other Settings**) must be set to `true`.
- **April 2026 User Experience, Accessibility and Infrastructure SF: 08101202 08080066**  
In some cases, there were multiple Primo login events in short succession. This was fixed.
- **April 2026 User Experience, Accessibility and Infrastructure SF: 08191697**

For Bib records with double-space in the Originating System ID field, the double space was not displayed in Alma, a single space was displayed instead. This was fixed, and now a double-space will be displayed. Note: We have currently fixed only the Originating System ID field and only in the header of the "Record View" page, since white space collapsing is the default browser behavior and changing it system-wide might cause undesired behavior elsewhere.

- **April 2026 User Experience, Accessibility and Infrastructure SF: 08265760**  
Previously, the calendar to choose a date in a Staff Mediated Deposit field did not open. This was fixed.
- **April 2026 Analytics and Insights SF: 08166376**  
Previously, the Analytics report did not display items with provenance codes exceeding 64 characters in Alma. This was fixed.
- **April 2026 Analytics and Insights SF: 08240761**  
Previously, the Data Sharing Profile form did not allow free-text entry when Other is selected for any question that includes this option. This was fixed.
- **April 2026 APIs SF: 08222934**  
Previously, the REST API update for digitization requests failed when page numbers were out of range. This was fixed; the API now behaves the same as the UI.
- **April 2026 Fulfillment and Resource Sharing SF: 8105010**  
Previously, staff could not set a shipped item to **Lost** when the lending request was associated with an NCIP partner. This was fixed, and a **Lost** action has been added that updates the borrowing request without sending a general message, enabling staff to set the item to **Lost** in these cases.
- **April 2026 Fulfillment and Resource Sharing SF: 07982690 08015756 08380365**  
Previously, when an item on loan had a Temporary Move Request and was checked in using the Return Items at the destination library, an error occurred, and the return was not processed. This was fixed, and the loan is now successfully returned.
- **April 2026 Fulfillment and Resource Sharing SF: 08117060**  
Previously, the Download Electronic Resource screen for lending requests did not display any results for limited-coverage portfolios or dateless lending requests. This was fixed.
- **April 2026 Fulfillment and Resource Sharing SF: 08163939**  
The patron workbench Fines and Fees list displayed an Oops error for corrupted fees where the fee owner (Library ID) was not found in the organization. This was fixed. Now, Alma displays the fee with an empty owner field.
- **April 2026 Fulfillment and Resource Sharing SF: 08219563**  
After canceling a booking request and loaning the item to a patron, the canceled request remained listed under Expired Hold Shelf. This was fixed.
- **April 2026 Fulfillment and Resource Sharing SF: 07941000**  
NCIP P2P ItemShipped messages were failing validation because the MonetaryValue element was sent with decimal values, while the NCIP specification requires an integer. The shipping cost value is now normalized before being included in the message, ensuring MonetaryValue is always sent as an integer. This aligns the message with NCIP requirements and prevents validation errors during processing.
- **April 2026 Fulfillment and Resource Sharing SF: 08274212**  
Previously, when an item's material type was changed while a request existed, the request was canceled without notifying the user. This was fixed, and a confirmation message now appears.
- **April 2026 Fulfillment and Resource Sharing SF: 08272545**  
In some cases, creating patron physical item requests with long notes did not work. This was fixed.
- **April 2026 Fulfillment and Resource Sharing SF: 08332647 08327345**  
Previously, when the ship digitally failed, lending requests were marked as shipped digitally, even though they were not actually shipped. This was fixed.
- **April 2026 Fulfillment and Resource Sharing SF: 08327393**  
Previously, when accessing Manage Patron Services via the On Loan Item > Borrower path, after selecting Done, an error was displayed. This was fixed.
- **April 2026 Fulfillment and Resource Sharing SF: 08386785 08388316**  
In some cases, the Rapido request form was not submitting. This was fixed.
- **April 2026 Fulfillment and Resource Sharing SF: 08294270**  
Previously, the long DOI format did not populate when performing a manual borrowing request. This was fixed.

- **April 2026 Fulfillment and Resource Sharing SF: 08349298 08359155**  
Previously, Alma automatically rejected all RapidILL Lending requests. This was fixed.
- **April 2026 Metadata Management SF: 07867766 07826965 06785838 07824983**  
Under some configurations, it was possible that during an import job, a temporary record in the institution was not deleted when the institution record was linked to a network record. This was fixed.
- **April 2026 Metadata Management SF: 07932016 07888787 07887460**  
Previously, when viewing imported records (**Import Job > ... > Imported Records**), the underlying query included the condition "linked institution not equal community." This condition caused issues when attempting to change the search type. The CZ-related condition has been removed from the query, as it is no longer relevant. As a result, the search type can now be changed successfully while preserving the existing query conditions.
- **April 2026 Metadata Management SF: 07854586**  
In some cases, the Metadata Editor displayed different metadata for holdings than the value in **MMS\_RECORD** and **INVENTORY\_HOLDING**. This was fixed.
- **April 2026 Metadata Management SF: 08060469**  
In some cases, the Duplicate Title Analysis job report didn't include all of the relevant institutions in the **Held By** column. This was fixed.
- **April 2026 Metadata Management SF: 08065708**  
When reloading an authority record from the NLI system (Authority Record Contribution integration profile: NLI), the external record's version was not updated in the Alma Community Zone. This was fixed.
- **April 2026 Metadata Management SF: 08156977**  
Previously, transliteration for special characters was incorrect. This was fixed.
- **April 2026 Metadata Management SF: 08208038 08255155 08245447**  
Previously, the **Advanced Search > Modification Date** reverted to the previous day when selected from a previous search. This was fixed.
- **April 2026 Metadata Management SF: 08229577 08281457**  
In some cases, when the Additional Authorized Fields were configured, the PTC job failed. This is fixed.
- **April 2026 Metadata Management SF: 08307962**  
Previously, the **Field Information** button on the Metadata Editor fields was linked to an outdated URL. This was fixed.
- **April 2026 Metadata Management SF: 08281738**  
Previously, when an XSL normalization contained a comment ( ) that included the word rule in it, it could not be saved properly. After saving, the editor cuts all text before the word rule. This was fixed.
- **April 2026 Metadata Management SF: 08331133**  
Previously, the **Update Inventory** import behavior was changed to apply Normalization before matching incoming records to existing records. This change caused issues for multiple customers who require normalization to be applied after the matching phase. A new customer parameter has been introduced to control whether to apply normalization prior to or after the matching phase.
- **April 2026 Metadata Management SF: 08328038**  
In some cases, when a title search contained multiple bibliographic records with related records, the Holdings tab displayed related holdings of another record. Those related holdings disappear when refreshing the search results. This was fixed.
- **April 2026 Resource Management SF: 08158585 08013989**  
Previously, when an Electronic Activation Task list included an electronic collection with thousands of portfolios, the **Unsuppress** action was non-responsive, resulting in a timeout. This was fixed.
- **April 2026 Resource Management SF: 7928835**  
Items List: When binding items that were in process and then selecting **Create and Edit**, when editing the bound item and saving it, the user was returned to the items list and the bound items were mistakenly displayed in the items list as blank rows. This was fixed.
- **April 2026 Resource Management SF: 08179454**  
Previously, the Primo VE link resolver was retrieving CZ-related records even when the **Related Records for Serials** configuration was disabled. This was fixed, and CZ-related records are now only retrieved when enabled by the user configuration.
- **April 2026 Resource Management SF: 07939042**  
Previously, the Representation was not imported for a record found as a single match with **MERGE** operation in the

OAI import job. This was fixed.

- **April 2026 Resource Management SF: 08221408**  
When a general publishing profile with Profile Details / Content / Publish the entire repository selected, and Data Enrichment / Related Records Enrichment / Add related records information selected and configured, was executed, the published records did not contain the expected related records data. This was fixed.
- **April 2026 Resource Management SF: 08165267**  
When creating a new portfolio via the API that was defined as active (the value of the availability tag was 11), the portfolio was activated, but the activation date remained empty. This was fixed.
- **April 2026 Resource Management SF: 08278680**  
When a network member institution retrieved an electronic portfolio in the **Community Zone** tab, a network icon was displayed to the left of the title, indicating that a Network Zone portfolio was linked to this Community Zone, even though no portfolio in the Network Zone was actually linked to the Community Zone portfolio. This was fixed, and the network icon is only displayed if there is a Network Zone portfolio directly linked to the Community Zone portfolio.
- **April 2026 Resource Management SF: 08303950**  
Previously, an incorrect expiry date was displayed in a **Long-Term Digital Loan expiry date** field in the Digital Viewer. This was fixed.
- **April 2026 Resource Management SF: 08322736**  
Previously, when using the Item updater by Excel, the Replacement Cost field was updated even when it was not included in the file. This was fixed.
- **April 2026 Resource Management SF: 08328567**  
Previously, Extended Exports from the Community Zone portfolios list downloaded an Excel file in the wrong format (appearing as corrupted). This was fixed, and the export now downloads in the correct Excel format.
- **April 2026 Resource Management SF: 08370008**  
Previously, the file sorting did not work according to the sub-field 08 linking number. This was fixed.
- **March 2026 Acquisitions SF: 08099408 08290660 08294826 08294470 08327831 08329304 08319384**  
Previously, wildcards and special characters did not work as expected on the Receive New Material search. This was fixed.
- **March 2026 Acquisitions SF: 8073250**  
Previously, when creating an invoice via EDI, invoices could not be created if the over expenditure limit sum was 0.0. This was fixed.
- **March 2026 Acquisitions SF: 08184374 08240818**  
Previously, the Uploaded Counter report did not appear in **Usage Data > Uploaded Files**. This was fixed.
- **March 2026 Acquisitions SF: 8130899**  
Previously, users with the roles **Purchasing Operator Extended** and **Purchasing Manager** were unable to delete POs. This was fixed. Now, if the PO line owner matches the library in the role scope, the user can delete the PO.
- **March 2026 Acquisitions SF: 8250748**  
Previously, the service unit name was not translated on the **In Process Item (Configuration > General > Work Order Types)** page. This was fixed, and the service unit name is now translated.
- **March 2026 Acquisitions SF: 08190147 08075310**  
Previously, the Replace resource action didn't remove the linking between the NZ resource and the local IZ poline. This caused the NZ resource to appear in Analytics reports. This was fixed.
- **March 2026 Acquisitions SF: 8242152**  
Previously, there was an issue with a limitation on records in input files. This was fixed. The limitation was removed, and large files can be loaded.
- **March 2026 Acquisitions SF: 8303664**  
Previously, creating an invoice from Excel always set the invoice line to fully invoiced and released the remaining encumbrance regardless of the encumbrance setting. This was fixed, and subscription PO lines will not be fully invoiced.
- **March 2026 Acquisitions SF: 8317624**  
Previously, users with read-only roles were not able to view the acquisition configuration. This was fixed.
- **March 2026 User Experience, Accessibility and Infrastructure SF: 8173354**  
Previously, bib headings created when Deposits were created with a name in field 100 could not be deleted. This was

fixed.

- **March 2026 User Experience, Accessibility and Infrastructure SF: 8287782**  
Previously, Discovery Import Job Counters were visible in the Alma job report UI, but were not exposed in the Get-Job-Instance API. This was fixed.
- **March 2026 User Experience, Accessibility and Infrastructure SF: 08283644 08321391 08292662**  
In some cases, users were receiving notifications on expired SAML certificates in a profile that no longer exists. This was fixed.
- **March 2026 Analytics and Insights SF: 8225498**  
Previously, when the Network Zone opened the Analytics configuration mapping table Participants in Consortial Analytics for the first time, the **Updated By** for every member had the login user ID, and **Last Update** was populated with the current date, even if the user did not change the table at all. This was fixed.
- **March 2026 Analytics and Insights SF: 8249188**  
Previously, the **Not Relevant** option was missing from the **Total Undergraduate Student Body Size** question in the Data Sharing Profile configuration form. This was fixed.
- **March 2026 Analytics and Insights SF: 8282310**  
Previously, several LC classification codes were not displayed in Analytics. This was fixed.
- **March 2026 APIs SF: 8091137**  
Previously, when First Label Print Position was set to any row other than Row 1, Col 1, the application reverted to Row 1, Col 1 upon restart. Additionally, while the preview displayed the correct starting position, the actual PDF output printed from position 1, 1 instead of the configured position. This was fixed, and the First Label Print Position is now retained, and the PDF output now prints the correct position.
- **March 2026 APIs SF: 08228003 08245501 08264202 08283722 08267822 08275555 08317676**  
Previously, when running the latest Stunnel version v5.76, an error was generated in the Stunnel log. This was fixed.
- **March 2026 APIs SF: 08289255**  
Previously, in the Webhook Integration Profile, the Custom Header was not sent via the GET challenge request. This was fixed.
- **March 2026 Fulfillment and Resource Sharing SF: 7207614**  
In some cases, the Create physical work orders job failed to communicate part of the remote storage request. This was fixed.
- **March 2026 Fulfillment and Resource Sharing SF: 08141225 07892060**  
Previously, the circulation desk names were displayed in English rather than the user's selected language on the create request form. This was fixed.
- **March 2026 Fulfillment and Resource Sharing SF: 08115142 08262080 08300845**  
Previously, **Export for Current View** ignored customizations and always used the default values. This was fixed.
- **March 2026 Fulfillment and Resource Sharing SF: 8153470**  
When a citation with copyright information was copied or duplicated to another reading list, the copyright data was lost and became editable. This was fixed so that the copyright information is retained and remains disabled for editing, just as it is on the original citation.
- **March 2026 Fulfillment and Resource Sharing SF: 8148886**  
In some cases, when searching for linked users via API source\_user\_id, or via UI Find user in another institution the user was not found even though the linked account already existed in the target institution. This resulted in the creation of multiple duplicate users. This was fixed. Now, when searching for a duplicated linked user, Alma returns the latest created user.
- **March 2026 Fulfillment and Resource Sharing SF: 8149652**  
In some cases, the rota template page did not display correctly. This was fixed.
- **March 2026 Fulfillment and Resource Sharing SF: 8166249**  
Previously, the user card was visible even when the **View User Card** was disabled. This was fixed, and now only users with the **View User Card** privilege can view user cards.
- **March 2026 Fulfillment and Resource Sharing SF: 08185960 08257107 08218646 08285960 08259743 08259682 08293979**  
Previously, a temporary CZ outage occurred during the first attempt to retrieve information, causing a runtime exception that resulted in duplication. This was fixed.
- **March 2026 Fulfillment and Resource Sharing SF: 08164867 08186496 08268070 08272106 08336416**

Previously, overdue fines continued accruing even when the **overdue\_at\_lost\_loan/overdue\_at\_claim\_return\_loan** (**Configuration Menu > Fulfillment > General > Other Settings**) parameter was set to true. This was fixed. Now, when the Found Item action is used to revert a lost/claim return item back to active status, any overdue fines that were generated are waived (based on the **overdue\_at\_lost\_loan/overdue\_at\_claim\_return\_loan** parameter). Once the item is actually returned, the overdue fine policies are applied to the entire overdue period.

- **March 2026 Fulfillment and Resource Sharing SF: 8215138**  
Previously, when creating an AFN request, the borrowing request displayed the correct pickup location, but the fulfillment request on the lending side displayed a library from another consortia institution. This was fixed.
- **March 2026 Fulfillment and Resource Sharing SF: 8223017**  
Previously, editing a fulfillment unit whose name contained an ampersand resulted in an error. This was fixed.
- **March 2026 Fulfillment and Resource Sharing SF: 8239728**  
In some cases, the show file action was not working. That was fixed
- **March 2026 Fulfillment and Resource Sharing SF: 08231072 08287110**  
Previously, when editing a physical item request, the error failed to initialize the request was generated, and the pickup location was not listed. This was fixed.
- **March 2026 Fulfillment and Resource Sharing SF: 8192435**  
Previously, the ISO 18626 message sent from Alma to Tipasa included incomplete or truncated data in the volume and issue fields. This was fixed.
- **March 2026 Fulfillment and Resource Sharing SF: 8252331**  
Previously, when a digital borrowing request was received as Physical non-returnable and completed upon receiving, the request's additional ID was not included in the On hold shelf letter. This was fixed, and now the field in the letter XML is populated correctly.
- **March 2026 Fulfillment and Resource Sharing SF: 8234435**  
Previously deselecting 'I only need a specific chapter' did not remove chapter information from Alma borrowing request. This was fixed.
- **March 2026 Fulfillment and Resource Sharing SF: 8259982**  
SSI: Handle historical archiving - Previously, the job **Status** was `Completed with Errors`, even though there were no failed records. This was fixed.
- **March 2026 Fulfillment and Resource Sharing SF: 08317665 08316927**  
Previously, **Recalculate Partner** and **Reset Rota** actions did not re-add partners that were already in the rota. It was fixed.
- **March 2026 Metadata Management SF: 07648627 07777627**  
In some cases, when **Record has matches** was defined as an error, authority records with matches were saved, and an error was generated. This is fixed.
- **March 2026 Metadata Management SF: 8039172**  
When a new UNIMARC authority record containing a field 815 was contributed to SBN, the tipoAuthority (authority type) attribute for the 815 link was incorrectly set to AU (Author) instead of RE (Repertoire), causing the SBN server to reject the record. This was fixed.
- **March 2026 Metadata Management SF: 08249028 08258474**  
Previously, the **Description** search index didn't work with `is/is not Empty`. This was fixed but requires re-indexing.
- **March 2026 Metadata Management SF: 08253742 08267593 08245281**  
In some cases, the CV-List was not displayed for repeated subfields. This was fixed.
- **March 2026 Metadata Management SF: 8257076**  
Previously, an incorrect info card was displayed in Primo VE when no info card was displayed in Alma. This was fixed.
- **March 2026 Resource Management SF: 8134079**  
Previously, the Springer autoholding integration generated an incorrect local date for a portfolio in the **Coverage** tab.
- **March 2026 Resource Management SF: 8165862**  
Previously, the host record did not display all related holdings and all related items from the part records. This was fixed.
- **March 2026 Resource Management SF: 8187904**  
Previously, Collections were not deleted after the **Delete Collection** job was run. This was fixed.
- **March 2026 Resource Management SF: 08230180 08344487**

Users with the role Physical Inventory Operator or Physical Inventory Operator - Limited were unable to see the **Run a Job** menu and run the **Change Physical Items Information** job. This was fixed.

- **March 2026 Resource Management SF: 08215120 08253170 08288925**  
Previously, when relinking a holdings record to a target bib record that had a matching holdings record, the items were moved from the source holdings record to the target matching holdings record; then, the empty source holdings record was deleted (unless it was marked as **committed to retain**). However, the deletion process was not completed, and the empty, partially deleted source holdings record was mistakenly attached to the target bib record. This made the source holdings record searchable and editable in the MD Editor as if it were part of the target bib record. Both of these issues were fixed.
- **March 2026 Resource Management SF: 8159175**  
Previously, parent records were deleted when a purchase request was rejected. This was fixed.
- **March 2026 Resource Management SF: 8221498**  
Previously, the Online service order configuration was not applied. This was fixed.
- **March 2026 Resource Management SF: 8284853**  
Previously, when the **Description** in the Copyrights Statements form exceeded the character limit, an error was generated. This was fixed.
- **March 2026 Resource Management SF: 8304754**  
Previously, when a collection was created via the API, the source and creator fields were not populated. This was fixed.
- **February 2026 Acquisitions SF: 08218470 07913344**  
Previously, there was an incorrect rounding in PO Lines created from an API when applying a discount, resulting in an inconsistency between the net price and total funds amount. This was fixed.
- **February 2026 Acquisitions SF: 8066446**  
In some cases, the classic Primo View It frame did not have white space padding between the Access Model field name and its value. This was fixed.
- **February 2026 Acquisitions SF: 8032144**  
Previously, PO line Ordered Collection results were inconsistent. This was fixed.
- **February 2026 Acquisitions SF: 8164681**  
Previously, the Has Content blue triangle indicator was missing from the **Licenses History** tab. This was fixed.
- **February 2026 Acquisitions SF: 8179190**  
Previously, the reclaim date did not behave consistently depending on how the date was changed. This was fixed.
- **February 2026 Acquisitions SF: 8232300**  
Previously, the request URL construction did not include proper normalization of spaces into valid encoded characters. This was fixed.
- **February 2026 Acquisitions SF: 07831409 08252574 08252187 08262143 07842204 08257233 08273133 08274260 08289623 08288954**  
Previously, when the parameter **po\_line\_description\_update\_upon\_bib\_change** (**Configuration Menu > Acquisitions > General > Other Settings**) was enabled in a Network Zone environment, when the Network Harvesting Job executed to distribute changes to the linked records in member institutions, the member registered was not updated. This was fixed.
- **February 2026 Acquisitions SF: 8242222**  
In some cases, the Import job failed. This was fixed.
- **February 2026 Analytics and Insights**  
In cases of long harvesting jobs, data was missing from Analytics. This was fixed.
- **February 2026 Analytics and Insights SF: 8082221**  
Previously, some successfully harvested COUNTER files were not loaded into Alma Analytics, causing missing usage data. This was fixed.
- **February 2026 Analytics and Insights SF: 8231753**  
After the fix, when an admin revokes a user's access to a report, the associated notification is automatically removed from that user's account.
- **February 2026 APIs SF: 8230381**  
Previously, when searching for a letter configuration for the SystemJobLetter using the API, the wrong configuration

was returned. This was fixed.

- **February 2026 APIs SF: 8242097**  
Previously, the SAML Certificate Expiration Email was sent despite the letter being disabled. This was fixed.
- **February 2026 Fulfillment and Resource Sharing SF: 6776553**  
SLNP: Previously, Alma returned an error response 510 Command not supported to the ZFL server, even though the lending request was correctly created in Alma. This was fixed.
- **February 2026 Fulfillment and Resource Sharing SF: 8115275**  
Previously, the **Creation Date** on resource sharing partners copied from the Community Zone was set to the current date rather than the date the partner was created. This was fixed.
- **February 2026 Fulfillment and Resource Sharing SF: 8186877**  
Previously, the measure **Days of Request to Material Arrival** was not accurate. This was fixed.
- **February 2026 Fulfillment and Resource Sharing SF: 8152977**  
In some cases, partners originating from the Network Zone received incorrect information from the Community Zone. This was fixed.
- **February 2026 Fulfillment and Resource Sharing SF: 8169326**  
Previously, **Fill Locally** workflow sometimes created a lending request to the wrong member. This was fixed.
- **February 2026 Fulfillment and Resource Sharing SF: 8219563**  
Previously, when a loaned item was scanned, the booking request that was canceled remained in the system and was not deleted. This was fixed.
- **February 2026 Fulfillment and Resource Sharing SF: 8257361**  
There was no translation for the **External Identifier** on the **Scan in Items**. This was fixed.
- **February 2026 Fulfillment and Resource Sharing SF: 08258777 08119975**  
Previously, when using `{rft.normalized_issn}` in the General Electronic Services (GES), the **ISSN** value was removed entirely, resulting in an empty parameter (`issn=&`) instead of returning the normalized ISSN. This was fixed.
- **February 2026 Fulfillment and Resource Sharing SF: 8243713**  
Manage patron services: Previously, filtering loans by **Loaning desk** caused a display issue where the wrong number of loans was displayed. This was fixed.
- **February 2026 Fulfillment and Resource Sharing SF: 8239481**  
In some cases, using the **Exact Open Days** option in the Grace Period policy caused problems when trying to return loaned items. This was fixed.
- **February 2026 Fulfillment and Resource Sharing SF: 8275396**  
Previously, when a lending request's overdue message failed to send, no indication was listed on the lending request's history. This was fixed.
- **February 2026 Metadata Management SF: 08351319 08351300 08353288 08351653 08352823 08349278 08349033 08343093 08353249 08351194 08353522 08354221 08353992 08349257 08356724 08352289 08357481 08359400 08358859 08353385 08358739 08361919**  
(Updated on 12 February 2026) The LoC iframe no longer works. LoC links will now open in a new tab instead of an iframe.
- **February 2026 Metadata Management**  
(Updated on 26 January 2026) In Metadata Editor records, when text spacing was in use, some content was cut off. This was fixed and it is now improved to comply with accessibility standards. For the fix to be implemented, the **text\_spacing\_extension\_correction** parameter (**Configuration Menu > Resources > General > Other Settings**) must be set to true (the default is false).
- **February 2026 Metadata Management SF: 07950333 08059340 07811933 07900249 08223318 08279617**  
In some cases, searches from the **Network** tab returned `Community zone server is down` error when it should not have. This was fixed.
- **February 2026 Metadata Management SF: 7998094**  
Held By Details page: Holdings suppressed on the location level were not shown as suppressed. This was fixed.
- **February 2026 Metadata Management SF: 8164017**  
In some very specific cases, when browsing bibliographic headings, the same heading was duplicated in the results list. This is fixed.
- **February 2026 Metadata Management SF: 8216305**

In some cases, when partial linking was activated in the Network Zone and not in the Institution Zone, editing an NZ record and reselecting the linked authority using **F3** sometimes duplicated the subfields. This is fixed.

- **February 2026 Resource Management SF: 08232956 08042063**  
In some cases, the Deleted bib records counter in the report of the **Withdraw Physical Items** job was incorrect. This was fixed.
- **February 2026 Resource Management SF: 08226846 08106801**  
Relink holdings to another bib: if a matching holdings was found in the target bib, and the source holdings had many (thousands) items, the relink action did not complete. This was fixed.
- **February 2026 Resource Management SF: 08164382 08104481**  
In some cases, when adding a new item in the Items List page, Alma returned to the Items List, but it was either empty or displayed fewer items. This was fixed.
- **February 2026 Resource Management SF: 8100394**  
Previously, the **Remove titles from collection** job displayed incorrect numbers. This was fixed.
- **February 2026 Resource Management SF: 8203517**  
Previously, the Network Zone **Held by** details page showed the same item twice, one in the permanent holding and once in the temporary (virtual) holding. This was fixed. When an item is in a temporary location, it is displayed in the virtual temporary holding, and does not also appear in the permanent holding entry.
- **February 2026 Resource Management SF: 08240163 08246656 08284579**  
Previously, due to corrupt data, an error was generated when opening the Electronic Resource Activation Task List (**Resources > Manage Inventory > Manage Electronic Resource Activation**). This was fixed.
- **February 2026 Resource Management SF: 8274343**  
In some cases, the wrong error message was generated for the **Restore** jobs tool in non-Network Zone environments. This was fixed.
- **February 2026 Resource Management SF: 8271651**  
Previously, the portfolio title was not displayed when the bib record is Dublin Core. This was fixed.
- **February 2026 User Experience, Accessibility and Infrastructure SF: 8173478**  
It is now possible to configure the **OpenID Connect** Login Link from the **Help menu > Premium Sandbox**.
- **February 2026 User Experience, Accessibility and Infrastructure SF: 8259007**  
Previously, the Print Queue showed printouts of another user when both users had the same first and last names. This was fixed.
- **February 2026 User Experience, Accessibility and Infrastructure SF: 8261268**  
Users created using SAML JIT were always created as account type EXTERNAL, even if the XSL specifically generated an XML with INTERNAL. This was fixed.
- **January 2026 Acquisitions SF: 08171726**  
Previously, when the Solr search language was in Korean/Japanese/Chinese, searching for a purchase request with a title in Korean/Japanese/Chinese did not return results. This was fixed.
- **January 2026 Acquisitions SF: 08130242 08227742 08036238 08100455 08098008**  
Previously, purchase orders were not closed when purchase order lines were closed by the invoice process. This was fixed.
- **January 2026 Acquisitions SF: 06985469 08209793 08232790**  
Previously, the serial item/s receiving process did not update the expected receiving date on the PO line. This was fixed.
- **January 2026 Acquisitions SF: 08118687**  
Previously, it was possible to generate fund transfers between different fiscal periods. This was fixed.
- **January 2026 Acquisitions SF: 08082352**  
Previously, the Manage EDI tasks included both English and the selected UI language in the response summary (**Acquisitions > Purchase Order Lines > Manage EDI Tasks**). This was fixed. Now only the selected UI language is displayed.
- **January 2026 Fulfillment and Resource Sharing SF: 07977013**  
When changing the due date on multiple loans, the new due date was not displayed in the **This Session** filter. This occurred in cases where the loan ID was longer than 14 digits. This issue has been resolved, and the new due date is now displayed immediately for all loans in "This Session".

- **January 2026 Fulfillment and Resource Sharing SF: 08184667**  
In some cases, hiding the **General Hold Request** button using Display Logic Rules (DLR) when a General Electronic Service (GES) existed did not work. This was fixed.
- **January 2026 Fulfillment and Resource Sharing SF: 08142256 08031444 08186472 08144502 08084155 08031561 08070341 08221355 08189769**  
In some cases, the manage patron services indicated users had active requests when those requests were not active. This was fixed.
- **January 2026 Fulfillment and Resource Sharing SF: 07964481**  
Previously, reading room items that were loaned were not renewed when they were re-scanned. This was fixed, and now reading room items with an **AT\_USER** status are renewed when re-scanned.
- **January 2026 Fulfillment and Resource Sharing SF: 07982690 08015756**  
Previously, when an item on loan had a Temporary Move Request and was checked in using the **Return Items** at the destination library, an error occurred, and the return was not processed. This was fixed, and the loan is now successfully returned.
- **January 2026 Fulfillment and Resource Sharing SF: 07911914**  
Previously, requests for serial items with identical item descriptions ignored the Pickup Location. This was fixed.
- **January 2026 Fulfillment and Resource Sharing SF: 06807126**  
In some cases, creating borrowing requests triggered a timeout. This was fixed.
- **January 2026 Fulfillment and Resource Sharing SF: 08282063**  
In some cases, Rapido tiles were not displayed for users who were not logged in. This was fixed. If customers prefer to hide these tiles for non-logged-in users, adjust the setting under from **Configuration > Resource Sharing > Hide Rapido Options**, and check the **Hide section when user is not logged in** checkbox.
- **January 2026 Metadata Management SF: 08212024**  
Previously, Alma always preserved the literal # character in MARC21 007 fields when storing the record in the database. This behavior is now configurable, and when the parameter is set to `false`, all # characters in MARC21 007 fields are replaced with spaces before being stored in the database. Contact support to change this parameter setting.
- **January 2026 Metadata Management SF: 08197214**  
In some cases, the record was not returned in the **LC Subject** search. This was fixed.
- **January 2026 Metadata Management SF: 08223775**  
In some cases, searches containing special characters returned incomplete results. This was fixed.
- **January 2026 Metadata Management SF: 08241533**  
Previously, portfolios whose collections contained special characters were not viewable in an All Title search. This was fixed.
- **January 2026 Metadata Management SF: 08153386**  
New titles search: In some cases, an "Oops" error was displayed when selecting the **Licenses** link. This was fixed.
- **January 2026 Metadata Management SF: 08216442**  
In some cases, scheduled manual jobs failed and were not restarted. This was fixed.
- **January 2026 Metadata Management SF: 08197357**  
Previously, the normalization rule was not considered when matching by the **POLine/vendor reference number** in the **Update Inventory import** profile. This was fixed.
- **January 2026 Metadata Management SF: 08155855**  
When an authority or bibliographic record was created in Alma, then contributed to SBN, the record's originating system id was not reset to be the SBN record id. Because the originating system id for an authority record did not match the external (SBN) system id, the authority import profile's match method "001 To ORIGINATING\_SYSTEM\_ID" did not match the Alma record to the SBN record, which resulted in the SBN authority alignment job creating duplicate authority records in Alma. This was fixed.
- **January 2026 Resource Management SF: 08170475**  
In some cases, the **Open Predicted Items** job took a long time to complete. This was fixed.
- **January 2026 Resource Management SF: 08097888**  
Previously, local extensions were deleted after adding portfolio contributions. This was fixed, and the local extensions now remain intact.
- **January 2026 Resource Management SF: 08075239 08071233**  
In some cases, when the **Delete Electronic Collection** job and the **Electronic activation job** accidentally ran almost

in parallel, bibliographic records that had live portfolios were deleted. As a result, these portfolios turned to "orphans". To prevent this, a dependency has been added between these two jobs, so that they can no longer run in parallel.

- **January 2026 Resource Management SF: 08158585 08013989**  
Unsuppress record from Electronic Activation Task list: when this involved an electronic collection with thousands of portfolios, the **Unsuppress** action got stuck and timed out. This was fixed.
- **January 2026 Resource Management SF: 08033240**  
In some cases, when selecting **Electronic Collection > Portfolio list > Other details > selecting a course with a linkable number**, an error occurred, and the course was not displayed. This was fixed.
- **January 2026 Resource Management SF: 08143772**  
Previously, Controlled Vocabulary tables were not displayed when the UI's **results per page** was set to a value lower than the number of tables. This was fixed.
- **January 2026 Resource Management SF: 07977003**  
Previously, collection name translations were not displayed correctly in the UI. This was fixed.
- **January 2026 User Experience, Accessibility and Infrastructure SF: 08222944**  
In some cases, the text from the multi-select text boxes was missing on the Staff-mediated Deposit form (**Specto > Deposit > Staff-mediated Deposit**). This was fixed.
- **January 2026 User Experience, Accessibility and Infrastructure SF: 08168238**  
Previously, the Bulk Fine Waiving functionality from a set did not work for all users in large sets. This was fixed.
- **January 2026 User Experience, Accessibility and Infrastructure SF: 08203650**  
Previously, translations were missing for Draft, Submitted, and Withdraw labels on the patron Deposit form. This was fixed.
- **January 2026 User Experience, Accessibility and Infrastructure SF: 08243441**  
Previously, when the Staff-mediated Deposit form (**Specto > Deposit > Staff-mediated Deposit**) was open, the file uploader appeared inactive. This was fixed.