
Alma Community Enhancement Requests and Voting (CERV)

This document provides a comprehensive summary of enhancements submitted through what was previously known as **NERS** (New Enhancement Request System), now renamed by the community to **CERV** (Community Enhancement Requests and Voting). It includes high-level solutions agreed upon through collaborative discussions with community representatives and reflects the current status of each enhancement.

To maintain continuity, we have retained references to NERS IDs for previously submitted requests, ensuring clarity for library staff and stakeholders familiar with past cycles. Going forward, future enhancement cycles will fully adopt the CERV terminology, and this document will serve as a consistent reference for the progress and implementation status of each approved enhancement request.

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CERV 2025 - High Level Solutions

As part of the CERV 2025 Enhancement procedure, a number of requests were voted to be included in Alma. Following are the CERV requirements and their high-level solution as agreed with the CERV representatives.

CERV 36294 - Add pop up screen to notify Library Staff that a patron physical item hold request is awaiting collection by the user at the hold shelf.

Total Votes: 6435

Request:

Add pop up screen to notify Library Staff that a patron physical item hold request is awaiting collection by the user at the hold shelf - when that user's ID card is scanned (or user is searched for) at the Manage Patron Services screen in Alma.

High Level Solution:

When logging in to the Manage Patron Service, a new pop-up message will appear, listing the items waiting for this patron on a hold shelf. The message will contain similar text like the system notes present, having all desks included and specified.

Status: Shared and approved. Planned for February 2026 release.

CERV 36332 - Catalog search

Total Votes: 5389

Request:

When search terms have a typo or is otherwise not exact (e.g., the title field has "&" and you search using "and"), the search yields no results. Please enable fuzzy searching so we can get results when the search terms have minor errors.

High Level Solution:

A "Did you mean?" mechanism will be integrated into Alma's search functionality. When a user enters a search term containing a typo, the system will detect the error and suggest a corrected term. Upon user confirmation, the corrected term will be used to perform the search. The mechanism will be based on the UI language. User will be able to turn on/off the new option.

Status: Planning Phase

CERV 36492 - Add NOT operator to advanced search

Total Votes: 8216

Request:

When we search for titles or keywords in other databases (not Alma) and don't want to include a specific word, we add NOT operator to search query. However, in Alma it's not supported in the basic search. In the advanced search it only appears in each rule line as "not contain keywords/phrase" condition, thus when we add a group of rules and would like to change the Boolean operator to NOT, we only have two options: And/OR, so we cannot exclude group of rules. Therefore, consider adding NOT operator to advanced search and support it in basic search to save time to navigate to advanced search in these cases.

High Level Solution:

Advanced Search – Group-Level NOT Logic: Introduce group-level Boolean control in Advanced Search, allowing users to apply the NOT operator to a group of conditions. For instance, users could define a group of terms and exclude the entire group in one action. The user interface should clearly indicate when a group is being negated and provide a simple way to toggle between inclusion and exclusion.

Status: Planning Phase

CERV 36487 - Record all changes to an Electronic Collection in the History tab with meaningful Old Value and New Value information

Total Votes: 5743

Request:

Alma has a wonderful resource of the History tab in Electronic Collection, but unfortunately the implementation of this in practice is greatly limited.

Currently there are many changes recorded only by "System" and a Modification Date of Old Value of the previous last change and the New Value of the date of change. But there is no meaningful information as to what was changed.

This does not support our workflows such as trying to troubleshoot problems. We must then attempt to track back through weekly Release Notes, entries in the CZ Update Task List, and Jobs History to try to match up the dates. Often we ultimately realize the futility of this and open a case, adding to the already overburdened Support team and waiting several weeks or even months for any answer from the data which is available to Ex Libris but hidden from customers. We should not have to contact a vendor simply to know what has happened to our records, when there is a mechanism in place already of a History tab, but it simply isn't developed properly yet to record meaningful data.

An example screenshot is attached, along with details of a prior Idea Exchange submission which Ex Libris advised first would be fulfilled: "Electronic Collection History tab will be changed to record all changes of Electronic Collection attributes" (Feb 2022) and then incorrectly closed it with partial delivery only: "Changes in "Access Type" and "Description" fields are now being tracked in the History tab of the Electronic Collection." (Aug 2024).

This request is that all changes made to an Electronic Collection are recorded in the History tab, including the Primary ID user account or System making the change and the details of what was changed in Old Value and New Value.

High Level Solution:

- Changes to electronic collection fields that are managed in the CZ will appear in the history tab.
- Changes to electronic collection's general notes will appear in the history tab.

Status: Done (February 2026). See 'Complete Record of All Changes in History for Electronic Resources' in [February 2026 Release Notes](#)

CERV 36485 - Improve Alma records with accurate information on staff activity

Total Votes: 4771

Request:

Alma current design is to record many audit trail type fields such as 'Created by' and 'Updated by' as being performed by "System".

Alma's automated workflows undoubtedly greatly help us in managing our environment. But the truth is that it is our staff who are initiating these workflows to occur by their own activity, and it is their Primary ID which should be recorded, not "System".

Issues with the current design:

- we cannot use the data to report on workflow efficiencies achieved by our staff in both Alma and Alma Analytics, which prevents using the data also for rostering and workload management, both in the short term and long term trend analysis
- we cannot easily troubleshoot problems by immediately approaching staff recorded in Alma as being involved for more information, which is extremely important to do quickly before memories fade, more data is overwritten, and logs are lost for case investigation

Examples of this, which are initiated by a user but recorded as "System"

- acquisition workflows such as initiating packaging and sending POLs
- updating various records by a staff member running a manual job

This submission requests that information fields such as "Created by", "Modified by" and "Updated by" will always reflect the Primary ID of the user account who initiated the action, whether by one-on-one or bulk automated workflows, not "System".

High Level Solution:

A blanket solution will be applied for **Manual jobs** only (not including the Manual Scheduled Jobs).

In addition, we will support the acquisition-related use-cases:

- Initiating packaging
- Sending POLs

Status: Planning Phase

NERS 2024 - High Level Solutions

As part of the NERS 2024 Enhancement procedure, a number of requests were voted to be included in Alma. Following are the NERS requirements and their high-level solution as agreed with the NERS representatives.

NERS 8918 - Enable the ability to make an item missing that has a process type

Total Votes: 3225

Request:

In order to mark an item 'missing' it currently has to have a status of 'item in place'. However, many items that have a status of 'item not in place' need to be marked as missing. If an item gets lost in transit from one library to another or has a process type of technical migration and cannot be found, those items need to be marked as missing.

High Level Solution:

Currently, toggling the missing status of an item is possible for items not in place if they are in a work order related request only by using the Requests link.

The option to toggle the missing status will be available from the items search result and from the items list.

Status: Done (February 2024) See 'Marking In-process Items as Missing' in [February 2025 Release Notes](#)

NERS 8734 - Waive Fines/Fees in Bulk by Set

Total Votes: 2936

Request:

Improve the ability to waive fines/fees in bulk by adding the ability to waive by either a set of fine ids, user ids, or by specific date ranges.

High Level Solution:

The following input parameters will be added to the Bulk Fine Waiving utility -

- Date range - only fines for which the creation date is within the range of this parameter will be considered for waiving
- Users set - it will be possible to select from a list of public user sets. Only fines of the users in the set will be considered.

- Analytic report - If this option is selected then it will not be possible to select any other parameter. This option will allow to select a report name from an Analytics Folder or to upload a file of fine IDs. Behind the scenes a fees set will be created based on the Analytics report's 'Fine Fee Id' column or the uploaded file, and the waive job will work on the fees of the set. The set will not be visible in the Manage Sets UI, and will be automatically removed when the job is done.

There is no change in the other parameters of the utility. For example:

- If the 'Maximum fine threshold to waive' parameter is set to 100 then if the total amount of the user's fines is greater than the threshold, none of the user's fines will be waived even if other parameters do match.
- Fines of users that are part of the set that is supplied to the job will not be waived if their create date is not within the supplied range.

Status: Done (August 2025). See 'Additional Options for Bulk Fine Waiving' in [August 2025 Release Notes](#).

NERS 8777 - New institutional number sequence, or reset Additional ID, to shorten hold shelf pickup number

Total Votes: 2769

Request:

In the April 2019 RN the feature "Additional ID for Hold Request Management" became available and it has been very useful for libraries, especially those who have an open hold shelf and need anonymized hold shelf slips. By the end of 2022 we noticed that the number sequence wasn't reset when it reached 999-999-999 like we expected it to. Instead new numbers are added and we've been told that it will just continue to add new numbers and never reset.

High Level Solution:

An additional ID will be added to requests, as an exposed ID. The ID will be generated based on an internal sequence. It will be possible to set the sequence:

- Prefix method. Options –
 - o Prefix+Sequence
 - o None
- Max number
- Prefix
- Padding

The ID will:

1. Be added to the pick slip, the Hold Shelf Request Slip Letter and the hold shelf email
2. Show in the hold shelf (active and expired) task list. Id will be a hidden column OTB.
3. Serve as the secondary sort (after the option selected in the UI) in the hold shelf (active and expired) list
4. Be an added as sort option to the Hold Shelf

Status: Done (August 2025). See 'Library Controlled Additional ID for Hold Requests' in [August 2025 Release Notes](#)..

NERS 8998 - Special Characters option in Metadata Editor

Total Votes: 3362

Request:

We would like a special character option within the Metadata Editor, so as to be able to enter diacritics/special characters (which are needed for foreign language materials) from there, like with Voyager. The other methods (copy and paste, pulling up operating system character maps, and downloading browser add-ons) are fussy.

High Level Solution:

1. Add a dialog box containing special characters, where the operator can select the special character.
2. Selecting the special character will insert it where the cursor indicator was when the dialog box was opened.
3. The dialog box will be opened using a menu option or a keyboard shortcut.

Status: Planned for August 2025.

NERS 8819 - Linking to authority via dropdown menu in MDE

Total Votes: 2731

Request:

In the Metadata Editor, F3 is used in order to look up to the authority headings from a specific bib heading. This is a crucial feature of the MDE, yet it is not available in the dropdown menus. As our librarians sometimes work with tablets, with no function keys, this lack is troublesome. Adding the look up functionality in the dropdown menus would be a welcome improvement of the MDE.

High Level Solution:

Add a new actions, "Open Authority Headings", to the "Editing Actions" menu. The new action would only appear when the cataloger is in a field that supports F3, and open the same look up for that field in the same way as pressing F3 on the keyboard would do, with the same data displayed (same vocabularies, same headings for that specific field and indicators, etc.) and same functionality (viewing and selecting headings, etc.).

Status: Done (November 2024) See 'Linking to Authority Via Dropdown Menu in Metadata Editor' in [November 2024 Release Notes](#)

NERS 8182 - Automatically suppress bibliographic records- inactive portfolios

Total Votes: 3309

Request:

Please enhance PrimoVE to also follow the behavior of automatically suppressing bibliographic records when the portfolio is inactive and there isn't any other active portfolio associated with the bib record.

High Level Solution:

A new customer parameter will be introduced. If set to true, titles without available inventory will not appear in PrimoVE search. This will be the situation regardless of the "Suppress" status that appears as an eye icon in Alma or the workflow which deleted/deactivated a resource, and even if the title did not have inventory in the first place.

Titles that have relations will not be automatically suppressed. This is to avoid broken links between related records.

- The solution will be implemented in PrimoVE (and not Primo classic)
- The existing PrimoVE logic for inventory availability (avail_e/avail_p/avail_d) will be used:
 - Physical inventory availability: if there are items or holding records
 - Electronic inventory availability: if there are active portfolios, or it is a descriptive record of an electronic collection
 - Digital inventory availability: if there are active representations
- The suppression will be logical, The Alma suppression indication will not be changed

Status: Planned for August 2025.

NERS 8861- Changing POL type after POL is sent

Total Votes: 2990

Request:

For POL, we would like the ability to change the POL type after the POL is sent. Currently, those types cannot be changed once the order is sent, as well as closed for retro records. It would be helpful for associating POL to correct collection if the type can be changed.

High Level Solution:

"Update PO lines information - advanced" job should support changing of PO line type cross inventory and cross continuity.

1. When selecting to change PO line type, additional parameters will appear on the job:
 - How to handle the existing inventory (delete/detach from pol)
 - Information for creating the new inventory: assigned inventory manually Y/N
2. For PO lines in statuses that are not cancelled/closed:
 - The order will be removed from the PO and set to "In Review"
 - If the PO line was already sent, a cancellation message will be sent to the vendor
3. For cancelled/closed po lines:
 - No cancellation message will be sent to the vendor
 - The PO line status will not be changed

Status: Done (February 2025), see 'Change PO Lines Types for Different Inventory and Continuity' in [Alma 2025 Release Notes](#)

NERS 8936-PO Line - Claiming job report should include information on vendors and PO lines for which claim letter was sent

Total Votes: 2850

Request:

When claim letters are sent from Alma, there's nowhere you can find an overview of all letters sent. The claim letters can be found under attachments on the vendor after the claiming job is done running, but if for some reason the job is aborted the copies managed to be sent are missing/not visible or stored in Alma. There are also difficult, if not impossible to retract this information from the job report. When a claiming job is finished running in Alma you can view "events" from the finished job. This gives a line for each claim processed in the job, and lists three different identifiers: JOBID, POLINEID and VENDORID. None of these identifiers are searchable for the library, and the library then have no option to control what letters were sent in that specific job. The only option is then to look at each vendor in Alma which has a POL in claim to see if a letter is saved under attachments. When the library has thousands of vendors this is not feasible.

NB! Claim letters in this regard includes both POL Claims and Legal Deposit Claims.

High Level Solution:

1. The *PO Line - Claiming* job report will be enhanced to include list of vendors (name+code) for which a claim letter was sent.
2. It will be possible to retrieve the list of PO lines handled for each vendor.

Status: Done (February 2025), see 'Enhanced "PO Line - Claiming" Scheduled Job Report' in [Alma 2025 Release Notes](#)

NERS 2023 - High Level Solutions

As part of the NERS 2023 Enhancement procedure, a number of requests were voted to be included in Alma. Following are the NERS requirements and their high-level solution as agreed with the NERS representatives.

NERS 6669: Editing items via Receiving, Save & Receive items

Total Votes: 3200

Request:

When staff need to edit additional item fields during receiving, **they need to be able to go to the Physical Item Editor and then Save & Receive**. Currently they can only Save from the Physical Item Editor, meaning the Receipt of an Item and the Editing of an Item are two disparate workflows, even though staff need to do them at the same time.

High Level Solution:

- A new "Save and Receive" button will be added to the item editing page
- The new button will not be visible if the item was already received ("Receiving Date" field is today or in the past)
- The new button will not be visible if there is no PO line associated with the item
- The new button will have the following behaviors when clicked:
 - Alma will validate that the location the user is in supports receiving of the item
 - If not the user will get an error message that their location does not support receiving of this item (not a receiving department) - when coming from the receiving WB it is likely that the correct location will be selected
- Alma will close the item editor page and take the user back to the page they came from. A full receiving process will run on the PO line (including populating the receiving date on the item and progressing the PO line in the workflow -

mostly relevant for One-Time orders)

- The button will appear at all cases, whether accessing the item from the receiving WB or from any other workflow (as long as the item was not received e.g. the item does not have a "receiving date").

Status: Done (February 2024), see 'New Save and Receive Action Added to Item Editor' in [Alma 2024 Release Notes](#)

NERS 8125 - Display user's loan due date in borrowing request screen

Total Votes: 4213

Request :

When a user who has an interlibrary loan requests a renewal of the item, staff need to check both the due date that the partner library has set, and the current due date of the loan on the user's record. This is because we can sometimes extend the due date of the loan without requesting a renewal from the partner library, since the loan due date will still be within the due date that the partner has given us. To do this check, staff need to view the borrowing request (to see the partner library's due date) as well as the user's record to check the current due back date. To make this process quicker and simpler, we would like user's loan due date for the item attached to the borrowing request, to display in the borrowing request screen.

High Level Solution:

The loan due date will be visible in the second column of the request in List View (as is the request due date) **as well as** in the right-hand pane in Split View. The field will be called 'loan due date' or similar to differentiate it from the request due date, and it will not replace the request due date.

If multiple items have been received then the earliest due date will be shown.

Status: Done (February 2024), see 'Display User's Loan Due Date in Borrowing Request Page' in [Alma 2024 Release Notes](#)

NERS 7877 - Enable viewing of Requests history in Alma

Total Votes: 4163

Request :

Currently, within a patron record in Alma, it's possible to view current and previous activity for Loans, Returns, and Fines and Fees. However, within Requests, it's only possible to view current requests. It would be incredibly useful for Alma users to be able to view historical requests as well, this to assist with any request queries. The ability to view request history in Alma Analytics has been very welcome and useful for reporting. However, for troubleshooting purposes, it would be much better to be able to use live Alma straight away, rather than having to wait until Alma data refreshes into Analytics.

High Level Solution:

Requests history already exists in the requests monitor. Similar to the existing list in the monitor, we will list the request history also in a requests history tab in the context of the user record in the patron services workbench. Note that this will be possible only if requests are not anonymized.

The intention is to include full history, including cancelled ones

Being that this is related to the Patron Services workbench, and since the new UI for this interface is being developed (see [Circulation Desk Redesign](#)) - this development will be done only in the new UI

Status: Done in new Manage Patron Service UI (November 2024) see [Filtering Requests](#)

NERS 8345 - Allow auto renewal to restart after blocks removed

Total Votes: 3342

Request:

Currently we receive reports of users that are to be blocked due to late payment of fees. Once the blocks are removed or made inactive auto renewal rules do not allow the automatic renewal process to restart.

High Level Solution:

When the 'Daily within range without repeating notification' option is selected for the 'Send Courtesy Notice' job it will be possible to configure another parameter for 'number of days after due date to attempt renewal'. If configured, the job will also look at loans that have passed the due date by the number of days in this parameter, and try to renew them. The maximum number of days to be configured will be 365. No courtesy notice will be sent for them.

Status: Done (May 2024), see "Auto Renewal After Due Date" in [Alma 2024 Release Notes](#).

NERS 8338 - Make an easy way for items to be removed from 'in transit' status

Total Votes: 3057

Request:

We continue to have items change to 'in transit' status and we don't know why and Ex Libris cases are at a dead end. We think it is a simple error of our students checking an item in or out of the wrong library but this is human error. We have changes our transit tables several times but the error continues to occur. Can we please get a feature to change an item out of 'in transit' status?

High Level Solution:

The 'Change Physical items information' job will have an additional option for 'remove transit to reshel status'. This selection will only affect items that are "in transit for reshelving" or "In Transit to Remote Storage" and will make the items be considered in place. This should delete the attached transit request as well.

Status: Development phase, will be included in August Release

NERS 8197 - Ensure email is delivered with DKIM protocols

Total Votes: 4384

Request:

DKIM (Domain Keys Identified Mail) is an email authentication technique that allows the receiver to check that an email was indeed sent and authorized by the owner of that domain. Currently Ex Libris does not issue DKIM keys to allow the implementation of this protocol. Increasingly, emails sent by Alma from institutions using their own domains are at risk of getting caught in spam filters and not being delivered.

High Level Solution:

A new checkbox "DKIM Setup" will be added to the Mail Handling integration profile's definition. When the customer will

check the 'DKIM Setup', a DKIM digital signature key will be generated and the public key CNAMEs will be displayed on screen. The customer admin will add the public key CNAMEs signature to their DNS record. Once done, the customer will check the 'DKIM Active' to start sending every email when it is signed with the DKIM digital signature.

A new checkbox “DKIM Setup” will be added to the Mail Handling integration profile's definition. When the customer will activate 'DKIM Setup', a pair of keys will be generated: a private key to sign the outgoing emails and a public key will be placed in a DNS record to allow the email receiver to use it to validate the emails. The public key will be placed on ExLibris's DNS, and the customer will create a CNAME from their DNS records to the DKIM entry on the ExLibris's DNS. Once done, the customer will be able to test the outgoing signed emails by pressing the 'Test DKIM DNS Setup' action. Finally, the customer will check the 'DKIM Active' checkbox to start signing each email sent, with the DKIM digital signature.

Status: Done (February 2024), see 'Recommendation for Mail Relay and Support DomainKeys Identified Mail (DKIM)' in [Alma 2024 Release Notes](#)

NERS 8373- Ability to Schedule Manual Job

Total Votes: 4459

Request:

Ability to schedule manual jobs -- Ideas Exchange: <https://ideas.exlibrisgroup.com/forums/-regular-basis> This would be very useful e.g. for scheduling a Suppress Bib Records job or a Normalization job on Sets of Bib records, or a Change Portfolio Information job (including deactivation for expiring licenses) on a Set of Portfolios. At present any such jobs have to be run manually and are therefore restricted to staff availability; it would be great to be able to schedule these in advance, whether they need to be run regularly (repeated) or just as a one-off job that can run outside normal working hours or when a staff member is on leave and cannot run it 'in-person'.

High Level Solution:

A new scheduling capability will be added to jobs executed via 'Run a job':

Schedule

SCHEDULE THE JOB TO RUN REGULARLY WITH THESE PARAMETERS

Frequency Hourly Daily Weekly Monthly Once Run Now

Every week(s)

On Sunday Monday Tuesday Wednesday Thursday Friday Saturday

At

Schedule Name

A new 'Scheduled Manual Jobs' tab will be added to the 'Monitor Jobs' page to allow management of the scheduled manual jobs. The user will be able to Edit, Delete, Run Now, View Job History and Setup Email Notifications of existing schedule jobs, as well as creating a new scheduled job straight from the management screen.

Status: Development phase.

Supported Functionality in NERS Enhancement Request List - 2023

As part of the NERS 2023 Enhancement procedure we identified a number of NERS requests that are already supported in Alma. Following are the request details, and the supported functionality for each of these requests.

NERS # 7685 - Ability to edit barcode after receiving borrowing request

Sometimes after receiving a borrowing request, we have a need to change the barcode. This could be because the wrong barcode was scanned in, the barcode is not responsive or another reason.

However, there is currently no way to change the barcode in the borrowing request record. Staff can update the item barcode (and we do) however this doesn't affect the original barcode that was scanned in against the borrowing request. We therefore have to add a lot of physical and electronic notes to the front desk staff and to the staff who will be returning the item to the partner library explaining which barcode to issue the book on etc.

Ex Libris:

From the borrowing requests task list, it is possible for an item record can be updated and its barcode changed. The change is reflected in the borrowing request screen, and the borrowing request workflow is indeed triggered when the altered barcode is scanned in to, for example, the Scan In screen.

NERS # 8123 - Ability to re-open a completed borrowing request

Sometimes borrowing requests go to Complete status when triggered by a particular workflow. However, sometimes further action needs to be taken. For example, Attachments need to be added, or a Request Note updated. The inability to edit the request or move the request manually to another status can be frustrating and leads to unnecessary workarounds. Could Completed requests have a 'Re-open' functionality in a similar way that Cancelled requests can be reactivated.

Ex Libris:

There is a Reactivate feature for both borrowing and lending requests.

Reactivate **borrowing request** will appear when:

1. The Operator has the Reactivate privilege in the scope of the owner of the request (reach out to Ex Libris support, who can enable the option to reactivate requests)
2. If an active partner exists, it should have the Reactivated step in the Borrowing workflow.
3. Status is one of: CANCELLED, REQUEST_COMPLETED, CANCELLED_BY_PATRON, CANCEL_REQUESTED, REJECTED, EXPORT_TO_THIRD_PARTY.

Selecting this option reactivates a completed peer to peer resource sharing request. A temporary item is recreated using the previous barcode with the process status set to **In resource sharing**. The library and location of the item are set to the same values as when the item was initially created. If the item is not yet on loan, a hold request is reinitiated.

When reactivating, two options appear on the confirmation window: **Reactivate loan** and **Send general message**. If no loan is initiated, the request status is **Request Reactivated**. The request's original external ID is maintained.

Reactivate **lending request** will appear when:

1. The Operator has the Reactivate privilege in the scope of the owner of the request.
2. If an active partner exists, it should have the Reactivated step in the Lending workflow.
3. Status is one of: REQUEST_COMPLETED, EXPIRED, REJECTED, CANCELLED.

Selecting this option reactivates a completed peer to peer resource sharing request. The shipped item's process status changes to **In resource sharing** and the item is relinked. The request status changes to **Request Reactivated**. The request's original external ID is maintained.

See https://knowledge.exlibrisgroup.com/Alma/Knowledge_Articles/

NERS 2022 - High Level Solutions

As part of the NERS 2022 Enhancement procedure, a number of requests were voted to be included in Alma. Following are the NERS requirements and their high-level solution as agreed with the NERS representatives.

NERS 7934 : Borrowing request with status Ready to be sent - should appear in task list

Total Votes: 4791

Request:

We would like borrowing requests with status Ready to be sent to appear in task list under Borrowing request heading.

Today, you need to open Borrowing requests and check facets to see if there are requests that are ready to be sent.

High Level Solution:

The Tasks Widget will have 'Ready to be Sent - Assigned to me ' and 'Ready to be Sent - Unassigned' widgets that link into the borrowing requests task list faceted for the relevant status

Status: Released. This has been released in the May 2023 release. See 'Borrowing Requests with "Ready to Be Sent" Status in Tasks List' in the [May 2023 release notes](#).

NERS 7705 - Make it possible to customize the cancellation reasons

Total Votes: 4987

Request:

When we choose to cancel a patron's hold or resource sharing borrowing request we have to select a cancellation reason from a drop-down list. The reason is then included in the letter to the patron. The available texts are currently not customizable by the library, which is a big problem. The texts should be customizable through a code table, just as the PO Line Cancellation Reasons. The available cancellation reasons, and especially the translations, are irrelevant and incomprehensible to our users.

High Level Solution:

Some of the cancellation codes are hardcoded to be used by Alma processes. They are therefore currently customizable only by EXL staff. The solution must make sure library customization does not damage these Alma processes.

A proposed solution would therefore be -

1. EXL will add additional 10 'reason x' - reasons to the current list, for library use. The codes will be disabled by default, so libraries will be able to activate new codes (and texts) that are needed.
2. EXL will enable the Alma institutions to customize the text of all codes
3. EXL will enable customers to disable some of the existing reasons

Disabling system used codes will not prevent the existing Alma processes that may use these codes from using them.

Status: Released. This has been released in the February 2023 release, see Request-Cancellation Reasons Now Customizable in the [February 2023 release notes](#) and video at [Customize Request Cancellation Reasons](#).

NERS 7948 : Adding “Does not contain” and “Not equal” search option in Alma staff search

Total Votes: 4900

Request:

Add “Not contains” or “Not equals” to Alma titles and inventory search indexes where “contains” or “equals” currently exist. (Original request: Adding "Does not contain" and "not" search option in Alma)

High Level Solution:

- "Not contains" search operators will be added to indexes where the index supported a "contains" search.
- "Not equals" search operators will be added to indexes where the index supported an "Equals" search.

Note that when searching with a lower-level index* using "not contains" or "not equals", the search will retrieve results if at least one entity matches the query.

For example, when searching for physical titles where holdings' location "not equals" stacks - if a title has two holdings, one fulfilling the condition (location=reference) and another not meeting it (location=stacks) - this title will be found by the search, since it has one holdings that matches the search criteria.

* lower level index is an index that belongs to an entity contained in the searched entity, e.g. searching for physical holdings by item data, searching for electronic titles by portfolio data, etc.

Status: Released. This has been released in the May 2023 release. See 'Add **Not Contains** or **Not Equals** to Alma Titles and Inventory Search Indexes Where **Contains** or **Equals** Currently Exist' in the [May 2023 release notes](#).

NERS 7876 : Improve letter editing functionality

Total Votes: 5075

Request:

Editing of letters in Alma is a complex and difficult process, requiring substantial prior knowledge in order to do this effectively. Improvements have been made during recent years (e.g. the ability to view impact of changes) but the editing functionality is still in need of improvement, including the following points. We consider the priority order of these to be:

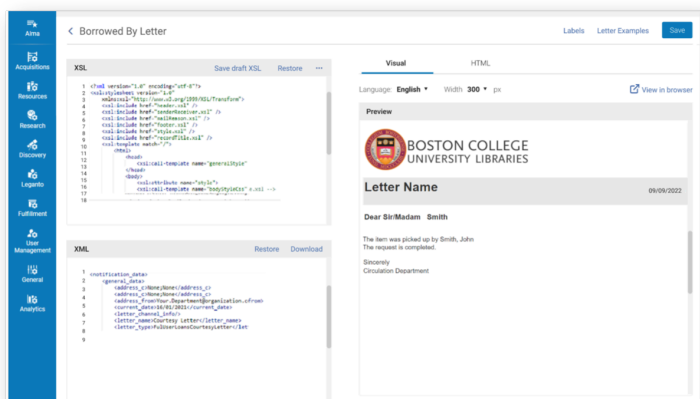
1. The built-in error checker is not helpful because it doesn't provide enough information about a supposed error to assist with identifying it, but it does prevent the template being saved, even when the user is confident they have not introduced any errors with their recent changes.
2. Use of XSL functions requires prior knowledge of those expressions. It would be much better if the letter template included an XSL glossary function from which a general system administrator could choose the appropriate XSL expression.
3. It would be useful to have a 'Save draft' function to make it possible to save templates being worked on that are not yet finished, enabling users to stop their work as needed and pick it up again later without having to start afresh.

4. Introducing an integral accessibility checker would enable us to be certain that we are meeting Web Content Accessibility Guidelines at source, rather than having to run checks on the emails themselves after sending.

Status: Under Development

High Level Solution:

1. The XML, XSL and the output HTML are all displayed on the same page while Changing the XSL will be immediately verified by presenting a preview allowing:
 - a. Verify that the change is valid
 - b. Validate the effect of the change on the output HTML
 - c. Enable changing the language of the letter
 - d. Enable sending the letter to an email address
2. Improve XSL and XML editor including appearance, readability (highlighted colors, indented text etc.) and improved error detection.
3. Template Draft version allowing to opt in and out and continue work on the draft in multiple sessions.
3. Easy availability for na accessibility check by adding a "View in browser" button. The browser view enables using market leading accessibility tools added as browser extensions.



Status: Under Development

NERS 7880: Dynamic collections that are automatically updated using logical sets

Total Votes: 4748

Request:

A collection (unrelated to an electronic collection) is a set of bibliographic records used to organize and showcase a group of related library resources (i.e., 1920's jazz recordings). Customers can create collections using itemized sets (a static group of selected records) or logical sets (the results of a saved query created dynamically each time the query is run). However, once you create a collection using a logical set, it becomes static, effectively negating its purported advantage and making it behave no different than an itemized set. In order to create collections that don't require ongoing curation and manual updates, we would like to be able to use logical sets in a way that would allow collections to update automatically every time new works are added to the repository that match the set's predefined criteria.

High Level Solution:

Each collection level could be categorized as either logical or itemized. Once defined as **logical**, the collection resource editor will include an attribute of a logical set of titles, which would be the only source populating the collection. Titles will not be able to be associated with that collection in any other way. An **itemized** collection, on the other hand, will continue working as of today.

A periodic system job, eg nightly, will run all logical collection queries and add / remove titles which were added / removed from each corresponding logical set.

Naturally, this will impact the collection discovery in Primo.

Status: Under Development

NERS 2021

As part of the NERS 2021 Enhancement procedure, a number of requests were voted to be included in Alma. Following are the NERS requirements and their high-level solution as agreed with the NERS representatives.

NERS 7177: Add option to configure Process Types for Unavailable Physical Items, without creation of requests

Total Votes: 3957

Request:

Alma Process Types and the associated Base status of 'Item not in place' or 'Item in place' are hardcoded, as are the automated workflows within Alma and the flow-through to Primo for the availability status to be set to 'Not Available' or 'Available'. This is extremely limiting, as there are scenarios when a Library might want their physical resources to still be discoverable in Primo ie not suppressed, but also be marked as Unavailable. Being able to control availability by configured Process Types will allow us to communicate to users that we hold resources already, so that they don't waste time submitting purchase requests or thinking that we have a poor collection, while also avoiding user confusion with resources set to 'Available', when they actually aren't. Use cases for the need for this option are closures due to mould outbreaks and closures for physical distancing requirements related to COVID-19. Outcome: A configuration option is added to Alma whereby a site can add, edit, and subsequently delete new Process Types, as a static status added to an item, with no associated automated workflows triggered or requests created within Alma. A discovery label can be added to each Process Type by code table, for the Get It display. The configured Process Types are available in the Change Physical Items job, allowing for sets of items to have this type added and also then removed easily in bulk by job. The assignment of the Process Type to a physical item in Alma would immediately flow-through to Primo to mark these resources to be 'Unavailable' by the availability status, and display the associated label in the Get It by Real Time Availability. These Process Types would also be ETL'd to Analytics, along with the existing hardcoded Process Types, in the Physical Items subject area, for tracking and ease of management. Note: The current configuration option of Work Orders are not suitable to fulfill this submission, as they create a request for each resource, which then cannot be removed in Alma by bulk job, and incorrectly inflate Analytics data for requests. In the use cases provided, we do not need Alma's help in managing our resources beyond making clear to users in Primo that the resources are not available currently. See Idea Exchange submission at 98 votes as at 5.1.2021: <https://ideas.exlibrisgroup.com/forums-for-physical>

High Level Solution:

- Streamlined process for the institution to add, edit, and delete Work Order Types for Physical Items, individually or in bulk
- o Work order types will no longer require any automated workflows, scanning in items or handling requests, and can be handled:
 - In bulk: It would be possible to add / remove the work order process type using a job

- In the item editor
 - Workflow flexibility: Libraries will be able to choose to also use the work order department workflows for some / all of their work order types
- o The configuration of work order types will be streamlined and automated. The admin will see
- Work order types – ability add, edit and delete
 - Department will be created automatically - admin can add or edit departments if needed
- In the Physical Item Editor
- o See, add, change or remove work order types
- o When a work order type is added the item is marked as "Not in place" (= "Unavailable" for publishing / GetIt).
- The Change Physical Item Information Job will allow adding / removing work order type from a set of items in bulk
 - The repository search will support searching for physical items in a specific work order types
 - In Exclude Process Types from Publishing configuration, work order types will be supported in addition to the existing stand-alone process types (e.g. Loan, Lost, Transit), allowing libraries to exclude only items in a specific work order type from discovery
 - Based on "Exclude Process Types from Publishing", mark the items as suppresses in both the search result and item editor

Already supported:

- The assignment of the Process Type to a physical item in Alma would immediately flow through to Primo to mark these resources to be 'Unavailable' by the availability status and display the associated label in the Get It by Real-Time Availability. [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/060Alma-Primo_Integration/030Publishing_Alma_Data_to_Primo/040Excluding_Resources_with_Specific_Process_Types_from_Publishing](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/060Alma-Primo_Integration/030Publishing_Alma_Data_to_Primo/040Excluding_Resources_with_Specific_Process_Types_from_Publishing)
- A discovery label which incorporates the work order type name is displayed in Get It for items with that work order type
- These Process Types would also be ETL'd to Analytics, along with the existing hardcoded Process Types, in the Physical Items subject area, for tracking and ease of management.

Note: Available Physical Items should be subject to regular loan processes

Status: Available as of Alma June 2022 Release

NERS 7343: Ability to Move/Re-Order Requests

Total Votes: 3725

Request:

We would like the ability to move/re-order requests within an item's queue.

High Level Solution:

It will be possible to sequence the entire requests queue.

Currently, it is only possible to activate one instead of the system selected one. By adding an explicit 'sequence' field to the request, it will be possible to set an override for the ordering of the request that will take precedence over the priority field.

Status: Available as of Alma August 2022 Release

NERS 7456: Restricting the number of fields that show when manually creating new users via Register New User

Total Votes: 3143

Request:

Library staff regularly create a variety of new users in Alma. When we create these records via Register New User, there are a total of 34 text boxes to navigate. At most, only 16 are needed--not even half. This doesn't include the check box for 'Find user in other institution', the required checkboxes for the email, postal address, and phone # and the Yes/No radio button selection to designate 'Patron has institutional record', all of which we still need. Would it be possible to limit the number of available fields, by allowing the institution to customize the form in Alma to only relevant fields. For example, relevant fields for our institution would be: (under User Information) First Name, Last Name, Primary Identifier, User Group, Expiration Date, Purge Date; (under User Management Information) Password, Verify Password; (under Email Addresses) Email Address; (under Addresses) Address line 1, Address line 2, City, State/Province, Postal Code, Country; (under Phone Numbers) Phone number.

High Level Solution:

It will be possible to use a mapping table to turn on/off fields in the user registration form (quick user edit form).

One configuration form will be used for all forms and all user types (public/staff) with a super set of all of the fields of all forms.

Ideally, it should enable removing fields altogether. Alternatively, it would grey out the undesired fields.

Status: Available as of Alma August 2022 Release

NERS 6664: Disable Item description confirmation message

Total Votes: 3125

Request:

Anytime you save an item that has a description, you get a pop-up message that reads "The description may need to be updated as well..." This occurs even if you have just updated the description manually. It is unhelpful, and is a bane for staff who work with serial items or multi-part works. It increases the time it takes to save an item and adds unnecessary keystrokes. The only time it does not occur is if you have clicked the Generate button in advance of Saving, but this button isn't generally used by our staff because there are too many bugs with the item description templates, and in other cases the Generate button is not appropriate, such as when you are cataloging a 9-disc volume set and the descriptions read "Disc 9," etc. This pop-up should be disabled, or there should be an institution-level configuration option to turn it off. Here's a video showing some of the latency. The pop-up adds several seconds to the transaction, which is a lot for staff trying to process hundreds of item records: <https://www.screencast.com/t/UIIQPrqi3DNy>

High Level Solution:

The messages when updating the description field will be adjusted as follows:

- Soft message will be displayed as an info feedback message
Note: User today can hide Info message by default
- Few of the messages will remain mandatory as part of specific workflows
- Unneeded messages will be removed

Status: Available as of Alma May 2022 Release

NERS 6969: Provide the ability to batch-edit electronic collections

Total Votes: 3043

Request:

Allow library staff the option to batch update multiple electronic collections at once. Use cases provided by requester below:

- 1) We subscribe to several collections on the same platform. The platform vendor announces site maintenance which will make the platform inaccessible for several hours. We want to be able batch-apply to all the collections on that platform the same Authentication Note stating that the platform is unavailable. Then, when the maintenance is over, we want to be able batch-remove the same note.
- 2) We subscribe to several collections on the same platform. The platform vendor announces that the URL syntax is changing from http to https. We want to run a job to batch change the Electronic Collection Level URLs. This would be something like "delete or replace portfolio's prefix" in the "Change Electronic Portfolio Information" job.
- 3) We subscribe to several collections on the same platform. The platform vendor announces that these collections' names have changed; "Database A" is now "Platform Name: Database A." We would like to be able to update these names in a batch so the new names display to users. Perhaps if there were a "collection editor" spreadsheet with columns for collection ID and all the other collection fields, we could enter the new names in the Public Name (override) column, upload the spreadsheet, the spreadsheet would match on Collection ID, and all our collections would have their new values in Public Name (override) applied.
- 4) We want to make sure that the collections we need to proxy all have the same proxy sever settings. For these collections, we want to run a job to batch enable proxying (at the collection and the service level) and batch set the proxy server (at the collection and service level) to our default proxy server.

High Level Solution:

A new job by the name of 'Update electronic collections' will be introduced, job will support:

- Setting the same value to a set of electronic collections:
 - Update of all relevant attributes (to be defined as part of the FSD)
- Clear electronic collection attributes values

Job will report relevant changes

Status: [Available as of Alma May 2022 Release](#)

NERS 7419: View electronic collection portfolios from the POL view.

Total Votes: 2862

Request:

We are able to search for an electronic collection and find a link to the order, however when we are viewing the order, we cannot click into the electronic collection to see the portfolios. We have to copy and paste the title, leave the order, and search electronic collections to view the portfolios.

High Level Solution:

In order to improve the navigation between an order of an electronic collection and its portfolios a new "view portfolios" link will be made available within the collection's summary section to reduce the number of clicks:"

Status: [Available as of Alma May 2022 Release](#)

NERS 2020

As part of the NERS 2020 Enhancement procedure, a number of requests were voted to be included in Alma. Following are the NERS requirements and their high-level solution as agreed with the NERS representatives.

NERS 6795: Improve Repository Search functionality with free text options for MARC tags and subfields in Advanced Search

PowerPoint Presentation: [Enhanced Ability to Filter a Set Using an Indication Rule \(NERS 6795\).pptx](#)

Total Votes: 4506

Requirement: The Alma search function focuses on out-of-the-box mapping of grouped fields. It is a powerful search environment, but it does not allow for the autonomy of any library staff to quickly and easily run a customized search by specific MARC tags and subfields on demand as the need arises. For example, the Title grouping contains more than 3 dozen MARC tags and over a hundred subfields. The current in-system solution is restricted to staff with a cataloger role and is not quick or easy with several steps including a steep learning curve for writing complex indication rules. It also results in only static itemized sets.

This submission requests the addition of free text fields in Alma's Advanced Search, where any MARC tags and subfields for both bibliographic and holdings can be typed in, such as an All Titles set just on data in 245 a, 130 a and 730 a, or just in 260 b and 264 b, or just data in 776 z, or specific entries like LDR 06 equal to a and LDR 07 equal to m and 008 equal to 21 of d, or any combination together. This functionality should be incorporated into existing Alma Repository Advanced Search options for all search types, including, but not limited to, All Titles, Physical Titles, and Electronic Titles. It should have comprehensive conditions including "contains", "not contains", "equals", "not equals", "is empty", "is not empty", and "starts with", as well as Boolean operator selection (AND & OR) between multiples lines of query, and the ability to select specific grouping of multiple lines with visual indication of this. The resulting records should be able to be saved as any Alma search set can currently, in a logical set, and also itemized immediately or later.

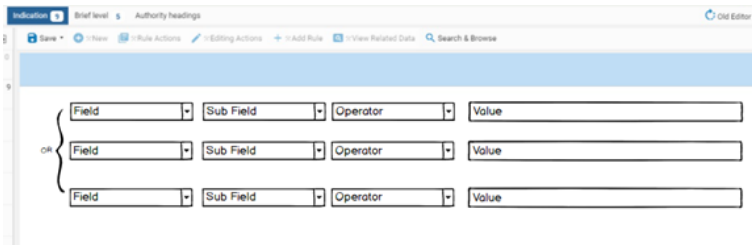
See mockup image provided and also Alma Idea Exchange entry with 264 votes as at 27.1.2020 and Planned status from 1.9.2017: [Ability to search via free text MARC tag and subfields](#)

High Level Solution:

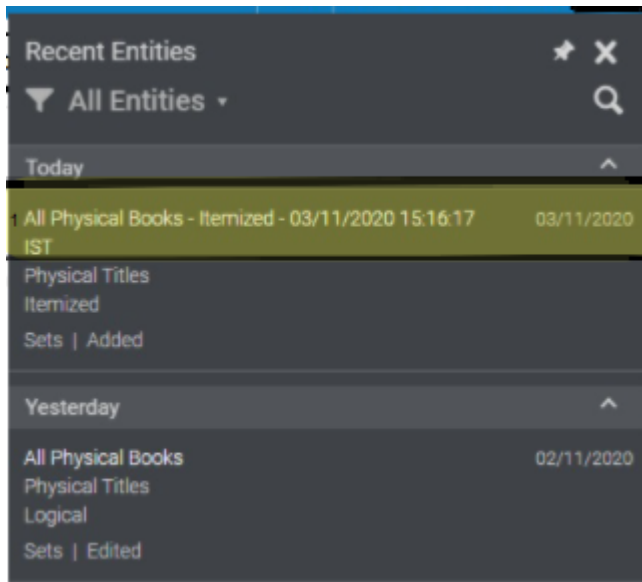
- i. User will perform a simple or advanced search
- ii. User will be able to choose a 'Filter' action that will open a panel. The user can choose a predefined Filter or an option to create a new Filter.



- iii. Filters are based on Indication rules which are conditions based on MARC fields and subfields. The creation of a new Filter/Indication Rule will be simplified, and form based. The indication rule will be created in the background without the need for knowledge of any drool language



- iv. When the user chooses 'Run a filter' an itemized set will be created "behind the scenes" applying the filter indication rules on the search results, The filtered results will be accessible via the Recent Entity panel.



- v. The indication rule is assigned as a filter to the saved set. The user will be able to update the assignment from the Set edit screen and will also be able to see all filter results created as itemized sets.

The screenshot displays the 'General Information' section for a set named 'All Physical Books'. The description is 'Visual Material in History for Cataloging as text by Ital'. The set content type is 'Physical titles', set type is 'Logical', and status is 'Active'. The creation date is 30/06/2020 23:12:58 IDT, created by 'exl_impl', and content origin is 'institution only'. Below this, the 'Filter set' section shows a 'Choose an indication rule' dropdown and a 'Create rule' button. A list of created itemized sets is shown, including 'All physicio books (Filtered) 2020-10-04', 'All physicio books (Filtered) 2020-10-01', and 'All physicio books (Filtered) 2020-09-13'.

Status: *Functionality available as of [Alma July 2021 release \(Enhanced Ability to Filter a Set Using an Indication Rule\)](#)*

NERS 6962: Resource sharing: updates to due dates of borrowing request loans to be reflected in resource sharing and fulfillment

PowerPoint Presentation: [Resource sharing - updates to due dates of borrowing request loans to be reflected in resource sharing and fulfillment \(NERS 6962\).pptx](#)

Status: *Functionality available as of [Alma March 2021 release](#)*

Total Votes: 3433

Requirement: If updating the due date of a borrowing request on loan, it should be reflected in both the patron account and the borrowing request, irrespective of where it was updated. Using the renew option in the borrowing request will update the due date in both borrowing and the patron side, but it should also be possible to update the due date in the patron side and for this to be reflected in the borrowing request, rather than having to do this twice

High Level Solution: Patrons will be able to renew a Resource Sharing loan in advance of getting a lender's approval. The loan due date will be updated as per the library's loan terms of use before getting the lender's approval. The loan can later be updated if the lender eventually responds with a different renew due date

NERS 7049 Acquisitions: Hyperlink invoice number in POL to invoice

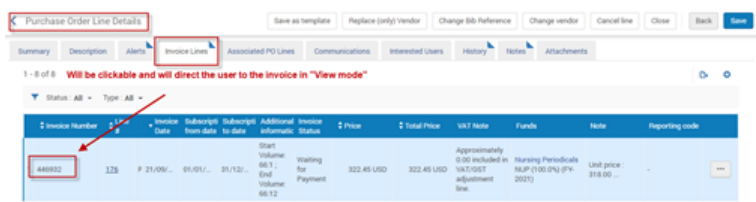
PowerPoint Presentation: [Acquisitions - Hyperlink invoice number in POL to invoice \(NERS 7049\).pptx](#)

Status: *Functionality available as of [Alma February 2021 release](#)*

Total Votes: 2890

Requirement: There's frequently a need to access invoice information while working on PO Lines. Staff need to be able to view payment date, check number and other PO Lines associated with the invoice. Under the Invoice Lines tab the invoice number is listed to the left. On the right there is a View button which only accesses brief invoice information associated with that PO Line and no others.

High Level Solution: The Invoice number for each invoice line will be hyperlinked from the PO Line "Invoice Lines" tab and will navigate the user to the relevant invoice screen in "view mode"



NERS # 6676 Enable customer-defined order of locations in the Get It menu

PowerPoint Presentation: [Enable customer-defined order of locations in the Get It menu \(NERS 6676\).pptx](#)

Status: *Functionality available as of [Alma December 2021 Release](#)*

Total Votes: 2583

Requirement: Currently, the locations in the Alma resolver (Get It menu) are not sorted in a consistent, meaningful manner. There is a "use IP best locations ordering" option, but this option is insufficient for many institutions. For instance, in many cases, users are off site or not in a library building, and many institutions do not reserve IP addresses for specific buildings. There is also an alphabetical option but often the size or significance of locations doesn't fit well into an alphabetical listing (for example a small branch starting with A or B might sort ahead of a large Central Library). Ideally, we would like the ability to explicitly define the preferred order in which locations are sorted. For multi-campus institutions, customers should be able to define the location order for each campus including accommodation for different sort orders between Alma available for groups/Primo views.

High Level Solution: The institution will be able to define list of libraries, in a prioritized order, and list of locations within a library. There may be groups of equal locations/libraries that are prioritized higher than another list of locations/libraries. The prioritization within the group will be random.

- When publishing availability, if the published record has multiple availability location lines, they will be published in the order that has been defined by the institution.
- When displaying list of locations in the GetIt tab, if the record has multiple holdings they will be listed in the order that has been defined by the institution.

Example: For "Main" Campus Primo view, Central Library resources will be sorted to be on the top of the list. For "Wellington" campus, Wellington Medical Library resources will be sorted to be on the top of the list.

Note

Where the institutional priorities have not been defined or are not relevant alphabetical sorting should be used.

PrimoVE only – Institutions will be able to define the prioritized order for each "Primo view", the system will take into account the "Primo view" in which the user is logged into and will present the order of the locations accordingly.

NERS # 6941 Enable customer-Improve Display Logic Rules

Status: *Functionality available as of [Alma November 2021 Release](#)*

Total Votes: 2659

Requirement:

1. Add the ability to display a single collection when multiple collection options are available from the same vendor via a single rule in Alma. Currently this requires making multiple rules in Alma. In SFX this was possible using the asterisk '*' suffix (e.g., Do not show EBSCOHOST* getFullTxt If available EBSCOHOST* getFullTxt Condition: same_threshold).\
2. Ability to give preference to collections that have a linked PO Line (to favor subscription access) or just being able to mark preferred collections.
3. Ability to prioritize collections by designating collections that should appear at the top of the list and collections that should be placed last on the list (this also was possible in SFX).

High Level Solution:

Requirement #1 and Requirement #3 are supported as described [here](#)

The solution will include the ability to give preference to collections/portfolios that have a linked PO Line (to favor subscription access)

1. New option by the name of 'Prefer Ordered Resources' will be added to the Online Service configuration page
2. Once enabled
 1. Services for for portfolios that have a POLine either at the level of the collection or at the level of the portfolio itself will be given preference in the sort order.
 2. This preference will override both the default alphabetic sort order as well as the list of services listed in the Top services section.

Supported Functionality in NERS Enhancement Request List - 2020

As part of the NERS 2020 Enhancement procedure we identified a number of NERS requests that are already supported in Alma. Following are the request details, and the supported functionality for each of these requests.

NERS # 7016 Provide patrons notification of reasons for failure to renew a loan

We would like it to be possible to notify users when they have an item on loan that cannot be renewed, and to explain the reason to them so as to avoid confusion to patrons. Reasons may include: - because it is requested, - the patron has reached their expiry period - or the item has reached its maximum renewal period. Currently when an item is about to go overdue a notification is sent to warn a user that an item must be renewed or returned even if there is a request on the item. However, when a renewal is attempted, whether by the patron, automatically, or by staff, it fails, e.g. because of the request, with no notification of the failure which is confusing to the end user.

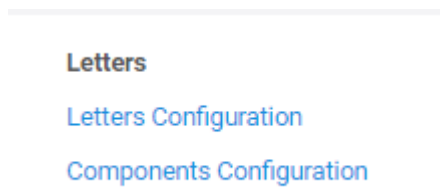
Ex Libris:

In December 2019 an enhancement relating to courtesy notices was introduced.

Courtesy notices now include the last renew status and date in the XML (so that customers can add it to the XSL). If the renew status is added to the XSL, then the output of the notice will include information as to why the last automatic renew failed.

You can configure the courtesy notice XSL to include the renew status in the notice.

Alma > Configuration > General > Letters > Letters Configuration:



Edit the Courtesy Notice Line:

Line	Name	Type	Channel	Length	...
1.	Conversation Letter	Conversation Letter	EMAIL	500	...
1.	Courtesy Notice	Courtesy Notice	EMAIL	500	...
1.	Courtesy Letter	Sms Courtesy Notice	SMS	-	...
1.	Deposit Activity Letter	Deposit Status Report	EMAIL	-	...

Note the New (from the December 2019 release) Renew Status line:

8	additional_info_2	EMPTY_STRING	EMPTY_STRING	-	-	...
9	additional_info_1	EMPTY_STRING	EMPTY_STRING	-	-	...
10	library	Library	Library	-	-	...
11	loans	Loans	Loans	-	-	...
12	location	Location	Location	-	-	...
13	Bcc	None	None	-	-	...
14	Cc	None	None	-	-	...
15	renew_status	Renew Status	Renew Status	-	-	...
16	sincerely	Sincerely	Sincerely	-	-	...
17	title	Title	Title	-	-	...

At the top of the table, click on the Template tab:

Add the renew status lines as in the example below:

```

<xsl:call-template name="mainTableStyleCss" /> <!-- style.xsl -->
</xsl:attribute>
<tr>
<th>@@title@@</th>
<th>@@description@@</th>
<th>@@author@@</th>
<th>@@due_date@@</th>
<th>@@library@@</th>
<th>@@renew_status@@</th>
</tr>

<xsl:for-each select="notification_data/item_loans/item_loan">
<tr>
<td><xsl:value-of select="title"/></td>
<td><xsl:value-of select="description"/></td>
<td><xsl:value-of select="author"/></td>
<td><xsl:value-of select="due_date"/></td>
<td><xsl:value-of select="library_name"/></td>
<td><xsl:value-of select="renew_status"/></td>
</tr>

```

The Courtesy notice will now have an additional column “Renew Status”. If there is more than one reason for the ‘non-renewal’ the reasons will be listed separated by a semi-colon (;).

Dear Dent

We would like to remind you that the following items at your disposal are due shortly:

Loans

Title	Description	Author	Due Date	Library	Renew Status
איך לשירד אפויק'סטת זונגים		שירד >> (ה)ר האחרון	2020/06/19	Rare books	The item policy is no renewals
The green tea book : the science-backed "miracle cure" / Lester A. Mitscher, and Victoria Dolby Toews.		Mitscher, Lester A.	2020/06/21	Law Library	The item policy is no renewals;The item status is "Recalled" and cannot be renewed;item renew period exceeded;

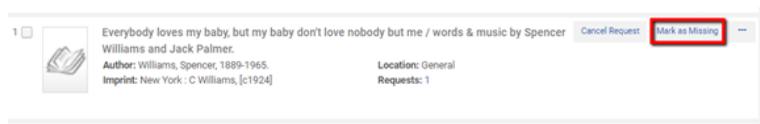
Sincerely
Circulation Department

NERS # 6555 Mark item as missing when cancelling a request

When we cancel a request and choose "item is missing" as the reason, we would like the option to update the item as missing as part of that process, rather than having to go back to the item record and mark it missing as a separate step"

Ex Libris:

In addition to the 'Cancel' option, the 'Pick From Shelf' (*Fulfillment > Resource Requests > Pick from Shelf*) screen offers the option to 'Mark as missing':




Clicking on this option will result in the following:

- The request will be canceled, and will no longer appear in the Pick From Shelf list
- The item will be marked as missing (note the following message, before confirming the 'Mark as missing' status):

Confirmation Message

Note that if there are multiple items attached to the holdings, they will all become missing. Are you sure you want to mark the items as missing?

Cancel Confirm

1  **Everybody loves my baby, but my baby don't love nobody but me / words & music by Spencer Williams and Jack Palmer.** [Edit Item](#)

Book By Williams, Spencer, (New York : C Williams, [c1924])
Barcode: 140-10
Library: Main Library
Creation Date: 09/15/2011 15:24
Modification Date: 06/22/2020 07:00
Process type: **Missing**
Expected Arrival Time: -
On Hold Expiration Date: -
Due Date: -
Needed By: -
Until: -
Permanent Location: General
[Other details](#)

Call Number Type: Library of Congress classification
Status: Item not in place
Due back: -
Item Policy: Four Week Loan
Material Type: Book

Item ID: 236110650000121
Holdings ID: 226110660000121
MMS ID: 991465730000121

Barcode	Librar	Location	Call Number	Item Call Number	Year	Volume	Description	Temporan Location	Status	Process type	Access Number	Receiving date
1 <input type="checkbox"/>	140-10	Main Libr...	General	-	-	-	-	No	Item not in place	Missing		01/19/2...

- A 'Request Cancel' letter will be sent to the patron with the information that the request has been cancelled as the 'Resource material cannot be located'.

Request Cancel Letter

Jane Brown
200 Orchard Road

College Town

Dear Jane Brown

On 06/21/2020 we canceled your request of 06/21/2020 detailed below :

Everybody loves my baby, but my baby don't love nobody but me /
By: Williams, Spencer.

Reason for deleting the request: Requested material cannot be located

Sincerely
Circulation Department

More information can be found on the Knowledge Center [here](#).

NERS # 6941 Improve display logic rules

This request included the following:

1. Add the ability to display a single collection when multiple collection options are available from the same vendor via a single rule in Alma. Currently this requires making multiple rules in Alma. In SFX this was possible using the asterisk '*' suffix (e.g., Do not show EBSCOHOST* getFullTxt If available EBSCOHOST* getFullTxt Condition: same_threshold).
2. Ability to prioritize collections by designating collections that should appear at the top of the list and collections that should be placed last on the list (this also was possible in SFX).
3. Ability to give preference to collections that have a linked PO Line (to favor subscription access) or just being able to mark preferred collections. By this we mean sort order – put collections/portfolios that have a PO Line at the top of the sort.

Ex Libris:

- With regard to #1:

Add the ability to display a single collection when multiple collection options are available from the same vendor via a single rule in Alma.

Alma has the ability to display a single collection when multiple collection of the same vendor exists using a single rule, see for example:

Add Rule

For user from groups: [dropdown]

hide service: Full Text [dropdown]

with: Interface [dropdown]

with value: EBSCOhost [dropdown]

if exists service: Full Text [dropdown]

with: Electronic collection [dropdown]

with value: EBSCOhost LGBT Life Plus Full Text(EBSCOhost LGBT Life Plus Full Text) [dropdown]

when in campus: [dropdown]

[Add] [Cancel] [Add and Close]

For all the options supported by display logic rules please see [here](#) on the CKC.

- With regard to #2:

Alma supports the ability to prioritize collections by designating collections that should appear at the top of the list and collections that should be placed last on the list using the 'Online Sort Ordering'.

Top services

Add to top [dropdown] [refresh] [reset]

	Move Up	Move Down	Service type	Service name	Service value	
1			-	-	-	...
2	[up]	[down]	Full Text	Electronic collection	North East Research Libraries Nature Single Titles	...
3	[up]	[down]	Full Text	Electronic collection	Gale World History in Context	...
4	[up]	[down]	Full Text	Interface	Free E- Journals	...
5	[up]	[down]	Full Text	Electronic collection	CAIRN Que sara je ?	...
6	[up]		Full Text	Electronic collection	Gale Cengage GreenR	...

For complete information please see [Online sort Order](#).

- With regard to #3:

The ability to mark preferred collections exists.

The request now is to be able to give preference to collections that have a linked PO Line (to favor subscription access).

[NERS # 7028 Add functionality to loan status Claimed Return](#)

Amended text after correspondence with Ex Libris:

Currently it is not possible for an item to have a claimed return status and simultaneously be in a work order status. Like

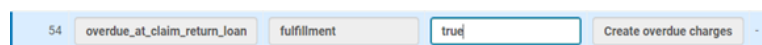
many institutions and per recommendation from the Ex Libris workflow analyst, we use work orders to track item searches (traces). These searches have multiple steps and can be tracked using their statuses. However, if you put something into a work order that you had marked as claimed return, it loses its claimed return status. This prevents the behaviors of claimed returns from applying to the item automatically.

We would like a special work order type “Claimed Return – Work Order” that allows the claimed return status to be retained while the item goes through the steps of the work order. This means retaining the behaviors associated with claimed return: that it stays on the patron’s account; that it has a process status and loan status of claimed return, in addition to the work order status; and that fines or lost fees don’t accrue while it is in claimed return status. Ideally, there’d be a step at the end of the special work order that could be either “found” or not, which would either check the item back in and release any fines, or remove the claimed return status from the loan on the patron’s record such that it would continue to accrue fines.

Ex Libris:

Our response relates to the original and the amended text of the NERS request.

In Alma there is a customer parameter *Configuration > Fulfillment > General > Other Settings* 'overdue_at_claim_return_loan':



Set to true if you want fines to stop accruing for items that were claimed to be returned. Read more about this [here](#)

During the process of searching for the item, the existing fine can be set as 'dispute' so that the patron will not be blocked due to this fine.

Every loan on a patron’s record has an optional 'notes' action. There can be multiple notes per loan. Using Alma's Analytics, you can generate a report which will present all items with a status 'Claim return' together with their notes. This can help monitor and track the number of times there was a search for the item.

During the process of searching for the item, the existing fine can be set as 'dispute' so that the patron will not be blocked due to this fine.

Once the item is found/not found, the claimed return status can be removed and fines will apply (or not if the item is found).

To summarize, Alma allows:

- Pausing fines from being accumulated during the 'searching phase'
- Adding a note on the loan which reflects the status of the item’s 'claim return'
- Creating an Analytics report to manage the search for items with a 'Claim return' status
- Disputing fines so as to not block patron activity while there is a search for the item.

[NERS #6780 - Requested titles show as available in Primo](#)

"Items that have been requested for pickup display as "available" in the Primo brief record. This causes issues if another patron attempts to borrow the item before it's retrieved from the shelves. Need option to display item as 'unavailable' or 'requested' in Primo."

Ex Libris:

In Alma there is an option to configure requested items to show as “Requested” in Primo, with an **unavailable** status. This setting needs to be enabled by Ex Libris support. For more details see [here](#).

- **Article last edited:** 09-Nov-2020