Module Name	Request Title	Request ID	Request Description	Request Keywords	Notes
Acquisitions	Purchase Request Library management in User records	6523	A new multi-selection field, Purchase Request Library, was added to the User Details page with the June 2018 release. If one or more libraries are defined for a user, the user may create purchase requests only for the listed libraries. If no libraries are defined, the user may create a purchase request for any library.\n \n But managing Purchase Request Libraries in user records can only be done record per record; there is no possibility for batch processes.\n \n Currently, there is no option: \n - to add or remove a Purchase Request Library with the Update/Notify Users job; \n - to add or remove a Purchase Request Library with an API; \n - to add or remove a Purchase Request Library with a SIS Integration Profile; \n - to retrieve in Alma Analytics existing Purchase Request Libraries in user records or to find user records that have no Purchase Request Library.\n \n We would appreciate a lot a more efficient Purchase Request Library management that would be integrated with the existing tools (Analytics, SIS, job, API).	purchase request, library	
Acquisitions	Change globally the Pattern type and Linking number, both item fields	6537	We would like to globally change the Pattern type and Linking number fields. It can not be done either via API or with Job(Change physical items). \n The purpose of these massive changes at the item level (fascicles) is the automatic creation of field 866 in the MARC record for each journal holding according to the fascicles received in Alma. In our case, it is essential to make this massive change but it can not be done via job or via API.\n \n https://knowledge.exlibrisgroup.com/Alma/Knowledge_Articles/Create_Summary_field_866867868\n	Pattern type ;Linking number	
Acquisitions	Link to edit POL when a purchase request is approved	6538	When a purchase request is approved, a pop-up appears with a confirmation message and a link to the POL that has been created. This link only allows you to visualize the POL.\n It would save time if it was an edit link of the POL or that from the display there would be a button to edit the POL.\n	Purchase request	
Acquisitions	Communications in POL independently of the POL Status	6551	Alma offers the possibility of sending communications to the vendors at the POL level. While the POL is active, you can see both the communications made and their content in the POL Communications tab. However, when the POL is canceled, the content of the communications cannot be displayed in Alma.\n \n Knowing the content of the communications, especially in POLs that are canceled, is necessary to know the reasons for the cancellation.\n We propose that the content of the communications be seen in Alma not only when the POL is active, but that it be viewed independently of the POL Status.\n	communictions, POL	

Acquisitions	Ability to set default search type for PO line search in invoice creation	6556	When manually creating an invoice, during the "Add Invoice Line" process, if we search for "PO line" using the dropdown options, the default search is "Vendor code - Equals". We would prefer the PO number be the default search on this screen. Better yet, we'd like to be able to set the default ourselves.	invoice default search	
Acquisitions	Allow exchange rates (Explicit Ratio) to be set at the library level	6636	Exchange rates are automatically and daily adjusted within Alma through a relationship with OpenExchangeRates.org. Many libraries belong to institutions which use internal "house rates" or pre-set exchange rates in the university financial system. This means either (a) invoicers have to manually set the exchange rate (Explicit Ratio) for each invoice or (b) having every foreign currency transaction calculated at a different rate in Alma vs. the financial system, making reconciliation impossible. This proposal is that there be a way to set and manage exchange rates at the library level. When an exchange rate is set, every invoice in that currency would automatically receive that rate as its Explicit Ratio.	currency	
Acquisitions	A purchase request with the status "Approved" can be rejected but this information is not updated in Primo-My Library	6643	The purpose is that a purchase request with the status "Approved" can be rejected (NOT deleted) and that this information is updated in My Library (we want the user can see that their purchase request was rejected). The problem when you try to do this is that Alma warns that requests with status "Approved" can not be rejected. \n \n Ideally, when the POL associated with the purchase request is canceled, Alma should automatically reject this request and it would be displayed in Primo-My Library. (for example, the provider says the book is out of stock)\n	purchase request	
Acquisitions	Editing items via Receiving, Save & Receive items	6669	From the Receive Items List, add options to edit description, enum, and chron. Currently only the barcode is editable here. This will greatly improve productivity. Furthermore, 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. Without this feature, working with continuous items is time-consuming, awkward, and requires many extra		
Acquisitions	Seperate the price and currency in Item's inventory price	6675	The field Inventory price field in physical item contains price and currency while Alma copies price from POL to item.Please seperate the currency into anohter field and make sure the price field is numeric. In this way, the Inventory price field can be counted directly.		
Acquisitions	Save more fields in POL template	6760	The POL template for continuations does not save the subscription from/to dates, the status of the Manual Renew checkbox, or the list price. The system defaults to having Manual Renew checked off for all new POLs (contins) and users have to uncheck it every time. There should also be an option to configure an institution default for this checkbox. Likewise, subscription from/to dates do not save in a template. This means that staff have to repeatedly choose the dates via the cumbersome calendar pop-ups, even though most of the time they are entering Jan. 1 to Dec. 31 of the current year. This should be saved as part of a template, or at least be configurable as an institutional default. It should be possible to save the list price in the template as well. In many cases we use 0.01 as the list price for various reasons. \n \n Additionally, add the ability to store INTERESTED USERS, POL NOTES, INVOICE STATUS, and the ADDITIONAL tab with the associated PO lines for all PO Lines templates.		

Acquisitions	Provide the option to either suppress or unsuppress from discovery, when a bib record is created from a purchase request	6787	When a purchase request is made for a title by the library, it is automatically suppressed from publishing to Primo.\n \n This requires the the purchasing team to then have to unsuppress the record during the approve and order process, which is an additional step in the workflow. \n This does not occur during our normal ordering processes, only when ordering via Manage Purchase Requests. We would ideally like items that are on order to be visible in Primo with their 'on order' status\n \n It would improve the workflow if, as an institution, we could choose to have records automatically unsuppressed from discovery when triggered by a purchase request. This should be a configurable setting as opposed to forced upon us by default.\n \n	purchase request, citation processing rules, suppress unsuppress from discovery	
Acquisitions	Ability to delete/remove redundant copyright records from the Approval Requests list	6810	On rollover, citations with copyright records that require manual approval are added to the Approval Requests List. The issue is that some of these units will not be using Leganto and will not submit a reading list. As a result, this List is full of redundant citations with copyright that will never be approved or rejected, and there is no way to remove them from the List. We would like the ability to delete or remove these records from the Approval Requests List, so that it becomes a useful tool to manage current copyright approvals awaiting	copyright, approvals, citations	
Acquisitions	Allow library staff to choose a preferred full text provider for resources delivered via the link resolver	6814	Currently, it is possible for library staff to choose which electronic portfolios to display for a citation added from the Alma repository. This is useful for reducing the number of potential access links displayed to the end user. However, this option does not exist for articles and other resources delivered via the link resolver. This enhancement would allow staff the option to select a preferred portfolio for these resources as well.		
Acquisitions	Allow libraries to customize the order of pickup locations in the request from	6816	When selecting a pickup location on the request form, our main campus locations currently appear after our less frequently used off campus locations. See screenshot at https://www.screencast.com/t/sf5eBxzN4dG. This enhancement would allow libraries the option to customize the order of pickup locations in the request		
Acquisitions	Ability to change default for â€œSelect PO Lineâ€ functionality	6917	Currently the Select PO Line is set to Active. When adding a closed PO Line to a portfolio/e-collection, invoice, or item record, staff have to change the filter from Active to All. We would like to set the default to All. Extra points for being able to set the default at the user level.	PO Line, Alma	
Acquisitions	Improve Encumbrance, Disencumbrance and Expenditure functionality	6926	Repeated from 4610 last year:\n \n The timing and use of encumbrances, disencumbrances and expenditures needs to be improved to both match the actual time of events and ensure appropriate accounting expectations are met. Â		
Acquisitions	Fiscal Year Facet	6927	We would like to have a fiscal year facet in the Order lines search results. One other option instead of a facet would be have fiscal year as an index within Order lines.	Order Lines, Facets	

Acquisitions	Ability to attach more than one PO Line to e-inventory	6928	Sometimes a collection is purchased in modules over time. When we purchase additional modules we have to move the first POL to the additional POL field and then link the second POL to the e-inventory so that the e-activation status can be marked Done and the POL status moves to waiting for invoice. If we had the ability to link more than one POL to e-inventory this would save a lot of steps. Plus we would have a true picture of inventory associated with PO Lines (e.g., from a Purchase Order Lines screen). An example resource purchased in modules is Adam Matthew's Colonial America (5 modules).		
Acquisitions	Ability to Change Bib Reference for multiple PO lines at one time	6932	PO lines on a bib record can only be moved one by one using the "Change Bib Reference" tool. When there are multiple PO lines, sometimes twenty or more, this can be a slow, tedious process. It would be helpful to be able to select multiple lines and link them to a new record all at once. (see https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/38103709-move-multiple-po-lines)		
Acquisitions	Print hold slips by circulation desk	6937	Our circulation folks would like the ability to print hold slips by circulation desk.		
Acquisitions	Resource sharing: updates to due dates of borrowing request loans to be reflected in resource sharing and fulfillment	6962	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.	resource sharing, renew, due date	
Acquisitions	Auto populate borrowing request possible for books as well as articles	6964	Currently when creating a borrowing request for articles, if the DOI/PMID is included Alma auto-populates with full details. This functionality should also be extended to books, based on ISBN, OCLC number\n	resource sharing, borrowing requests, auto-populate	
Acquisitions	Offer an option to exclude newspapers from direct linking	6967	Alma allows customers the ability to exclude journals from direct linking so users can select the best provider based on their coverage needs. Although the same logic applies when using newspapers, these materials are not excluded from direct linking. As a result, users are automatically directed to the first full text provider regardless of whether or not that provider offers the desired coverage. This enhancement would allow libraries the option to exclude both journals and newspapers from direct linking.		
Acquisitions	Provide the ability to identify broken links to electronic and digital resources	6968	Incorporate automatic link checking functionality into Alma that provides customers with regular reports of broken links for electronic and digital resources.		

Acquisitions	Provide the ability to batch-edit electronic collections	6969	Allow library staff the option to batch update multiple electronic collections at once. \n \n Use cases provided by requester below:\n \n 1) We subscribe to several collections on the\n 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.\n \n 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.\n \n 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.\n \n 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.		
Acquisitions	Provide the ability to assign notes and other settings at the Interface level, and have them be inherited by all electronic collections with that interface	6970	In Alma, Electronic Collections can be associated with an Interface. The Interface settings are configured in the Vendor record. Sometimes, the same operation needs to be applied to all collections with the same Interface (such as adding or removing an authentication note when a platform is experiencing linking problems).		
Acquisitions	Hold Shelf policy for RS items	6972	Using Lender Due Date for RS items sets the date for pick up from shelf to be the same as the due date. Staff must then manually weed the hold shelf for items older than 2 weeks. If this process could be automated e.g. by TOU policy it would be much more efficient.		

Acquisitions	Configure overdue notices accurately for reading room items	6973	Overdue and bill notices cannot be configured to be sent out if a reading room item is still checked out at library closing. This appears to be because there is no option for a loan status of Normal (with user) in the Overdue and Lost Loan Profile; there is only an option labeled Normal. This setting sends the overdue and bill notices whether the status is Normal (with user) or Normal (on shelf). We would like to send overdue and bill notice for RR checkouts ONLY when the Loan status if Normal (with user).		
Acquisitions	Price update on the item record	6986	In Alma, we require - for reporting purposes, inside the library and to our finance dept - that the final price that was paid for the item is converted to our local currency and automatically written to the item's Inventory price field.\n \n Currently in Alma, since the October 2018 release, the PO line's price is written to the item's inventory price field. If the PO line's currency is different than the institution's default currency, the total is exchanged and copied to the item. The amount is copied to the item with the currency for example: 10.00 USD.\n \n However, when an invoice is paid in Alma, the item's inventory price should be updated automatically with the final amount in our local (and default) currency. This part of the development is still outstanding. Most of the time there is quite a difference between the price from the PO line and that of the invoice (also because of exchange rates) and it has a huge impact on our financial reporting.	local price; inventory price	https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/19295566-item-s-inventory-price\n NERS ID 5583 (2019)
Acquisitions	Ability to add notes to invoice lines from invoices that are paid and close	6987	We are aware that one can edit notes on an invoice that is already paid and closed. However, for subscriptions, journals and continuations we often have the need to add/edit notes on the invoice lines of invoices that are already closed and paid. Manually putting the invoice back in Review to edit / add notes to the invoice lines doesn't solve the problem as this makes the payment information disappear which we then have to re-enter.\n \n We require the ability to add notes to invoice lines from invoices that were already paid and closed without having to re-open the invoice.	editing; notes; invoice lines; closed invoices	https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/35812681-ability-to-add-notes-to-invoice-lines-from-invoice\n NERS ID 6210 (2019)
Acquisitions	Acquisitions: Funds' Initial Allocated Amount	6988	Currently in Alma, the Initial Allocated Amount for an allocated fund is e.g. 1,000.00 ZAR. When an amount from this Initial Allocation e.g. 100.00 ZAR is transferred to another fund, the 100.00 ZAR gets deducted from the Initial Allocated Amount of 1,000.00 ZAR and is now displayed as 900.00 ZAR.\n \n In Aleph, the amount was transferred, yet the Allocated Amount remained the same, which is correct.\n \n When running reports on the Initial Allocated Amount in Alma, the adjusted 900.00 ZAR for the Initial Allocated Amount does not give a correct indication of the amount originally allocated from the institutional budget.	initial allocated amount; transfers; fund balance reports; Analytics	https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/32814679-initial-allocated-amount\n NERS ID 5613 (2019)\n
Acquisitions	Acquisitions: Fiscal Period Rollover-Move Cash Balance Forward	7045	Currently in Fiscal Period Rollover there's an option to Allocate new funds based on the Cash Balance of the same fund in the closing fiscal period, but the process leaves the cash balance on the closing fund.	Fiscal Period Rollover; Allocation; Cash balance; Transfers	

Acquisitions	New Purchase Request Creator role	7046	Please create a role in Alma that allows the user to create purchase requests inside Alma on behalf of other users, but not approve or reject purchase requests. The two current roles for purchase requests both allow the user to reject/approve the purchase request.	purchase requests, users	
Acquisitions	Acquisitions: Hyperlink invoice number in POL to invoice	7049	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.	Invoice; PO Line	
Acquisitions	Acquisitions: Allow inventory to be linked to multiple licenses	7050	Some resources are licensed with two entities, both a content provider and an access provider. An example of this is APA. If we choose to have our APA content hosted by another provider (which is an option), we must have a license with both the content provider and an access provider. Currently, we need to choose only one license to link inventory to.	License; Inventory	
Acquisitions	Acquisitions: Link Electronic Collection PO Lines to CKB bib records and portfolios	7051	When an "Electronic Collection" PO Line for a CZ e-collection (aggregator or selective package with portfolios) is created by clicking on the "Order" button in CZ, Alma only links the PO Line to the CZ e-collection and not to any bib record (example: https://www.screencast.com/t/yrg8gzM1Z). Since CZ e-collections are linked to bib/descriptive records, the desirable outcome would be that POLs created in this manner are linked to both CZ e-collections and bib records.	e-collection; Electronic Collection; PO Line	
Acquisitions	Append Notes via Batch Update instead of Overlaying	7057	Notes to be added to records can be appended by batch update instead of overlaying the original note		
Acquisitions	Invoice approval by batches instead of one by one	7058	Enable approval of invoices in batches. Currently, this has to be approved one by one.		
Acquisitions	Batch update of predicted items	7059	Currently we need to delete all predicted items when 1 item is predicted wrongly. There should be a batch update of predicted items.		
Acquisitions	Enhance purchase request form to include new fields	7062	TFor the Citation Type options Book and Journal, replace the wording â€œCitation Typeâ€ with â€œOrder Typeâ€ and replace Book and Journal entirely with â€œOne-Timeâ€and â€œOngoing". If weâ€™re ordering a â€˜continuingâ€™ streaming video itâ€™s not intuitive to choose citation type â€˜Journalâ€™ to create a continuing purchase order for a streaming video.\n \n We would also like a new option created â€œOne-Time with ongoing costsâ€. The expected outcome for this new option would be to create both a one-time and an ongoing Purchase Order Line upon approval of the Purchase Request. Use case: Oxford Handbooks Online is an order where we pay a one time payment for the purchase of the collection using monograph funds. But Oxford also charges an annual access fee which we pay for using periodical funds.\n \n Another enhancement we would like to see here is the addition of a URL text field for electronic resources.	Alma Purchase Request Form e-resources streaming video databases	

Acquisitions	Received Items List - enhance functionality	7065	Please add the ability to view Material type as a column, add a button to Open Predicted Items, and add a button to Withdraw items to the Received Items List in Acquisitions > Receive.\n \n Use case for Open Predicted Items (added from 6668):\n A user is responsible for receiving issues of print serials. While doing so via the Receiving List, they need to create additional predicted items for a title. They navigate to the List of Items for the correct holding associated with that title using a Repository Search, then use the Open Predicted Items function.\n They then need to navigate back to the Receiving List to continue their work until needing to create additional predicted items for another title.		
Acquisitions	Purchasing Review Rules	7067	Allow the general rule to be set to review (True) and customized rules to be set to skip review (False).		
Administration	Improve sort functionality and make consistent across all lists	6326	Implement a set of sort criteria consistent across all lists, e.g. Alphabetical, Numerical, Chronological, and Status based sort options would be available for Orders, Resource Sharing, Invoices, Citations, etc. So the same options are available and applied in a consistent manner.		Noted that this was done for Resource Sharing (Ideas Exchange - https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/19042831-ability-to-sort-resource-sharing-borrowing-request) but would be better if the same was available consistently across all the lists.

Administration	New role for Manage Import Profiles	6662	Currently users must have a Cat Admin role or Gen Sys Admin role to be able to Manage Import Profiles (change/add profiles). This also gives them access to the Configuration area of Alma. There should be a role to permit users to Manage Import Profiles that does NOT also give them access to the Alma configuration area. Access to the Alma configuration menu should be separate from the ability to Manage Import Profiles. We want to empower staff in different units to set up and maintain their own import profiles for their vendors, but we cannot roll this out as much as we would like because giving them this access also gives them access to Alma Configuration, which we need to limit to systems librarians who have undergone Alma certification. The staff who manage importing are not the same staff who need administration access, thus the permissions to Manage Import Profile should be its own role in Alma, which would allow us to give that access to more staff, while preventing them from access the configuration area, which should be limited to systems librarians. \n \n See also Ideas Exchange which has over 130 votes as of Dec 19, 2019. https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/38965627-new-role-for-manage-import-profiles		
Administration	Add AM/PM to 12 hour clock.	6740	We would like the 12hour clock to display AM/PM.Â This causes confusion when users check out hourly loans because Alma displays to the staff and in the notices 8:00 and users do not know if it is AM or PM.Â This then leads to misunderstandings, overdue materials, and angry patrons.Â		
Administration	Add the ability to select marc fields / local fields displayed in the brief record view	6903	In the brief record view in Alma there is an option to add/remove various fields from the brief results view. The list of the fields is set and quite limited. It would be very helpful to have more flexibility to choose which fields will appear in the list and for the list to include local fields	brief results view, UX, local fields	
Administration	Add MMS ID to any Export URL report	6905	When running the Export URLs job there is an option to export URLs from the bibliographic record, from digital representation or from the portfolios. When choosing to export URLs from set of electronic portfolios, the report contains only the Portfolio ID and the URL.	Export URL, job reports,	

Administration	Additional functions to the Normalization Rules (NR)	6908	Here are the requested functions to the Normalization Rules (the attached file includes the examples and explanations)\n 1. Position sensitive functions \n 2. Popup function \n 3. Identify & remove duplicate fields \n 4. Position sensitive removeSubField function \n 5. Functionality for Booleans in if conditions \n 6. Let the changeField also control indicators \n 7. Add the possibility to delete specific repeatable subfields based on contents \n 8. Possibility to check "when" conditionals after manipulation of the fields \n 9. Possibility to add several subfields with one function \n 10. Add functionality to copyField based on position \n 11. Add functionality to copyControlField based on position \n 12. Add the possibility to check if contents are the same \n 13. Check string length \n 14. Let functions run on several fields \n 15. Add mathematical functions / variables \n 16. Function for merging all subfields to a single subfield \n 17. Use metadata from within the NR \n (See also: https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/18865093-normalization-rules-adding-dates) \n 18. Possibility to exchange data between holdings and bibliographical records \n 19. Add possibility to add/remove characters based on hex/Unicode to bypass problems with problematic characters \n 20. Add "View versions" to NR	Normalization Rules	This is a request from Hanoch Roniger - It was added to the Ideas Exchange and it already has 155 votes:\n "Suggestions for Normalization Rules (NR) functions" - https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/37313869-suggestions-for-normalization-rules-nr-functions\n \n
Administration	Limiting the ability to run jobs	6915	We want the ability to allow some of our student workers to edit items, but would rather them not have the ability to run batch jobs. However, we have discovered that many roles allow the ability to run jobs like Physical Inventory Operator. Can the option to run jobs be pulled out as a separate function and allow Libraries to determine who can or cannot run this?	Alma, Jobs, Roles	
Administration	Add Expiration Date column to User Profiles	6919	When updating the User Profiles, it would help if we could see the Expiration Date of the Roles assigned to that Profile. Right now, we have to go into each one. In fact, it would be great if we could just select the ones we wanted to update and then be able to update the Expiration date all at once (have to go into each one to do that now).\n \n In the attached image, we put a note in the name of the Profile to know when the roles expire, but it would help us if there was a column with "Expiration Date"\n		

Administration	Add the ability to delete multiple sets from Manage Sets	6935	Often we work on a set of records and then the set is no longer needed and/or is empty. We have accumulated many of these and would like the ability to select multiple sets and delete these. This should be limited to sets the user owns - not other user's sets. (see https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/33505454-add-the-ability-to-delete-multiple-sets-from-the)		
Administration	Improve the â€œAdd Reminderâ€ functionality	6936	Â· Adding it to analytics. It would be very useful to create and schedule reports on reminders by type, status, and etcetera. \n Â· Add an email field to the reminder that will push it to the person for whom it is created. Currently, someone has to remember to go check reminders, which is not very effective. (see https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/17903803-add-notifications-to-alma-reminders)	Reminders, Alma	
Administration	Facets	6958	According to the Knowledge Center documentation, you may select more than one facet when multiple facets are available. However, you canâ€™t choose two of the same kind of facet, which is what we need. For example, under status we need to be able to choose all of the open PO Lines so we can eliminate the closed and cancelled lines. This functionality should apply to all of the availalbe facets, not just order status.		
Administration	View "Proxy For" details	6976	Currently, you are able to see who a particular user is a proxy for, but there is no way to determine who has that particular user as a proxy.		
Administration	Waive Fines in Bulk by Set	6978	Add the ability to wave fines in bulk by a set of users, or using specific date ranges.		
Administration	Read only view of user record information	6985	There is a need to provide our faculty librarians with a role that allows for a read only view of the user record information e.g. user details, addresses, contact details, etc.	read only; view; user information	https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/19588501-read-only-view-of-user-record-information\n NERS ID 6216 (2019)\n
Administration	More control over Alma user Fulfillment privileges	7031	Ability to have more granular control over user roles in ALMA Ability to select a role and check/uncheck specific associated attributes that we want to limit\n		Resubmit by Tufts U of a VCU NERS from prior ballot.
Administration	Ability to add a role profile to a set of users	7032	With the Update/Notify Users job, you can add a single role to a set of users, but you can't add a group of roles from a role profile. It would save a lot of time to be able to add a role profile to a set of users.\n		Resubmit by Tufts U of a Washington Research Library Consortium WRLC NERS from prior ballot.

All	Changes in the BIB records should be reflected automatically in all components of the record.	6564	We need that changes in bibliographic record will be automatically reflected in the "auxiliary" components of the whole record, such as the digital representation, PO line, etc.	Cataloging	
All	Improve Repository Search functionality with free text options for MARC tags and subfields in Advanced Search	6795	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 autonomy of any library staff to quickly and easily run a customised search by specific MARC tags and subfields on demand as need arises. For example, the Title grouping contains more than 3 dozen MARC tags and over a hundred subfields. \n 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.\n 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. \n 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 â€œcontainsâ€, "not contains", â€œequalsâ€, â€œnot equalsâ€, "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.\n 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 https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/17197337-ability-to-search-via-free-text-marc-tag-and-subfi	Repository Search ; MARC ; search ; Advanced Search; free text	
All	Divide save functionality between "save and close" and "save and continue"	6844	It would be useful if "save" functionality could be divided between two buttons "save and close" and "save and continue". \n \n \n		

All	Display due date in list of items	6951	Due date should be visible in the list of items or able to be added as a custom field. Receiving date is included in the list by default, however, we feel it would be more beneficial if due date was also displayed here. Currently from this screen, you can only view due dates individually for each item, by clicking on Process type.\n \n If the library holds a large number of copies of a book, having the due date display in the list of items would make it easier to see at a glance which copy is due back earliest. It would also be useful if you could sort the list by this field.\n \n Although due date is visible in the list of results if you do a physical item search, as opposed to title level, we feel that it would also be beneficial to include in the list of items screen, which gives you a more easily	physical item, fulfillment, due date	
All	Purge date in user account to update in line with expiry date	6953	Purge dates should be able to be set to update alongside expiry dates and in line with a defined user retention policy. For example, if users are purged a year after expiry, the purge date should automatically be populated with the value of expiry date + 1 year. Every time the expiry date for a user is updated, the purge date should update accordingly.\n \n As the purge users job runs based on the purge date, currently manual preparation work is required before running this job, to identify users who fit the criteria for purging (expiry date is greater than 1 year ago) and update any where the purge date is later than the expiry date, or users who should not be purged, but have a purge date earlier than their purge date. Otherwise this can lead to users inadvertently being deleted.	purge, purge date, expiry, user account	
All	Deactivate auto-highlight of text when clicking back into repository search bar	6982	We would like to have a per-user customization that would allow staff to deactivate the automatic highlighting of the entire search string when clicking back into the repository search box after performing a search. While some staff frequently copy this text, others hardly ever do and it results in more clicks for them when they have to re-type searches that they'd only intended to edit.		
All	Incorporate accessibility features into Alma itself	6994	Until recently, it was possible to control elements such background colour, font, font size, text style and text colour - all colour and text settings - using a Google Chrome browser extension called Care your Eyes (https://chrome.google.com/webstore/detail/care-your-eyes/fidmpnedniahpnkeomejhnepmbdamlhl?hl=en). However, this no longer works within Metadata Editor after recent updates, as part of either the December 2019 or January 2020 release.\n \n Given recent UK legislation around the accessibility of web pages (https://www.gov.uk/guidance/accessibility-requirements-for-public-sector-websites-and-apps), we believe this functionality should be incorporated into Alma itself rather than depending on the web browser, the features of which are limited and may cause	Accessibility; text; background; font; font size; colour; visual adjustments; legislation	

All	Allow institutions to export and import all configurations from Alma Premium Sandbox	7000	Ex Librisâ€™ new policy of forcing a refresh of all customersâ€™ Alma Premium Sandbox twice a year presents a significant challenge because of the inability to export configurations from this Sandbox. It means that before every refresh, we have to go through the largely manual process of exporting all configurations out of the sandbox so we can keep record of them. Then if we want to recreate the old configurations, we have to do this manually. We need the ability to export and import all of our Sandbox settings, and especially the Display Normalization rules. We continually work on these to try to get the display as we want it, but we're not ready to make those live yet. We haven't found an easy way to export these, not even with the APIs, so we have to go through each one, copy and paste into a Word document that we can reference after the refresh, and then re-input them into the refreshed Sandbox.	premium sandbox; sandbox configuration	
All	Allow for sorting for all columns in Alma tables and increase the ability to filter	7037	Add the ability to sort or filter columns in Manage Patron Services, Fines/Fees Summary, and Manage Sets tables. Specifically add the Item Policy column on Manage Patron Services, the Status Date column on the Fines/Fees summary, and Created by and Creation Date columns on the Manage Sets.		
Analytics	Allow End Users to pull data from Alma Analytics to quickly visualise in Power BI	6524	Currently users use Alma Analytics interface to generate any reports. Library Staff (admin & end users) would like to pull Alma Analytics data directly into Power BI tool for quick and fancy visualisations. Can there be some Alma Analytics interfaces/APIs to allow this integration?	Reports, Power BI, Alma Analytics, API	
Analytics	Alma Analytics and SUSHI enhancements	6534	Iâ€™d like to request Alma Analytics include the following features which are currently are available in the 360 Counter service:\n \n â€¢Client has option to complete an online DRS Request Form, which informs Ex Libris of usage statistics reports to retrieve, clean and upload on the clients behalf. Usage would be ingested via SUSHI-Protocol Harvesting, or Administration-Based Harvesting. Once usage reports are uploaded, Ex Libris reports back to the client on what was uploaded along with any issues that might have arisen.\n â€¢Provide COUNTER-compliant templates to enable uploading of non-COUNTER-compliant reports into Alma Analytics (COUNTER R4 and COUNTER R5): Alma at times wonâ€™t upload a report because of some coding embedded in the Excel spreadsheet. \n		
Analytics	Expand "Interested user" options in Analytics	6909	When adding "Interested user" to a POL there are choice options to notify the user upon arrival or cancellation or create a hold (see attachment). These options do not appear in Analytics, only the existence of "interested user".	interested user, analytics reports	
Analytics	Support multiple subject areas in an Alma Analytics report	6957	Currently, attempts to use more than one 'subject area', e.g. Fulfillment and Physical items, within Alma Analytics end in failure. Sometimes, this causes an error and no results will display at all. On other occasions, the columns and rows appear but some are unpopulated.	Analytics; multiple subject areas	
Analytics	All MARC fields available in Analytics	6974	Add the ability to run analysis on every MARC field (and subfield).		
Analytics	More local parameters available in ALMA analytics	6975	Ability to add more than 10 local parameters to ALMA analytics		
Analytics	Analytics: Display both code and name for Statistical Categories	7003	Currently, within Analytics, we only see the name for the statistical category. We would like to see the code as well. (see https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/37762024-add-the-code-to-the-list-of-statistical-category-w)		

Analytics	Add Usage Data Details dimension to E-Inventory and Funds Expenditures SAs	7041	In the Analytics E-Inventory and Funds Expenditure subject areas, add the following dimensions (currently only available in Usage subject area):\n â€¢Usage Data Details\n â€¢Usage Data Details - JR5\n â€¢Usage Data Details - Release 5\n This is necessary, because the usage data in the Usage subject area currently does not have any identifier (MMS ID, POL Reference) to connect it to other necessary e-resource data found in other subject areas. It is currently not possible to connect the data even externally to Analytics (such as via Excel using VLOOKUP) because of the lack of these identifiers. The E-Inventory subject area has the Cost Usage dimension, but the underlying data is opaque, and accurate usage data cannot be derived from it.\n	Analytics, Usage Data, E-Inventory, Funds Expenditure	
Analytics	Preview of results option for queries in Analytics	7053	We would like to see a feature where the first 50 lines of query output could be viewed as a preview of a report. This preview would allow one to make sure that you are getting what you intend without having to wait for the entire report to run.\n	Analytics, Preview	
Analytics	Reject Request data added to Analytics	7055	Can the data in the Reject Request pop up be added to Analytics so that reports could be created that specifies the reason that a request was rejected?\n \n We found the field is titled Reject reason and it appears in the Reject Request popup. It doesn't seem to be present in either the borrowing or lending reporting areas of analytics.\n		
Analytics	Alma Analytics - E-Inventory Subject Area. Pulling Electronic Collection Public Name Override into lessens report results	7063	When using Alma Analytics, e-inventory SA to build a report on electronic collections if you pull the public name override field or several other fields from the Electronic Collections folder (identified in the SalesForce case) the number of results drops by the thousands. Yes, this is a bug but Ex Libris is in no great hurry to fix it because the fix is complicated. BC's case is pending development but the U of Queensland case was actually closed as an enhancement.	Analytics e-inventory electronic collections	
Electronic Resources	Provide automated method for changing electronic collection proxy setting	6677	We are in the process of replacing EZProxy with OpenAthens. We have over 400 electronic collections to manage. During the transition period we may want to switch between EZProxy and OpenAthens for selected collections. Currently we have to edit each collection manually and make the proxy change. We'd like the ability to apply this change either through some type of batch process, or some type of electronic collection		

Electronic Resources	Evaluation workflow - close trial, keep data	6684	The existing Alma Evaluation Workflow does not allow us to CANCEL a POL for an unwanted item. It only allows us to DELETE the POL (and therefore lose the trial/evaluation data).\n \n The Evaluation Workflow documentation (see step 7 in the link below) suggests that cancelling is an option distinct from deleting, but there is no cancel option in Alma.\n https://knowledge.exlibrisgroup.com/Alma/ProductDocumentation/010AlmaOnlineHelp(English)/020Acquisitions/060EvaluationsandTrials/010Evaluation_Workflow\n \n It would be helpful to have an option that would close/cancel the evaluation process for items that are not acquired/purchased. This would allow for better record-keeping around trial results and better internal tracking of the rationale for not acquiring the resource.\n \n This issue was confirmed by Ex Libris via Salesforce Case #00714360.		
Electronic Resources	Customizable Electronic Material Types for portfolios	6739	Electronic Material Type for portfolios is currently hard coded and additional Types cannot be configured or added. We have a need to add additional electronic material types for consistency and accuracy with our electronic collections. There should be consistency of functionality in Alma across resource types; we're able to add additional Physical Material Types and we should be able to add additional Electronic Material Types.		
Electronic Resources	SUSHI: Alma not recognizing manually uploaded reports	6788	When sushi reports fail to load automatically but are then loaded manually, we continue to get failure reports for this each month as Alma continues to think that the data is missing. Alma does not "know" for which months a manual file was loaded,so it does not figure out that these months were loaded manually when the SUSHI harvesting is running. We request that a manual load should be treated the same as an automated load	SUSHI Counter report manual	
Electronic Resources	Perpetual Notification	6924	When deleting e-inventory that is marked Access Type = Perpetual, it would be nice to get a pop-up notice indicating we are entitled to perpetual access.	Deleting, E-Inventory, Perpetucal, Notification	
Electronic Resources	Load Usage Data: Add Platform filter in Monthly Usage Data tab	6929	The â€œUploaded Filesâ€ tab has the ability to limit by Vendor â€“ we need this same ability with the â€œMonthly Usage Dataâ€ tab, especially for platform. (see https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/37734136-add-platform-filter-to-the-missing-data)		
Electronic Resources	Add "Additional e-mails" fields to "Report to ex libris" form in Alma	6934	In Salesforce the customers can use "Additional e-mails" feature to let colleagues know that they have (already) opened a case for a specific issue. This makes teamwork easier. For SF cases opened using the "Report to ex libris" feature, this is not possible. Please add 5 "E-mail 1" - "E-mail 5" as in SalesForce. (see https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/36006103-add-additional-e-mails-fields-to-report-to-e)		
Electronic Resources	Limiting CZ Portfolios After Title Search	6939	Please provide more ways to limit the CZ portfolios list that appears after a title search. For example, one journal can have over a hundred portfolios to choose from and it is time-consuming to review, even after using the existing interface and material type facets. Suggest adding: ability to limit to non-consortial portfolios; to only free portfolios; to already active or non-active collections.		

Electronic Resources	Improve Display Logic Rules	6941	Â· 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).\n Â· Ability to give preference to collections that have a linked PO Line (to favor subscription access) or just being able to mark preferred collections.\n Â· 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).		
Electronic Resources	display electronic holding statements in chronology sequence	6946	To display electronic holding (coverage) statements in chronology sequence â€“ from oldest to newest, instead of random order\n We find that the autoload holding statements supplied by vendor ScienceDirect is in chronology sequence (from oldest to newest). But the display of multiple holding statements in Primo GetIT is random or not in sequence after the autoload of holding statements.\n \n e.g. International journal of radiation oncology, biology, physics.\n https://julac.hosted.exlibrisgroup.com/permalink/f/1m2sapd/HKPU_IZ51203553420003411\n Holding statements should be display in chronology order so that user can easily identify which year we have accessing right, instead of browsing through all the holding statements.\n \n Detailed SF case #00731863	Holding sequence; New UI; Electronic Holding	
Electronic Resources	Include rolling dates in local date information field	6991	Passing along a request from our ER Librarian:\n \n I would like to see a better way to deal with rolling coverage dates. There does not seem to be a good way to deal with gaps in portfolio coverage when there's a moving target date involved. For example, if a title includes perpetual access from 2011-present, and issues 12 years or older are open access, unless you include a public note, what will display is:\n \n Available from 2011 volume: xx issue: xx\n Most recent 12 year(s) not available	rolling coverage, portfolio coverage	
Electronic Resources	Add additional fields for linking local electronic materials to Community Zone (CZ) materials	7034	For linking a local electronic collection to the Community Zone- provide option(s) in addition to ISSN/ISBN identifier (such as OCLC number) to confirm a match between the local portfolios in the electronic collection being linked with portfolios in the Community Zone.		
Electronic Resources	Add additional info to Community Zone (CZ) records	7039	Add more detailed information for Community Zone records, including creator and affiliation along with a history of the record and the number of institutions currently using it.		

Electronic Resources	Provide the ability to "link" local extension access points to the Community Zone (CZ) authorities	7044	Many local extension access points, such as 9XX fields, simultaneously exist as Authorized Access Points in the LC Authority File (in the CZ). It would be nice to have the ability to "link" these Local Extensions to the CZ Authorities to benefit from any of these access points changing (e.g., death dates added)		
Electronic Resources	Provide MARC record quality measures to CZ collections	7069	CZ collections vary in regard to the quality of their metadata. Some CZ collections contain rich MARC records, while others contain very poor records. When facing the question whether to import vendor's MARC records or to rely on CZ records, librarians usually lack basic information about the quality of existing MARC records in a given CZ collection.\n \n I would like to suggest that each CZ collection will include basic statistical information about the MARC records quality. Such information could be generated in different ways. \n \n One possibility is to provide an analysis based on predefined quality profiles of MARC records. Here, specific profiles of MARC record quality would be defined (such as: 'brief', 'basic' and 'rich'), this in accordance to the type and number of MARC tags included in each profile. Based on those predefined quality profiles, each collection would then include a summary of the percentage of records fitting each quality profile. The librarians could see that CZ collection 'X' contains 10% 'brief' MARC records, 60% 'basic' MARC records, etc.\n \n Second possibility (complementary to the previous), would be to provide a general MARC tags count for all the collection records. Here, librarians would easily see the frequency of each MARC tag in the records set. With this information provided, it would be easier for librarians to assess the MARC records quality of a collection, judging by the percentage of records that contain certain tags, as ISBN (020), ISSN (022), subject heading (6xx), etc. Preferably, within the CZ collection view, librarians would be provided with a summary of the information, focused on several important tags (ISBN/ISSN, authors, subject heading, etc.), and an option to download a full frequency analysis report.	metadata MARC CZ electronic collections quality statistics	
Fulfillment	Add more then one Auto-renewal period	5178	We need to have the option to configure auto-renewal jobs for different item policies and/or fulfillment units.\n \n As things are now, library policy is dependent on software limitations. The single auto-renewal interval works ok with one policy e.g 14 days, but if there is another fulfillment unit with other policy, for instance 3 days, the	Auto-renewal, fulfillment	
Fulfillment	Ability to add Citation Details fields to the Citation display in Edit Reading list or Edit Citation screens	5648	Currently important information for reading list workflows like Edition are not displayed in the Citation in the Edit Reading List screen, but only when the tab â€˜Citation Detailsâ€™ is expanded. Fields like Edition are more important to display at a glance for citations, than the currently displayed Subject or Series.Â We would like to be able to configure which Citation Details fields display via manage column display feature.	Course reserves; reading lists; fulfillment	
Fulfillment	Add Leganto discussion notes to Brief Citation display	5708	When a new library discussion note has been added to a citation, we would like this to be visible at list level in Alma (Edit Citation screen) and on the full citation list (ie, the note will display next to the blue 'Alert' text). Currently we need to click into each citation to view the notes, and cannot use use ctrl + F in browser to identify similar notes.	citation, discussion notes, brief display, course reserves, leganto, reading lists,	

Fulfillment	Add the Citation Id to the Citation Edit page	5709	We would like the citation ID to display on the edit citation screen as it would improve cross working between Leganto and Alma.	citation, citation id, edit, editing, leganto, reading lists, fulfil	The Citation ID has been added to the Citation Search screen and the Reading Lists view screen (December 2019 release?), this would be the final step to make it visible everywhere it can be helpful.
Fulfillment	Add Course Information to the Excel columns exported from the Alma Citations page	5710	We would like Department Name, Number of Participants, and Term added to the export from the Edit Citations screen. We make purchasing decisions based on citations tagged as Use in Library Only, which department they are for and how many students are on the course. It would be useful to have all this information in one place and would allow us to work more efficiently and effectively with this export.	citation, course information, edit, citations page, department name, term, participants,	
Fulfillment	Enable a different digitisation department for a circulation desk that doesnâ€™t support digitisation	5808	We have a circulation desk for our remote storage location but this circulation desk does not support digitisation. We would like to be able to be able to configure it to be served by a different circulation desk just for digitisation. This would mean that when items are checked in, they would be put in transit to a different circulation desk for scanning and then put in transit back to the original circulation desk once complete.		
Fulfillment	Make personal delivery labels in Resource Sharing request form configurable.	5809	We have had many complaints from users who do not understand what Work Address means in the pickup/delivery location drop down menu in the resource sharing form, or they don't even see it. We much prefer the layout within the patron physical item request form where home and work address are separated from pickup locations under a personal delivery heading and where we can customise the labels for Home and Work Address. Please make the same functionality available in the resource sharing request form so that we can make all of our request forms a consistent experience for users.		
Fulfillment	Adding reset button to the volume filter in the GetIt tab	6194	The filter in the GetIt tab allows users to filter the display of the volumes by year, volume or description. It would be helpful to add a RESET button that will reset the values chosen and display all values available.		
Fulfillment	User/Patron notes deletion	6219	We would like to be able to delete all the notes in patron's library account on Alma at once. Now we have to delete them one by one	user notes, UX	

Fulfillment	Create reading lists by importing a file to Alma	6318	Create reading lists by importing a CSV or XLS file to Alma (formatted similarly to the files we supplied when migrating list data from our old system to Leganto).	Reading Lists, Bulk, Load, Create	Related Ideas Exchange item - https://ideas.exlibrisgroup.com/forums/395697-leganto/suggestions/33629557-create-reading-lists-by-importing-csv-or-xls-forma)
Fulfillment	Notify when a title is deleted in Alma that is referred to in Leganto Reading Lists	6325	The user should get warning notifications against citations when titles included in a leganto reading list are deleted, so that the librarian can replace the related entry with an alternative copy.	Reading Lists, orphan link, deleted title	Related Ideas Exchange - https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/36648628-notify-when-a-title-esp-electronic-portfolio-ch, also similar in Leganto
Fulfillment	One library has two circ desks which serve different locations within the library. When on-loan items are requested, we should be able to configure which (if any) hold shelf is indicated as pickup location.	6535	One of our libraries has two circulation desks, DEFAULT_CIRC_DESK and FPS_SC. DEFAULT_CIRC_DESK does not have a hold shelf while FPS_SC does have a hold shelf. Each circ desk serves and manages different locations within the library. Users may place a request on items when they are on loan; however, we do not want the â€œDEFAULT_CIRC_DESKâ€ or â€œFPS_SCâ€ to display as a pickup location for these items.	hold shelf, request, fulfilment, circulation desk	
Fulfillment	Automatic Blocks Do Not Show in User Details Blocks Tab	6540	When a patron has an automatically created block, such as for having too much money in outstanding fines, it does not appear in the blocks tab under the User Details wizard.	Alma, blocks	
Fulfillment	Configure Bookings with a lead time for the booking start date	6550	The ability to configure a lead time between time of making a booking and booking start time would ensure that we providing a better client experience for users of our Rare Books and Special Collections. It would give our staff time to check item condition and availability, and advise client of outcome of this before they arrive at our Library to view the item. This would mean that clients, many of whom will have travelled some distance to our Library, are guaranteed access when they visit us.\n	booking, terms of use, policy	

Fulfillment	Mark item as missing when cancelling a request	6555	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.	request cancel missing	
Fulfillment	Include sort by Due Date in the primary and secondary sort of Alma search results	6562	When searching for physical items, Alma users can use facets to limit items that are on loan, but there is no way to sort those items by the due date. This would be very useful for high-demand short-term loans such as course reserve items. Including a sort by Due Date in the primary and secondary sort of Alma search results would allow Alma users to see items due back soon in a more efficient way.	Due Date, Sort, Fulfillment, Manage Sets	
Fulfillment	Prevent refunds for items with Lost and Paid status	6565	When the close_paid_lost_loan is set to true, an items status is changed to Lost and Paid and the loan is closed from the patrons account when the last fees are paid or exported. If the TOU allows refunds and the item is returned even after the loan has been closed, the patron receives the refund. We would like the option to configure the Lost and Paid status not to initiate a refund if the item is returned regardless of the TOU refund policy. When lost loans are closed via the Close Lost Loans job the patron no longer receives a refund if the item is returned. We consider the Lost and Paid status to be the equivalent automatic method for the Close Lost Loans job so believe we should be able to configure it to not refund the patron. If an item with the Lost and Paid status was returned, we would also expect a pop-up message to display in Alma indicating the item has a Lost and Paid status. This would alert the staff not to re-shelve the book but follow internal library processes for the next steps for Lost and Paid returned items.		
Fulfillment	Use preferred email from Partner record for shipping digital Lending Requests	6582	Often the Requester Email in a Lending Request is not the email that we can ship a digital item to (or sometimes the Requester Email is empty). Instead, the email address we use is from the preferred email address in the Partner record. We would like configuration to be made available so institutions could choose to use the preferred email address from the Partner record in Alma when shipping digitally instead of the Requester Email address that comes with the Lending Request.		
Fulfillment	Update User Purge Dates to Match Expiry Dates on Renewal	6641	When staff select the pop-up option to renew an expired internal account, the expiry date is updated based on the User Renewal Period policies, but the purge date is unchanged.\n \n Because the Purge Users job acts on the purge date only, this results in accidental deletions of accounts staff intended to renew and keep.	user accounts, purge, expiration, renewal	
Fulfillment	Allow user preferred pick up location while retaining other options	6661	Currently in the TOU you can allow pick-up at "Any pick-up location" or at" User affiliated Campus Pick-up locations". If the latter is set, ONLY pick-up locations of the user's campus are available. We need an extension to the former rule, that lets the user's preferred pick-up location (a new parameter in the user profile) be selected as default option, while still allowing the user to select a different location when placing the request.\n Obviously, the "User preferred pick-up library" needs to be added to the user profile.		Previously submitted as an Idea: https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/38032540-allow-user-preferred-pick-up-location-while-retain

Fulfillment	Enable customer-defined order of locations in the Get It menu	6676	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 doesnâ€™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).\n \n 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.\n	Get it locations sort	See NERS # 5683. Made the shortlist in 2019
Fulfillment	Controlled Digital Lending	6736	Controlled Digital Lending - Alma-D has very robust functionality as a digital asset management tool. There are already very good methods for controlling access to digital assets, a variety of viewers accommodating many file types, and integrated publishing from Alma to Primo. One compelling feature that would make Alma-D the "no-brainer" digital asset management system is functionality that supports controlled digital lending.	Alma-D, Controlled Digital Lending	
Fulfillment	Change due dates when patrons expire	6737	We would like the due dates of a patron's books to be changed to their account Expiration Date if this is reduced. For example, if a book is issued to a student for 10 weeks and they withdraw or go on a leave of absence, the original due date remains which can be some weeks after they have left. This can cause confusion for library staff and the patron.		
Fulfillment	Interested in Letter to Have Resource URL	6738	Users have to take the additional step of searching for the the resource in Primo in order to access it, and some users are confused as to how to access the resource from the notification email.		
Fulfillment	Requested titles show as available in Primo	6780	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.		
Fulfillment	Change the "Save" and "Done" buttons for digitisation requests	6781	We would like to improve the clarity of the user interface in the attach documents step of the digitisation workflow. Currently, when fulfilling a digitisation request, the staff member will click on 'Next Steps' and then 'Attach Documents' to reach the Attachments screen. After uploading the document, the next step is unclear. Available buttons are 'Done' 'Save' and 'Cancel'. Save is highlighted, indicating it is the next step. However, if selected, the Save button saves the attachment, but does not send the document, and sends the user back to the previous screen which lists all digitisation requests. The user must then navigate back to the Attach Documents screen of the request to complete fulfillment. The 'Done' button however will deliver the attached document and fulfill the request. We would like the 'Done' button to be renamed 'Send' and to be highlighted instead of the 'Save' button to indicate it is the next step of the workflow.		
Fulfillment	Notification of internal patron record expiration	6782	Alma letter and SMS letter to be issued x days before internal patron record is due to expire. Currently there is no option in Alma to send a membership renewal letter to internal users. A letter/SMS to advise them of expiry, and renewal options, would be client focussed. Ideally, such a letter could be configured to send automatically x days before expiry.		

Fulfillment	Mapping chapter details fields in borrowing requests to partners	6784	Currently Alma does not send the 'Chapter title' and 'Chapter author' fields in borrowing requests to partners using the ISO ILL protocol. This means that staff have to remember to edit requests to move this information into the Chapter Number field in order for it to be transmitted to partners. We would like Ex Libris to map these fields so that they are transmitted via an appropriate ISO field to the partner library.	resource sharing, chapter title, chapter author, chapter number, ISO protocol	
Fulfillment	Linking Fines and Items in Alma	6797	1. In the patron fines tab, link item barcode to the item's page.\n 2. In the item information, link to the fines page instead of or in addition to the abbreviated user page.		
Fulfillment	Missing button moved in Alma	6798	Previously, when you did a physical items search in Alma, you could find an item, click the ellipsis menu, and select "mark item missing." This has disappeared and it would be really nice to have it back.		
Fulfillment	Add Call Number to Fines Tab in Alma	6801	Currently, only item title and barcode are listed in a user's Fines/Fees tab in Alma. Can we add call number to that list?		
Fulfillment	Provide option to extend page timeout in Alma	6802	Provide the option in the Alma configurations to extend the timeout for any one page.		
Fulfillment	Allow RFID multi scan function in Alma	6823	Currently, Alma doesn't allow multi scan use with RFID readers.\n \n This means librarians at circulation desk have to scan one by one items with RFID reader instead of dropping them off directely on the RFID reader. \n \n However, some self check machines offer this possibility with Alma.	RFID, multiple-scan	
Fulfillment	Fulfillment Network On Hold Shelf Letters should come from the Pickup Library, not the owning library	6832	When an item is requested through our consortiumâ€™s fulfillment network is scanned in at itâ€™s pickup location, the â€œOn Hold Shelf Letterâ€ that is sent to the patron is generated from the itemâ€™s owning library instead of the pickup library. We would like the On Hold Shelf Letter to be generated from the pickup libraryâ€™s â€œOn Hold Shelf Letterâ€ instead.	fulfillment network, holds, letters	
Fulfillment	Fulfillment Network Requesting in Primo should require fewer clicks	6833	Fulfillment Network Requesting should take fewer clicks and be less confusing, especially for Guest users. When requesting from Fulfillment Network institutions through Primo, it takes a lot of extra clicks, is confusing to users, and Guest (non-logged in) users especially are likely to be misled about whether their request has been placed. For Fulfillment Network items, when a patron clicks Request they should be taken directly to the request preferences screen (the dialog where they select the pickup location) whenever possible. If they must login first, then upon clicking Request they should be taken directly to the login screen then redirected to the request preferences screen to complete placing the request.	primo,fulfillment network,request	
Fulfillment	Add more information to "Update BLDSS Requests" job	6845	When a job was completed with errors, it would be useful to see more details on why the errors occurred in the Event Description.		
Fulfillment	A search function in the Edit Reading List screen that allows you to search for citations within a reading list	6846	A search function in the Edit Reading List screen that allows you to search for citations within a reading list. This function exists in Leganto but not Alma.		
Fulfillment	Add status "On Waiting List" to resource sharing borrowing request status field	6847	It would be beneficial a new status "On Waiting List" to the drop-down list for the Request Status field in a resource sharing borrowing request.		

Fulfillment	Department/Faculty to be added to user profile	6849	Currently, there is no "academic dept./faculty" in the user details section of Alma.		
Fulfillment	Add rules to control anonymization of requests, resource sharing and fines	6902	We'd want to be able to control the anonymisation of requests, resource sharing requests and fines and fees in a similar way to loans. In particular we'd like to be able to set a parameter for days since user expiry and since the request or fine was complete.		Copied from Idea Exchange and slightly modified with "rules" instead of "parameters" in the title and an added "Expected Outcome" section:\n \n https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/34128751-add-parameters-to-control-anonymization-of-request
Fulfillment	Notices Sent by Library Instead of Institution	6911	We would like the option to have letters and notices sent according the library instead of the institution level.		
Fulfillment	Ability to Move/Re-Order Requests	6912	We would like the ability to move/re-order requests within an item's queue.		
Fulfillment	Recall/Non-recall Request Options	6913	Our patrons would like the option to request items without recalling them from patrons. Sometimes patrons DO want recalls, but other times, they just want to know when the book is available.		
Fulfillment	Multiple Actions from Patron Loans	6940	Add the ability to mark multiple loans as Found or Lost, Delete multiple loans, or create Work Orders in bulk, from a patron's Loan Display		
Fulfillment	Improve Work Order Workflow	6943	A frequent complaint I hear about work orders is repetitive scanning. Adding a radio button that allows an operator to place the item in transit directly to the work order department specified when the work order is created could eliminate the necessity of scanning an item to place it in transit after creating a work order. The option would be helpful from both the Place Items In Process screen after Work Order is selected from a Row Actions List, and within the Create Physical Item Work Order job.		

Fulfillment	Improve Scan In Items Workflow	6944	Adding a Create Work Order tab to Scan In Items, with drop down options for Process Type, Do Not Pick from Shelf, Notes and Managing Department, could greatly reduce some of the repetitive clicking and scanning done by processing staff throughout the day.		
Fulfillment	On Hold Shelf Letter Info	6945	There is currently a notes affect loan label in Letters that will conditionally create a message if a patron has a block on their account. Another factor that could affect the decision to loan an item is the physical condition of that item. A conditional message in the On Hold Shelf Letter that the item is Brittle or Damaged or Fragile and may not be available for loan would be ideal.		
Fulfillment	Request note should be visible in the Resource Sharing Lending Requests Task List page	6955	Currently, the request note is not visible in the Resource Sharing Lending Requests Task List page. When working with lending requests it is often useful to add a note, which can be done in the request note field. Also, there are sometimes notes from the lender that provides us with useful information. In order to see and/or add a note you need to open every single request via the "edit" button. This is very time consuming when working with a large amount of requests in a daily basis. In our institution a team is working with requests which means that there are several persons handling the same request. Failing to check every request means that you could possibly miss out on important information that will slow down the process.	Resource Sharing Lending Requests Task List, request note	
Fulfillment	Resource sharing: batch upload/import file of borrowing requests	6963	Sometimes receive a large number of resource sharing requests from individual users, e.g. spreadsheet is emailed to the team with list of requests. It would save time if it was possible to upload these in batch to Alma as borrowing requests, rather than entering each one manually	borrowing requests, resource sharing	
Fulfillment	Maintain central list of resource sharing partners	6965	Ability to add resource sharing partners from a centrally maintained list e/g/ based on British Library list with ILL dept details. This would save individually entering same details across multiple institutions and allow institutions to update their own details in one place if necessary.\n	resource sharing, partners	
Fulfillment	Resource sharing: Search union catalogues for holdings from within Alma (e.g. Library Hub Discover, WorldCat)	6966	It should be possible to search union catalogues, such as WorldCat, JISC Library Hub Discover, from within Alma for bibliographic data and for holdings information to locate a potential partner. This could then populate the borrowing request with bibliographic data, as well as pulling through a selected partner of those with the item available. Staff would no longer have to search outside of Alma to confirm the availability of an item at a partner institution and could search a wider range of potential partners in one go.	Resource sharing, locate, partners	
Fulfillment	Grace Period for the Lost Item Replacement Fee refund in the Lost Loan Job	6981	Currently, Alma has two configuration options related to refunding the Lost Item Replacement Fee:\n i) % of refund can be configured - at the point of returning the lost item, we can indicate what percentage of the lost item replacement fee is to be refunded. The problem with this is it doesn't have a date parameter and therefore we cannot say "...if an item is returned X days after being declared lost, then increase/decrease the % being refunded" \n \n ii) Delete Lost Loan Job - this job allows us to dissociate a Lost Loan from a patron record, so that even if a Lost Item is returned, the Lost Item Replacement fee will not be refunded. This job can be run manually or via a schedule. The problem is that the job does not take into consideration how long the item has been Lost. For instance, when the job is run, all items with a Lost status (irrespective of the amount of time it has been lost) will be removed from patron account. \n	Grace Period, Lost Loan, Refund Period	

Fulfillment	Anonymize loans for a single patron and allow him to do it himself from his account	6983	We need to have an option in the patron services page to allow our staff to anonymize a patronâ€™s inactive loans, if he ask to. We would like also that the patron could do it himself from his Primo account. This option should exist at the institution zone level and every institution could choose if activate it or not.	Patron, Loans Anonymization, Data privacy, Fulfillment	
Fulfillment	Add request history to Request tab in Patron Services	6992	Currently, it is possible to view to 'All' and 'Current session' in the Loans and Returns tabs of Patron Services, giving the option of seeing a history of these functions. No equivalent exists for Requests, so it possible to view active requests in the Requests tab but not those that have been cancelled, have expired or have completed. We would like this functionality to be added to the Requests tab, e.g. a filter by status (e.g. Active,	Requests; history; cancelled; expired; completed; Patron Services	
Fulfillment	Letters: allow the "address from" field to be set per library	6999	Dynamically set â€œaddressFromâ€ field in letters. Some ideas from are:\n \n * Using conditional logic for addressFrom in the XSL template\n * Using operatorâ€™s from address: https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/10194222-configure-alma-letters-to-use-the-operator-s-from\n * Ability to use different library addresses on letters: https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/17631835-allow-a-differentiation-of-library-addresses		
Fulfillment	Letters: Opt-in/Opt-Out	7001	Add all patron delivered letters to selected patron letters opt-in/opt-out choices (https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/15562599-add-all-patron-delivered-letters-to-selected-patro) : It would be very useful to list all letters that are delivered to patrons in the Selected Patron Letters options. Letters like Loan Receipt and Borrowed By are conspicuously absent, but we have many patrons who don't want to receive an email every time they check something out. Others patrons do, so we don't want to globally disable these letters.\n \n The fact that Selected Patron Letters includes letters that require patron action (Overdue Notice, Recall letter) but not letters that are more informational (Loan Receipt, Borrowed By) seems backwards. Regardless, all patron-delivered letters should be available for opting in/out.		

Fulfillment	User Records: Dynamic Statistical Categories	7002	Dynamically create statistical category and type during SIS load or manual input. The user.xsd XML schema contains statistical category an type description.\n \n <userstatistics>\n <userstatistic segmenttype="External">\n <statisticcategory desc="STAPS">\n 4200013\n </statisticcategory>\n <categorytype desc="Code SISE">\n BSISE\n </categorytype>\n </userstatistic>\n \n However, when imported from SIS, if the category and type in a user.xml file imported from SIS does not already exist in Alma configuration tables, it is not imported in the statistical type specified.\n \n In the example, category 4200013 and its description STAPS, type BSISE and its description Code SISE required to have been already created in Alma configuration tables.\n \n If its not the case, the category 420003 is imported with NO type and no description.\n \n It would be very helpful if Alma could automatically update its configuration table so that the category 4200013 STAPS goes in the right type Code Sise, because for huge quantity of category of a given type, it's not possible to create them manually and to do the match with the right type.\n \n (https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/35335687-dynamically-create-statistical-category-and-type-s)\n https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/35335687-dynamically-create-statistical-category-and-type-s		
Fulfillment	Add expiration date and renewal options to Proxy User	7004	Add expiration date and renewal options to Proxy User. Our faculty usually provide assistants with proxy permission for a semester or academic year, it would be great if staff were able to set an expiration date and action renewal of proxies.		Resubmit by Tufts U of a Boston College NERS from prior ballot.

Fulfillment	Fulfillment: Request cancellation table	7005	Currently, the drop-down for request cancellation shows the following list (screenshots attached - cancel-options-1; cancel-options-2). For us, this list can be overwhelming for staff, especially when some of the reasons do not pertain to our situation. However, currently there is no way to modify this list.\n \n But there are several code tables within Alma Configuration that can be customized to control what and how to display in certain drop down lists. Some examples are:\n \n POLineCancellationReasons code table (PO-Line-cancellations screen shot) in Configuration -> Acquisitions -> Purchase Orders -> PO Line Cancellation Reasons\n PR_ReejectReasons code table in Configuration -> Acquisition -> General -> Purchase Request Reject Reasons\n FineFeeTransactionReason table in Configuration -> User Management -> Patron Charges -> Patron Charges\n \n What we would like to request is a customizable table that would at a minimum allow us to enable or to disable the option, but also be able to change the display text. For instance:\n \n â€œRequest switchedâ€ might be better as â€œAn equivalent item was found to fill this requestâ€\n \n â€œFailed to locate potential suppliersâ€, â€œSupplier rejected this requestâ€, and â€œItem withdrawnâ€ could all be more clearly stated as â€œItem is lost and not currently available for purchaseâ€\n \n I donâ€™t know what â€œRequest was changed due to an updateâ€ means. â€œSee enclosed noteâ€ might be preferable. My guess is that both would to accomplish the same thing.		
Fulfillment	Ability to both include and exclude facets on Borrowing Requests, Lending Requests, and Monitor Requests & Item Processes pages	7008	Currently when using the Borrowing Requests, Lending Requests, and Monitor Requests & Item Processes pages, you can limit the results via facets by including the records with the a facet value you want to see (but even then, only one per category). It would be helpful and easier sometimes to be able to use a process of elimination and eliminate what you know you don't want to see, especially when you aren't sure exactly what you want to see.		Resubmit by Tufts U of a Cooperating Libraries in Consortium (CLIC)\n NERS from prior ballot.

Fulfillment	Fulfillment: Searchable Proxy User Field	7011	It's possible to view a list of principal patrons that a patron is a proxy for from within the proxy's user record (the "Proxy For" tab).\n \n It's not possible to view or search for patrons that are proxies to a principal patron.\n \n Examples:\n 1) Alice and Bob are known proxies for Chad.\n I can open the Proxy For tab for Alice and Bob, where Chad will be listed for both.\n \n 2) Chad has several proxies, but it's uncertain who they all are.\n It's impossible to search for or get a list of those users. (see https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/15015042-proxy-principal-user-search)		
Fulfillment	Option to auto-populate Reading List Name and Code fields with identical values from Course Name & Code Fields	7013	In course reserves, we use identical Name and Code values for a course and its corresponding reading list. We would like to auto-populate a Reading List's Name and Code values based upon its course.\n		Resubmit by Tufts U of an Orbis Cascade Alliance NERS from prior ballot.
Fulfillment	Fulfillment: Lost Item Process Fee Refund Ratio	7014	There is a lost item replace fee refund ratio, could we add a lost item process fee refund ratio?		
Fulfillment	Allow patrons a minimum loan period before items can be recalled	7015	Alma should be able to allow patrons to have a loan for a minimum amount of days before it can be recalled. Currently, we can only set the number of days a patron can have an item after it has been recalled, regardless of how long the patron has already had the item. An example: If a person checks out an item, then someone else puts a hold on that item the next day, the first patron only has the loan for one day plus the post-recall period. We would like a patrons to have a general circulating item for a minimum set period of time before it can be recalled. This period would ideally be configurable by number of days or weeks allowed.\n		Resubmit by Tufts U of an Orbis Cascade Alliance NERS from prior ballot.
Fulfillment	Provide patrons notification of reasons for failure to renew a loan	7016	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.\n		Resubmit by Tufts U of an Orbis Cascade Alliance\n NERS from prior ballot.

Fulfillment	Allow staff to override if an item type is not requestable	7017	We would like reference (not for loan) items to be non-requestable for patrons but for Library staff to be able to override this as needed to put in a request on a patron's behalf. Currently, our staff are unable to override the block that they encounter when trying to request a non-requestable item on a patron's behalf. This is a problem when we have an item on order that has already been earmarked as non-requestable, but circumstances mean that we want to trap the book on behalf of a patron. It is sometimes necessary to prioritise the cataloguing and processing of a particular item. As we are unable to do this currently, it takes longer for the patron to gain access to the item/s they need\n		Resubmit by Tufts U of a Sheffield Hallam University\n ge NERS from prior ballot.
Fulfillment	â€œRestoreâ€ the reading list to its original location	7018	We often have large amount of course reserve items that need to be moved from a permanent to temporary location and back again. We would like to be able to â€œrestoreâ€ a reading list to its original location in ALMA by running a restore job on a defined set of reading lists or through adding a restore action to reading list functionality. Bulk restore would improve efficiency by removing the need to scan in items individually.\n		Resubmit by Tufts U of a Tarrant County College District\n NERS from prior ballot.
Fulfillment	Fulfillment: Manage Patron Services = Manage Fulfillment Activities	7019	It would be great if Manage Patron Services and Manage Fulfillment Activities were the same page and named the same thing. The staff user experience is tedious:\n \n 1) Patron comes to desk with scant details about their account,\n 2) Staff runs a user search in the persistent search,\n 3) Staff reads out list of checked out items and fines owed,\n 4) Patron wants to pay fines, and then\n 5) Staff run a new search in Manage Fulfillment Activities from the â€œFulfillmentâ€ dropdown.\n \n Re-entering the user details over and over again into different search fields has become a hassle for desk staff, especially here in an academic library at the end of a semester when everyone's trying to settle their debts with us in the same week. (see https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/36274744-make-manage-fulfillment-activities-the-same-thing)		
Fulfillment	Add functionality to batch check-in/check-out items in the patron record.	7020	We need to be able to extend loans that have reached their renewal limit. The use case for this is faculty who may have a large number of items out, and they call the circulation desk and ask if staff can extend their due dates. Rather than having them bring in all their items to be checked in and checked out, circ desks at their discretion sometimes just re-check these items out over the phone. Currently this requires the circ staff member to check in each item by barcode and then check each item out again. For patrons with dozens or even more than a hundred items on their record, this can be time-consuming. The change due date function in the patron record wouldn't be ideal for this because we want to create a whole new loan, with a refreshed allowed renewal period. This also applies to the Batch Change Due Date function which has another problem of not being able to limit to a set of users. We'd like to have a some kind of functionality in the patron record that can created a new loan for all selected items.\n		

Fulfillment	Add preferred pronoun field that displays in Fulfillment Manage Patron Services display	7021	We will be asked to provide a place to store preferred pronoun for our users (e.g. he/his/him) at some point in not too distant future. We cannot use Note field for this information because we have been told by Ex Libris that if we import notes the entire note section in a user record is overwritten. We need a configurable field (i.e. we can add the categories of preferred pronoun) that displays in the patron info section of the Fulfillment Manage Patron Services display\n		
Fulfillment	Add Call Number and Location to the Excel columns exported from Reading Lists	7022	When exporting citations to Excel from a Reading List, we would like the item's Location (Permanent or Temporary if applicable) and Call Number to each export to a separate column in the spreadsheet. Our workflow is to export citations to create a list for pulling items from the shelves to process for reserve, so we need to be able to sort the sheet by location and call number. Currently we have to add columns and then copy and paste this information (from the Availability column in the spreadsheet or from the citation information in Alma), which is inconvenient and time-consuming.\n		
Fulfillment	Option to Return Items without registering an in-house use	7023	Currently, checking in an item in Return Items that is not checked out to a patron registers an in-house use count.Â We would like a checkbox on the Return Items screen (similar to the one on Scan In Items) that we could select to not register in-house use if an item is not on loan.Â Some libraries check all returns in twice to ensure they are removed from patron accounts, but this creates inaccurate in-house use counts.Â We would like to maintain this workflow while also collecting meaningful in-house use statistics.\n		
Fulfillment	Choosing hold or recall when placing a physical item request	7024	When entering a physical item request, there should be an option to override the Loan Recalls Configuration table. In most cases, we want to recall the item, but there are circumstances in which we may prefer not to. There is currently no way to control this on a case-by-case basis. Currently Alma requires a blanket decision on whether to initiate a recall when placing a physical item request, with no way to handle exceptions. When placing a physical item request that will result in a recall, the form should include an option to place the request without enforcing the recall (a passive hold that will prevent renewals\n		Resubmit by Tufts U of a UConn NERS from prior ballot.
Fulfillment	Enable staff users to override any TOU	7025	Enable staff users to override any TOU. Library staff need to have the option to perform certain actions that otherwise might need manual handling. For example, we would like reference (not for loan) items to be non-requestable for patrons but for Library staff to be able to override this as needed. Work orders do not always provides the desired solution. We are trying to minimize the use of work orders that sometimes bring unnecessary complications to our work flows.\n		Resubmit by Tufts U of a Univ of Haifa NERS from prior ballot.
Fulfillment	Course reserve workflow streamlining needed	7026	Streamline the workflow for adding an item to a course reading list. Reducing the number of steps required to add items to courses will simplify and streamline workflows. Add a new option to the action menu of a Reading List line that allows a user to go directly to â€œChange item information at Scan in items".\n		Resubmit by Tufts U of Univ of Hong Kong NERS from prior ballot.

Fulfillment	Add functionality to loan status Claimed Return	7028	Currently the loan status "claimed returned" is nothing but a label. While this is helpful when looking at a specific patron's record the fact that is does nothing but label a loan "claimed returned" is unhelpful. At our institution, placing an item in claim return comes with a number of steps: the item must be searched for a number 3 times over a course of several months, the lost item fines and fees that would normally result from an item not being returned over a period of time, must be delayed or disabled while the item is in "Claimed return: search status", so to speak; We must be able to retain any notes regarding this procedure linked to the item and the patron; we must be able to waive or note a claim return without charge for a first offense or special situation. Adding the below functionalities to this loan label would allow our institution to better track and administer our claimed returned. Even simply allowing this loan status to delay fines and fees would be helpful: the item must be searched for a number 3 times over a course of several months, the lost item fines and fees that would normally result from an item not being returned over a period of time, must be delayed or disabled while the item is in "Claimed return: search status", so to speak; We must be able to retain any notes regarding this procedure linked to the item and the patron; we must be able to waive or note a claim return without charge for a first offense or special situation.\n		Resubmit by Tufts U of a Univ of Pennsylvania NERS from prior ballot.
Fulfillment	Select All citations across multiple pages in Edit Citations screen	7029	On some Alma results pages (e.g. Course Reserves; Citations) the 'Select All' checkbox only selects items visible on the current page (100 maximum). It would be useful if the user can select all items (within the currently filtered list) across multiple pages, particularly when making bulk status changes. When doing bulk changes have to work on one page at a time (max 100 items depending on list settings)\n		Resubmit by Tufts U of a Univ of York NERS from prior ballot.
Fulfillment	Notify when a title is deleted in Alma that is referred to in Leganto Reading Lists	7030	The user should get warning notifications against citations when titles included in a leganto reading list are deleted, so that the librarian can replace the related entry with an alternative copy. This is especially relevant when dealing with electronic titles, for example when importing them, subsequently the portfolio may be deleted. However, these may have previously selected for inclusion in a reading list. But nobody would notice that, until the students find a broken link in Leganto. The only way to avoid this currently is to perform a manual check, relying on an Analysis looking for Electronic Titles selected for reading lists before running the import, and comparing that with the list of deleted portfolios we have when the import is finished. Which is time consuming. It would be much better to get a notification when the deleted title was previously included in a leganto reading list, so that the librarian can replace the related entry with an alternative copy. The issue is especially relevant to electronic titles, however it may also occur with physical titles that are withdrawn, an implementation of such a warning for both electronic and physical titles would be the best solution.\n		Resubmit by Tufts U of a Univ of York NERS from prior ballot.
Fulfillment	Prevent role/job categories from being added to stub records	7035	In Alma, if a patron's user account has a job category set, and they borrow a book from another USG institution, when their stub account is created at the lending institution, roles for that job category are added to the account there. These roles are useless at the lending institution (the account has no password so the user cannot log in), but this impacts (increases) our number of "Named Users", which could		

Fulfillment	Add an operator detail for the fines/fee summary table	7038	Add an operator detail for the fines/fee summary table. When an operator adds a manual credit it does not include operator history so it is impossible to track down details if you need to audit. If payment is accepted or a fine/fee is waived the accepted by column is created but if anything is added manually you do not have operator history available.		
Fulfillment	Add "Location" to the customizable view list on the In Process Items (under Fulfillment) page	7040	Add â€œLocationâ€ to the customizable view list on the â€œIn Process Itemsâ€ screen and allow for that information to be exported to Excel. The location should be pulled from the Location Information fields within the item record. If the Temporary Location field is populated, it should be pulled. If not, the information should be pulled from the Permanent Location field.		
Fulfillment	Allow patrons ability to automatically extend hold shelf period of requested items on hold shelf	7043	For livraries handling large numbers of physical requests, it is frequently necessary to extend the initial hold shelf period for patrons who are unable to collect an item in an initial period. This enhancement seeks to allow such a hold shelf period extension request to be automated for physical item requests on the hold shelf which do not have any other outstanding queue of requests.		Also an idea\n https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/17240672-allow-patrons-to-request-extension-of-hold-shelf-p\n

Fulfillment	Resource Sharing Electronic Locate for Borrowing article requests	7052	A borrowing article request is stopped for local ownership when the library has an electronic database that may have coverage for the journal. \n \n Currently, the borrowing locate local ownership check does not check the year, volume or issue in the article request to determine if the library has access to this specific year in the database. The borrowing locate does not check for embargo status.\n \n Because the citation year is not checked for local ownership, requests are stopped from being automatically sent to lending libraries that have the article.\n \n Library staff must spend time checking if their library has access to the specific year in their electronic databases.\n \n In Alma Configuration> Fulfillment> General>Other Settings the rs_uresolver_locate can be used to check a lending libraryâ€™s electronic coverage. \n \n An additional Customer Parameter should be added to "Other Settings" to allow a borrowing library to check their own libraryâ€™s database coverage information.\n \n If a request is for an article that is not within the database coverage or is in an embargo the request should be sent to the lending library without staff mediation. Requests that are found in the libraryâ€™s database should be placed in the Ready to be sent status for staff to review.\n \n	Resource sharing electronic locate article articles database	
Fulfillment	E-resources in the Network Zone and Course Reserve Linking in the IZ	7054	We are unable to add a repository citation to a reading list if that citation is in the Network Zone (NZ). Some of our consortium's shared electronic books are only cataloged in the Network Zone. Our current workaround is to add a brief citation to the reading list, but this creates a duplicate record in our catalog that then has to be deleted when the reading list expires.\n \n We would like to be able to add a repository citation to a reading list when the cited title is from the Network Zone. The ability to use a title from the Network Zone in an Institution Zone citation would standardize the process of adding to reading lists and maximize the use of shared resources maintained in the Network Zone.\n \n Consortia purchase collectively for both physical and electronic resources - truly building a shared collection. With the increasing market dominance of electronic books and other e-resources, it is important for Ex Libris to make this leap in functionality and understand that shared resources need to be accessible to all entitled	OER, ebooks, Network Zone, Institution Zone, reading list, Course Reserve, electronic books,	

Fulfillment	Request for Improved linking to courses associated with a title from the â€˜All Titlesâ€™ citation list	7064	As Library staff I want to be able to link to an associated Course code without the multiple clicking that is currently required.\n \n What is required:\n We are requesting that the result of an All titles search immediately displays with a â€œCoursesâ€ hyperlink for each title that would result in the courses list displaying on the next page.\n The Courses hyperlink would preferably display where the Orders and Requests hyperlinks currently display on the citation list page.		Ex Libris Alma Idea Exchange:\n https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/36115789-request-for-improved-linking-to-courses-associated
Fulfillment	Enable Alma users to view a patron's My Library Card in Primo	7071	We would like Alma users to be able to view a patron's My Library Card, as the patron themselves sees it in Primo.	Primo; My Library Card; loans; requests; fines; troubleshooting	
Interoperability & Integration	Add the Import function to the Statistical Categories/Types mapping table	6685	Statistical Category and Category Types can be Imported but mapping between the two cannot be batch imported, and manually adding them in the UI is exceedingly tedious.		https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/19472419-add-the-import-function-to-the-statistical-categor\n
Interoperability & Integration	Fix Direct Linking to go straight to the article (use link resolver settings)	6733	We would like users to always be directly routed to the article in the brief record by using the link resolver settings as they do in the full record. When users click â€œAvailable Onlineâ€ in the brief record, users are not always directed to the article itself. They are routed to the database/vendor and have to perform a search again. This causes chat questions and unnecessary confusion for patrons as they have to navigate a new website to complete their search.	direct linking	
Interoperability & Integration	add bursar integration option to export fine/fee credits even if minimum export set to > 0	6831	Alma currently will not export credits if you set a minimum value for the bursar fine export that is greater than zero. We would like the system to permit us to set a positive minimum value for the bursar fine export, but still export credits.	bursar,export,fines,credit	

Interoperability & Integration	WPM E-Payment integration to support single line payment	6949	Single line payment in WPM is not currently supported in Alma, with Alma only sending one payment element with the total amount the user owes.\n \n It should be possible for Alma to send more granular payment information to WPM, such as single lines for each individual charge owing on the account or a summary by charge type (e.g. overdue fine, resource sharing fee).\n \n If Alma was able to send a breakdown of payment by fine/fee type or individual fine/fee to WPM, this could then be automatically consolidated correctly and would streamline the process considerably. Currently we have to manually identify payments which include multiple fine/fee types using an Analytics report and regularly transfer funds to corresponding codes in our finance system.\n	e-payment, WPM, fines, fees, payment, online payment	
Interoperability & Integration	Alma/Primo e-payment system	6990	There is an existing e-payment solution in Alma/Primo involving WPM eductation. Unfortunately it only works in the UK. \n We would like to have a global integrated e-payment solution in Alma/Primo that we can connect to our local online payment providers.	e-payment, Alma, Primo	SF 00775446
Interoperability & Integration	Allow reservation and prioritisation of certain API calls within overall customer limit	7042	In some situations there may be integrations which make unexpectedly sudden high demands on Alma APIs which could cause the customer limit to be reached, examples may include unexpectedly high volumes of calls from other Ex Libris products such as live tiles in CampusM. It would be useful for institutions to be able to reserve and prioritise certain API calls to prevent an unexpected rush in one service to prevent normal operation in another API service area, e.g. a reserve limit for User API calls or purchase calls could be much more important than Bib calls, so by protecting a reserve serious negative impacts could be avoided and critical business processes protected.	API,limit, prioritisation,reserve	
Interoperability & Integration	Library general/summary details is missing external name field that can be used in the Primo display	7047	The library general information screen is missing an external name that can be used in Primo like the external name that is setup in the location general information screen. We setup our library names when we went live in July 2012 and now find that we would like the display name in Primo for library = O'Neill to be O'Neill Library, the display name in Primo for library = Law to be Law Library and the display name in Primo for library = Bapst to be Bapst Library. If we change the library names in Alma we found this breaks all of our reports that prompt by library name in Alma Analytics. Rather than breaking our reports an easier solution would be to have an external name field in Alma on the Library General information tab that can be used for display in Primo the same way that there is an external name field defined on the general information tab for location.	Alma Library General Information	
Resource Management	Abilitiy for all Item Record fields to show in the repository Physical Items brief results	6525	We would like all Item Record fields to appears as options in the repository brief results for Physical Items. At the moment, many - but not all - of the Item Record fields are available. For example, we would like the ability to see the Item Record Storage ID field in the brief results, so if an item is shelved by a Storage ID number, rather than a call number, Fulfillment staff can see that information from the brief results without having to open the item record.		

Resource Management	Suppressing individual item records from Primo display	6526	:: We would like the ability to suppress records from Primo at the item level. Current workarounds, including creating suppressed holdings and moving items to those holdings to suppress, require extra work and maintenance. In addition, for serials, having some items on a suppressed holding and some on a displayed holding makes it harder to locate a specific volume when searching in Alma. We need to be able to: 1) suppress individual item records without having to change the location; 2) suppress a Set of item records via a Job; and 3) suppress a group of item records via an API command. (see https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/32882308-allow-suppression-of-items-		
Resource Management	Disable pop-ups in Metadata Editor for 260/264... fields	6654	In the MDE, when you are typing in field 260 or 264, the system offers pop-up suggestions. For cataloging staff, this is a hindrance and not an aid. These fields are transcription fields which means catalogers transcribe what is on the piece in hand, and do not choose from a controlled vocabulary. It's frustrating for staff because it usually interferes with their typing and the suggestions are not helpful. The pop-up presents a usability issue because it shows up when it is unwanted, requires extra keystrokes to get rid of, obscures the text the cataloger is trying to enter, and creates a momentary latency in the UI while the cataloger is trying to type. \n \n There should be an institutional-level configuration option to turn this off (or remove it as a feature entirely since it appears to be unwanted by customers). \n \n The pop-ups appear to be active for fields 260, 264, and 505rt and 561$, and these should all be disabled. \n \n There is an existing Ideas Exchange to disable this feature that (as of Dec 2019) has almost 100 votes: \n https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/37477183-make-configurable-pop-up-		
Resource Management	Scan in Items... Status / Done selections need to be sticky	6663	The Scan in Items... Status field value is not sticky. This is a productivity issue and also leads to errors. Generally a given staff member frequently chooses a single value repeatedly, but the system always defaults to the first value in the list (alphabetically) and they have to change it every time. The same is true for the Done option. The last used option should stick. \n \n Use Case: I am a staff member in Acquisitions technical services. I am an original cataloger and my workflow involves cataloging a piece, and then updating the status of the work order to "Shelf Prep." From the Metadata Editor, I complete my cataloging, save and release the bib record, then go to Scan In Items, change the status from the default value (first alphabetically) of "Cataloging" to "Shelf Prep," then Scan in the barcode. Now I work on my next bib record, finish cataloging in the MDE, save and release record, go to the Scan in Items screen, and now I have to re-select the status of "Shelf Prep" and scan in the item. I have to re-select this status all day long as I go about my cataloging work.		

Resource Management	Disable Item description confirmation message	6664	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. \n \n This pop-up should be disabled, or there should be an institution-level configuration option to turn it off. \n \n Here's a video showing some of the latency. The pop-up adds several seconds to the transaction, which is a lot		
Resource Management	Add consistent shortcuts and more buttons to search results	6665	In Alma search results there are keyboard equivalents to navigate but not to all options (e.g. Edit record, Full View then Edit Record...). There should be consistent keyboard shortcuts for navigation throughout the system. Specifically: 1) from search results, when physical tab is expanded, there should be a button (and shortcut) to edit a holding in the list, instead of the current method of opening the holding in View mode and then clicking Edit; 2) from search results, need a keyboard shortcut to invoke Edit of bib record. 3) From the search results, need a button and shortcut for going to list of items.		
Resource Management	More mapping options in Import Profiles	6666	We need additional mapping options in Import Profiles. We need the ability to map to Electronic Collection, Material Type, and Acquisition method, based on field/subfield values in the input file. For example, we have several EOD profiles for Casalini, when we could have 1 if these values could be mapped. We have several because we load different material types (Books, DVDs, etc.) and have multiple Acq Methods, such as Approval, Purchase at Vendor System, etc. Similarly, for Import Profiles that load Portfolios, you cannot map to Collection. You have to have a separate profile for each Electronic Collection for which you want to load portfolios. These greatly increases the number of profiles we need to maintain. If we could map to Electronic Collection from a field/subfield value in the input file, we would need to maintain significantly fewer profiles. \n		

Resource Management	Item record description, enum, chron features	6667	There are features related to Item Record enun/chrom and descriptions that were present in Aleph that are lacking in Alma. The absence of these features have had an adverse effect on productivity and accuracy, and have made Alma much less user-friendly for staff. \n \n FIRST ISSUE: Use of description templates instead of 853/863 paired fields in MARC holdings -- while the Alma Item Templates features may be useful to institutions that do not use paired 853/863 fields in MARC holdings, for those institutions that do use paired fields, Alma Templates are a greatly inadequate substitution. Our staff are already coding information in the 853 of the holdings and the creation of templates is therefore redundant work. Likewise, the templates are not as flexible as the 853 field solution. In Aleph, items could be linked to a specific 853/4/5 field in a holdings record, thus ensuring that the correct captions were added for each separate item. Captions used on the piece sometimes vary even within the run of the serial itself â€“ Vanity fair, for example, switched from v.:no.(year:month) designations to no.(year:month) Permalink \n http://id.lib.harvard.edu/alma/990001594850203941/catalog. The Aleph feature therefore allowed a single serial with changing patterns of publication to produce the correct item descriptions by linking to a specific 853 where the pattern was coded. Using already coded data in 85X/86X obviates need for templates. \n \n SECOND ISSUE: Alma lacks automatic generate of description upon Save -- in Aleph, item descriptions would simply be generated using the 853 field when items were predicted. Independent from prediction, staff could link an item to a particular 853 field and the description would be filled in when you saved the item record. In Alma this work is more burdensome as you have to take additional steps to generate the description. \n \n THIRD ISSUE: Improperly translated captions in Alma -- in Aleph, for a subset of languages, the presence of the language code in the 008 of the holdings would automatically generate appropriate ordinal endings and months and seasons from the 853. In Alma, if one uses the â€œgenerateâ€ button to generate the description from the enumeration and chronology, numerical codes used in the chronology field to represent months and seasons are not translated into language. Even for English language captions, Alma does not translate 02 into Feb.\n \n		

Resource Management	Preferred term correction: flip headings that change tag number	6670	Alma authority control does not handle cases where the bib heading is linked to an authority via a cross-reference, but the preferred and non-preferred terms are in different fields, e.g. preferred term is in authority field 130 and cross-reference in authority is in 410. Alma should be able to handle this scenario. Currently when the bib heading matches the authority cross-reference, Alma won't correct these and instead puts them on this report: Preferred Term Correction - Bib Heading found no authorized term. This is a common scenario and the lack of this feature is a significant gap in the Alma authority control process. Handling these manually would require an unsustainable amount of effort by staff, because they can only be corrected through complicated norm rules, and it is not feasible to write a norm rule for every relevant heading and run jobs to update records. // \n \n Example bib heading that Alma won't correct:\n \n 110/2_ $$a Allied and Associated Powers (1914-1920). $$t Treaties, etc. $$g Germany, $$d 1919 June 28.\n \n The authority record that this heading links to (via its cross-reference)\n \n 130/0 $$a Treaty of Versailles $$d (1919 June 28) \n 410/2$$a Allied and Associated Powers (1914-1920). $$t Treaties, etc. $$g Germany, $$d 1919 June 28.\n \n The bib heading in 110 links to the authority via the cross-reference in the 410, but because the preferred term in the authority is in 130 (and not 110), Alma will not flip the heading.\n \n // This is also in Ideas Exchange with about 145 votes (12/19/19): https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/36030319-preferred-term-correction-should-flip-headings-tha		
Resource Management	Browse bib headings: handle apostrophes, phonetic modifiers correctly	6679	When using the "Browse Bibliographic Headings" function, apostrophes and phonetic modifiers are not handled correctly and you have to search multiple ways to see all results. The system should normalize these values such that headings file together appropriately and in the correct order. When an apostrophe is present, it should be dropped for filing purposes such that the word is treated as a single word, per LC filing rules. The miagkii znak is treated as a space, even if it appears in the middle of the word. You should be able to omit the miagkii znak from the search term and get the same results as you would if you left it in (as happens in the Primo browse). This is how it works when doing a keyword search in the persistent search bar. The ayn is also a problem. Names with and without the ayn appear in different parts of the browse list, but they should file next to each other. (Examples provided below).		

Resource Management	Improve management of digital representations	6689	We have many digital representations of physical books that have been created for course readings for students. These representations are suppressed from appearing in Primo due to copyright, but are visible in Leganto from the student's reading list. All these representations are stored in one Collection but we are unable to isolate and make changes to these representations easily. Currently to make all representations in a Collection inactive (to ensure they are visible in Leganto but not in Primo), we need to make a set based on a Public Note we have previously added to the representation, and then run the job 'Global Representation Changes'. Instead, we would like to have the following possibilities:\n 1) the active/inactive status of representations to be harvested to Alma Analytics. We would then be able to identify representations that should be inactive but are active and vice versa.\n 2) to have the ability to retrieve all representations in a Collection as a set and update them OR \n 3) to make global changes to representations at the Collection level (eg. make all representations in a Collection inactive by default)	representations, inactive, action, digital representations, analytics, collection	
Resource Management	Running norm rules on holdings -- pick rule as you run job	6761	When running a job to apply a norm rule on holdings, you should be able to choose the rule when running the job, instead of having to configure a process in advance. When running a job to apply a norm rule to *bibs*, it is possible to choose the rule at the time of running the job, but this is not possible for holdings. In order to run a norm rule on holdings, you first have to go to Alma configuration > Resources > Metadata Configuration > Norm Processes, to set up a process that will apply the rule. Then when running the Change Holdings Job, you select the process when running the job. We would like it to be possible to choose the norm rule at the time of running the Change Holdings Job. The problem with the current workflow is that only system administrators have access to Alma configuration, but it's catalogers who are involved in writing norm rules to run on holdings. Staff should be able to independently write and run rules on holdings without being depending on administrators to set up the process via Alma configuration.		

Resource Management	Subdivided LCSH headings should be flipped by PTC	6773	Preferred Term Correction is not flipping all LCSH headings when the authority record changes. If there is an authority record that has a subdivision, it is only flipped by PTC if the heading in the bib has no additional subdivisions. This means there is a significant gap in the PTC process that requires manual attention and handling, which is unsustainable. The PTC process needs to be more thorough. \n \n For example, this LCSH: \n \n $a Germany $x Politics and government $y 19th century \n \n was updated by LC to be: \n \n $a Germany $x Politics and government $y 1789-1900 \n \n When the authority record changed, bib headings that had the original $a $x $y (only) were flipped by PTC to have the new $y. But any headings that had additional subdivisions were not flipped. \n \n For example, this bib heading was flipped to the new form: \n BEFORE: $a Germany $x Politics and government $y 19th century\n AFTER: $a Germany $x Politics and government $y 1789-1900 \n \n But this bib heading was NOT flipped: \n $a Germany $x Politics and government $y 19th century $v Congresses. \n \n More example of headings that were not flipped but should have been flipped: \n 6510$a Germany $x Politics and government $y 19th century $v Caricatures and cartoons. \n 6510$a Germany $x Politics and government $y 19th century $v Congresses. \n 6510$a Germany $x Politics and government $y 19th century $v Exhibitions. \n 6510$a Germany $x Politics and government $y 19th century $x In literature. \n 6510$a Germany $x Politics and government $y 19th century $v Periodicals. \n		
Resource Management	Mechanism to validate binary MARC record structure	6785	There is currently no mechanism within Alma to ensure that exported or published binary MARC records have valid record structures. Even though Alma uses MARCXML and is not impacted internally by invalid binary MARC, libraries must still provide binary MARC records to external entities in the course of regular business (vendors, outsourcers, agencies, other stakeholders).		
Resource Management	make Browse Shelf Listing printable	6799	I would like to add a request to make the output of the Browse Shelf Listing tool in the Metadata Editor printable/exportable, for shelf reading projects where staff need to examine the stacks using a printout of specific call number ranges.	shelf list, shelflist, inventory, analytics, metadata editor	

Resource Management	Browse Shelf Listing: add support to configure the default call number level	6827	In the Browse shelf listing, currently, the â€œcall number levelâ€ is set by default to â€œHolding call numberâ€ and itâ€™s not configurable.\n Itâ€™s possible to set a default value for the â€œcall number typeâ€ but not for the â€œcall number levelâ€. We would like to have the possibilty to change the â€œcall number levelâ€ by default as it's for the â€œcall number typeâ€.\n	Browse Shelf Listing	
Resource Management	Add Previous and Next buttons to Repository Record View	6828	After conducting a search and selecting a record to view, it would be very useful to have Previous/Next buttons for navigation through the results, rather than needing to always go "Back" and then select the next record in the list for viewing	Repository Navigation Button Next Previous	
Resource Management	Prevent choosing an invalid item policy when editing a physical item	6843	When editing the information for a physical item you have the option to select an item policy that overrides the default fulfillment rules for the chosen location. The drop-down list shows all item policies available in the system, regardless if we have configured any corresponding exception rule or not. As we have several item policies that should only be used for specific locations this leads to confusion and mistakes.\n \n	Item policy	
Resource Management	MDE Add Portfolio should auto-fill URL from Bib 856$u	6851	When adding a portfolio to a bibliographic record from the Metadata Editor, the Add Portfolio form should auto-fill the URL from the Bib 856$u.	Metadata Editor, add portfolio, URL	Important: The system should not force the first 856 $u when there are multiples and thus not allowing several portfolios to be built.
Resource Management	Enable creation of itemized sets of digital representations and files	6904	There is no option to create a set of a list of Representation IDs (itemized set) as it is possible with MMS IDs or Portfolio IDs. This option is highly required when handling large digital collections.	Itemized sets, digital files, digital representations	
Resource Management	Enable to upload controlled vocabulary lists in Excel format	6907	Currently the only way to create a new controlled vocabulary list (to use in fields with per-defined values) in Alma is by adding the values manually, one by one. Usually the controlled vocabulary lists are added in implementation by the migration teams, but after Go Live, there is no way to do that neither by the institution nor by the support.	controlled vocabulary lists, upload file	
Resource Management	Additional Options on All Titles Search	6910	Folks here would like to have "Edit Holdings" and "Edit Items" options available under the "more options" menu for All Titles searches.		

Resource Management	Improve Alma Job Reports for Failed Record	6914	Improve Alma Analytics and Alma job reporting capability to provide lists of the specific records involved in such jobs as publishing to OCLC, so that failed records can be fixed and jobs re-run.	Alma reports; failed records	Already on the Idea Exchange with 102 votes \n https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/15192714-improve-alma-job-reports-for-failed-record
Resource Management	Edit Holdings on result page in Alma when only one holdings record	6916	We would like the ability within Alma to add an â€œEdit Holdingsâ€ option when there is only ONE holding present. Currently we have to open the holdings to edit. This is not a big deal, but it would reduce the number of clicks. Most of the titles I work on only have Law holdings.	Alma, Holdings, Editing	

Resource Management	Fix the Implemented Punctuation Table	6918	The Implemented Punctuation Table, which governs the punctuation of bib heading fields which are affected by the Preferred Term Correction job, is not very well constructed and seems unfinished. It results in bad punctuation, or sometimes no punctuation where there should be some, and it often â€œcorrectsâ€ punctuation that was correct to begin with. Often that is the only change to a heading, which is somewhat frustrating, because these â€œchangesâ€ come out on the Preferred Term Correction reports and clutter them up.\n \n The Table is not nuanced enough. It lumps together field/subfield combinations that really require different punctuation. For example, between the $a and $d subfields of a 7## field, it prescribes a comma. However, while this is correct for a 700 field, it is not correct for a 711 field. There should be at least two different lines in the table to cover these diverse situations. Also, an $e subfield holds one kind of information in most name fields, but a different kind in 111 and 711 fields, and the tableâ€™s instructions concerning it should be different for those fields. I think an accurate table would be quite a bit longer.\n \n The Table does not add punctuation, or even removes it, in some situations that require it. For example, no comma is prescribed between the $a and $e subfields of a 1## field, and when one exists it is (incorrectly) removed. Periods are removed after terminal $t subfields in 800 fields as wellâ€"why? (On the other hand, terminal $e subfields in fields like 100 and 700 do get periods, even though this is NOT being explicitly prescribed by the table presented in the documentationâ€"maybe it is understood, but not recorded in the documentation, that a period always follows an $e subfield?)\n The Table is simply wrong in some cases. For example, while a semicolon is correctly prescribed between the $t and $v subfields of an 800 field, there should really be a blank space in front of the semicolon, by the rules of ISBD punctuation. Instead, the semicolon follows immediately the end of the $t, with no space between. This has resulted in the PTC job â€œcorrectingâ€ thousands of 830 headings by incorrectly removing a space where there should be one.\n There are two lines in the table which are just nonsense:\n \n 600 $b $a (a comma is prescribed)\n	Punctuation table, Authority control, Alma	
Resource Management	Improve Browse Bib Headings-always display $$q subfields	6920	In Browse Bib Headings currently, a personal name will appear in the results list with its $$q subfield for instances when it is used in a 600 field, but without it when it is used in a 100 or 700 field. So, for example, two different lines will appear:\n Lewis, C. S. 1898-1963\n Lewis, C. S. (Clive Staples), 1898-1963\n This happens even though the names appear exactly the same, with $q subfields, in the source records. (The first line is from a 100 field and the second from a 600 field.)\n Please have the $$q subfield display whether the heading is a 600 or a 100/700. This would make the BBH function much more helpful for authority checking and cleanup. It makes no sense to me that the $$q subfields are displayed only some of the time.	Browse Bibliographic Headings, Names, Authorities	

Resource Management	Make authority-bib field matching respect the MARC format	6921	Authority control should respect the MARC format and not disregard subfield indicators. Example: A bib record has a field like this:\n 600:10: Austen, Jane, $$d 1775-1817 $$v Correspondence.\n By the Link Bib Heading and Preferred Term Correction jobs, it will get changed to match this authority record:\n 100:1 : Austen, Jane, $$d 1775-1817. $$t Correspondence.\n This is incorrect. As changed, the subject heading will suggest that the item cataloged is about a particular edition of Austenâ€™s entire correspondence. Actually, it is a collection of some or all of Austenâ€™s correspondenceâ€"NOT a book ABOUT that correspondence. \n For another example, this is a legitimate subject heading in a bib record:\n 600:10: Shakespeare, William, $$d 1564-1616 $$x Comedies.\n â€œComediesâ€ is a free-floating subject subdivision under authors. The subject heading means that the item being cataloged is about Shakespeareâ€™s comedies. Unfortunately, there is a name-title authority record that has this pair of authorized heading and cross reference:\n 100:1 : Shakespeare, William, $$d 1564-1616. $$t Plays. $$k Selections\n 400:1 : Shakespeare, William, $$d 1564-1616. $$t Comedies.\n Based on this authority record and disregarding the differences in subfielding, Almaâ€™s authority control functions turn the subject bib heading into:\n 600:10: Shakespeare, William, $$d 1564-1616. $$t Plays. $$k Selections.\n This is wrong. This subject heading suggests that the book is about some resource that is a particular selection of Shakespeareâ€™s plays. It is instead about Shakespeareâ€™s comedies in general.\n Almaâ€™s authority control functions should not disregard subfield indicators in headings when matching	Authority Records, Bibliographic Records, Link Bib Headings, Preferred Term Correction	
Resource Management	Need to be notified when â€œManual Handling Requiredâ€	6922	When an Import Profile has a problem loading records, it gives the message "Manual Handling Required". However, if these are automated, we do not realize there is an issue unless we check the history of each profile.	Manual Handling Required, Alma, Import Profiles	

Resource Management	Allow overlap analysis tool to include print as well as e	6947	We would find it useful if the overlap analysis tool could also compare against print holdings, as well as electronic. Currently it only allows you to compare overlap within electronic titles, however the functionality of the tool is useful in that you can upload a file containing a list of identifiers, set up the overlap and leave it to run.\n \n The only way to conduct print and e overlap analysis in Alma at the moment is to use the Title level overlap analysis dashboard in Analytics, which includes various overlap reports and includes both print and electronic. However, we have found problems in using these reports and Analytics in general to conduct overlap analysis, namely that the reports are slow to load, frequently time out, and if matching on ISBN/identifiers, there is a limit to the number of these which can be included at any one time. For example, we often need to check large numbers of titles (e.g. around 150,000) to see what we currently hold in either print or e. Using analytics, with a limit of 9999 ISBNs, the report would need to be run a large number of time to cover all ISBNs.\n \n Being able to conduct overlap analysis between print and e is important for us in terms of making purchasing decisions and we feel that including print in the overlap analysis tool would make this a more efficient process within Alma\n	overlap analysis, collection development, overlap, p and e	
Resource Management	Ability to merge local and bibliographic headings with authorised versions and for all records to remain attached	6948	We have records attached to authorised versions of headings but we can also have records attached to local headings we made (which L of C sometimes creates headings for under a different form) and old bibliographic headings (pre-Alma)\n \n It would be useful to be able to merge any local and bibliographic headings with the authorised one and for all the records to still be attached. Something similar could be done in our previous LMS. At the moment these records can only be moved individually and manually.\n \n This is particularly relevant to Special Collections records.	authority, authority control, subject headings, local headings	
Resource Management	Publish to WorldCat tag automatically change to don't publish when record suppressed	6952	It should be configurable for the Publish to WorldCat management tag for records to automatically change to don't publish once a record is suppressed. We only want unsuppressed records to be exported and visible in WorldCat. As the default setting is to set this tag to Publish to WorldCat, this change would not rely on library staff having to remember to change the tag on individual records and reduce the need to regularly run jobs to change suppressed records to don't publish.	WordlCat, publishing, management tag, suppressed	

Resource Management	Allow multiple instances of field/subfields when importing bibliographic records via CSV	6954	When importing bibliographic records using csv/Excel files, its not currently possible to include multiple instances of MARC fields within the record. Alma will create a single instance of the field with multiple instances of the repeated subfield, rather than creating multiple fields. It would be preferred if an import via csv could create multiple instances of a field, in the same way that importing xml or mrc files does.\n \n Being able to import records with multiple repeated fields correctly via csv/Excel would be beneficial in capturing work by volunteers, interns and library staff who are not Alma/MARC trained, particularly for Special Collections records which can contain multiple entries on certain fields (5XX, 7XX, 6XX). There is also a potential that data exchange from local TEI and EAD might come via csv for import into Alma.	metadata, bibliographic record, import, csv	
Resource Management	Add more options for "Physical Condition"	6977	currently this field is limited to the following options: Brittle, Damaged, Deteriorating, Fragile, None. We need an ability to add new entries. Proposed solution: make table configurable.\n		Use 6742 for voting.

Resource Management	Fix gaps in Subject Browse	6979	The separation of subjects into these 2 separate browses is very problematic: LCSH, "LC name authority records for 651". Staff must check each browse separately to find all headings. This affects Primo VE customers as well, where the incomplete Subject Browse is a serious patron facing issue. For example, you have to use the LCSH browse to find Michigan--Antiquities, but you have to use the LC names for 651 browse to find Michigan--Antiquities--Bibliography. There should be a single subject browse that contains both LCSH and LC names for 651. Geographic headings in "LC Names 651" are used as subjects and need to be in the same browse as LCSH terms. The fact that they are controlled by separate vocabularies is incidental for discovery and database management purposes. In LC practice, some subdivided geographic headings are established LCSH authorities, not LC Name authorities. Only the un-subdivided name is included in LC Names. Subdivided names are included in LCSH. (For an easier to read version of this request please see: https://docs.google.com/document/d/1spu9GJqeT1SOS45rlyy5qGe8Lg799rbbbPvZp4e_ucw/edit?usp=sharing). FULLER EXAMPLE: \n \n In LCSH browse you see: \n Michigan--Antiquities; \n Michigan--Biography; \n Michigan--Guidebooks;\n \n But in LC Names for 651 you see: \n Michigan;\n Michigan--Antiquities--Bibliography;\n Michigan--Antiquities--Periodicals;\n Michigan--Gazeteers;\n \n What you should see is a single browse: \n Michigan;\n Michigan--Antiquities; \n Michigan--Antiquities--Bibliography;\n Michigan--Antiquities--Periodicals;\n		
Resource Management	Ability to create item templates	6980	We would like the ability to create item-level templates by material type and location. This would include as optional every field in both the General and Notes tabs on item records so that, for example, a cataloger who works with special collections would be able to have templates that include provenance, but that field would be optional for a serials person who doesn't work with that information. Internal and statistics notes fields would need to be included as options.		
Resource Management	Scan in items - don't overwrite the call number	6989	When using the "scan in items" page to move items from one location to another, the call number is overwritten if another holding with a different call number already exists in the target location.	call number, scan in items, change location	SF 00574591
Resource Management	Limit external search by format in Metadata Editor	6993	When using external search with Metadata Editor, we would like to be able to limit by format, preferably via a tick box or drop-down menu to select print, electronic or all. Alternatively, it would be good if there was a label to indicate print or electronic version.	Metadata Editor; external search; limit search; format; print;	

Resource Management	Browse Shelf Listing improvements	6995	There needs to be an option to view a bib or holdings record from Browse Shelf List, not just to edit. It should also be possible to close the record selected from this list and return to browsing from the full original window/display.		
Resource Management	Add bib records for electronic collections to the "electronic titles" search	6998	Currently, bib records for electronic collections can only be found in an "all titles" search. We would like electronic collections to be considered inventory so that their bib records will be findable in an "electronic titles" search along with bib records for portfolios.	"electronic collections";"electronic titles"	
Resource Management	Ability to relink to a different bibliographic record when there is a process type applied	7036	We would like the ability to relink to a different bibliographic record when there is a Process Type applied to an item. Currently, we have to remove the Process Type before we can relink to a different bibliographic record		
Resource Management	Customer domain URIs for linked data	7061	Give customers an option to specify a domain name registered to their institution, to be used within Alma to construct URIs assigned and published by Alma to represent linked data entities (such as a BIBFRAME Work or FRBR/RDA Expression).	linked data, URI, BIBFRAME	This enhancement request is submitted based on discussions in the Linked Open Data Working Group.
Resource Management	Reminders - enhance functionality	7066	This area of Alma is incredibly useful, but could use some enhancements to make it better. If it behaved more like the E-Activation task list it would become much more valuable and popular. 1. Showing up on the homepage Task List/sends emails (most important); 2. Ability to assign the tasks; 3. The ability to filter by type or status better; 4. More useful filtering of due dates.		
Resource Management	Authorities available in Analytics	7070	Currently, authority data are not indexed in Analytics. It is impossible to report informations such as how many authority records were created in a period of time, how many records were created by a specific operator, etc. Adding authority data in Analytics would be a welcome improvement.	Authorities, Analytics	