

February 2023 Feature Release Highlights



GuideMe

GuideMe was launched in early 2020 to provide users with step-by-step guides on a curated set of workflows within Alma.

Since then, we've released over 30 walkthroughs ranging from creating sets for manual jobs, to activating electronic collections from the community zone, and running the fiscal period close rollover.

While feedback on these walkthroughs has been largely positive and reaffirms that providing in-app help enhances the overall customer experience, we will be decommissioning GuideMe from the February 2023 release.

In the interim, we will be investigating other third-party digital adoption options. While we currently cannot commit to a timeline until we complete our due diligence, we will keep you updated as we get closer to finding an alternative solution.

Resource Management



Idea Exchange - Electronic Service - Expiry Date Option for the "Service Temporarily Unavailable" Message

A new field "Display unavailable message until date" allows the Alma user to set a date for when the "Service temporarily unavailable" message will expire and will no longer display in the "View it" of the resource.



The Alma user no longer needs to proactively move the "Display temporarily unavailable message" back to "No".



Idea Exchange - Automatically Control the Availability of Portfolios

Two additional fields have been added to the Portfolio Editor screen (as well as to the New Portfolio screen when adding a new local portfolio):

- Field 1 - "Available from date" specifies when the portfolio is automatically set to "Available."
- Field 2 - "Available until date" specifies when the portfolio is automatically set to "Not available."



Automation of aspects of electronic resources management.

Menu Keyboard Shortcuts in the New MD Editor

It is now possible to easily and quickly access menus in the new Metadata Editor using a keyboard only.



This is especially useful for catalogers that rely on keyboard shortcuts in their work.

Note

To assure a quality release of the **personalized quick links** in the new Metadata Editor, we will be postponing their deployment to the May release to invest further time in providing a robust and fully tested capability. We will delay the classic MD Editor sunset to coincide with this important enhancement to the new MD Editor's capabilities and efficiencies.

Updates to the MARC21 Profile

The following MARC21 updates are available for bibliographic, holdings and authority profiles:

- Update No. 33, November 2021
- Update No. 34, July 2022

Improved UX in the Alma Viewer

The Alma Viewer design has been improved to provide maximum space for the file content thus providing an optimal end user experience. Several new configurations allow collapsing information panes by default. The file display has been expanded to improve the viewing experience.

< Service Details

Cancel

Save

Service Details

Service Availability Rules

Customization

Active

Service Code *

Service Name *

Service Description

Hide Repeated Labels

Use New Viewer

Hide Fulltext

Expand Content Pane

Expand Description Pane

PDF Default zoom



These improvements will provide an optimal end user experience for patrons viewing the library's digital resources.

Fulfillment



NERS Request - [Customize Request Cancellation Reasons](#)

It is now possible to edit the Request Cancel pop up screen to remove request cancellation reasons and to add new options as required. The library can customize a list of cancellation options that is relevant for the library.



When cancelling a patron request, the user will only see a list of request cancellation reasons used at the library, preventing mistakes of selecting a reason that should not be used.

Resource Sharing

New Resource Sharing Task Lists

After having released the new resource sharing task lists with an opt-out option in the previous release, we plan to retire the old task lists in the May 2023 Feature Release, leaving the new task lists as the only available option.

Analytics

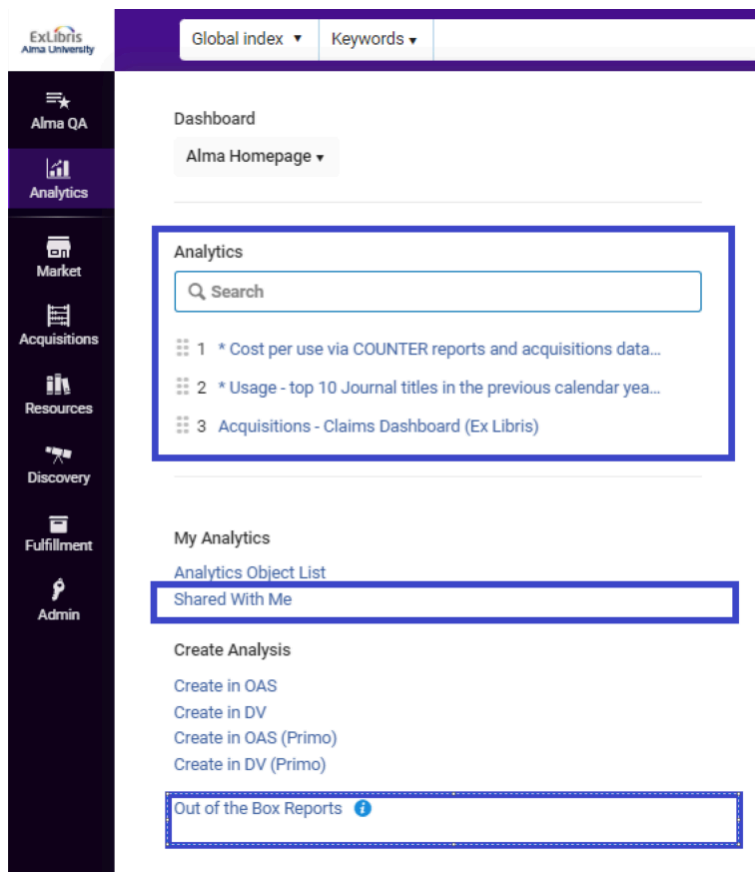
New UI for Analytics Management

The Analytics Object List is now accessible with a new UI design. You can personally opt in to use the new UI, or continue using the current version of the analytics lists.

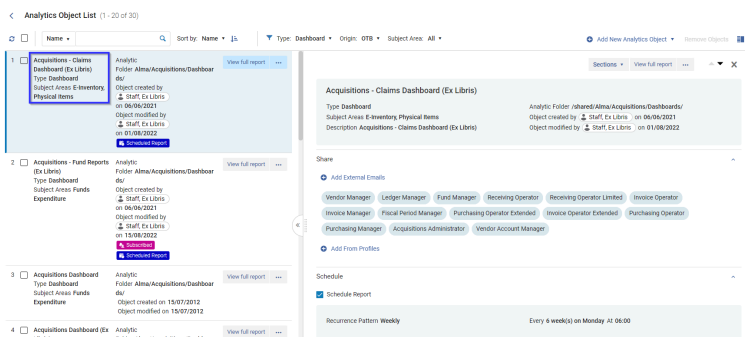


The new UI for analytics has many benefits, including:

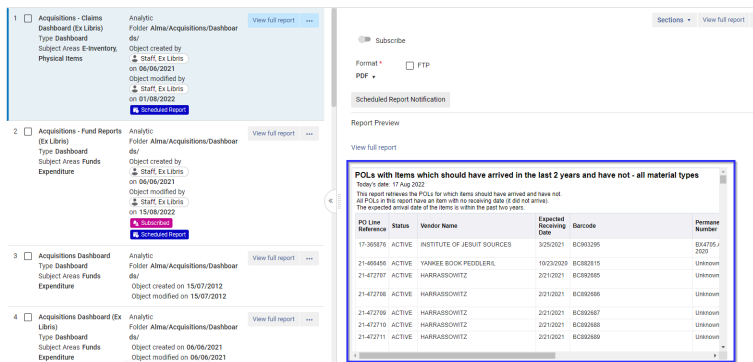
- An all-new analytics menu including: an integral search box for analytics objects, customizable quick links for favorite reports, a dedicated separate area for out-of-the box reports and a new "shared with me" list where all shared reports are in one central and searchable list.



- A side by side view including a right pane work area that will enable inline editing of the analytics object in focus, with no need to navigate to a separate edit form and lose the context of the analytics object list that is being processed.



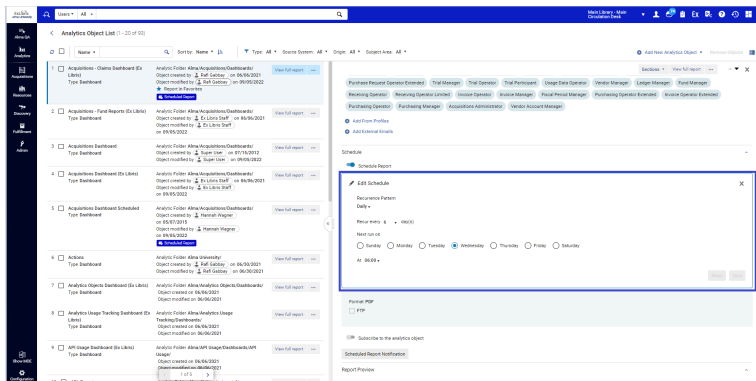
- A preview of the analytics report is available within the Alma UI, making it easier to manage analytics objects in one application, rather than having to open Oracle Analytics Server.



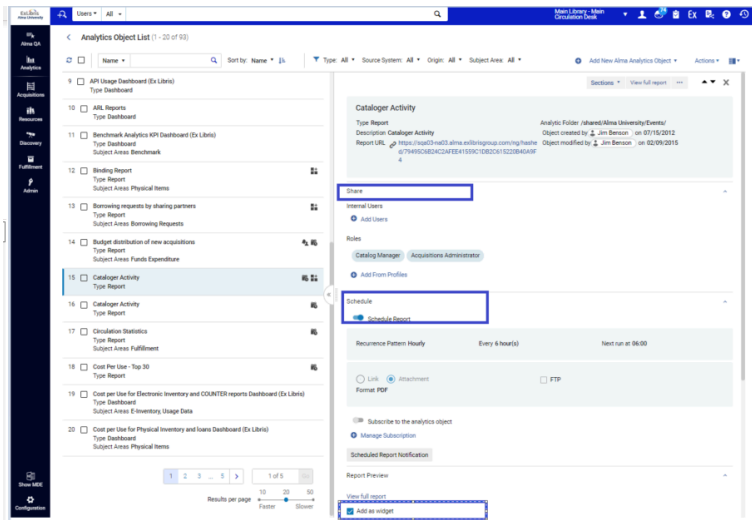
- Multiple search, sort and filter options to easily find relevant analytics objects including sorting by “Subject Area”.



- A flexible and intuitive way scheduled analytics with a wide variety of customization



- A "one stop shop" approach to creating objects: allowing sharing, scheduling and adding analytics as widgets in one analytics object rather than importing analytics several times as different objects.



- Labels provide a quick visual indication of whether a report is scheduled, added as a widget and whether you are subscribed to it.

13	Borrowing requests by sharing partners Type Report Subject Areas: Borrowing Requests	Analytic Folder: Alma University/Borrowing Requests/ Object created by: Hannah Wagner on 08/26/2015 Object modified by: Hannah Wagner on 09/26/2015	Added as Widget	View full report ...
14	Budget distribution of new acquisitions Type Report Subject Areas: Funds Expenditure	Analytic Folder: Alma University/Acquisitions/ Object created by: Erin Lewis BUCKED - Not an Alma on 01/05/2015 Object modified by: Rafi Gabday on 12/01/2022	Subscribed Scheduled Report	View full report ...
15	Cataloger Activity Type Report	Analytic Folder: Alma University/Events/ Object created by: Jim Benson on 07/15/2012 Object modified by: Jim Benson on 02/09/2015	Added as Widget	View full report ...
16	Cataloger Activity Type Report	Analytic Folder: Alma University/Events/ Object created by: Cathy Owen on 07/16/2012 Object modified by: Cathy Owen on 08/03/2015	Scheduled Report	View full report ...