

## August 2023 Feature Release Highlights



### General

## NERS 2022 enhancements

The August Release sees the implementation of two NERS 2022 enhancements:

1. [Improve letter editing functionality](#)
2. [Support for dynamic collections](#)

With the inclusion of these enhancements, we mark the completion of the NERS 2022 enhancement cycle. Looking ahead, we are already planning and preparing for the NERS 2023 cycle, continuing our long standing collaboration with our user community.

## New Cookies Banner

As part of our commitment to transparency and privacy protection, we will be introducing a new feature in Alma and all our higher-education back-office products that requests user consent for the use of cookies. Regardless of your cookie preferences, your daily activities and Alma functionality will remain unaffected. See full details about this in the August Release Notes.

We use necessary cookies to make our site work. If you allow, we use optional cookies to measure our site's performance, personalize content and ads to you, and provide social media features. [Learn more](#)

Manage cookie preferences

Accept all

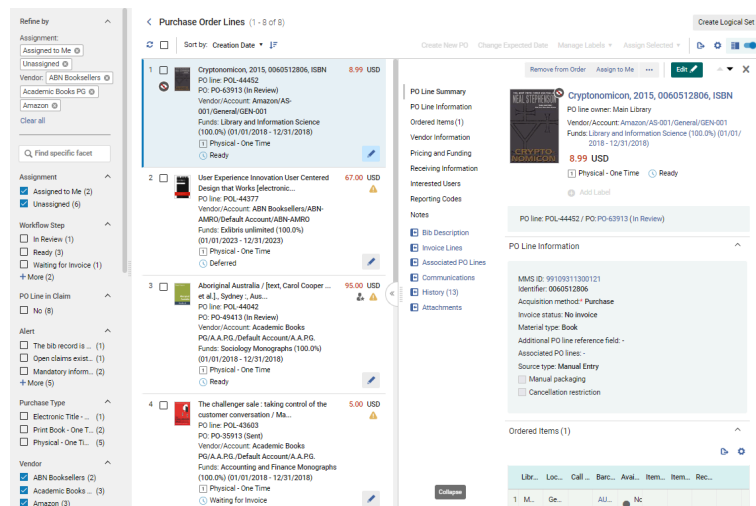
This feature will be rolled out gradually post August Release.

### Acquisitions

## [New PO Line task list](#)

The next-generation Alma UI design is now available for the PO Lines task list. Individual users can opt-in to use the new UI task list layout, or continue using the classic UI.

The New Layout is designed to provide users who manage PO lines with a more streamlined experience, in which more information is available at a glance and new search and facet options make it easier to locate PO lines with certain characteristics.



The new user Interface is being gradually rolled out. For more information [see here](#). In August the new UI will be turned off by default. Users are encouraged to opt-in to benefit from the new UI advantages.

There are multiple changes and advantages with the new interface, which also addresses a number of Ideas Exchange items. For more information [see here](#).

A webinar on “The New Unified PO Line list” will be delivered in two separate time zones on Aug. 08.

For further information and registration see the [Alma 2023 Roadmap Webinar Series](#) page.



Users will have a more streamlined experience, more information available upfront, new search and facet options and many more advantages.

## Resource Management

### Linked Data

#### Linked Open Data Enrichment for EuroVoc Authorities

The Linked Data enrichment process for bibliographic records that are linked to EuroVoc authorities now also generate URIs to the EuroVoc authority records, so that libraries that work with EuroVoc authorities can benefit from their Linked Open Data capabilities.

#### New Search Indexes for URI Cataloged in \$\$1

New search indexes are added for Real World Object (URI), so the titles can be searched by cataloged URIs.

This is useful for libraries that catalog URIs, and enables them to use these identifiers in their searches.

## ORCID URI Enrichment for Bib Records Using the Alma Refine Cloud App

Configuring an integration profile for ORCID in Alma is now possible, enabling you to use your ORCID credentials to add ORCID URIs to your Bib records using the **Alma Refine** cloud app.

## Bibliographic record retention

It is now possible to prevent a bib record from being deleted. This is based on a new "Bibliographic Collection Retention definition" table, where administrators can specify conditions for record retention.

For network zone records, the retention is determined according to the configuration in the Network Zone table.

When attempting to delete a bibliographic record that is linked to the Community Zone, the removal of the linked record from the local institution is restricted based on the specific configuration set by that institution.



Impact

This is especially useful for libraries with collaborative collections, who wish to protect certain records from being deleted.



## Idea Exchange - Browse Authority headings

A new feature called **Browse Authority Headings** has been introduced, enabling users to browse authority files for name and subject authority records.

This browsing functionality displays both the preferred and non-preferred terms in the authority record, clearly indicating which terms are preferred.



Impact

This is useful for librarians who wish to browse the authority vocabulary using a specific name or subject, without being sure if it is the preferred term or not.



## Idea Exchange - Undo options in the Metadata Editor

Previously, it was not possible to undo removing fields from a bib record. It is now possible to "Undo Remove, Cut, Paste Field" (Ctrl+Shift+Z), that allows catalogers to undo these actions as well.



Impact

This is useful when a field is accidentally removed and needs to be recovered, without having to restore a previous version of the record.



## Idea Exchange - [Library scope with the Physical Titles search](#)

The library scope which was previously applied only to the physical items and holdings search now also applies to the physical titles search.

Staff that define a preferred libraries scope will only see search results of the physical titles that have holdings in the defined libraries.

The library scope will be remembered and applied across sessions and search types.



This is helpful for staff that are only interested in titles held by specific libraries. They no longer have to add a library search condition to every physical titles search.

## Automated upload of electronic holdings now supported for PROJECT MUSE titles

In addition to the existing publishers/vendors integrating with Alma, the Automated [Upload of Electronic holdings](#) process now supports PROJECT MUSE titles. Customers are now able to configure an integration profile with PROJECT MUSE and fully automate their holdings update.



Automated upload of electronic holdings for PROJECT MUSE saves staff manual labor, and time and improves accuracy and efficiency.



### Digital Resource Management

## Long term digital loans with limit to concurrent usage

Long term digital loans is a process by which libraries can lend out digital copies (representations) of physical materials to patrons for periods of a day or more. The system imitates the experience of lending physical items by allowing you to limit the number of digital copies being lent concurrently and configuring the time period of the loan. As with physical items, if the digital copy is on loan, the requester enters a waitlist. Alma keeps track of the patrons who requested the digital representation and notifies the next person in the waitlist when it is available. Users can also indicate the list of physical items that are represented by each digital resource.

Long term digital loans introduces a rich set of policies, is fully integrated into the Alma requests workflow, and is accessible from the patron Library Card in Primo.



There is full control over digital loans, both from a workflow and from a copyrights perspective.



## NERS Enhancement - Logical Collections for automatic title assignment

A new type of "Logical" collection allows for the automatic assignment of titles according to a pre-defined logical set. To support this feature, a new **Logical Collection** checkbox was added to the Add New Collection page when creating a collection.

General Information

Name \*

Description

Library \*

Logical Collection

In addition, you can now search for logical collections with the advanced search:

Search in: **Collection** Zone: **Instituti**

Look-up or select

Collection : Is Logical

Title

Collection

Collection ID

Collection Name

External System

External System Id

Is Logical

Library



Save significant time by automating population of title collections.

### Improved menu search

Enhancements have been made to the Alma internal search menu functionality, incorporating "smart" search capabilities. The search feature now provides suggestions for synonyms, interchangeable terms, and support for spelling mistakes. This enhancement facilitates users' navigation making it easier to find links in the Alma search menu.

## Note

With the August 2023 release similar terms functionality will be supported only for English. Spelling will be supported in the following languages: English, German, Spanish, Danish, Finnish, French, Hungarian, Italian, Japanese, Dutch, Norwegian, Portuguese, Romanian, Russian, and Thai.

Similar terms will be gradually enriched with additional languages in forthcoming releases.



This facilitates the user's navigation in the Alma menu making it easier to find links in the Alma search menu.



## NERS Enhancement - [An improved user interface for the letter editor](#)

The interface of the letter editor has been improved with a side by side real time preview, improved readability for the text editor and error detection, and a "Save Draft" option.

The screenshot displays the letter editor interface. On the left, there are two editors: 'Editable XSL' and 'Editable XML'. The 'Editable XSL' editor shows XSL-FO code for generating a letter. The 'Editable XML' editor shows the resulting XML structure. On the right, there is a 'Preview - Visual & HTML' pane showing a real-time preview of the letter. The preview includes a header with 'Borrowed By Letter', a 'Letter Name' field, a 'Dear Sir/Madam Smith' salutation, and a 'Main College' footer. The interface also includes buttons for 'Save Draft', 'Remove Draft', and 'Restore'.

The screenshot displays the letter editor interface with a 'Draft' state. On the left, there are two editors: 'XSL (Draft)' and 'XML'. The 'XSL (Draft)' editor shows XSL-FO code for generating a letter. The 'XML' editor shows the resulting XML structure. On the right, there is a 'Preview - Visual & HTML' pane showing a real-time preview of the letter. The preview includes a header with 'Borrowed By Letter', a 'Letter Name' field, a 'Dear John Smith' salutation, and a 'Main College' footer. The interface also includes buttons for 'Save Draft', 'Remove Draft', and 'Restore'. A 'Permanent Save' button is also visible.

A webinar on "The New User Interface for Customizing Letters in Alma" will be delivered in two separate time zones on Aug. 09.

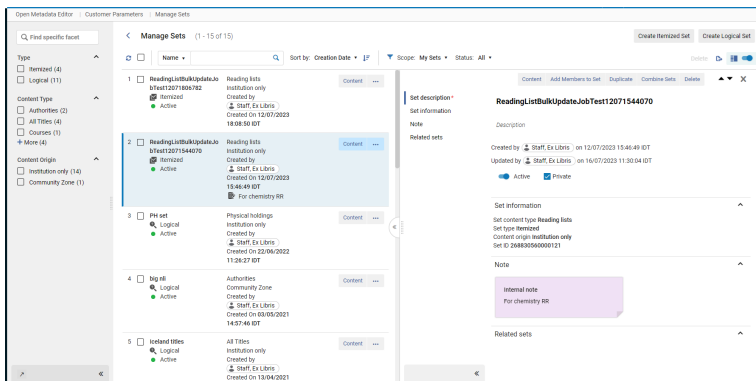
For further information and registration see the [Alma 2023 Roadmap Webinar Series](#) page.



Creating and editing letters will be easier and more transparent, offering more control to the staff user.

## [A new layout for the “Manage Sets” page](#)

The next-generation Alma UI design is now available for the Manage Sets page. The New Layout is designed to provide users with a more streamlined experience, in which more information is available at a glance and new facet options make it easier to locate sets with certain characteristics.



In addition, the physical holdings sets management has been enhanced enabling operators to easily create and manage itemized as well as logical sets of physical holdings records. This is especially useful when you want your set to include specific holdings, or to create an itemized set from a logical set of all holdings that fulfill a condition at a specific point in time.













This is a better overall user experience when creating and managing sets.

## Analytics



## Idea Exchange - Local parameter fields labeled in Analytics

Local parameter fields in analytics now include the institution label for the field, in addition to the local parameter number.

-  901 - Local Param 01
-  940 - Local Param 02
-  Local Param 03
-  Local Param 04
-  Local Param 05
-  Local Param 06
-  Local Param 07
-  Local Param 08
-  Local Param 09
-  Local Param 10



It will be easier for analytics designers to choose the correct field to include in analyses. In addition, users who review reports / dashboards that include local fields, can easily understand the contents of the labeled fields.

## Analytics new layout: feature rollout moving to phase 2

With the August release the new Analytics layout has been switched on for everyone as the default layout.

You can switch back to the old layout until the November release,

If you haven't yet tried the new layout, don't be in a hurry to switch back to the old layout. Try getting used to the new layout, so that you will be fully familiar with it by the November release.

For more information about how to use the new layout, watch this [webinar](#) and check out our [Online Help](#).



## New API for the Retrieval of Import Profile Report: Single Matches and Multi Matches

There is a new API to retrieve an Import profile report for both single and multi matches.

## New API for updating Logical Sets

A new API is now available for updating logical sets.

## New API for Managing Library Relations

A new Library Relations API is now available. This API can be used to retrieve, create, update, and delete library relations.

## Location API Enhancement

The Location API now includes the options to create or delete a library location.

Total views:

1639