

Alma Roadmap – Completed – 2023 H2

Metadata Management

Collaborative Collections - Prevent Deletion of Bib Records According to their Metadata

What's New	Highlights	Impact
Libraries will be able to prevent the deletion of bib records that contain metadata indicating that the record should be retained.	<ul style="list-style-type: none"> When enabled, Alma will prevent the deletion of bib records containing metadata that marks them as not to be deleted. This validation will be added to all deletion workflows. 	Libraries will be able to maintain their catalog without accidentally deleting records that they are committed to retain as part of collaborative collection agreements.

Browse Name and Subject Authority Records



Idea Exchange

What's New	Highlights	Impact
Alma's browse functionality will be enhanced to support not only bib headings but also authority records, including non-preferred terms.	Staff will be able to browse authority records.	Staff will be able to browse authority records, showing both preferred and non-preferred terms.

Undo for Remove, Cut and Paste Field in Metadata Editor



Idea Exchange

What's New	Highlights	Impact
A new action, Undo Remove, Cut and Paste Field will be added to the Metadata Editor	<p>Catalogers will be able to undo the following actions in Metadata Editor:</p> <ul style="list-style-type: none"> Remove Field Cut Field Paste Field 	Staff will be able to restore data changed by these field actions without having to reload a previous version of the record.

Electronic Resource Management

Usage Indication for Electronic Resources in Staff Search Results



Idea Exchange

What's New	Highlights	Impact
Search results (All title + Electronic portfolio) includes link resolver usage information for electronic resources that are part of the institution's inventory.	A dedicated counter was added to the search results to indicate the number of "clicks" which were counted in Alma's link resolver.	Presenting usage information enables institutions to make smart decisions regarding removing or adding electronic inventory to the library collection.

Automatic Upload of Electronic Holdings - Project Muse

What's New	Highlights	Impact
Upload Electronic Holdings from Project Muse replaces the current manual, multi-step workflow for managing Project Muse holdings.	<ul style="list-style-type: none">• Customer-specific electronic holdings for Project Muse content is activated automatically.• The integration runs on a fixed schedule.	Reduces manual work involved in activating and maintaining the library holdings of Project Muse electronic resources.

General Electronic Services - Allow Enrichment of URL Template with any Bibliographic Metadata Elements



Idea Exchange

What's New	Highlights	Impact
The General Electronic Service (GES) functionality was enhanced to allow institutions who define a URL template to enrich it with any element derived from Bibliographic Metadata.	<p>The General Electronic Service (GES) functionality now supports the following:</p> <ul style="list-style-type: none">• Ability to enrich the context_object with any bibliographic fields/metadata.• Ability to create GES rules that are based on bibliographic metadata that the context_object was enriched with.	Enable libraries to expose additional sets of services to their patrons.

Physical Resource Management



Idea Exchange

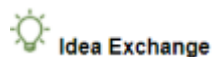
Add Library Scope to Physical Titles Search

What's New	Highlights	Impact
<p>Library Scope, used to limit the scope of the search for physical holdings or items of specific libraries, will be available in the Physical Titles search. It will enable limiting titles to search titles that have physical inventory in specific libraries.</p>	<ul style="list-style-type: none"> • Ability to limit Physical Title searches to titles with physical inventory in specific libraries. • Ability for operators to exclude irrelevant titles from the search. 	<p>This will reduce the need to define the library in the Advanced search or to use facets for every search for operators only interested in titles with inventory in specific libraries.</p>



Holdings – Support Itemized Set Management

What's New	Highlights	Impact
<p>Staff users managing physical inventory will be able to manage sets on the holdings level.</p>	<ul style="list-style-type: none"> • Ability to manage itemized holdings sets. • Ability to create itemized and logical holdings sets using the new Manage Sets UX. 	<p>Staff users will be able to better manage holdings with a higher level of accuracy.</p>



Add Notes to Physical Items Using the "Change Physical items Information" Job

What's New	Highlights	Impact
<p>The Change Physical Items job enables replacing existing notes on items.</p> <p>It will be possible to add new notes to physical items without removing the existing notes by appending the new note to the existing note content.</p>	<ul style="list-style-type: none"> • Ability to add notes to all items in the set without having to skip items with existing notes. • Ability to add notes to physical items without losing the existing content. 	<p>Staff users will be able to better manage their physical items notes in bulk.</p>

Digital Resource Management

Long Term Digital Loans

What's New	Highlights	Impact
<p>Long term loans for digital resources.</p> <p>Further reading on the long term loans theme page.</p>	<p>Provide remote access to digital resources while providing tools to adhere with copyright terms.</p>	<p>Manage remote access to digital resources while providing tools to adhere with copyright terms.</p>

Dynamic Collections



NERS Request

What's New	Highlights	Impact
<p>Logical assignment of titles to collections.</p>	<p>Alma will automatically populate collections according to logical queries assigned per collection.</p>	<p>Significantly reduce effort in managing collections</p>



Idea Exchange

Deliver Office Documents

What's New	Highlights	Impact
<ul style="list-style-type: none"> Support preview / delivery of Office documents such as Word, Excel, PPT Restrict download when necessary 	<ul style="list-style-type: none"> Support preview and delivery of Office documents such as Word, Excel, PPT Restrict download when necessary 	<p>Expand range of content types to be delivered to patrons</p>

Fulfillment & Resource Sharing



[Library Independence](#)

Library Independence - Library Separation in User Search

What's New	Highlights	Impact
Option to make the core user-information accessible only to designated library operators.	It is possible to restrict searching for user information to specific libraries. Users of a library will be retrieved in searches only for staff operators of that library.	Increased privacy by having the ability to separate the libraries' patron list between libraries.



Self Set Address for Personal Delivery

What's New	Highlights	Impact
Updating personal delivery address at request time.	Patrons that are eligible for personal delivery can request to pick up resources at an address other than their registered home address.	<p>This enables using the personal delivery service even when no known home address has been uploaded to the system.</p> <p>It also enables patrons to easily change the registered address when requesting for personal delivery.</p>

Acquisitions

PO Line Workflows - Enhanced UX - Gradual Rollout - Available to all by default

What's New	Highlights	Impact
<p>The Purchase Order Line search screens and task lists were updated and redesigned for better usability, performance, productivity, and overall user experience.</p> <p>For additional information, see Workflow Simplification.</p>	<p>Adjustments to the layout of the PO line task list streamline the processing of PO lines. Users are able to:</p> <ul style="list-style-type: none"> • Review all PO lines in all statuses in a single unified list. • Assign PO lines in any active status to users. • Access entities related to the PO line and easily navigate back to it when done, all while not losing orientation with the page you came from. • Receive items directly from the PO line editing page. • Much more. 	<p>Users can manage their PO lines in a more convenient, straightforward manner using multiple enhancements added to the PO line management and editing page. Utilizing Alma's new user experience capabilities allows users a "single page application" experience, saving the users from the need to navigate to and from multiple pages to complete their tasks .</p> <p>To learn more, see New Unified PO Line Task List.</p>



Fund Management - Detailed Expenditure and Encumbrance Information

What's New	Highlights	Impact
<p>The fund management screen was enhanced to present users with information regarding the PO lines that impact the fund balance.</p>	<p>Two new linking options are available in the fund management screen to allow users to see:</p> <ul style="list-style-type: none"> • A list of POLs with their encumbered amount • A list of POLs with their expended amount 	<p>With a single click, users can view the PO lines that impact the fund balance. This allows users to better understand the orders that were already paid or were not yet paid.</p>

"Save and dismiss" button in "Manage EDI Tasks"

What's New	Highlights	Impact
The EDI task list was enhanced to allow users to dismiss the task when modifying the expected receipt date.	A new "Save and Dismiss" action was added to the pop-up window where users update the receipt date.	Adding a new "Save and dismiss" action improves the efficiency, save the users time, and multiple clicks, when working with the task list .

Analytics and Insights

Analytics Usage Insight Dashboard

What's New	Highlights	Impact
<p>A new Analytics Usage Insight Dashboard* was created to support institutions overview and understanding of their Analytics usage.</p> <p>*Insight Dashboards built with Oracle Data Visualization.</p>	<ul style="list-style-type: none"> Analytics usage is transparent and visual. Information regarding running times. 	More transparency and self support regarding Analytics usage in the Analytics administrator's institution.

Enhanced User Experience: Enhanced Manage Subscriptions Section in Analytics Object List

What's New	Highlights	Impact
A Manage Subscription section and new interface was added to Analytics object side by side view	<ul style="list-style-type: none"> A section in the object details rather than a sliding panel for a quicker and more centralized experience Adding subscribers- simpler and more intuitive workflow Information regarding Analytics errors and running issues. 	More Centralized and intuitive analytics administration.

New Configurations (limited) Subject Area

What's New	Highlights	Impact
A new Configurations Subject Area was added to Analytics to support fulfillment management	<ul style="list-style-type: none">Data includes Fulfillment policies and Fulfillment terms Configuration	Allows administrators a more transparent view of how libraries configure their policies and terms of use

Linked Open Data

New search indexes for URI cataloged in \$\$1

What's New	Highlights	Impact
New search indexes were added for Real World Object (URI), so the titles can be searched by cataloged URIs.	<ul style="list-style-type: none">Real World Object URI: indexing \$\$1 from supporting fieldsORCID - Real World Object URI: indexing \$\$1 from supporting fields that contain ORCID URIISNI - Real World Object URI: indexing \$\$1 from supporting fields that contain ISNI URI	This allows libraries that catalog URIs to use these identifiers in their searches.

back to [Linked Open Data Roadmap](#)

ORCID in Alma Refine

What's New	Highlights	Impact
ORCID URI enrichment for bib records using the Alma Refine cloud app	<ul style="list-style-type: none">Add an integration profile with Integration Type ORCID, and enter the client ID and secret for connecting to ORCID.Select ORCID from the list of Refine services in the Alma Refine cloud app.	Research libraries with many records by researchers with an ORCID ID can have this ID in their catalog.

back to [Linked Open Data Roadmap](#)

Configuring URI generation for partially-linked authorities

What's New	Highlights	Impact
A new customer parameter that allows users to block the option for a partial match when enriching MARC records.	<ul style="list-style-type: none"> • Users can determine whether they want to allow partial matching. • Handled in all areas (Linked Data record in staff search, Linked Data in MDE, General publishing, APIs) 	Libraries can choose to allow or block partial matches when enriching with linked data.

User Experience, Accessibility & Infrastructure

Improved Letter - Editing Functionality



NERS Request

What's New	Highlights	Impact
The letter editor was enhanced with a design that improves the UX when working with the XML/XSL editor. It includes a live preview reflecting immediate changes in the XML/XSL editors and draft-saving functionality.	<ul style="list-style-type: none"> • Side by side live preview, updated immediately when changes are made in the XSL/XML editors • Draft feature to enable multi-session work • Improved error detection and error description 	Added efficiency and transparency to letter-editing workflows

Manage Sets - New Layout

What's New	Highlights	Impact
As part of the Workflow Simplification process, a more informative list view for Sets with enhanced UX capabilities	<ul style="list-style-type: none"> • Side-by-side view enabling quicker and more informative navigation between sets • Facets in the search feature for more accurate set searches 	Fast and more efficient workflows with sets

Configuration Improvements

What's New	Highlights	Impact
<p>Code and Mapping tables were improved to enhance their usability and navigation. These enhancements made working with and navigating through these tables much easier for users</p>	<ul style="list-style-type: none">• Pagination for multi-page tables• Search within the tables• Filtering capability	<p>Simplified administrative work</p>