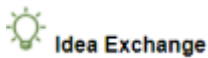


## Alma Roadmap – Completed – 2024 H1

### Metadata Management

#### Authority Control – Support Respecting MARC Subfields When Linking Bibliographic Headings - Early Access

What's New	Highlights	Impact
Libraries are able to select whether to force subfields to be taken into account when linking to bibliographic headings.	Bibliographic record fields will only link to authority headings if the matching content is in the same subfields.	The linking accurately reflects not only matching content, but also matching cataloged subfields.



#### Support Indication Rules Form for Holdings Records

What's New	Highlights	Impact
It is possible to easily create indication rules for holdings records in the Metadata Editor and use them for filtering holdings sets.	<ul style="list-style-type: none"> <li>The Metadata Editor supports creating indication rules for holdings using a form, similar to bibliographic and authority records.</li> <li>When creating a holdings set, it is possible to apply an indication rule to create a filtered itemized set.</li> </ul>	Staff is able to easily filter holdings sets according to the holdings record metadata.

### Electronic Resource Management

#### Usage Indication for Electronic Resources - Overlap Analysis

What's New	Highlights	Impact
The reports generated by the Overlap Analysis tool include link resolver usage information for electronic resources that are part of the institution's inventory.	A new column was added to the Overlap Analysis report, indicating usage for the specific title/resource.	Presenting usage information enables institutions to make smart decisions regarding removing or adding electronic inventory to the library collection.

## Automatic Upload of Electronic Holdings - Taylor & Francis Journals

What's New	Highlights	Impact
<p>The Upload Electronic Holdings from Taylor &amp; Francis books was enhanced to support Taylor &amp; Francis Journals (in addition to Books). This replaces the current manual, multi-step workflow for managing Taylor &amp; Francis Journals holdings.</p>	<ul style="list-style-type: none"> <li>• Customer-specific electronic holdings for Taylor &amp; Francis Journals content are activated automatically.</li> <li>• The integration runs on a fixed schedule.</li> </ul>	<p>Reduces manual work involved in activating and maintaining the library holdings of Taylor&amp;Francis Journals electronic resources.</p>

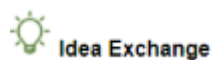


Idea Exchange

## "Public Access Model" in Collection Level

What's New	Highlights	Impact
<p>A new "Public Access Model" field was added to electronic collections. When defined, it is the default public access model for all the portfolios of the electronic collection, unless defined at the portfolio level.</p>	<ul style="list-style-type: none"> <li>• It is possible to define the "Public Access Model" for the entire collection.</li> <li>• If defined in the level of portfolio, the portfolio-level public access model is used.</li> </ul>	<p>Many ebook collections have the same access model for all the related portfolios (for example: unlimited (UA)). Being able to set this at the collection level saves time and effort.</p>

## Physical Resource Management



Idea Exchange

## Holdings – Enhanced Batch Jobs

What's New	Highlights	Impact
<p>Bulk operations and batch jobs for holdings records support running on holdings sets (and not just physical items and physical titles).</p>	<ul style="list-style-type: none"> <li>• Ability to use a set of holdings for jobs covering different aspects of inventory management, for example, change holdings information.</li> <li>• Only update relevant holdings selected for the physical holdings set, and not all holdings for the title as with a physical titles set.</li> </ul>	<p>The inventory manager is able to better automate holdings management with a higher level of accuracy.</p>

## Physical Item Templates

What's New	Highlights	Impact
<p>It is possible to save an item as a template, to then be used to pre-populate common item information when creating new items.</p>	<ul style="list-style-type: none"> <li>• Ability to save an existing item as a template.</li> <li>• The new template contains much of the item's non-unique data (for example, item policy, physical item material type, etc.) for use in creating future items.</li> <li>• When creating a new item, it is possible to select the template to be used to pre-populate the new item's data.</li> </ul>	<p>Physical inventory operators can more easily and efficiently create physical items, as they no longer need to manually input common item information.</p>

## Acquisitions

### PO Line Workflows - Enhanced UX – General Availability

What's New	Highlights	Impact
<p>The Purchase Order Line search pages and task lists were updated and redesigned for better usability, performance, productivity, and overall user experience.</p> <p>This is the final phase where the new pages are available to all customers and the old pages are no longer available.</p> <p>For additional information, see <a href="#">Workflow Simplification</a>.</p>	<p>Adjustments to the layout of the PO line task list streamlines the processing of PO lines. Users are able to:</p> <ul style="list-style-type: none"> <li>• Review all PO lines in all statuses in a single unified list.</li> <li>• Assign PO lines in any active status to users.</li> <li>• Access entities related to the PO line and easily navigate back to it when done, all while not losing orientation with the page they came from.</li> <li>• Receive items directly from the PO line editing page.</li> <li>• Much more.</li> </ul>	<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 them the need to navigate to and from multiple pages to complete their tasks .</p> <p>To learn more, see <a href="#">New Unified PO Line Task List</a>.</p>

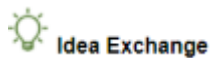
## Order It! - Quick Ordering from Amazon

What's New	Highlights	Impact
Users are able to utilize new streamlined options for creating PO lines from Amazon.	When the user orders a resource from the Amazon platform, a browser add-on allows for the harvesting of metadata and creating the order automatically. The user no longer needs to access Alma to create the order.	Improved user efficiency in the creation of orders in Alma. The <b>Order It!</b> functionality is designed to eliminate the need for duplication when creating an order outside of Alma, as it is no longer necessary to have to manually record these orders in Alma.



## Bulk Delete of COUNTER Reports

		Impact
The list of harvested SUSHI reports was enhanced to allow users to delete selected reports in bulk.	When reviewing the list of harvested reports, users can multi-select a number of reports and delete the selected reports.	Simplifying the management of deleting SUSHI reports saves users from the repetitive work of selecting reports one at a time and then deleting them.



## EDI – Support for “Quantity for Pricing” and “Access Model”

What's New	Highlights	Impact
When sending orders via EDI for electronic resources, additional information about the order is passed to the vendor within the EDI file.	Institutions are able to send the vendor, via EDI, information regarding the access requirements for the electronic resource being ordered (the "access model") and information regarding the quantity for pricing.	More accurate information regarding the order is sent to the vendor.



## Remove License from License List

What's New	Highlights	Impact
The licenses list was enhanced to allow the complete removal of a license.	<p>The "Delete" action was enhanced to allow the complete removal of a license from the list.</p> <p>An additional "Deactivate" action was added to allow marking a license as</p>	Removing licenses that are not in use improves the efficiency and saves the users time when working with licenses .

What's New	Highlights	Impact
	"Inactive".	

## Digital Resource Management

### MODS Enhancements

What's New	Highlights	Impact
Major enhancements to Alma MODS metadata support.	<ul style="list-style-type: none"> <li>OAI MODS for harvesting MODS metadata from a remote MODS repository.</li> <li>MODS patron deposit.</li> <li>Expand MODS fields for display in Primo: Stage 1 completed in Alma with development partners. Primo will complete work for the discovery side by the beginning of 2025.</li> </ul>	Enable richer use of MODS as a local ALMA metadata standard.



### Delivery: Multilingual Closed Captions and ePub Viewer

What's New	Highlights	Impact
<ul style="list-style-type: none"> <li>Subtitles or closed captions displayed in multiple languages.</li> <li>Out of box delivery of ePub files.</li> </ul>	<ul style="list-style-type: none"> <li>Alma users can associate multiple VTT files with a single video, each representing a different language.</li> <li>Deliver ePub files via the out of box Digital Viewer.</li> </ul>	Improve end user accessibility.

### Toggle Logical and Itemized Collections

What's New	Highlights	Impact
Easily toggle between logical and itemized collections and back.	<ul style="list-style-type: none"> <li>Toggle an existing itemized collection to an logical one.</li> <li>Toggle an existing logical collection to an itemized one, retaining the titles already associated with the collection.</li> </ul>	Enhances flexibility and efficiency by allowing seamless toggling between itemized and logical collections, retaining associated titles for better collection management.

## Fulfillment and Resource Sharing

---

## Enhanced RapidILL Integration

What's New	Highlights	Impact
New integration points with RapidILL.	It is possible to configure lending off-times in Alma and have them automatically registered as off-times in RapidILL, eliminating the need for configuring both separately.	Fully seamless workflow and configuration with RapidILL.

---

## Support Version 3 of D2IR APIs for Integration with InnReach

What's New	Highlights	Impact
Alma supports version 3 of the INNReach D2IR APIs.	The new version of the API supports seamless integration in an InnReach network, including the ability to support visiting patrons.	Improved integration and more efficient workflows for Alma libraries that participate in an InnReach network. Support visiting patrons when the Alma library is part of an InnReach network.

---

## RequestIt! - Submitting Resource Sharing Requests to External Sources

What's New	Highlights	Impact
Ability to submit resource-sharing requests from Amazon.	Patrons can use pre-populated forms, based on search results from Amazon, for submitting resource-sharing requests.	Patrons can create resource-sharing requests from Amazon.

---

### Note

Currently available for Rapido libraries only.

---

---

## Linked Open Data

### Creating and Managing BIBFRAME Instances and Works with APIs – Early Access

What's New	Highlights	Impact
Libraries can manage Linked Open Data records alongside existing bibliographic records.	<ul style="list-style-type: none"><li>Provides the ability to create and update BIBFRAME Works and Instances through Alma's APIs.</li><li>Provides the ability to search Linked Open Data Instances in conjunction with all other records created in the different formats that exist in the catalog.</li></ul>	Using Linked Open Data Instance records in all parts of Alma in end-to-end workflows is possible.

What's New	Highlights	Impact
	<ul style="list-style-type: none"> <li>Provides the ability to manage relationships between records, including linking works to multiple instances.</li> <li>Provides the ability to use Linked Open Data Instances in Acquisitions and Fulfillment workflows.</li> </ul>	

## Linked Open Data - Support Core Functionality – Early Access

What's New	Highlights	Impact
Libraries can manage their Linked Open Data records in Alma.	<ul style="list-style-type: none"> <li>Provides the ability to search for BIBFRAME instance records in the staff search.</li> <li>These instance records are available for use in Acquisitions and Fulfillment workflows.</li> <li>Provides the ability to publish BIBFRAME instance records as MARC or as BIBFRAME records.</li> </ul>	Using Linked Open Data Instance records in all parts of Alma in end-to-end workflows will be

## Linked Open Data – Cataloging via Sinopia – Early Access

What's New	Highlights	Impact
The cataloger can create BIBFRAME records in Sinopia and add them to the Alma catalog.	<ul style="list-style-type: none"> <li>The cataloger can create a Linked Open Data record using Sinopia.</li> <li>Catalogers can enrich their records using Linked Open Data sources, such as the Library of Congress, Wikidata, and Getty.</li> <li>This extends Alma's support for multi-formats.</li> </ul>	The cataloger can perform catalog maintenance tasks more accurately with less effort.

## Linked Open Data - Linking BIBFRAME to Authorities – Early Access

What's New	Highlights	Impact
Libraries can link BIBFRAME records to authorities in Alma.	<ul style="list-style-type: none"> <li>BIBFRAME records (works and instances) can be linked to LC names and LC subjects.</li> <li>BIBFRAME works and instances can be enriched and searchable by the authority records to which they are linked.</li> </ul>	Using Linked Open Data Instance records side by side along with other records.

## Adding VIAF and Linking it to Authorities

What's New	Highlights	Impact
Libraries can add VIAF URIs to linked authorities in the Alma linked data enrichment process.	<ul style="list-style-type: none"> <li>VIAF clusters have been added and updated in Alma.</li> <li>VIAF URIs can be added to authorities that are linked and will be displayed in the linked data enrichment as part of publishing, on-the-fly conversion to BIBFRAME, and as part of the MARC APIs.</li> <li>The subfield containing the VIAF URI is configurable between \$\$1 and \$\$0.</li> </ul>	Using VIAF URIs in linked data enrichment and linking different name authorities to expand the connectivity of the records.

## Creating and Managing BIBFRAME Instances and Works with APIs – General Availability

What's New	Highlights	Impact
Libraries can manage Linked Open Data records alongside existing bibliographic records.	<ul style="list-style-type: none"> <li>Provides the ability to create and update BIBFRAME Works and Instances through Alma's APIs.</li> <li>Provides the ability to search Linked Open Data Instances in conjunction with all other records created in the different formats that exist in the catalog.</li> <li>Provides the ability to manage relationships between records, including linking works to multiple instances.</li> <li>Provides the ability to use Linked Open Data Instances in Acquisitions and Fulfillment workflows.</li> </ul>	Using Linked Open Data Instance records in all parts of Alma in end-to-end workflows is possible.

## Linked Open Data - Support Core Functionality – General Availability

What's New	Highlights	Impact
Libraries can manage their Linked Open Data records in Alma.	<ul style="list-style-type: none"> <li>Provides the ability to search for BIBFRAME Instance records in the staff search.</li> <li>These Instance records are available for use in Acquisitions and Fulfillment workflows.</li> <li>Provides the ability to publish BIBFRAME Instance records as MARC or as BIBFRAME records.</li> </ul>	Using Linked Open Data Instance records in all parts of Alma in end-to-end workflows is possible.

## Linked Open Data - Linking BIBFRAME to Authorities – General Availability

What's New	Highlights	Impact
Libraries can link BIBFRAME records to authorities in Alma.	<ul style="list-style-type: none"> <li>BIBFRAME records (works and instances) can be linked to LC names and LC subjects.</li> <li>BIBFRAME works and instances can be enriched and searchable by the authority records to which they are linked.</li> </ul>	Using Linked Open Data Instance records side by side along with other records.

## User Experience, Accessibility, and Infrastructure

### Support Multiple Tabs in Browser

What's New	Highlights	Impact
The librarian is able to sign in as the same user using multiple tabs in the same browser. The librarian is able to view and update across several records and pages and perform different workflow tasks in separate tabs within the same browser.	<ul style="list-style-type: none"> <li>The same user is able to sign in to Alma from more than one tab of the same browser.</li> <li>The user will be able to use different or similar pages with different records in multiple tabs in a single browser.</li> <li>Each tab will keep its own session.</li> <li>Supporting existing navigation.</li> </ul>	The Librarian is more productive and efficient, for example, by being able to open multiple records in parallel and copy information from one record to another.

### Manual Job Scheduling



#### NERS Request

What's New	Highlights	Impact
Permitted user is able to schedule manual jobs.	<ul style="list-style-type: none"> <li>Schedule a manual job to run on a predefined, delayed, or recurring schedule.</li> <li>Manage scheduled manual jobs.</li> </ul>	User is able to schedule in advance the running of manual jobs for a time that is most suitable.

## Real Time Notification for Jobs

What's New	Highlights	Impact
A new notification is provided to the user when a manual job is completed.	<ul style="list-style-type: none"> <li>A new notification icon is added to the action icons.</li> <li>An indication for a new notification is displayed on the new notification icon when a manual job has finished.</li> </ul>	The user can continue to work without the need to check the job history or receive an external email and will receive a notification when the job finishes.

## Color Theme Selection by User

What's New	Highlights	Impact
Allowing color theme configuration at the user level.	<ul style="list-style-type: none"> <li>Allowing the user to select the color theme in the user interface.</li> <li>Administrators can control permissions allowing the user to change the color theme according to the institution's policy.</li> </ul>	The user can select the appropriate color theme.

## Quick Focus on Sections, Fields, and Actions

What's New	Highlights	Impact
Ability to easily trigger, find, and focus on various sections, fields, or actions in the new layout.	Allow the user to easily write the name of the section, action, or field they want to trigger, find, and focus on.	Increase productivity and usability by allowing an easier and quicker way for users to find what they are looking for on a page.

# Alma Analytics

## Analytics Dictionary – Funds Expenditure Subject Area

What's New	Highlights	Impact
Analytics Online Help documentation is in an ongoing process of enrichment with the goal of clarifying the relation between data in Alma and Analytics and providing more information on the analytics data fields.	<ul style="list-style-type: none"> <li>The first subject area enriched was the Funds Expenditure.</li> <li>A column was added to the fields table describing the location and label in Alma.</li> </ul>	Clarity in understanding the data represented in Analytics eases the use and creation of Analytics reports, dashboards, and visualizations.

## National Reporting – ACRL/IPEDS Out-of-the-Box Report: Integration with LibInsight

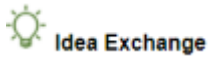
What's New	Highlights	Impact
<p>Support National Reporting by offering a powerful out-of-the-box ACRL/IPEDS report which will include the relevant data from LibInsight*.</p> <p>*This feature is relevant to LibInsight users only.</p>	<ul style="list-style-type: none"> <li>Integration of LibInsight dataset from API in Alma for easier reporting in one place.</li> <li>An out-of-the-box report supporting national reporting including accumulated data from LibInsights (Springshare).</li> </ul>	<p>Saving time by offering a ready-made out-of-the-box ACRL/IPEDS report template.</p> <p>One place for the majority of operational library analytics.</p>

## Collection Development: Books – Retention Insight Dashboard (Institutional Level)

What's New	Highlights	Impact
<p>An out-of-the-box insight* dashboard focusing on identifying last copies based on various criteria and support retention decisions was added. This dashboard is one of several dashboards designed to support Collection Development.</p> <p>*Insight Dashboards are built with Oracle Data Visualization.</p>	<ul style="list-style-type: none"> <li>Out of the Box Data Visualization Project.</li> <li>Useful insights on the institution's physical inventory, their retention status, and more to support decisions regarding retention.</li> </ul>	<p>Enables institutions to identify items for retention taking into account various factors and enabling data driven decisions regarding the complex area of collection development.</p>

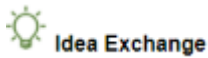
## Collection Development: Books – Deselection Insight Dashboard (Institutional Level)

What's New	Highlights	Impact
<p>An out-of-the-box insight* dashboard focusing on identifying last copies based on various criteria and support deselection ("weeding") was added. This dashboard is one of several dashboards designed to support Collection Development.</p> <p>*Insight Dashboards are built with Oracle Data Visualization.</p>	<ul style="list-style-type: none"> <li>Out of the Box Data Visualization Project.</li> <li>Useful insights to help institutions identify potential physical inventory for weeding and space reclamation.</li> </ul>	<p>Enables institutions to identify items for deselection taking into account various factors and enabling data driven decisions regarding the complex area of collection development.</p>



## More Granular Design Analytics Roles

What's New	Highlights	Impact
In addition to the standard Analytics Designer role, additional designer roles were added with limited scopes based on the main areas of Alma functionality.	<ul style="list-style-type: none"> <li>Restricted design roles enabling limited subject areas based on the type of role selected.</li> <li>Design role type can be configured by administration.</li> </ul>	Enabling restricted Analytics design roles for enhancing privacy and data control.



## Bibliographic Records – Additional 20 Fields as Local Parameters

What's New	Highlights	Impact
An addition of 20 additional bibliographic fields can now be reported in Alma Analytics for a total of 30 fields .	<ul style="list-style-type: none"> <li>Up to 30 fields can be added as local parameters under the Bibliographic Details shared dimension.</li> <li>The labels can be displayed in Analytics via configuration for more clarity.</li> </ul>	More customization and specific needs impact the data represented in Analytics for in-depth reporting.

## Consortia

### Control Network Zone Imports

What's New	Highlights	Impact
Importing records from a member to the NZ was allowed for all consortia members. The consortia central office Admin can now control which consortia members can import records to the Network Zone.	The central office can configure which Institution Zone can import bibliographic/ authority records to the Network Zone.	Enhanced control is granted to the central office, enabling them to maintain higher quality standards for the central catalog. This increased control facilitate improved oversight and management, ensuring the catalog met the desired quality criteria set by the central office.

## Digital Resource Management

