

Alma Roadmap – Completed – 2024 H2

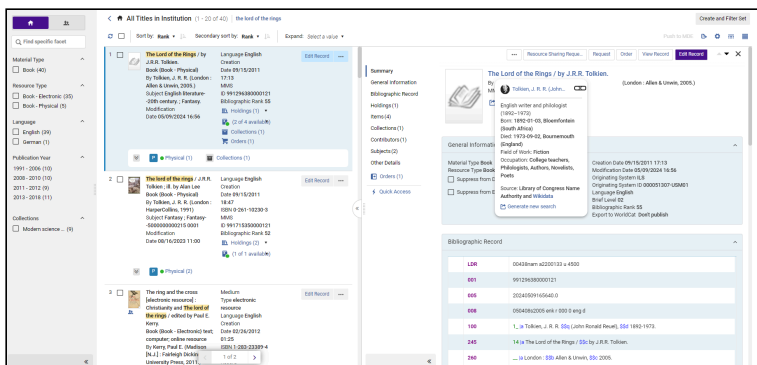
Metadata Management

Titles Staff Search – Enhanced UX General Availability



Repository Search Enhanced UX

What's New	Highlights	Impact
<p>The Titles Staff Searches are updated and redesigned for better usability, performance, productivity, and overall user experience.</p>	<ul style="list-style-type: none"> A new “side by side” presentation reflects general information regarding the title and its inventory. A new table view for easy scanning of the search results. Actionable sections within the right panel enables users to edit specific information associated with the titles' inventory without leaving the search results. 	<p>Simpler workflows due to new user interface, introducing efficient navigation:</p> <ul style="list-style-type: none"> Reduced number of steps needed for common actions MARC simple view upfront New Item section Actionable inventory information <p>Available for opt-in by all users.</p>



The new titles search split view, including details on the bibliographic record, creator and inventory, and the ability to perform actions directly from search

Title	Creator / Imprint	MMS ID	Physical Availability	Electronic Availability	Digital Availability	Badges and Icons
The Lord of the Rings / by J.R.R. Tolkien.	By Tolkien, J. R. R. (London: Allen & Unwin, 2005.)	99129630000121	Physical version at General, Main Library, 812. (Items 1 until 3)			Holdings (1) Items (2 of 4 available) Collections (1) Subjects (1)
The lord of the rings / J.R.R. Tolkien. - II. by Alan Lee.	By Tolkien, J. R. R. (London: HarperCollins, 1999)	99171535000121	Physical version temporarily at Audio-Visual, Music Library (1 item out of 1 available) Physic...			Holdings (2) Items (1 of 1 available)
The ring and the cross [electronic resource] : Christianity and the lord of the rings / edited by Paul...	By Kerry, Paul E. (Madison [N.J.] : Fairleigh Dickinson University Press, 2011.)	99114901500121		Electronic version at Ebook Central; Ebook Central Academic Complete International Editon...		Electronic Portfol... (1) Collections (1)
The international relations of Middle-earth [electronic resource] : learning from the lo...	By Ruane, Adigal E. (Ann Arbor: University of Michigan Press, 2012.)	9912139500121		Electronic version at Ebook Central; Ebook Central Academic Complete International Editon...		Electronic Portfol... (1) Collections (1)
The international relations of Middle-earth : learning from the lord of the ring / Adigal E...	By Ruane, Adigal E. (Ann Arbor: University of Michigan Press, 2012.)	99139120000121	Physical version at General, Main Library, .D27342 .R63 2012 (1 item out of 1 available)			Holdings (1) Items (1 of 1 available)
Proddo's journey : discovering the hidden meaning of The Lord of the Rings / Joseph Pearce.	By Pearce, Joseph (Charlotte, North Carolina: Saint Benedict Press, 2014)	9913548000121		Electronic version at Ebook Central; Ebook Central Academic Complete International Editon...		Electronic Portfol... (1) Collections (1)
The Lord of the Rings, 1954-2004 [electronic resource]	By Bakula, Richard E. (Milwaukee, Wis. : Marquette University Press, c2006.)	99113995700121		Electronic version at ABC-CLIO, ABC-CLIO eBooks Full Text Available; 53713164000121...		Electronic Portfol... (1) Collections (1)
Unsung heroes of the Lord of the Rings: from the page to the screen [electronic resource]...	By Porter, Lynette H. (Westport, Conn. : Praeger Publishers, c2005.)	99177910000121		Electronic version at ABC-CLIO, ABC-CLIO eBooks Full Text Available; 53713164000121...		Electronic Portfol... (2) Collections (1)
The fellowship of the ring : being the first part of the lord of the rings / by J.R.R. Tolkien.	By Tolkien, J. R. R. (Boston: Houghton Mifflin Harcourt, [2012])	99184910000121	Physical version at General, Physics Library, PH0297.D22.L4 general; www.mh.com/easytable...			Holdings (2) Items (1 of 1 available)

The new titles search table view

Open Authority Headings Menu Action in Metadata Editor



CERV Enhancement (ID #8819)

What's New	Highlights	Impact
When working in the Metadata Editor, catalogers are able to open the authority headings lookup using a menu action (in addition to the F3 keyboard shortcut).	<ul style="list-style-type: none"> Metadata Editor has a menu action in the "Editing Actions" menu that opens the authority headings lookup, similar to the F3 keyboard shortcut. Catalogers are able to select whether to use the keyboard or menu for linking bibliographic headings to authority records. 	Catalogers are able to efficiently work on a wider selection of devices, including ones (such as tablets) that don't have function keys.

Support Preferred Term Correction Flipping Headings that Change Tag Number



Idea Exchange

What's New	Highlights	Impact
Linking and preferred term correction handle cases where the bibliographic heading is linked to an authority via a cross-reference, but the preferred and non-preferred terms are in different fields (for example, the preferred term is in authority field 130, and cross-reference in authority is in 410).	<ul style="list-style-type: none"> PTC corrects the heading to the preferred term when the preferred and non-preferred terms are in different fields. PTC updates the field number of the bibliographic 	Better automated authority updates, keeping the library's catalog up to date, and reducing the need for manual corrections.

What's New	Highlights	Impact
	<p>heading in the bibliographic record to match the linked authority record's preferred term.</p> <ul style="list-style-type: none"> The library is able to review these changes in the Authority Control Task List. 	

Electronic Resource Management

Improved Auto-Holdings Job Report



Idea Exchange

What's New	Highlights	Impact
<p>The auto-holdings job report was improved, including better report navigation and additional information.</p>	<ul style="list-style-type: none"> Information about deleted portfolios and bibliographic records. Number of "multi-matches" and "MMS not found". 	<p>The improved report provides better navigation and additional fields, making it easier and more efficient for customers to understand which data was processed.</p>

Network Zone Managed Electronic Resources - Library/Campus Level



Idea Exchange

What's New	Highlights	Impact
<p>Prior to this enhancement, the central office operator could manage electronic resources in the Network Zone and make them available for the entire network OR member(s) Institution Zone(s). With this feature, the central office operator can make electronic resources available for specific libraries/campuses within the member (IZ) institution.</p>	<ul style="list-style-type: none"> Configure Network Zone 'Inventory management' groups based on member (IZ) institutions' campuses/libraries. Activate Network Zone electronic resources and define "Available for" the created group. Enable Link Resolver access to electronic resources managed in the Network Zone for Institution Zone library/campus. 	<p>The central office can work more efficiently by centrally managing electronic resources on behalf of libraries/campuses hosted in member Institution Zones.</p>

What's New	Highlights	Impact

Electronic Titles Staff Search - Early Access Enhanced UX



[Repository Search](#)
[Enhanced UX](#)

What's New	Highlights	Impact
<p>The Electronic Titles Staff Search was updated and redesigned for better usability, performance, productivity, and overall user experience.</p>	<ul style="list-style-type: none"> • A new “side by side” presentation saves users from having to access a designated page to review entity details. • Ability to use multi-value selection facets. • Ability to perform cross-page bulk operations. • Display more information. • Quickly perform actions on titles. 	<p>Workflow simplification is achieved by an enhanced user experience, facilitating a smoother user-friendly layout and navigation options.</p> <p>The new layout enables easy switching between ongoing tasks in your main workflow and any peripheral tasks, enabling efficient work with electronic resources.</p>

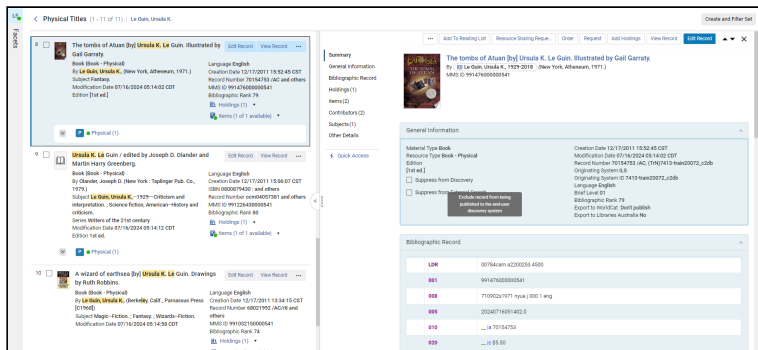
Physical Resource Management

Physical Title Staff Search – Enhanced UX General Availability



[Repository Search](#)
[Enhanced UX](#)

What's New	Highlights	Impact
<p>The Physical Title Search was updated and redesigned for better usability, performance, productivity, and overall user experience.</p>	<ul style="list-style-type: none"> • Ability to use multi-value selection facets. • Ability to perform cross-page bulk operations. • Display more information. • Quickly perform actions on titles. 	<p>The user can quickly find titles and perform actions as needed.</p>



The new Physical Titles search, including details on the bibliographic record, creator and inventory, and the ability to perform actions directly from search

Enhanced Handling of Bib Records When Holdings are Deleted

What's New	Highlights	Impact
<p>Holdings deletion workflows now allow operators to handle bibliographic records in case there's no other inventory.</p>	<p>When deleting a holdings record from the holdings list or search, the operator can decide if the bibliographic record should be suppressed or deleted if it has no other inventory.</p>	<p>The user can quickly and efficiently manage the catalog when handling physical inventory.</p>

Efficiently Create Multiple Items



Idea Exchange

What's New	Highlights	Impact
<p>Create multiple similar items for the same holdings in one go.</p>	<p>When adding similar items to a holding, it is now possible to add them together and not individually.</p>	<p>The user can quickly and efficiently add similar items, minimizing manual processing.</p>

Acquisitions

Open Access - Capture & Record

What's New	Highlights	Impact
An increasing number of publisher agreements offer opportunities for open-access publication. Additionally, some institutions designate libraries to oversee funds for covering article and book processing charges related to open access. Alma was enhanced to capture and record open access activities, including transformative agreements, article processing charges, and more.	<ul style="list-style-type: none">• Well defined workflow for managing APC.• Management of transformative agreements.	Streamlined APC management and transformative agreement handling to simplify administrative tasks, save time and ensure compliance with open access policies, leading to a more efficient workflow.

Additional Fields in the Update PO Lines Information Job



Idea Exchange

What's New	Highlights	Impact
The "Update PO lines information" job was re-designed, enabling better form navigation and providing additional fields.	<ul style="list-style-type: none">• Nineteen new fields were added to the "Update PO lines information" job in Alma, including notes, labels, subscription, renewal fields, and more.• The job form was divided to match the PO lines sections.	The redesigned "Update PO Lines Information" job provides better form navigation and additional fields, making it easier and more efficient for customers to update purchase order lines, ultimately improving their workflow and data accuracy.

Fulfillment and Resource Sharing

Manage Patron Services Screen – Opt-In to Enhanced UX

What's New	Highlights	Impact
New Patron Services User Interface	<p>The interface was redesigned to leverage new layout capabilities and provide a fresh and improved user experience.</p> <p>In this phase of the UI rollout, the new UI will not be activated by</p>	Quicker and more effective work at the circulation desk, using a cleaner and improved personalized Patron Services page.

What's New	Highlights	Impact
	default, but it will be possible for institutions and individual users to activate it if they choose to do so.	

Notification Letter When Hold Shelf Expiration Date is Updated



Idea Exchange

What's New	Highlights	Impact
It is possible to configure the system to send a new email to the patron when hold shelf renewal takes place.	Updating the expiration date for items on the hold shelf enables resending a notification letter with the new expiration date.	Patrons will be better updated about the status of their hold shelf items without requiring manual library staff work.

Automatic Renew Notice



Idea Exchange

What's New	Highlights	Impact
Notices are automatically sent to patrons when their loans are automatically renewed.	Patrons receive a notification when a loan is renewed by the system.	This new option makes it easier for patrons to track the status of their loans.

Linked Open Data

Cataloging via Sinopia - General Availability

What's New	Highlights	Impact
The cataloger is able to create BIBFRAME records in Sinopia and add them to the Alma catalog.	<ul style="list-style-type: none"> The cataloger is able to create a Linked Open Data record using Sinopia. 	The cataloger can perform catalog maintenance tasks more accurately with less effort, while using BIBFRAME.

What's New	Highlights	Impact
	<ul style="list-style-type: none"> The cataloger can enrich their records using Linked Open Data sources, such as the Library of Congress, Wikidata, and Getty. This extends Alma's support for multi-formats. 	

Info Cards in All Titles Staff Search

What's New	Highlights	Impact
Librarians can see info cards with additional information about contributors in All Titles staff search results.	The All Titles staff search presents short info cards regarding contributors based on authority data and Wikidata.	The staff and cataloger enjoy a linked open data experience while quickly accessing external information from within Alma.

Info Cards in Metadata Editor

What's New	Highlights	Impact
Catalogers can see contributor pages in the metadata editor with additional information about contributors.	While linking authorities in the Metadata Editor, Alma presents additional information from external resources other than the authorities to assist with the linking.	The staff and cataloger enjoy a linked data experience while quickly accessing external information from within Alma.

User Experience, Accessibility, and Infrastructure

Support Microsoft Graph API For Sending Emails

What's New	Highlights	Impact
Sending emails from Alma can be done by calling Microsoft Graph APIs. The institution is able to configure the Mail Handling integration profile to send emails using MS Graph API.	A new option of 'Send using MS Graph API' was added to the Mail-Handling integration profile.	Since Microsoft deprecated Basic Auth for SMTP, we provide support for sending emails by calling Microsoft Graph APIs, which allows for continued email distribution with no impact.

Menu Simplification: Support Similar Terms in Hebrew

What's New	Highlights	Impact
Support similar terms	Search-matching capabilities for non-identical	The librarian can now find relevant entries in the menu based on a standard term in the same language as the interface language.

What's New	Highlights	Impact
in additional languages.	<p>terms in additional languages:</p> <ul style="list-style-type: none"> • Hebrew <p>Note: The additional languages will be coordinated with the relevant Alma user community.</p>	

Bulk Action Results Indication

What's New	Highlights	Impact
A new and clearer indication in the result status of bulk actions performed by the user.	<ul style="list-style-type: none"> • A Success/Failure/Warning indication appears next to every affected record. • The user has the ability to filter the list of records based on the action's result status. 	An efficient workflow for error handling.

Sets – Enhanced Functionality

What's New	Highlights	Impact
Simplified the set process to be quicker and more straightforward, including quick access capabilities.	<ul style="list-style-type: none"> • Intuitive and straightforward set creation. • Quick and intuitive utilization of sets for various jobs. • Quick access to commonly used sets. • Easier set management. 	Simpler workflows with fewer steps and increased efficiency.

Alma Analytics

Enhanced User Experience: Admin Global "Pin to Menu" and Sharing Objects with Roles – Role Selection Component

What's New	Highlights	Impact
<p>When roles are selected for an analytics object, sharing a new object now allows for a more orderly and categorized workflow.</p>	<ul style="list-style-type: none"> Administrators can pin globally or have users pin for themselves. Once pinned, each user can unpin if they want. Designated component for role selection based on categories and an improved selection interface. 	<p>Additional support capabilities added to Analytics administrators for easy and flexible analytics object sharing.</p> <p>More information allowing more control and a clearer workflow for selecting roles.</p>

More Granular Design Analytics Roles – Users and Administrative Data



Idea Exchange

What's New	Highlights	Impact
<p>Enhanced granularity has been introduced to the new Analytics Designer roles, allowing for the separation of users and administrative data into distinct roles.</p>	<ul style="list-style-type: none"> Restricted design roles enabling limited subject areas based on the type of role selected. Design role type can now be configured by administrators. Users and administrative data separated as separate additional roles. 	<p>This enhancement empowers more precise control over private data.</p>

Enhanced User Experience: Analytics Notifications

What's New	Highlights	Impact
<p>A new feature was added to the library platform, notifying users when a new analytics object was shared with them or pinned to their menu by their Analytics administrator.</p>	<ul style="list-style-type: none"> Simple and unobtrusive notifications to notify users when they have a new analytics object in their analytics object list or a new link in the analytics menu. 	<p>Enable seamless and efficient communication and collaboration between Analytics administrators and their colleagues.</p>

Consortia

Central Configuration Dashboard for All Distributable Code and Mapping Tables & Rules

What's New	Highlights	Impact
<p>Today, the central office operator needs to log in to the individual Institution Zone members' environment to configure some of the policies that are determined at a central level.</p> <p>The consortia central office will have more centralized operational policies.</p>	<ul style="list-style-type: none"> The central office will be able to configure more policies in the Network Zone and apply them to selected members. All distributable code and mapping tables + rules will be manageable in a one-stop-shop. 	<p>The central office will be able to work more efficiently, reducing time spent applying central policies.</p>

Authority Control Task List - Manage Network Zone Linked BIB records

What's New	Highlights	Impact
<p>Network members will be able to take part in managing the Network Zone Authority Control workflow from within the member's Institution Zone Authority Control Task List.</p>	<ul style="list-style-type: none"> Network members will be able to view the Network Zone Authority Control Task List from within the Institution Zone. Network members will be able to perform actions on Authority Control List entries. 	<p>Network members can collaborate and jointly manage authority control activity.</p> <p>It will enhance the work of catalogers when working as a group and enable easier and more productive processing and corrections of their shared bibliographic data.</p>

Network Zone Managed Electronic Resources - Library/Campus Level



Idea Exchange

What's New	Highlights	Impact
<p>Today, the central office operator can manage electronic resources in the Network Zone and make these resources available for the entire network OR for member(s) Institution Zone (s).</p> <p>With this feature, the central office operator can make electronic resources available for specific groups of libraries/campuses within the member (IZ) institution.</p>	<ul style="list-style-type: none"> Configure Network Zone Available For groups based on member (IZ) institutions library/campus. Activate Network Zone electronic resources based on member (IZ) institutions library/campus. Enable Link Resolver access to electronic resources managed in the Network Zone for Institution Zone library/campus. 	<p>The central office will be able to work more efficiently by centrally managing electronic resources on behalf of libraries/campuses hosted in member Institution Zones.</p>

