

## Alma Roadmap – Completed – 2025 H2

### Metadata and Linked Open Data



#### Bulk Bibliographic Records Enrichment with Automated Copy-Cataloging and AI Title Matching - Early Access

What's New	Highlights	Impact
<p>It is possible to enrich a set of bibliographic records by copy-cataloging from the library's regular search profiles, using automated results filtering and AI title matching.</p>	<ul style="list-style-type: none"> <li>• Manual job to enrich a set of records using copy-cataloging.</li> <li>• AI title matching for resources that can't be matched using identifiers.</li> <li>• Easily review and approve / reject copy-cataloging suggestions.</li> </ul>	<p>Reduce the time and effort a cataloger spends on copy-cataloging to enrich bibliographic records.</p>



#### Linked Open Data Editor - Early Access

[Linked Open Data](#) theme

What's New	Highlights	Impact
<p>Librarians are able to create BIBFRAME records (work and instance) in a new editor.</p>	<ul style="list-style-type: none"> <li>• A fully integrated linked open data editor as part of Alma and Alma workflows.</li> <li>• Creation of templates based on the ontology.</li> <li>• Metadata creation in a form-based interface.</li> </ul>	<p>Libraries can create BIBFRAME Works and Instances as part of the metadata creation workflow inside Alma.</p>

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## Relative Date Searches in Repository Search



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



### Idea Exchange

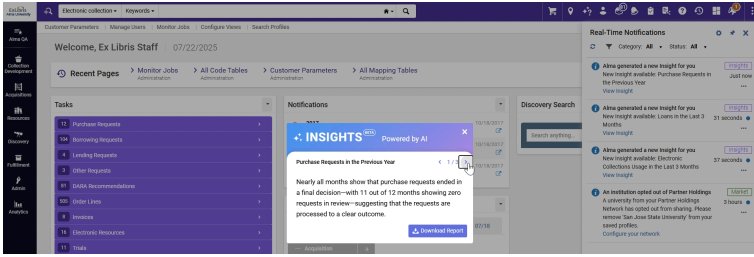
What's New	Highlights	Impact
<p>Date indexes in the repository search, including the physical and electronic inventory searches, support searching by relative date.</p>	<ul style="list-style-type: none"> <li>• Ability to search by number of days before current date.</li> <li>• Ability to search by number of days after current date.</li> </ul>	<p>The user is able to perform searches and save logical sets such as "Received X days ago", "Available X days ago", etc.</p>

## Resource Management



### Alma AI-Powered Insights

What's New	Highlights	Impact
<p>This new AI-powered feature is designed to transform your analytics data into clear, accessible, and meaningful insights—delivered directly within Alma: It periodically highlights relevant trends and information across different areas of the library, helping all team members stay informed and engaged without the need to run complex Analytics reports or sift through raw data.</p>	<p>Alma began delivering automated insights based on pre-defined Analytics reports. These insights are generated periodically and shared as notifications with users in relevant roles. Users have the option to download the underlying report data for further review.</p>	<p>Users are receiving key insights directly, reducing the need to generate reports for routine monitoring and helping them quickly understand key aspects of library activity.</p>



For more information, see [Artificial Intelligence in Alma](#)

## E-Resource Overview: Out-of-the-box Insight Dashboard

What's New	Highlights	Impact
<p>An out-of-the-box insight dashboard providing an overview of E-Resource activity.</p>	<ul style="list-style-type: none"> <li>• Out-of-the-box Data Visualization Project.</li> <li>• Insights on the availability of electronic resources and the catalog's growth over time.</li> <li>• Much more...</li> </ul>	<p>Giving e-resource librarians a clear view of resource activity to help them track performance against KPIs and work more efficiently..</p>

## Relative Date Searches in Repository Search



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



**Idea Exchange**

What's New	Highlights	Impact
<p>Date indexes in the repository search, including the physical and electronic inventory searches, now support searching by relative dates.</p>	<ul style="list-style-type: none"> <li>• Ability to perform searches such as "Received X days ago", "Activated X days ago", etc.</li> <li>• Ability to create logical sets using relative dates.</li> </ul>	<p>Using relative dates, staff users are able to create logical sets and use them efficiently.</p>

## Automatic Upload of Electronic Holdings - Oxford University Press



## Idea Exchange

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

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## Acquisitions

### "Withdraw" and "Open Predicted Items" Actions in Receiving Workbench



#### Idea Exchange

What's New	Highlights	Impact
Additional actions were added to the 'Received Items List' page of the receiving workbench.	<ul style="list-style-type: none"><li>• "Withdraw" of specific items.</li><li>• Open Predicted Items.</li></ul>	Staff users are able to perform item-related actions during receiving operations, eliminating the need to search for the title or navigate to the items list.

## Bulk Management of PO lines



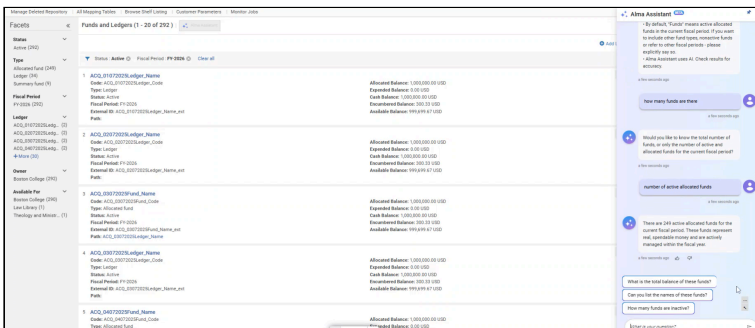
#### Idea Exchange

What's New	Highlights	Impact
Additional improvements were incorporated into the unified PO lines interface to facilitate more effective bulk management of multiple PO lines on a larger scale.	<ul style="list-style-type: none"><li>• Ability to exclude facets.</li><li>• Ability to run a job on selected PO lines directly from the list.</li><li>• And more</li></ul>	Improve usability and efficiency by enabling staff users to exclude facets and execute jobs directly from the PO lines list- streamlining workflows and boosting overall productivity.



# Alma AI Assistant for Funds and Ledgers - Early Access

What's New	Highlights	Impact
<p>An AI-powered assistant in Alma that answers fund and ledger questions using natural language. It provides real-time, contextual responses without the need to navigate menus or run reports, helping staff work more efficiently and make faster financial decisions.</p>	<ul style="list-style-type: none"> <li>• Conversational interface that allows users to ask questions in natural language.</li> <li>• Smart suggestions for follow-up questions to expand the conversation.</li> <li>• Graphical representation of responses for clearer insights.</li> <li>• Option to provide feedback on the quality or usefulness of responses.</li> <li>• Seamless navigation from the assistant to relevant areas in the Alma interface.</li> </ul>	<p>The Alma AI Assistant simplifies access to financial data, helping staff work more efficiently and make informed decisions faster.</p> <p>It lowers the learning curve for new users and enables experienced staff to manage complex queries with greater ease.</p>



For more information, see [Artificial Intelligence in Alma](#)

## COUNTER Usage: Additional Fields and Better Reporting



Idea Exchange

What's New	Highlights	Impact
Additional improvements were incorporated into the COUNTER usage workflows to facilitate more effective harvesting of usage data.	<ul style="list-style-type: none"> <li>• Display of "Parent" fields in Analytics.</li> <li>• Option to request additional non-mandatory attributes during SUSHI harvesting (e.g. Access Type).</li> <li>• Improve job reporting in case of errors (e.g. invalid header structure).</li> </ul>	Allowing institutions to compare and analyze usage data effectively, supporting data-driven decision making.

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## Fulfillment and Resource Sharing

### Waive Fines/Fees in Bulk by Set



#### CERV Enhancement (ID #8734)

What's New	Highlights	Impact
Waiving fines based on additional criteria or based on an input file.	It is possible to waive fines based on additional criteria, such as a Users set or a date range. In addition, it is possible to waive a known set of fees that are listed in an Analytics report.	Enhanced flexibility in processing fees that have been identified as waived fees.

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### Additional Library Controlled Request ID



#### CERV Enhancement (ID #8777)

What's New	Highlights	Impact
An additional ID can be added to requests. The institution can control different attributes of the ID.	A new request ID is assignable to requests. The institution can set the maximum number after which the ID will reset, as well as a prefix and a padding option for the ID.	Better control over the IDs that are used to sort request lists.

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## User Management: Advanced User Search by Role and Scope

What's New	Highlights	Impact
<p>The Advanced Search functionality includes searching for users by their roles and scopes.</p>	<ul style="list-style-type: none"> <li>• New Search Indexes: The Advanced Search menu includes 'User Role' and 'Scope' as searchable indexes.</li> <li>• Flexible Conditions: Supports conditions such as Equal, Not-Equal, Is Empty, and Is Not Empty for precise filtering.</li> </ul>	<p>This enhancement empowers libraries to locate users based on specific roles and scopes, improving user management and operational efficiency.</p>

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## User Management: Purge Users Based on User Sets



### Idea Exchange

What's New	Highlights	Impact
<p>Institutions can perform user purges based on predefined Users sets. This enhancement allows for greater flexibility and precision in user management by enabling bulk deletions using standard purge validations and the configured delete user policy.</p>	<ul style="list-style-type: none"> <li>• Enables purging of user records based on selected user sets.</li> <li>• Utilizes standard purge validations to ensure compliance with institutional policies.</li> <li>• Provides enhanced flexibility compared to the existing purge job, which is limited to user record types and user groups.</li> </ul>	<p>This feature empowers institutions to streamline their user management processes by providing more granular control over user record deletions. It helps optimize system performance and maintain data accuracy by allowing targeted purging of user records according to specific criteria.</p>

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## User Management: Scheduled Purge User Records Job



### Idea Exchange

What's New	Highlights	Impact
The Purge User Records job is enhanced to include scheduling and run automatically, eliminating the need for manual activation.	<ul style="list-style-type: none"> <li>• New Scheduling Section: A new 'Schedule' section to the Purge User Records job interface.</li> <li>• Automated Execution: Staff can set up automatic job runs without requiring manual intervention.</li> </ul>	This enhancement streamlines the process of purging user records by enabling automated scheduling, reducing manual workload, and ensuring timely job execution.

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## User Experience, Accessibility, and Infrastructure

### Main Menu Simplification: Adding Simple Menu View Mode

What's New	Highlights	Impact
In addition to the existing main menu, the librarian now have the option to enable a simplified menu view mode and is able to navigate to entries commonly accessed, and add additional entries by marking it as favorites.	<ul style="list-style-type: none"> <li>• A new simplified menu is implemented by default with the most commonly used entries.</li> <li>• Favorites are automatically added to the simplified menu view.</li> <li>• An easy access to the full menu when needed.</li> </ul>	The menu is customizable according to your needs, allowing quick access and improved usability focusing merely on the menu entries you actually need, based on your selection.

### Menu Search Enhancement: Support 'Similar Terms' Functionality in German Language

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



## LibOW: Alma API to trigger LibOW workflow

What's New	Highlights	Impact
<p>Invoke any Library Open Workflow directly via a new Alma REST API endpoint. This enhancement extends LibOW's integration capabilities by enabling external systems to programmatically trigger complex automation sequences in Alma.</p>	<ul style="list-style-type: none"> <li>Asynchronous Mode: Background workflows execution.</li> <li>Standardized Response: Receives an indication if the workflow had been triggered or not.</li> <li>Error Handling: Detailed error codes and messages returned when invocation fails.</li> </ul>	<p>This feature empowers customers to seamlessly integrate LibOW workflows into third party applications and ETL pipelines, reducing manual steps and accelerating end to end automation across library systems.</p>

## Alma Analytics

### New Consortial Analytics Interface

What's New	Highlights	Impact
<p>A new Analytics area has been introduced for consortia members to collaborate and manage shared print.</p>	<ul style="list-style-type: none"> <li>Retention and de-selection reports</li> <li>Benchmark with other member institutions for collection expansion</li> </ul>	<p>Enables informed decisions, which considers data from other libraries in the consortium.</p>

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## New Management Tags for Titles Reports



### Idea Exchange

What's New	Highlights	Impact
<p>A new capability to generate reports in the Titles Subject area based on the management tags -</p> <ul style="list-style-type: none"> <li>• Export to WorldCat</li> <li>• Export to Libraries Australia</li> </ul>	Allowing users to verify which records were marked for export and identify missing or failed exports.	Enabling a broader scope of reporting on Titles

# Consortia

## Patron Blocks Across a Network



### Idea Exchange

What's New	Highlights	Impact
Fulfillment Network members can share local blocks with the entire network.	Patron Blocks is copied not only from the source institution but also from the target institutions.	Libraries are able to better consolidate their fulfillment services across the network.

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## Display Logic Rules - Shared Network Zone choices in Institution Zone



### Idea Exchange

What's New	Highlights	Impact
Using the "Display Logic Rules", Network members are able to create rules for the Link Resolver electronic services for electronic collections manage in the Network Zone or the institution.	<ul style="list-style-type: none"><li>• Network Zone operator are able to manage a member Display Logic Rules configuration and combine e-resources coming from both Network and Institution zones from the Central Configuration Dashboard.</li><li>• Member administrator are able to manage Display Logic Rules configuration by combining e-resources coming from both Network and Institution zones.</li></ul>	This enhancement improves efficiency for Consortia by enabling combination of electronic resources activated at both levels (locally and centrally) for the Display Logic Rules.

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## Central Configuration Dashboard - New added services and options

What's New	Highlights	Impact
We continued our ongoing development of the new Central Configuration Dashboard by adding new services and options to the Network Zone operators.  The consortia central office has more centralized operational policies.	The following options and services were added to the new Central Configuration Dashboard: <ul style="list-style-type: none"><li>• Management of Share Online Services Order configuration from the Central Configuration Dashboard.</li><li>• View in the Network - option for the Member Administrator to view the</li></ul>	The central office is able to work more efficiently, reducing time spent applying central policies.

What's New	Highlights	Impact
	<p>network configuration from its member institution.</p> <ul style="list-style-type: none"><li>• Get Value from Network - option for the Member Administrator to get the network configuration from its member institution.</li></ul>	

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