

## Alma Roadmap – Completed – 2021 H1

### Metadata Management

#### New Metadata Editor enhanced UX - records management

What's New	Highlights	Impact
<p>As part of the new Metadata Editor project, the records editing capabilities and workflows were redesigned. The catalogers will be able to navigate better, work with improved workflows, and edit modes.</p>	<ul style="list-style-type: none"> <li>• Easy to use navigation panel with relevant actions</li> <li>• Adaptive menu according to record type and context</li> <li>• Consistent split screen behavior with improved workflows</li> <li>• Improved inline editing</li> <li>• Quick creation of new records from favorite templates</li> </ul>	<p>Catalogers will be able to perform cataloging tasks more efficiently and effectively</p>

#### New Metadata Editor enhanced UX - templates management

What's New	Highlights	Impact
<p>As part of the new Metadata Editor project, the template management capabilities and workflows were redesigned. The catalogers will be able to navigate better, work with improved workflows, and edit modes.</p>	<ul style="list-style-type: none"> <li>• Easy to use navigation panel showing all templates with all the relevant actions</li> <li>• Main menu organized by record type and aligned with the navigation panel</li> <li>• Improved workflows for managing templates and applying them to records</li> </ul>	<p>Catalogers will be able to manage cataloging templates more efficiently and effectively</p>

## New Metadata Editor enhanced UX - rules management

What's New	Highlights	Impact
<p>As part of the new Metadata Editor project, the management capabilities and workflows were redesigned. The catalogers will be able to navigate better, work with improved workflows, and edit modes.</p>	<ul style="list-style-type: none"> <li>• Easy to use navigation panel showing all rules with all the relevant actions</li> <li>• Main menu organized by rule type and aligned with the navigation panel</li> <li>• Improved workflows for managing rules and testing them with records</li> </ul>	<p>The cataloger will be able to manage catalog rules more efficiently</p>

## Refine Advance Search (NERS 2020 #6795)

What's New	Highlights	Impact
<p>The repository operator will be able to perform an improved advanced search for titles with high accuracy, using specific metadata fields and subfields. It will allow for the use of criteria beyond the predefined indexes.</p>	<ul style="list-style-type: none"> <li>• Ability to perform search refinement on given search results using metadata fields and subfields base on indication rules</li> </ul>	<p>The staff user will be able to better focus their work on relevant titles, which will make their workflow more efficient</p>

## Electronic Resource Management

### CZ Update Task List Improvements

What's New	Highlights	Impact
<p>Additional details, facets and better navigation between electronic resource management entities and relevant Community Zone updates</p>	<p>The staff user will be able to navigate from the electronic resource editor to the relevant entries in the Community Zone Task list and see the specific electronic collection/ portfolio Community Zone changes</p>	<p>Better transparency about Community Zone ongoing updates that might affect the management of electronic resources</p>

## Digital

## Unlimited Copyright Declarations

What's New	Highlights	Impact
Support unlimited customized and commonly used copyright declarations	<ul style="list-style-type: none"> <li>• OTB for all following translatable licenses:               <ul style="list-style-type: none"> <li>◦ Creative Commons</li> <li>◦ Rights statement</li> <li>◦ U.S. Code</li> <li>◦ Unlimited customizable copyright templates</li> </ul> </li> </ul>	Advanced and unlimited possibilities for managing licensing terms of digital content

## Physical Resource Management

### Metadata Import – Additional Physical Inventory Fields

What's New	Highlights	Impact
New fields and capabilities will be added to the Metadata Import Profile regarding the import of physical inventory	<ul style="list-style-type: none"> <li>• Ability to import additional item general information subfields such as "Copy ID" and "Replacement cost"</li> <li>• Ability to import item temporary location and due backdate</li> <li>• Ability to import inventory information such as number, date, and price</li> </ul>	Staff users dealing with the import of records and the creation of physical inventory will be able to import more information on items thus saving manual updates

## Call Number Sequence Generation

What's New	Highlights	Impact
New capabilities will be added for the automatic generation of call numbers at the holding and item level, including support for prefix, suffix and the dynamic creation of new sequences	<ul style="list-style-type: none"> <li>• The next unused call number will be generated at the item and holding level</li> <li>• It will be possible to define a Prefix and Suffix for the call number</li> <li>• New call number sequences will be added dynamically to the accession number configuration table</li> <li>• An improved User Experience management of sequences</li> </ul>	Easily generate call numbers as part of resource management daily operations

# Acquisitions

## Improved Acquisitions Indexing and Faceting

What's New	Highlights	Impact
Acquisition searching was enhanced with new infrastructure	<ul style="list-style-type: none"><li>• infrastructure improvements (SOLR) supports more complex queries and speed up response time and will allow future development of<ul style="list-style-type: none"><li>◦ New facet options</li><li>◦ New PO Line attributes in the advanced search</li></ul></li></ul>	Improved overall experience and efficiencies in acquisition workflows

## Move Purchase Orders from One vendor to Another – Improvements

What's New	Highlights	Impact
Move bulk purchase orders from one vendor to another and automatically send the newly created orders to the new vendor  Read more about <a href="#">Changing Vendors in PO Lines and POs</a>	<ul style="list-style-type: none"><li>• The enhanced “Change vendor in order” function allows users to determine whether to send the newly created order to the new vendor or not.</li><li>• For continuous purchase order lines Alma includes information about the last received item and pass it to the new vendor in order to maintain receiving continuity.</li></ul>	Efficiently handle Purchase Order line vendor changes when this is required.

## Replace Resource in Electronic PO Lines

What's New	Highlights	Impact
Users are able to replace an electronic resource associated with a PO line, with another electronic resource  Read more about <a href="#">Replacing Resource Associated With An Electronic PO Line</a>	<ul style="list-style-type: none"><li>• This functionality is efficient in cases where a PO line was created for a local resource and there is a need to associate the PO line to a resource managed by the Community/Network Zone (or to another local resource). This means that the user does not need to delete the PO line and create a new one.</li><li>• When relevant, users will be able to decide whether to delete the previous resource or maintain it.</li></ul>	Streamline the workflow of changing the resources of an order.

## Acquisition Flow for Digital Content

What's New	Highlights	Impact
Designated acquisition flows for digital inventory	<ul style="list-style-type: none"><li>• Purchase Order Lines for one-time and continuous digital content</li></ul>	Support legal deposit and other digital content sources requiring a full acquisitions workflow

What's New	Highlights	Impact
	<ul style="list-style-type: none"> <li>Support for locally stored files</li> </ul>	

## Fulfillment & Resource Sharing

### Full Rapid ILL Integration

What's New	Highlights	Impact
New integration points with Rapid ILL	It will be possible to override Rapid's self ownership block from Alma.	Fully seamless workflow and configuration with RapidILL

### Utilize Electronic Licenses for Resource Sharing

What's New	Highlights	Impact
The lender will be able to auto reject incoming requests for electronic resources that are not allowed for resource sharing	It will be possible to define automatic reject rules dependent on the license terms, allowing to automatically reject requests for electronic resources which are not allowed for resource sharing by their license terms	Electronic requests will be processed only for allowed resources.

### New Borrower Side Document Delivery Management Options

What's New	Highlights	Impact
Borrower side options to forward a document delivery service to the patron	Libraries will be able to securely forward documents to their patrons that have been received from lenders	Secure document delivery service to patrons will not depend on the lender's document delivery tools

### Enhanced ILLiad Integration (User Management)

What's New	Highlights	Impact
On the fly creation of user accounts in ILLiad	Pushing borrowing requests to ILLiad will be possible without prior registration of the patrons in ILLiad	Full integration, including pushing borrowing requests to ILLiad, will not require patron records to be loaded to ILLiad

## Alma Analytics

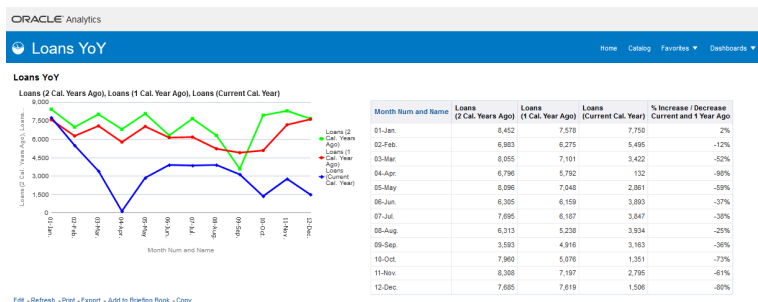
### Reports and dashboards for "Analytics Objects"

What's New	Highlights	Impact
New reports and a dashboard for the "Analytics Objects" subject	The institution will be able to analyze the presence and use of objects such as dashboards, widgets	Ability to gain insight into how analytics is (and is not) being used in the

What's New	Highlights	Impact
area	and scheduled reports.	institution.

## Year over Year (YoY) reports and dashboard

What's New	Highlights	Impact
New set of reports and a dashboard for YoY reports	There will be a new set of reports and dashboards analyzing data in a year over year format. This includes for example, loans, physical item requests, and expenditures by format of material.	YoY reports provide an easy way to identify trends for data driven decision making.



## Updated Events Subject Area

What's New	Highlights	Impact
The Events subject area will be redesigned	The Events subject area will be redesigned and will include only the events which are used. This will make it easier to create reports and choose fields to display and filter.	This will provide yet another method to identify trends and pattern in the library.

## Consortia

### Assign/Reassign Bibliographic/Authority Records in Network Shared Catalog

What's New	Highlights	Impact
Consortia members will be able to share & manage cataloging activity across the Network by assigning records for cataloging to any user in the Network	Today a cataloger can only assign records for cataloging to catalogers that are in their institution. With this new functionality a cataloger will be able to assign a record for cataloging to any cataloger in the Network	Simplify the ability to share and manage cataloging activity and expertise across the Network.

### Inventory Transfer between Institutions Early Access

What's New	Highlights	Impact
There will be a workflow that will allow consortia members to acquire physical resources by one member and to transfer these resources for the use of another member.	The purchasing and receiving of a physical resource will be done by the purchasing institution	Simplify the ability to share physical resources across the Network

What's New	Highlights	Impact
	<p>The item will be sent to the host institution</p> <p>The host institution will receive the item and adds/change any necessary item information</p>	

## Open Platform & Administration

### APIs for Sets of Vendors and Users

What's New	Highlights	Impact
APIs for creating and updating sets of vendors and users	<ul style="list-style-type: none"> <li>• There will be APIs for creating sets of vendors and users.</li> <li>• These sets will then be able to be further processed via APIs and the applications running those APIs</li> </ul>	A more complete option for integration with external systems

### Online Printout Improvements

What's New	Highlights	Impact
Improvements to the print daemon as well as the online printout queue	<ul style="list-style-type: none"> <li>• The print daemon will support the ability to printout to multiple locally connected printers instead of just the default printer</li> </ul>	Easier setup and administration of automated printing via the print daemon, as well as better efficiencies for handling pending printouts in the online printout queue

### Recent Entities - Configuration

What's New	Highlights	Impact
Key configuration entities will be added to the recent entities slide out	<ul style="list-style-type: none"> <li>• The following configuration entities will be added to the Recent Entities functionality <ul style="list-style-type: none"> <li>◦ Code Tables</li> <li>◦ Mapping Tables</li> <li>◦ Integration Profiles</li> </ul> </li> <li>• Whenever a change or modification is made in one of these entities, it will appear in the recent entities slide out</li> </ul>	Easier navigation and administration of configuration activities

## Fund Management APIs

What's New	Highlights	Impact
APIS for creating, editing and deleting funds will be added to Alma's RESTful APIs	<ul style="list-style-type: none"> <li>Acquisition APIs will be enhanced to include the full set of APIs needed to create, manage and delete Funds and Ledgers</li> </ul>	Libraries will have new options for integrating financial systems and Alma

## User Experience & Accessibility

### New Concepts - new layout

What's New	Highlights	Impact
A new vertical customizable menu and a header with search always on top, as well as the summary section on the side, aimed to optimize the use of space	<ul style="list-style-type: none"> <li>With the new header the search bar, as well as access to main actions, is always on top</li> <li>A new adaptive and scalable vertical menu shows different areas of the system</li> <li>User is able to customize the menu and quick links</li> <li>The summary section has more vertical space to see more fields and sections from a form</li> </ul>	User will be able to navigate more easily across different areas of Alma

### Accessibility - WCAG 2.1 level A

What's New	Highlights	Impact
All elements of Alma will comply with WCGA 2.1 level A	<ul style="list-style-type: none"> <li>Colors and contrasts standards</li> <li>Keyboard usage instead of mouse</li> <li>Support screen readers</li> <li>Zoom and responsiveness</li> </ul>	Users with disabilities will be able to better interact with Alma