

Alma Roadmap – Completed – 2022 H1

Metadata Management

Refine Advance Search (NERS 2020 #6795) - Indication Rule Form

What's New	Highlights	Impact
<p>The repository operator is able to perform an improved advanced search for titles with high accuracy, using specific metadata fields and subfields. This allows for the use of criteria beyond the predefined indexes.</p>	<p>Ability to create an indication rule in the Metadata Editor using a form, thus making it simpler to create such rules</p>	<p>The staff user is able to better focus their work on relevant titles.</p> <p>Read more here.</p>

Metadata import match methods enhancement

What's New	Highlights	Impact
<p>The catalog manager is able to import titles by</p> <ul style="list-style-type: none"> Using a match method with specific ID options and with a specific order Provide conditions for a single match 	<ul style="list-style-type: none"> It is possible to define up to 5 match methods (from the existing list of options for match methods) and define the order of using them. A new option for "Automatic multi-match handling", under a new title (in addition to the Select Action): Avoid multi matches by preferring the last created record. 	<p>The catalog manager can efficiently update titles using accurate match methods.</p> <p>Read more here and here.</p>

Electronic Resource Management

Automatic Upload of Electronic Holdings – Wiley

What's New	Highlights	Impact
<p>Upload Electronic Holdings from Wiley replaces the manual, multi-step workflow for managing Wiley holdings</p>	<ul style="list-style-type: none"> Customer specific electronic holdings for Wiley content are activated automatically 	<p>Reduces manual work involved with activating and maintaining library holdings of Wiley electronic resources.</p>

What's New	Highlights	Impact
	<ul style="list-style-type: none"> Integration runs on a weekly basis 	Read more here

Overlap Analysis Improvements

What's New	Highlights	Impact
<p>The Overlap Analysis Tool was improved to include additional overlap comparing options and summary reporting</p>	<ul style="list-style-type: none"> UX improvement for selecting content to be compared Summary reporting of overlap analysis report Additional comparing options 	<p>Better collection development capabilities of libraries' electronic resources</p> <p>Read more here</p> <p>Watch the New & Improved Overlap Analysis Tool video (4:42 minutes).</p>

DARA Recommendation for Standalone Portfolios

What's New	Highlights	Impact
<p>DARA identifies potential local standalone portfolios that can be grouped into a collection</p>	<p>DARA provides recommendations to review standalone portfolios that could potentially be grouped into a single collection</p>	<p>Inventory management is easier when portfolios are managed within collections</p> <p>Read more here</p> <p>Watch the DARA: Group Local Standalone Portfolios into a Collection video (51 seconds)</p>

Physical Resource Management

Unavailable Physical Items Process Types (NERS 7177, 7350)

What's New	Highlights	Impact
<p>The inventory operator can control the availability of items using simple work orders ("static status")</p>	<ul style="list-style-type: none"> Ability to add a new work order without a department which can be used as a 'static status' Ability to change the item process type using a custom work order Ability to change the item Process Type via the Change Physical Items job A discovery label can be added to each Process 	<p>Increase the accuracy of item's availability in discovery.</p> <p>Read more here.</p>

What's New	Highlights	Impact
	<p>Type by a code table, for the Get It display (Fulfillment)</p> <ul style="list-style-type: none"> • Add Process Types to "Exclude Process Types from Publishing" • Suppressed items will be marked in the search result 	

Acquisitions

Search PO Lines by their Notes

What's New	Highlights	Impact
<p>Ability to search Acquisitions PO lines by their internal notes.</p>	<p>When using the simple search to search PO lines, the existing "All" index was enhanced to search PO lines by their internal notes. Users can search by the full note description or perform a search by a partial description of the note content.</p> <p>Internal notes can also be searched using the new dedicated Internal Notes search index.</p>	<p>This enables Acquisitions staff to find specific PO lines by searching their notes.</p> <p>Watch the Search PO Lines by Their Internal Note video (53 seconds).</p>

Enhancements to the PO Line "Pricing" functionality

What's New	Highlights	Impact
<p>Two new elements were added to the PO line's Pricing section:</p> <ol style="list-style-type: none"> 1. Update Net Price according to item quantity 2. Discount (amount) field 	<p>Update Net Price according to item quantity (relevant only for physical PO lines) checkbox reflects the number of ordered items within the Quantity for pricing field. When the checkbox is enabled, the Quantity for pricing amount is updated automatically once the user adds/removes items, and as a result, the Net Price field is also updated.</p> <p>Discount (amount) field - this field enables users to insert a specific discount amount which is automatically calculated and reflected in the Discount (%) field.</p>	<p>This saves users the manual labor of updating the quantity for pricing when adding/removing item on a PO line as well as prevents human errors.</p> <p>Allowing users to set the discount amount saves the users from the need to calculate the exact discount percentage when adding a discount on a PO line.</p> <p>Read more here</p> <p>Watch the Enhancements to the PO Line Pricing</p>

What's New	Highlights	Impact
		Section video (2:25 minutes).

Fulfillment & Resource Sharing

Limit Fulfillment Management Actions According to User Role Scope



[Library
Independence](#)

What's New	Highlights	Impact
Staff users can perform Fulfillment management actions based on the scope of their roles.	<ul style="list-style-type: none"> Various actions on the user record such as add or remove blocks/notes/attachments, can be enabled/disabled based on the scope definition of the user role (specific library level or institution level (across libraries)). See more details in the Library Independence document. The existing library information on circulation activities can be used to limit access to the loans/returns/requests/finest&fees. See more details in the Library Independence document. 	<p>Better control over staff activity across libraries.</p> <p>Read more here</p>

Export Resource Sharing Borrower Requests to WorldShare ILL and Tipasa

What's New	Highlights	Impact
Alma can export borrower requests into WorldShare ILL and Tipasa for further processing.	Borrower request can be exported to WorldShare ILL and Tipasa. The lifecycle of the borrower request may continue in these systems and be further integrated with Alma via NCIP (for Tipasa).	<p>WorldShare ILL and Tipasa can be seamlessly integrated in Alma's rota as suppliers of last resort. Requests can be fulfilled first by local rota members, and then be automatically exported to these systems for further processing.</p> <p>Read more here</p>

Enhanced ILLiad Integration (Notes Management)

What's New	Highlights	Impact
Including request notes in requests pushed to ILLiad.	Pushing borrowing requests into ILLiad will include request notes.	Full integration, including pushing borrowing requests notes to ILLiad. Read more here

Alma Analytics

Oracle Data Visualization connected to Alma

What's New	Highlights	Impact
Data Visualization will be available via Alma	<ul style="list-style-type: none">DV reports can be added as objects to Alma similar to OAS reports.DV reports can be viewed, scheduled, and sent via the Alma platform	Easily and intuitively create reports demonstrating KPI's and trends that are integrated with your Alma workflows

Consortia

Export Shared Network Zone Bibliographic Records & Portfolios

What's New	Highlights	Impact
Consortia member's can export Network Zone shared Bibliographic records and Portfolios from within the Institution Zone	Export jobs ' Export electronic portfolios ' and ' Export bibliographic records ' support exporting sets of content origin 'Network and Institution'	Libraries can share bibliographic records and portfolios that are managed for them in the Network Zone with 3rd party systems using ad-hoc export utilities

Open Platform & Administration

User Experience & Accessibility

Safari Certification - Metadata Editor

What's New	Highlights	Impact
The user can use the Metadata Editor in a Safari browser	<ul style="list-style-type: none">• Ability to use the MDE in a Safari browser on MacOS• Ability to use the MDE in a Safari browser on iOS, using an iPad in landscape orientation	Users can use a larger variety of major browsers according to their preference

Back to [User Experience & Accessibility Roadmap](#)