TSWG Alma enhancements

Already on ExL Roadmap (not an exhaustive list)

These requests are either from past NERS voting, marked as Planned on Ideas Exchange, or seen on the published roadmap. For "(HVD...)" notations, refer to Harvard Top 15 Issue Review with Ex Libris.

Note: Some Ideas Exchange have been "planned" for years. In order to get them on concrete roadmap for the following year, they would need to go through NERS.

- **METADATA EDITOR**
  - Ctrl-z/Undo in the Metadata Editor (at Planned since 2019)
- **ACQUISITIONS**
  - Searchable invoice notes (at Planned since Jan 2019)
  - Vendor audit report (2021) (HVD-PGL-AR-01 top 15)
- **E-RESOURCES**
  - Improve 'Electronic Resource Activation Task List' Management (at Planned since 2018)
  - e-activation task list - set 'done' in Bulk (at Planned Jan 2019)
  - Add option to remove deleted License records in Alma (at Planned since 2018)
  - Provide the ability to select more than one file to delete when looking at uploaded sushi files (at Planned since Dec 2018)
  - Repository import profiles for electronic titles - limit matching to specific electronic collection (at Planned since 2018)
  - Add 'activation note' to purchase order screen for electronic orders (at Planned since 2018)
- **BROWSING**
  - Browse Shelf List improvements (was also a Harvard 2019 NERS submission # 6202) (includes sticky drop downs, slated for 2021) (Ideas at Planned since Oct 2019)
- **AUTHORITIES**
  - Fix bug: Respect MARC subfield coding when linking bib headings (Shakespeare - Comedies example)
    - #1 priority from AAFG list
    - Planned for 2023
    - Reported as critical during implementation phase 10/16/17
  - Partial linking for name/title. On 2024 roadmap.

Placeholder for 2023

- Potential ideas for 2023 (not yet submitted to NERS)
  - Create predicated items in temp locs
  - MDE - shortcut for Search Resources (pushing for this via UX group)
  - Name/title browse. See proposal for Primo (same config).
  - Follow NACO rules when linking bib headings (reduce number of "ambiguous" headings in ACTL reports)

- New submissions for 2023
  - Item physical condition field - make configurable (2023 NERS 8120)
    - (Judaica)
    - Ideas Exchange (changed to Planned by ExL on 8/22/2019)
  - Re-submissions from 2020, 2021 and 2022:
    - Added by Corinna
      - Authority control: Subdivided LCSH headings should be flipped by PTC (NERS 7206)
        - Request detail (someone deleted from NERS after 2020 process hence new number, was 6773).
        - #29 priority from AAFG list
        - Planned for 2023
        - Reported as critical during implementation phase 10/16/17
      - Authority control: Preferred term correction should flip headings that change tag number (NERS 6670)
        - (2022, #65 in Round 1)
        - See also Ideas Exchange (249 votes as of 12/14/22; submitted in Nov 2018). Marked as Planned by ExL on 9/21/2021
        - (partially covered by Ideas Exchange) (2020 NERS 6666) Request detail (2022 #28 in Round 1)
      - Items: Editing items via Receiving, Save & Receive items (post go live issues list) (2020 NERS 6669) Request detail (#6 Round 2 2022 (#6), points: 20)
        - This is supposed to be part of forthcoming Receiving Workflow improvements, but waiting to hear confirmation from ExL that it will be delivered 2/4/22
    - Items: create new predicted items from the receiving list (post go-live issues list)(for 2023 submitted as NERS 8119)
      - Request detail
      - In 2020 was NERS 6668
      - merged into 7065 by WG
      - (2022 #103 Round 1)
      - This is supposed to be part of forthcoming Receiving Workflow improvements, but waiting to hear confirmation from ExL that it will be delivered 2/4/22
      - Scan in Items.. Status / Done is not sticky (post go-live issues list) (2020 NERS 6663) Request detail (2022 #35 Round 1)
      - Need input from TSWG on what else should be resubmitted from last year

Harvard NERS requests for 2022

- New for 2022
- Ability to link a holding template with an order template (NERS 7786)(#165 Round 1)
- Link an order to existing inventory directly from a POL (NERS 7785)(#52 in Round 1)
- Make POL on holding list a hyperlink to POL. (NERS 7775)(#94 in Round 1)
- More robust searching in the receiving workbench (all ISBNs, 246) (NERS 7784)(#153 in Round 1)
- Ability to duplicate an invoice (NERS 7776)(NERS 776; #38 in Round 1)
- Receiving workbench - status value should be sticky (NERS 7786)(#83 in Round 1)
- Ability to link unpredicted items to publication patterns in holding to generate automatic item descriptions (NERS 7808)(#135 in Round 1)

- Resubmissions from both 2020 and 2021
  - Search Results: Add consistent shortcuts and more buttons (post go-live issues list) (2020 NERS 6665) Request detail (2022 #92 in Round 1)
  - Import profiles: Mapping options for Import Profiles (Electronic Collection, Acquisition Method, Material Type) (partially covered by Ideas Exchange) (2020 NERS 6666) Request detail (2022 #28 in Round 1)
  - Scan in Items.. Status / Done is not sticky (post go-live issues list) (2020 NERS 6663) Request detail (2022 #35 Round 1)
  - Authority control: Preferred term correction should flip headings that change tag number (2020 NERS 6670)(2022, #65 in Round 1)
  - Authority control: Subdivided LCSH headings should be flipped by PTC (2020 NERS 7206)(2022 #9 after Round 1). Request detail (someone deleted from NERS after 2020 process hence new number, was 6773). See also Ideas Exchange
  - Browse bib headings: fix gaps in subject browse (2020 NERS 6979)(2022, #70 in Round 1) Request detail

- Resubmissions from 2021
  - Items: create new predicted items from the receiving list (post go-live issues list) (2020 NERS 6668 merged into 7065 by WG) Request detail #103 Round 1 2022
    - This is supposed to be part of forthcoming Receiving Workflow improvements, but waiting to hear confirmation from ExL that it will be delivered 2/4/22
  - Items: Editing items via Receiving, Save & Receive items (post go live issues list) (2020 NERS 6669) Request detail (#6 Round 2 2022, points: 20)
    - This is supposed to be part of forthcoming Receiving Workflow improvements, but waiting to hear confirmation from ExL that it will be delivered 2/4/22
  - Do not pursue
    - Import profile to merge to existing holdings (e.g. add fields to holdings via a merge routine, from an input file) use hol API instead
    - Add Reminders to Analytics
    - Need job to change work order status use cloud app
    - batch unlink holdings from POLs - probably just one-time need for migration clean-up
    - Large configuration tables which use up/down arrows to order entries (e.g., Online Services Order) are wicked. I realize this issue is unlikely to receive widespread community support since so few users touch these.

### Harvard NERS requests for 2021

- Resubmissions from 2020
  - Search Results: Add consistent shortcuts and more buttons (post go-live issues list) (2020 NERS 6665) Request detail
  - MDE: Remove pop-up "assistance" in MDE for 260, 264 etc. (Also in Ideas Exchange) (2020 NERS 6654)
  - Import profiles: Mapping options for Import Profiles (Electronic Collection, Acquisition Method, Material Type) (partially covered by Ideas Exchange) (2020 NERS 6666) Request detail
  - Import profiles: New role for Manage Import Profiles (2020 NERS 6662)
  - Scan in Items.. Status / Done is not sticky (post go-live issues list) (2020 NERS 6663) Request detail
  - Items: Disable item description confirmation message (post go live issues list) (2020 NERS 6664) Request detail Complete
  - Authority control: Preferred term correction should flip headings that change tag number (2020 NERS 6670)
  - Authority control: Subdivided LCSH headings should be flipped by PTC (2020 NERS 7206)(2022 #9 after Round 1). Request detail (someone deleted from NERS after 2020 process hence new number, was 6773). See also Ideas Exchange
  - Browse bib headings: fix gaps in subject browse (2020 NERS 6979) Request detail
  - Acq: Save more fields in POL template (e.g. sub dates, man renew checkbox) (2020 NERS 6760) Request detail
  - More efficient method for applying norm rules to holdings (2020 NERS 6761)

- New for 2021
  - Add Authority Control Task List reports to Alma Analytics (2021 NERS 7216) Request detail

### Harvard NERS requests for 2020

- Search Results: Add consistent shortcuts and more buttons (post go-live issues list) (2020 NERS 6665) Request detail
- MDE: Remove pop-up “assistance” in MDE for 260, 264 etc. (Also in Ideas Exchange) (2020 NERS 6654)
- Import profiles: Mapping options for Import Profiles (Electronic Collection, Acquisition Method, Material Type) (partially covered by Ideas Exchange) (2020 NERS 6666) Request detail
- Import profiles: New role for Manage Import Profiles (2020 NERS 6662)
- Scan in Items.. Status / Done is not sticky (post go-live issues list) (2020 NERS 6663) Request detail
- Items: Disable item description confirmation message (post go live issues list) (2020 NERS 6664) Request detail Complete
- Items: description, enun/chron, pull patterns from hol 853 (parity with Aleph) (2020 NERS 6667) Request detail
  - Note, if we re-add for 2021, separate into multiple requests
  - still a big issue for non-predicated items... consult with Laura about refining request to separate multiple, Paris has code in python to pull this from API, not part of updated code, ITS working on things LTS said needed to be changed, (check also on the add-on exl did) rewritten for 2022 submission
- Items: create new predicted items from the receiving list (post go-live issues list) (2020 NERS 6668 merged into 7065 by WG) Request detail
  - This is supposed to be part of forthcoming Receiving Workflow improvements, but waiting to hear confirmation from ExL that it will be delivered 2/4/22
- Items: need Save and Receive Option when editing continuous items (post go live issues list) (2020 NERS 6669) Request detail
  - This is supposed to be part of forthcoming Receiving Workflow improvements, but waiting to hear confirmation from ExL that it will be delivered 2/4/22
- Authority control: Preferred term correction should flip headings that change tag number (2020 NERS 6670)
Other things we've talked about

- PTC LC/FT
- Normalization: Add security levels to Norm Rules
- Include authority cross-references in Browse Bib Headings
- Add "Move to department" option for Acq departments (Harvard NERS submission # 5577 from 2018)
- Preferred term correction - correct coding when flipping LCSH to LC/FT
- Make Suppressing a location function the same as suppressing a holding in all publishing jobs (relevant for OCLC Data Sync and other data exports)
- Identify headings linked to authority records in Simple Record View
- MDE: allow customers to configure fatal errors when saving bibs and holdings (e.g. an error that would prevent you from saving a record, as opposed to just a warning)
- Staff suggestion from 2020: add Not Equals to Library (Holdings) search (for bibliographer use) (FP 8559)

See also

- Alma Ideas Exchange