



Alma Roadmap Update

GUGM

Asaf Kline

Director, Alma Product Management


ExLibris[®]
a ProQuest Company

*“Ch-ch-ch-changes,
Turn and face the strange”*



WE ARE
CREATURES OF
HABIT

“The more we do something - eat nuts while watching TV, ride a bike, play an instrument, study a new language - **the stronger the neuronal circuit becomes** that supports that habit”

GoodTherapy.org[®]

Habits are hard to break – Moving to a new library software

**The outcomes
are uncertain**

It's difficult at first

Fear of the unknown

Glitches and hiccups



But change can also be a very good thing

**CHANGE IS LEARNING.
LEARNING IS GROWING.
GROWING IS LIVING. SO LIVE**

**MAKES YOU MORE
FLEXIBLE & ADAPTABLE**

**CHANGE IS
OPPORTUNITY**



A good change in moving to a new library software

Productivity

Innovation

Simplicity

Satisfied users



Alma July 2017 Release

The Soul of Alma
Collaboration

User Name:

Password:

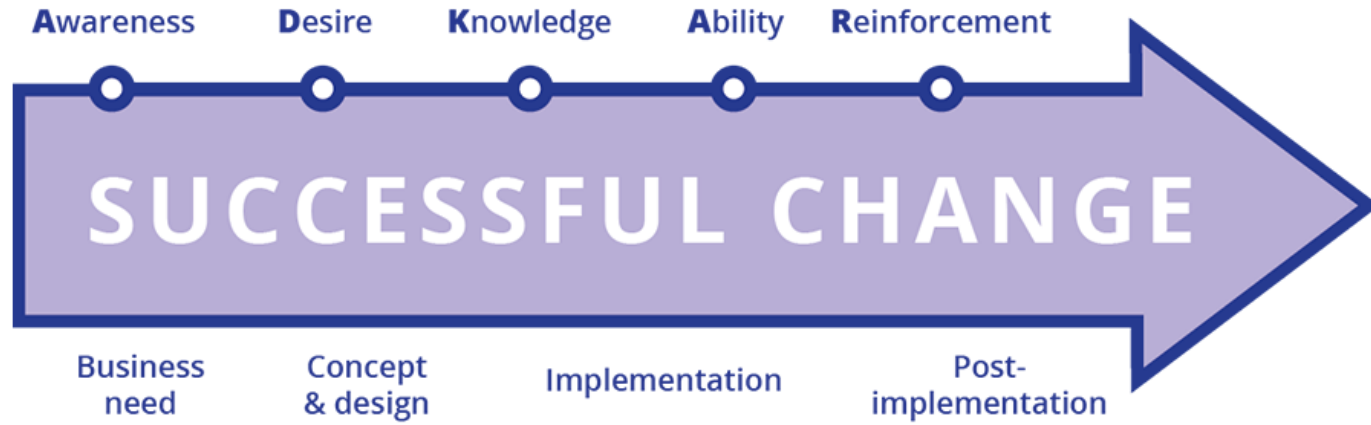
Login

How can we help?



Successful Change In Adopting a new Library Software

THE PEOPLE SIDE OF CHANGE



PHASES OF A CHANGE PROJECT

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ADKAR is a research-based, individual change model that represents the five milestones in order to change successfully.

We are here to help



ADKAR is a research-based, individual change model that represents the five milestones in order to change successfully.



Alma – Current and Future

Driving 'Forces' of the Strategic Roadmap



STREAMLINING
ACQUISITION WORKFLOWS



GAINING BETTER
INSIGHTS



EXTENDING
COLLABORATIONS



ENHANCING THE
USER EXPERIENCE



UNIFYING RESOURCE
MANAGEMENT

UX Project Goal & Focus

- Improve Alma user experience & satisfaction
- Holistic approach and commitment to improving UX in Alma



VISUAL DESIGN

MOST-USED AREAS

NAVIGATION

**SCREEN LAYOUT
DATA ARRANGEMENT**

**SYSTEM-WIDE
UI ELEMENTS**

MESSAGES & ALERTS

UX Customer Group



Completely New Visual Design

The screenshot displays the ExLibris Alma user interface, featuring a clean, modern design with a blue header and a white main content area. The header includes the ExLibris logo, the name 'Alma', and navigation links for Acquisitions, Resources, Fulfillment, Admin, and Analytics. A search bar and user profile icon are also present.

The main content area is divided into several sections:

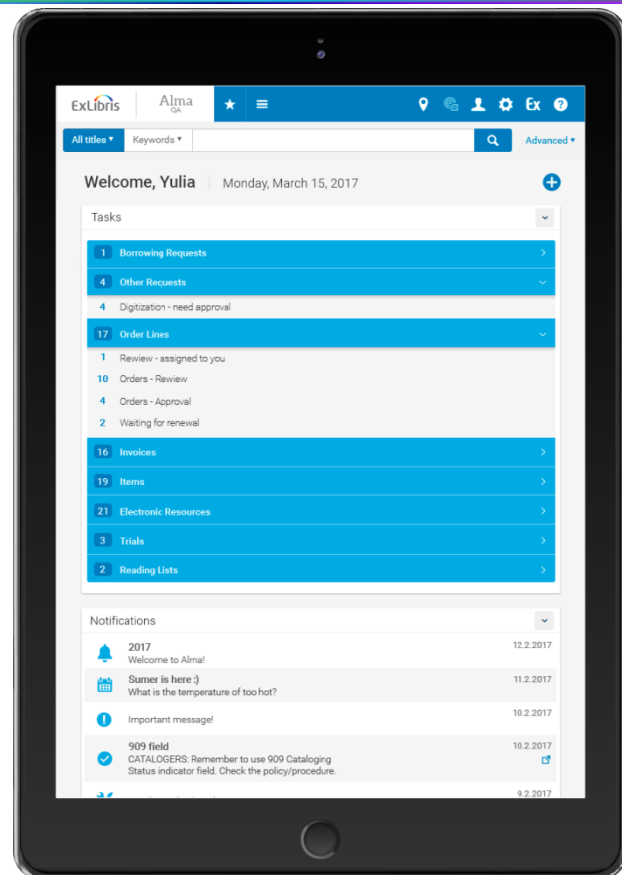
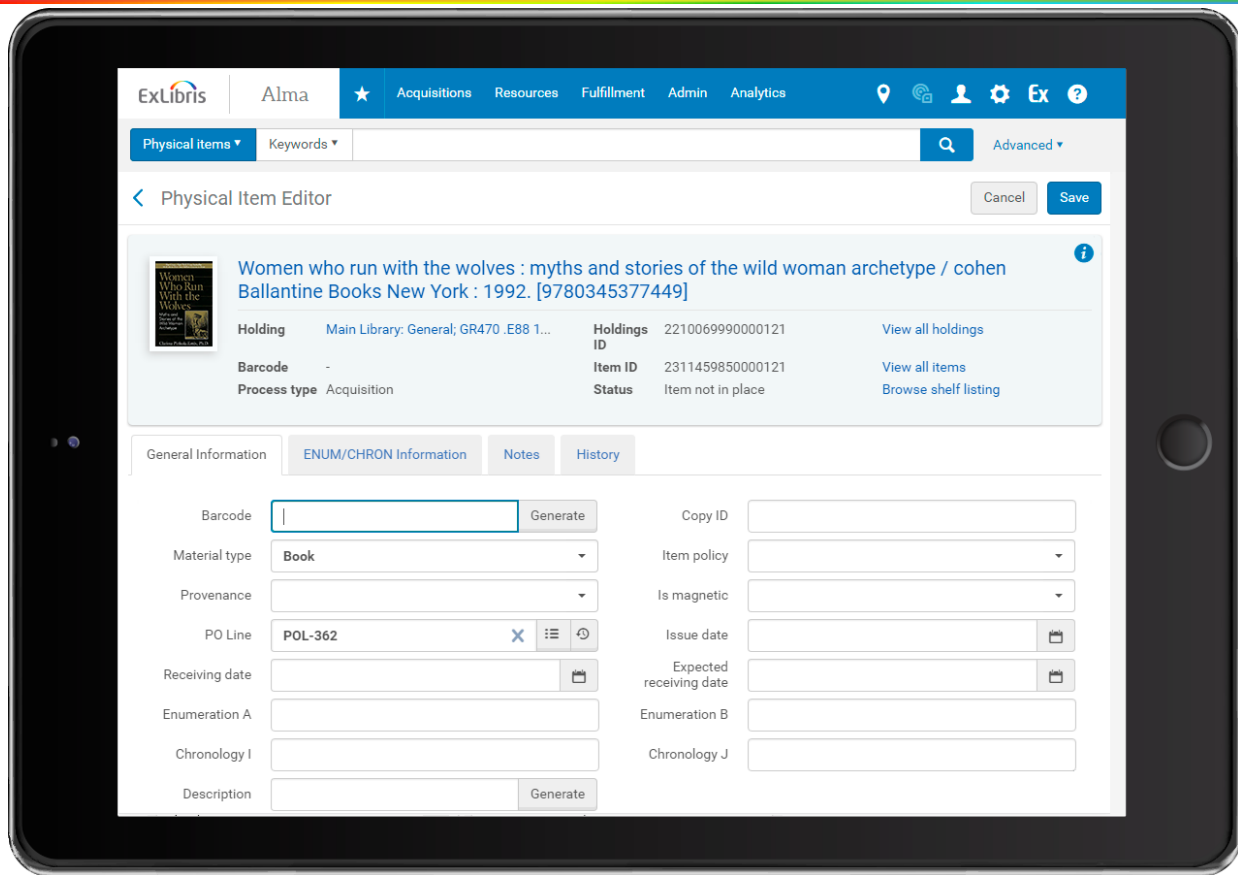
- Welcome, Yulia**: A personalized greeting and the date 'Monday, March 15, 2017'.
- Tasks**: A list of tasks with a dropdown menu. The tasks include: Borrowing Requests (1), Other Requests (4), Digitization - need approval (4), Order Lines (17), Review - assigned to you (1), Orders - Review (10), Orders - Approval (4), Waiting for renewal (2), Invoices (16), Items (19), Electronic Resources (21), Trials (3), and Reading Lists (2).
- Notifications**: A list of notifications with a dropdown menu. The notifications include: 2011-2012 Welcome to Alma! (12.2.2017), Summer is here :) What is the temperature of too hot? (11.2.2017), Important message! (10.2.2017), 909 field CATALOGERS: Remember to use 909 Cataloging Status indicator field. Check the policy/procedure. (10.2.2017), Har du en ide til ExLibris? (9.2.2017), Widget for sok i Oriera na tiljengeling (7.2.2017), October-December Alma-sammenslaing HSN - se status/fremdrift (7.2.2017), Patron: Where do you keep your books on paranoia? Librarian: Who wants to know? (6.2.2017), 시스템 점검으로 인한 서비스 일시 중단 (4월 9일 01:00-05:00, 약 4시간) (6.2.2017), Congratulations! We're live! (4.2.2017), and We did it! Lorem ipsum dolor sit amet. (4.2.2017).
- Scheduled Jobs Status**: A grid of job status cards. The cards include: Acquisition (green checkmark), Administration (red exclamation mark), Data services (green checkmark), Fulfillment (green checkmark), Import (red exclamation mark), Publishing (red exclamation mark), Repository (green checkmark), and Users (green checkmark).
- Organization calendar**: A calendar view for March 12, 2017. The calendar shows the days of the week and the dates. The date 12 March is highlighted, and the opening hours are listed as 'Opening hours: Closed'.
- ExLibris Primo**: A section for the ExLibris Primo interface, featuring a search bar and a list of last published job details. The details include: Starting Time (04/03/2017 24:55:45 IST), Status (Completed Successfully), and Type (Incremental).
- What's new**: A section for the latest news, featuring a video player with a play button and a thumbnail image of a library interior.
- Number of Loans by Patron Group**: A section for the number of loans by patron group, featuring a dropdown menu.

Personalized and Customizable

The screenshot displays the ExLibris Alma interface, specifically the 'Customize view' configuration screen. The interface is divided into several sections:

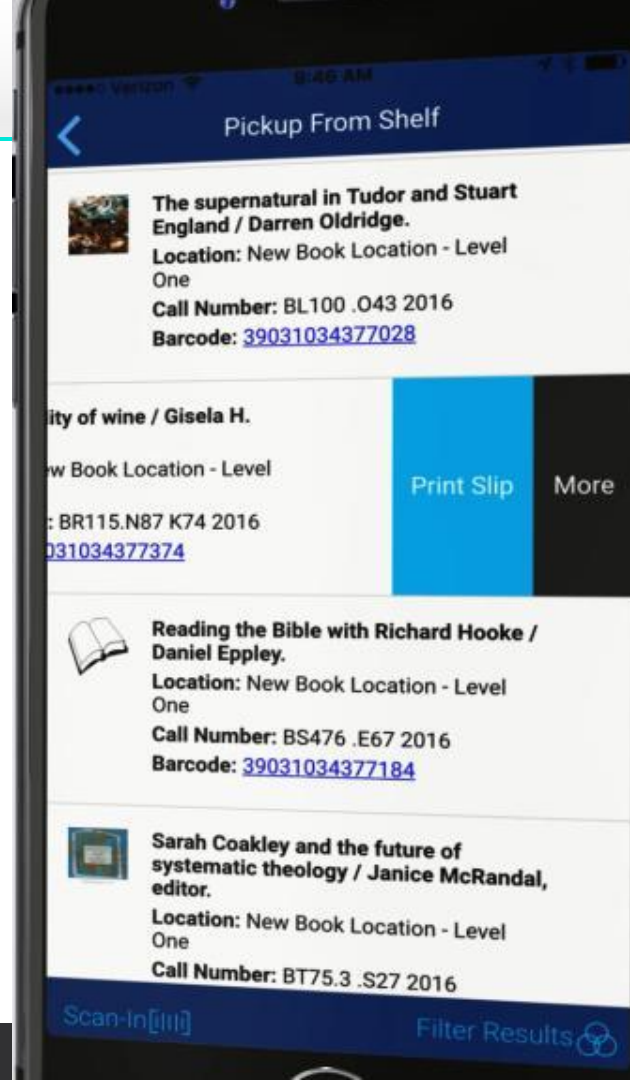
- Left Sidebar:** Contains filters for 'Material Type' (Book, Music, Visual material), 'Resource Type' (Audio musical, Book - Electronic, Book - Physical), 'Language' (Abkhaz, Adangme, English, etc.), 'Publication Year' (1753-2005, 2006-2008, etc.), and 'Collection' (Art Collection, etc.).
- Top Navigation:** Includes tabs for 'All titles', 'Keywords', and 'love', along with a search bar and an 'Advanced' dropdown.
- Customize view Panel:**
 - Title information order:** A table with three columns (Column1, Column2, Column3) showing selected fields like Creator/Publisher, Subject, Series, Collections, Relation, Edition, Medium Type, Availability, Availability (Network), Language, Library Unit, ISBN, and Record number.
 - Action order:** A list of actions such as Edit Record, Holdings, Items, Representations, Collection, Order, Request, Resource sharing request, Document Delivery, Add to reading list, Add to collection, Add Reminder, Remove, More info, Delete, Linked Data, View It, and Reminders, each with a checkbox to enable it.
- Bottom Section:** Displays a sample search result for 'Sex, Love and Hedonism [electronic resource]' with details like Medium Type, Language, ISBN, and Record number.

Responsive Design – Improved Experience on Tablets



Alma Mobile

- **Review** the Pickup from Shelf list for a library location
- **Filter** the list by request date, request type, material type, location, call number, or destination
- **Scan items** to see where they need to go
- **Track** usage of items left on library tables and shelves
- **Scan barcodes** via the device's built-in camera as well as portable wireless barcode scanners



Collaborative Network Analytics



Benchmark and compare among other member institutions of the consortia



Ability to create customized reports by the consortia itself



Support consortia collection analysis



Analytical reporting a built-in and fully integrated part of system

Usage Analytics – COUNTER and SUSHI

14 COUNTER 4.0 Reports Templates:

JR1	Journal Report: Successful Full-Text Article Requests by Month and Journal
JR1 GOA	Journal Report: Successful Gold Open Access Full-Text Article Requests by Month and Journal
JR1a	Journal Report: Successful Full-Time Article Requests from an Archive by Month and Journal
JR2	Journal Report: Access Denied to Full-Text Articles by Month, Journal, and Category
JR5	Journal Report: Successful Full-Text Article Requests by Year-of-Publication (YOP) and Journal
DB1	Database Report: Searches, Result Clicks, and Record Views by Month and Platform
DB2	Database Report: Access Denied by Month, Database, and Category
PR1	Total searches, result clicks, and record views by Month and Platform (previously DB3)
BR1	Book Report: Successful Title Requests by Month and Title
BR2	Book Report: Successful Section Requests by Month and Title
BR3	Book Report: Access Denied to Content Items by Month, Title, and Category
BR4	Book Report: Access Denied to Content Items by Month, Platform, and Category
BR5	Book Report: Total searches by Month and Title
MR1	Multimedia Report: Successful Full Multimedia Content Unit Requests by Month and Collection

23

default dashboards
("out of the box"
ready to use and
change if desired)

224

default reports
("out of the box"
ready to use and
change if desired)

Analytics - Beyond the consortia

- **Benchmark Analytics** puts focus on the breadth of comparison
- Data being compared is high level/KPI

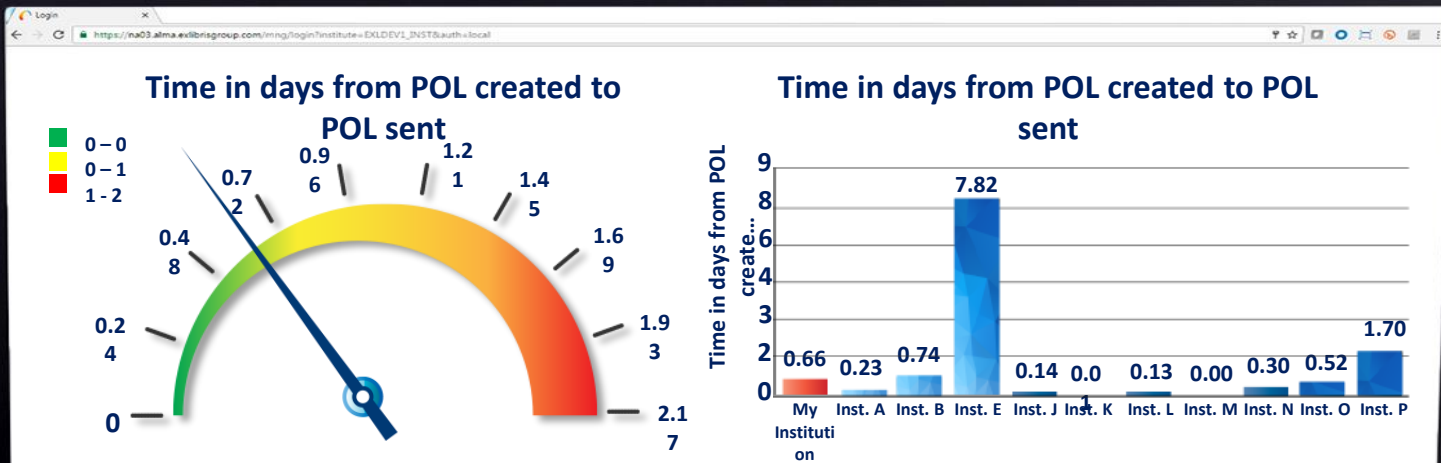


- **Comparative Collection Analytics** puts focus on the depth of comparison
- Group for comparison is smaller



Benchmark Analytics

How efficient is our acquisition process compared to other institutions?



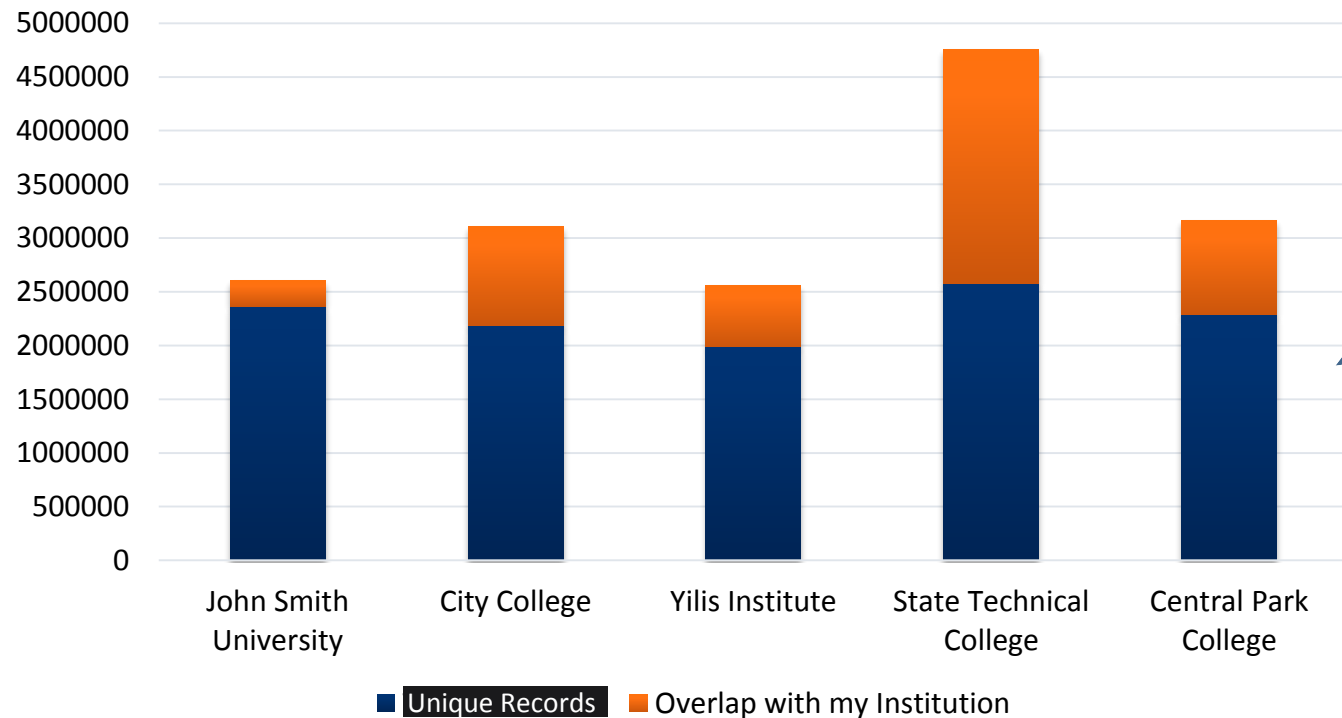
Analyze

- Analyze efficiency of the acquisition workflow in your library
- Compare workflow efficiency with other institutions

Optimize

- Drill down to check the acquisition process per library

Comparative Collection Analytics



Overlap & Unique
record comparison
with Peer Institutions

Real-Time Ordering

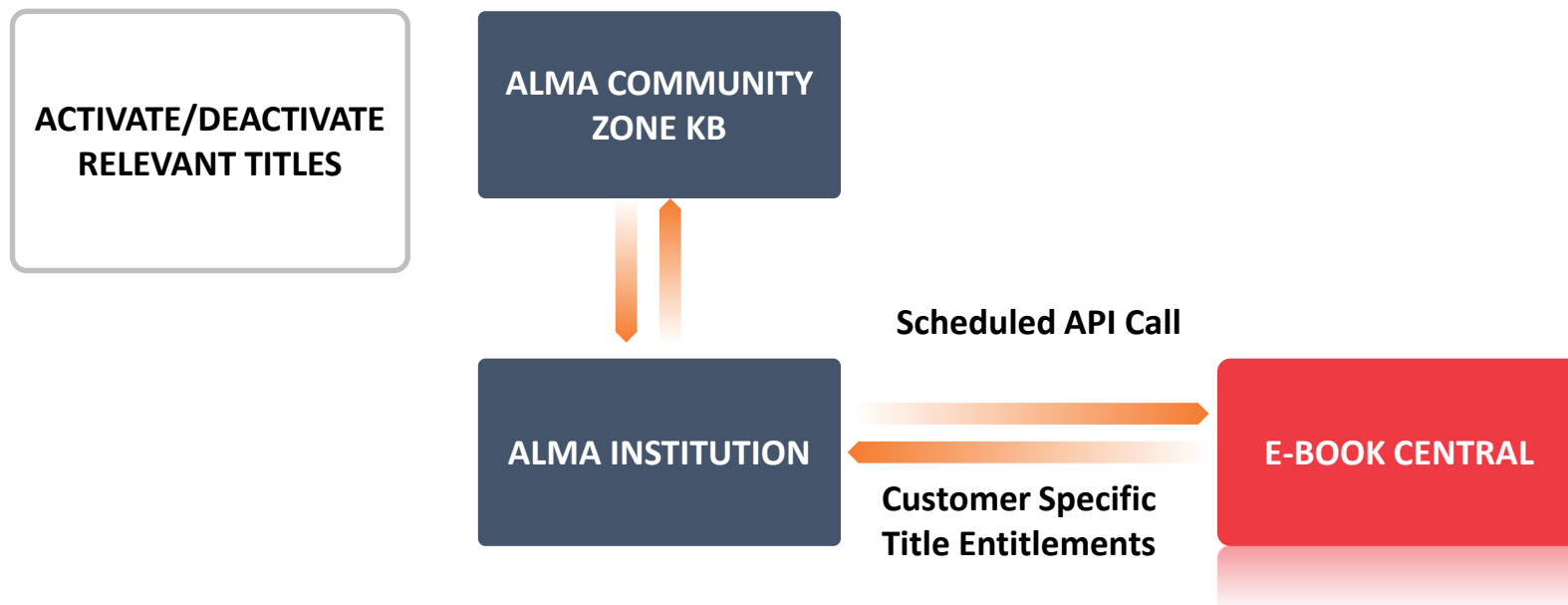
- **Faster, real-time insertion of order data into Alma** at the same time the order is placed in vendor system, creating order records that allow library staff to see what is on order
- **Streamlines book workflows:** API allows order information to flow from vendor system to Alma without the need to use a (slower) FTP data transfer method
- **Saves staff time** through the automated transfer of information. Library staff does not need to perform additional steps to integrate order information into their library management system

Main added value: **increased workflow efficiency**

The logo for OASIS, featuring the word "OASIS" in a blue, sans-serif font with a trademark symbol.The logo for HARRASSOWITZ, featuring the name in a black, sans-serif font with a stylized rainbow arc above it.The logo for BAKER & TAYLOR, featuring a stylized book icon to the left of the text "BAKER & TAYLOR" in a blue, sans-serif font. Below it, "YBP Library Services" is written in a smaller font, and "the future delivered" is written in a script font at the bottom.

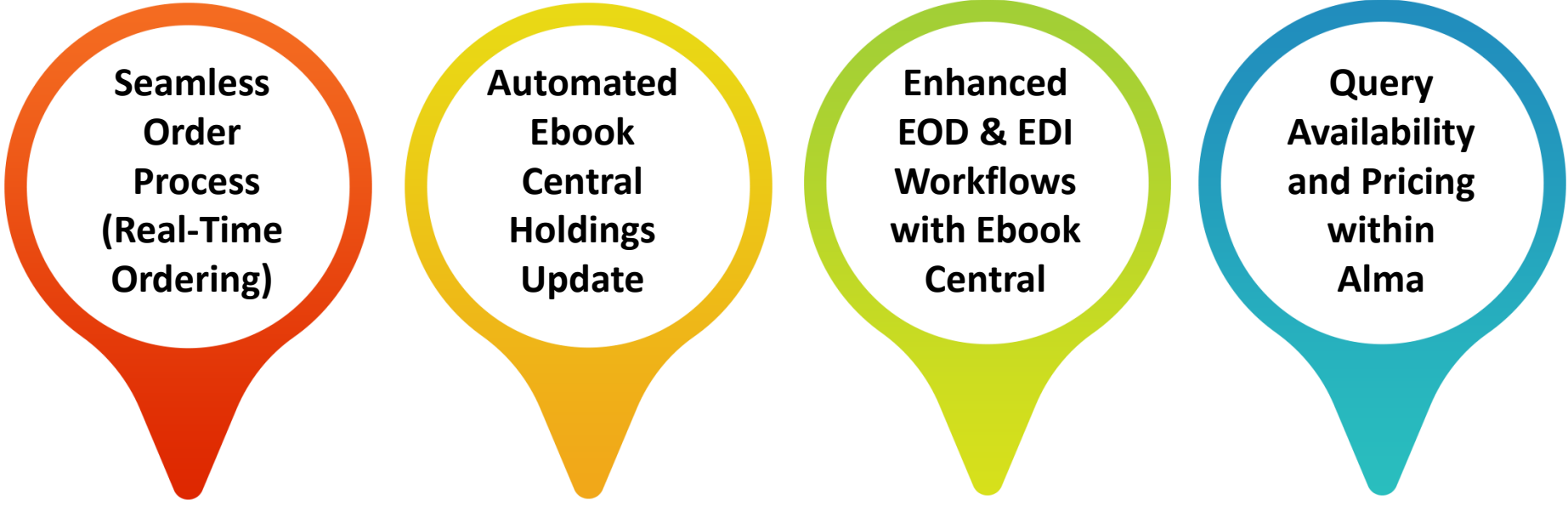
Auto Holdings Update

- **Objective:** Streamline the process of managing institution entitlements in Alma
- **Solution:** Automatic service that regularly updates institution entitlements with information retrieved from vendor on a scheduled basis



Deeper Integrations with Selection Platforms

Integrate **Ebook Central**, **Oasis**, and **Alma** functions for seamless workflow



Seamless
Order
Process
(Real-Time
Ordering)

Automated
Ebook
Central
Holdings
Update

Enhanced
EOD & EDI
Workflows
with Ebook
Central

Query
Availability
and Pricing
within
Alma

Alma Digital Today

Curate the unique content that your campus/community produces in one place



Alma Digital Today

Hidden resources have no value, but Alma + Primo elevate the visibility of digital content

1



BOOK CHAPTER

Conceptual Dualism

Papineau, David ; 2002
Oxford University Press
Thinking about Consciousness, Chapter 3

 [Online Access Available >](#)

2



DISSERTATION

On sensible matters : a defense of conceptual dualism

Elpidorou, Andreas. ; 2013

 [Available at Mugar Memorial Library Microforms: Microfilm \(PhD 2013 elp \) >](#)

 [Online Access Available >](#)

Analytics—never an afterthought

- Link Resolver Usage
 - OpenURL Context Measures
 - Number of Requests
 - Number of Clicked Requests
 - Number of Requests Without Services
 -
 - Number of Services (total)
 - Number of Electronic Services
 - Numbr of Digital Services**
 -
 - Number of Clicked Services (total)
 - Number of Electronic Clicks Services
 - Number of Digital Clicks Services**
 -
 - % Clicks from Requests
 - % Requests Without Services from Requests

Alma Digital Today



NUMBER OF ALMA-D LIBRARIES:

85

TOTAL NUMBER OF DIGITAL OBJECTS
ADDED TO ALMA:

931, 249

ONE YEAR INCREASE IN THE NUMBER OF
REPRESENTATIONS ADDED TO ALMA:

234%

AMAZON S3 STORAGE USED GREW BY

700%
SINCE LAST YEAR

THE MOST POPULAR FILE FORMAT

pdf

Managing Digital Resources in Alma



With a single interface and an integrated approach to all source material – electronic, print, and digital – Alma is breaking down collection silos in the library

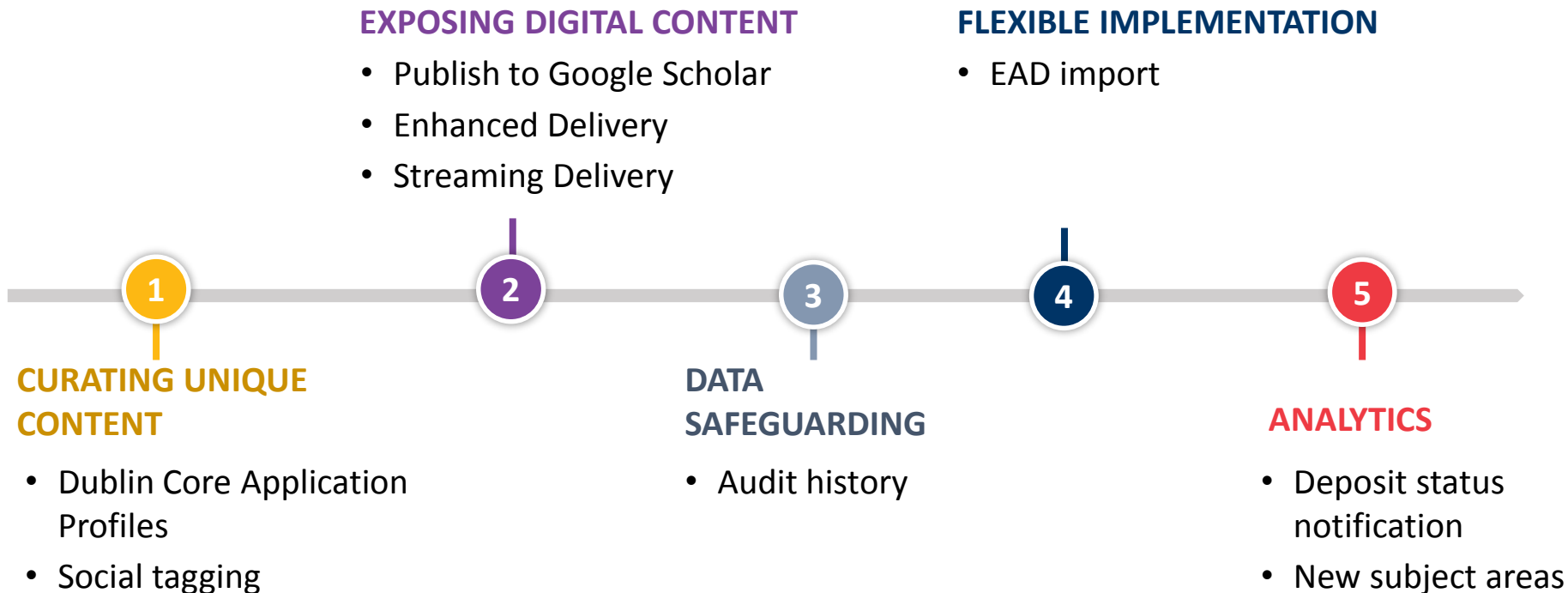


Boston University libraries shifted to using Alma for managing their digital collections, which increased efficiency, streamlined workflows, changed organizational structures, and allowed them to develop new services



UEL's libraries manage their digital assets using Ex Libris Alma, including professional materials used by specific schools, dissertations, and learning materials in alternative accessible formats

What's Planned for Alma-D's Future?



Resource Sharing - Current Facts

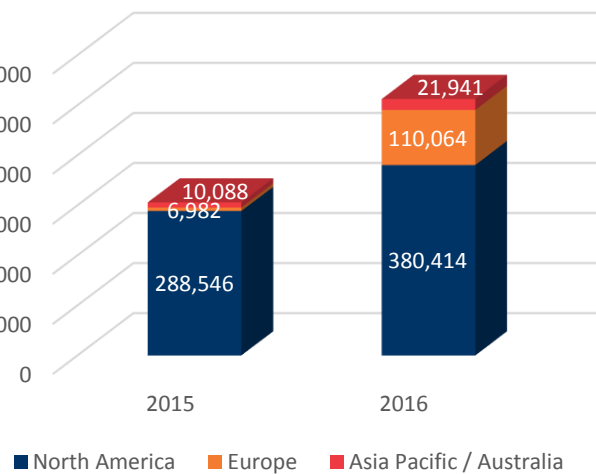


Resource Sharing is supported today in a range of different workflows and involves a variety of different systems. Main workflow types include:

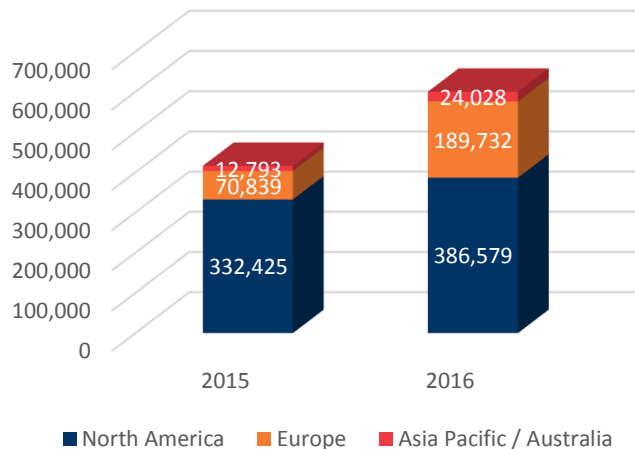
- **Broker based integrated workflow**, involving systems such as ILLiad, Relais ILL/D2D, Inn-Reach or national and regional systems
- **Peer to peer consortial borrowing**, implemented by NA consortia
- **Peer to peer resource sharing by non consortial libraries**, such BIBSYS libraries and Australian libraries relaying requests through Libraries Australia Document Delivery (LADD).
- **Direct services between libraries**, some of which utilize direct requesting options for patrons of one library that use the catalog of another library to place requests, and some of which only allow walk in services

Resource Sharing - Current Facts

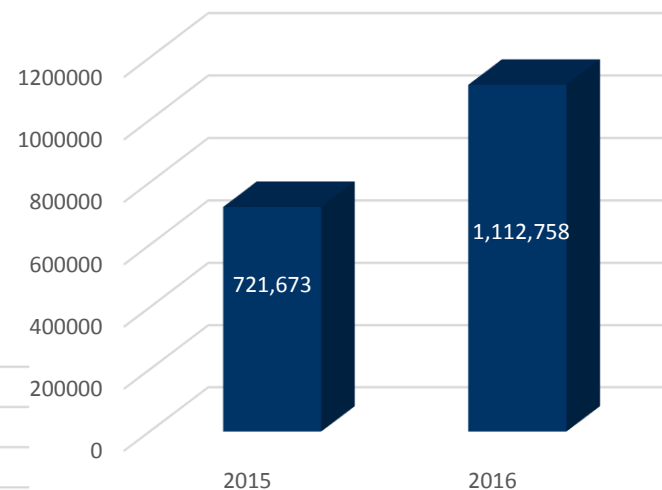
Lending Requests



Borrowing Requests



Sum



Fulfillment Network



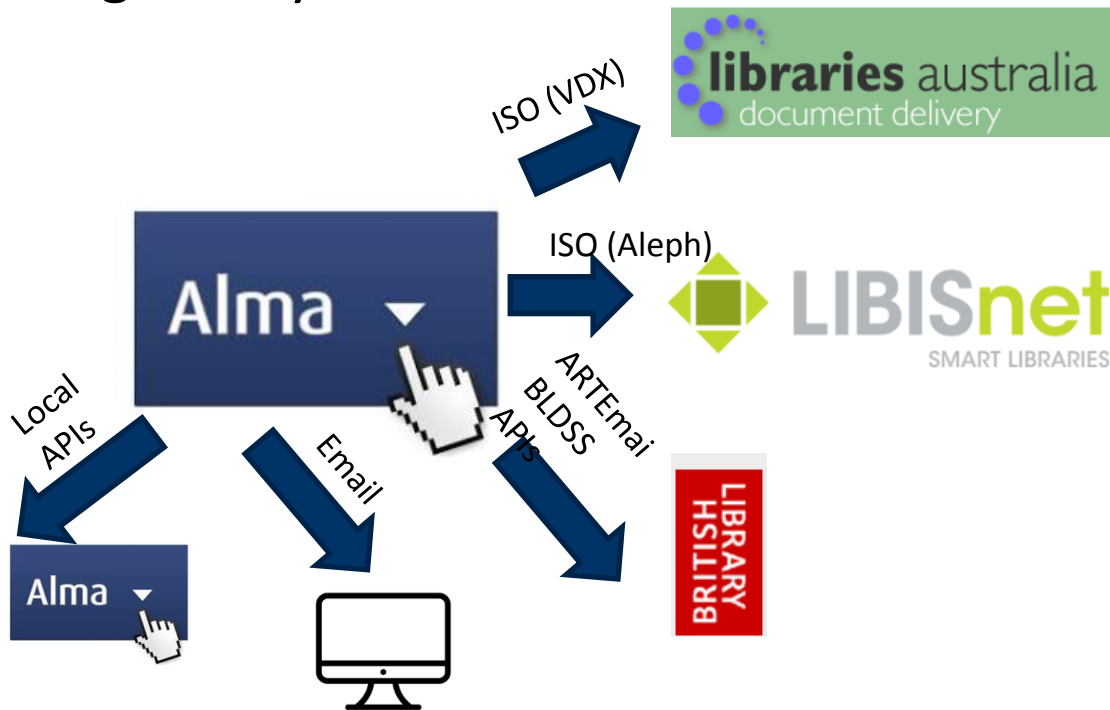
External Systems (Broker)

- Global\National interlibrary loan automation services

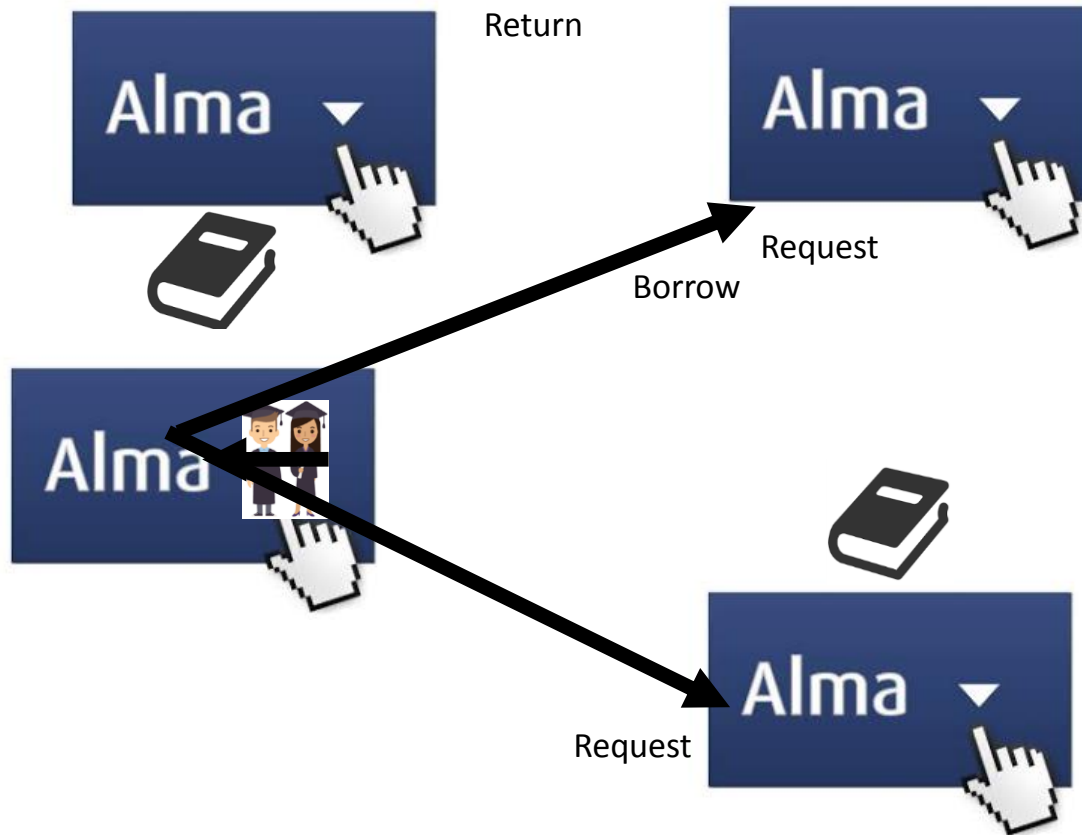


Peer to Peer (P2P)

- Used for direct requesting. At times also used via national or regional gateways

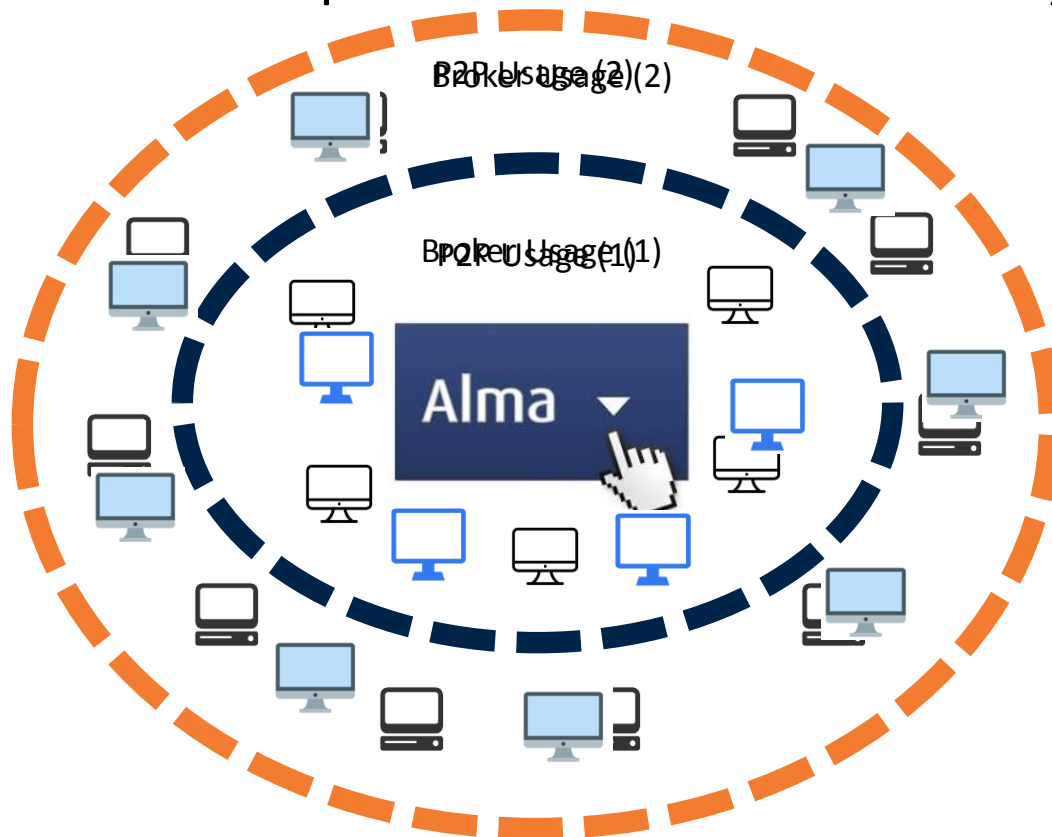


Enhanced Fulfillment Network



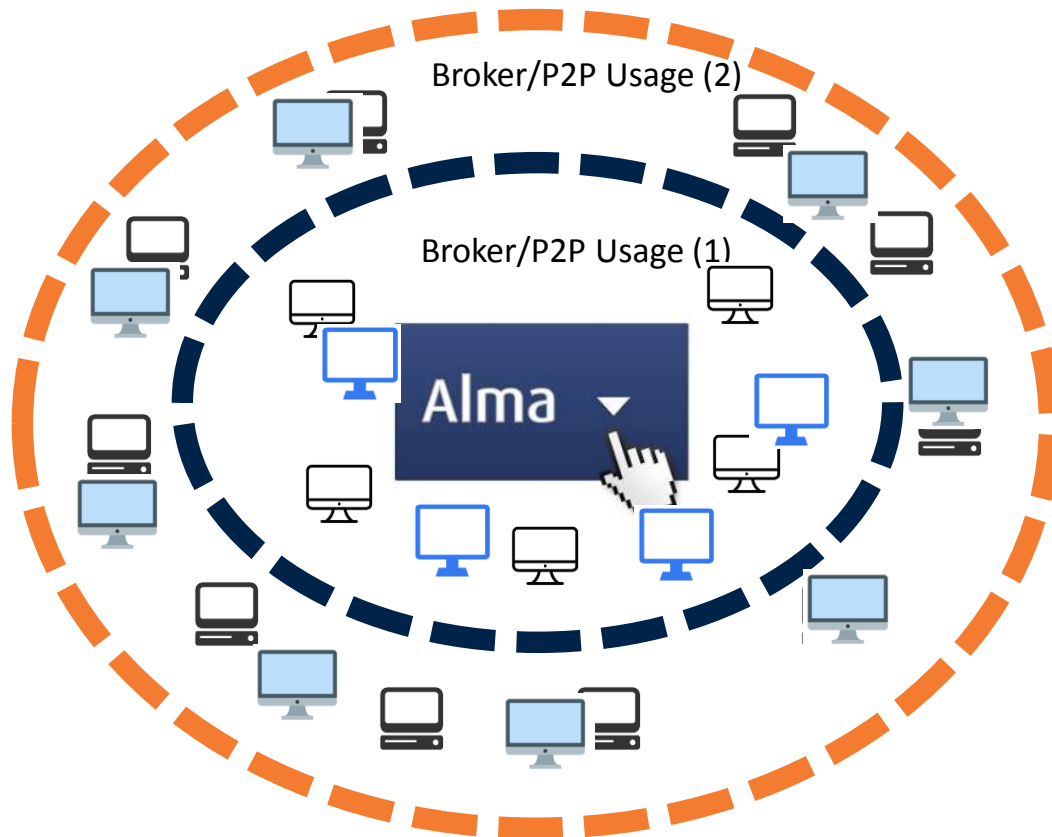
Bringing it Together

- What if I have partners of more than one type ?

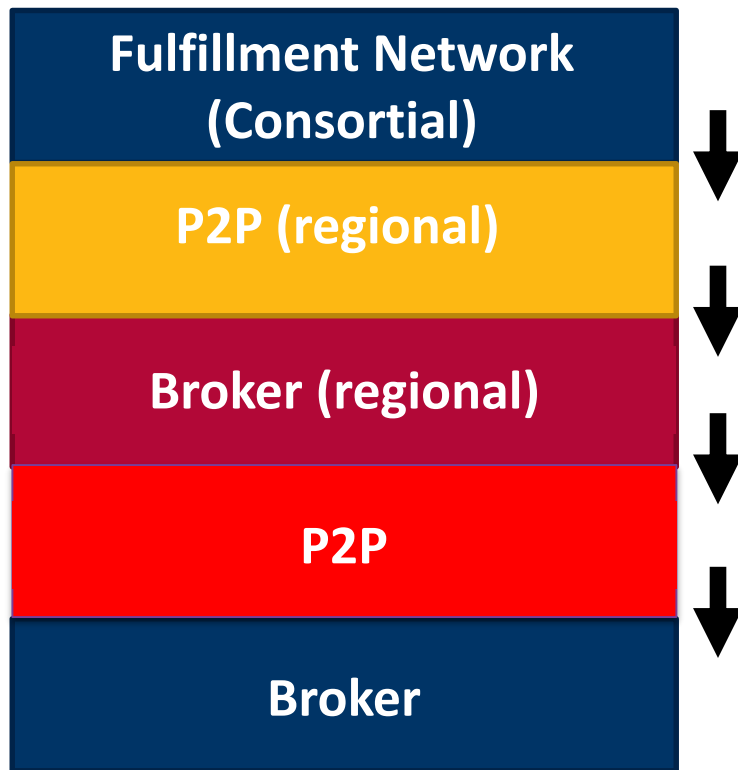


Bringing it Together

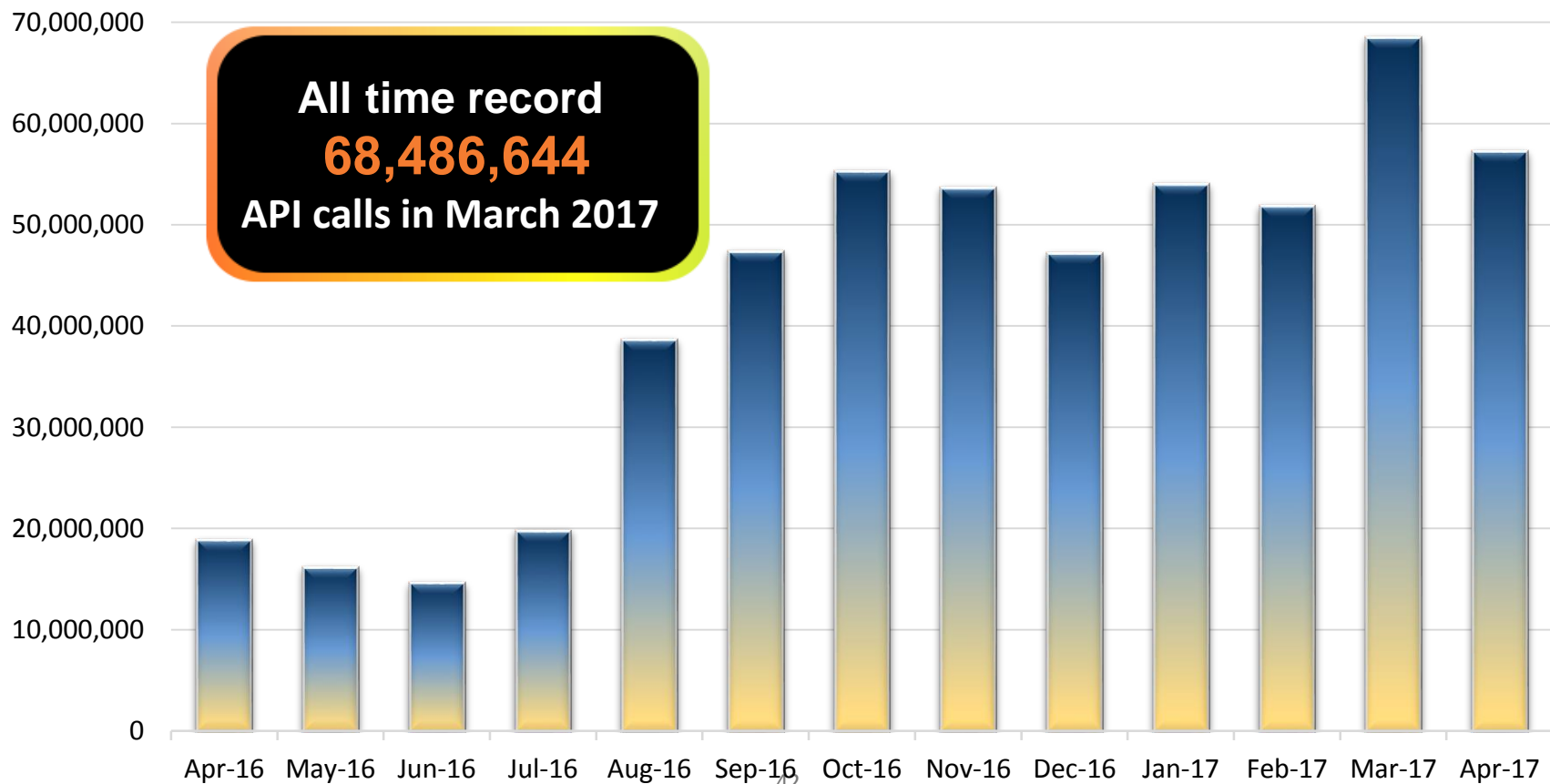
- What if I have partners of more than one type ?



■ Bringing It Together



APIs in Alma



42

BIBFRAME and Linked Data

Acquisitions Resources Fulfillment Admin Analytics

All titles ▾ Keywords ▾ Advanced ▾

< All Titles (1 - 3 of 3) Title Contains Keywords cry the beloved country Save Query

Institution Community

1 - 3 of 3 Expand ▾

1

Cry, the Beloved Country
BK (Book - Physical) (2008)
Language: English

Portfolio List Edit Record

Physical ● Electronic (1) Digital Other details

Linked Data

Context	https://open-na.hosted.exlibrisgroup.com/alma/contexts/bib	
bibo:isbn10	http://www.isbnsearch.org/isbn/1433243180	1-4332-4318-0
bibo:isbn10	https://open-na.hosted.exlibrisgroup.com/resolver/wikidata/isbn10/1433243180	1-4332-4318-0
dct:language	http://id.loc.gov/vocabulary/iso639-2/eng	—

BIBFRAME and Linked Data



SHORT TERM

Planned support for representing MARC bibliographic records in BIBFRAME 2.0 format

- Publish MARC bibliographic records in BIBFRAME format
- View a MARC record as a BIBFRAME record
- Expose MARC bibliographic records as BIBFRAME via API



LONG TERM

- Support for native cataloging in BIBFRAME starting with a proof of concept version.
- Support a triple store service for linked data in Alma.

Shifting Focus to the Strategic



**WORK MORE
EFFICIENTLY**



**FOCUS ON AREAS
OF VALUE**



**DRIVE NEW
SERVICES**



THANK YOU

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