

# Alma 2022 Roadmap Update



# Alma Focuses on...



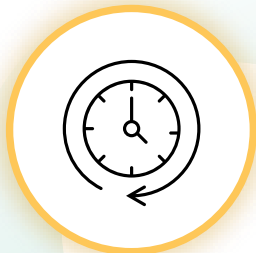


# Reliability



the probability that the product (system) will perform its intended function for a specified time period when operating under normal (or stated) environmental conditions.

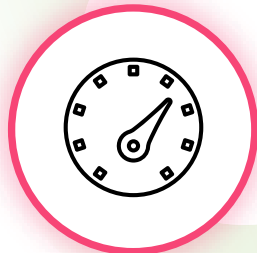
# Reliability



Uptime



Bugs,  
Defects and  
Regressions



Performance



[Analytics ETL]



# Quality KPIs

An intense and ongoing focus to improve quality, reduce time to issue resolution and reduce regressions



KPI	2021
Regressions	10% less
Open High Priority Trend	35% less
High Priority Backlog	20% less

# Regression Testing Statistics – April 2022



**2,819**

Number of scenarios

**2,354**

Automated scenarios  
(Run daily)

**93%**

Automated  
(from total scenarios)

# Performance

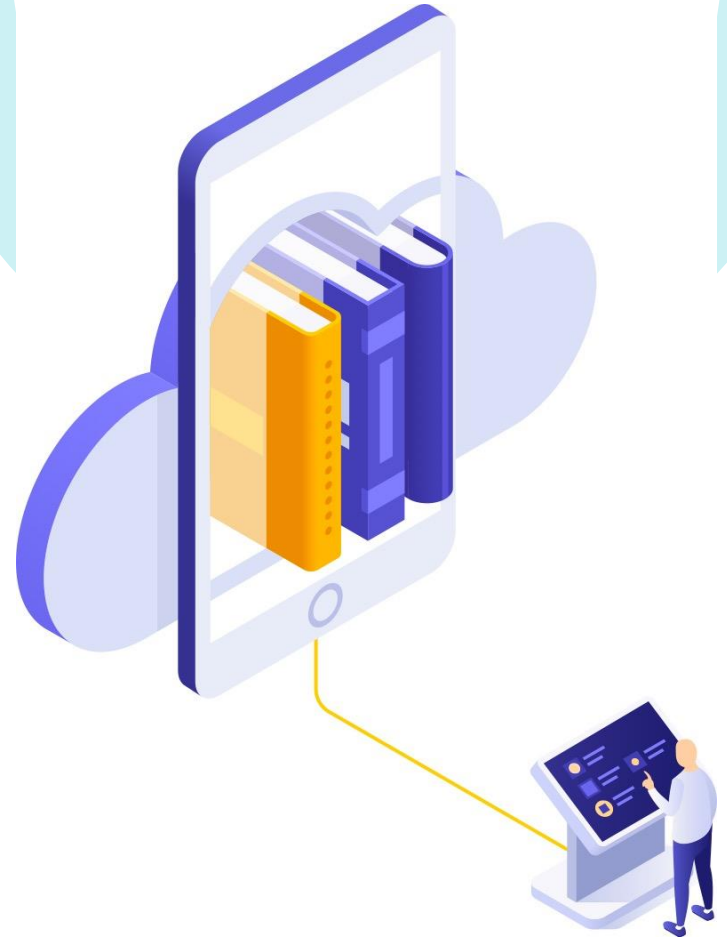
Quarterly  
Updates

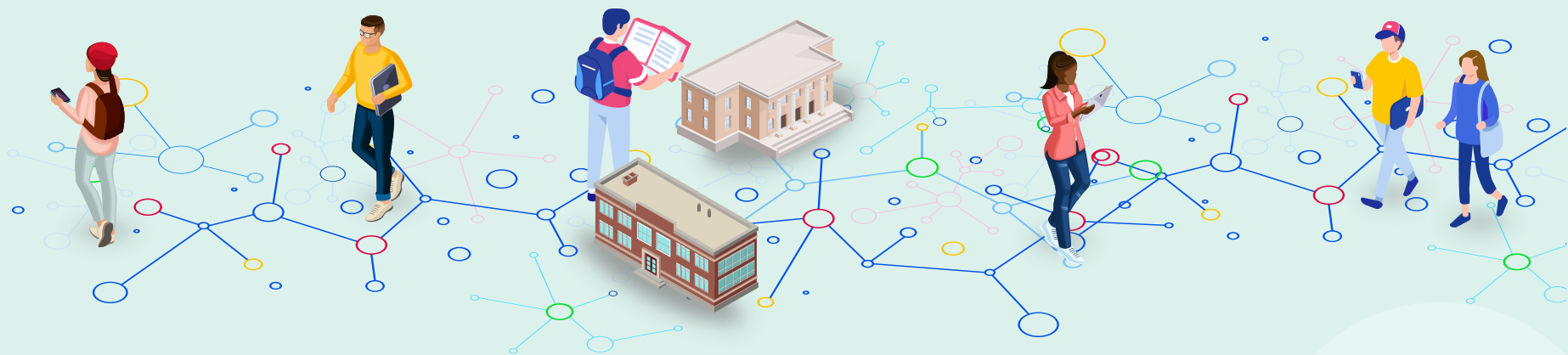
**95%**  
Overall screen  
average

Our focus Areas

- Loan
- Scan Item
- PO Line
- Staff Search

Looking at job  
performance stats  
which we can share  
with the community





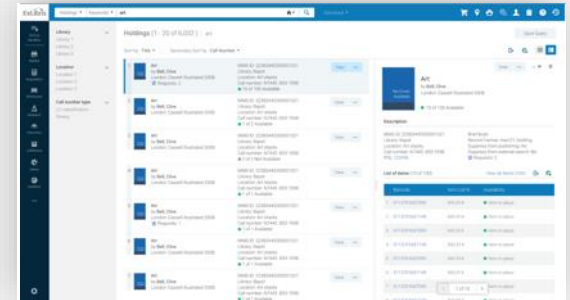
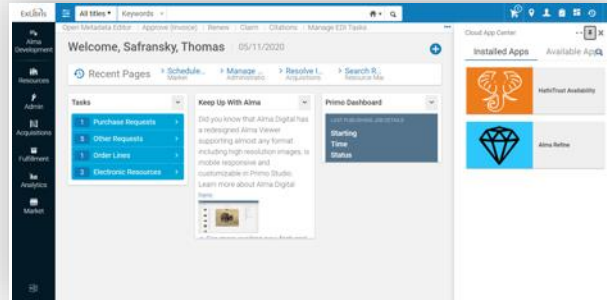
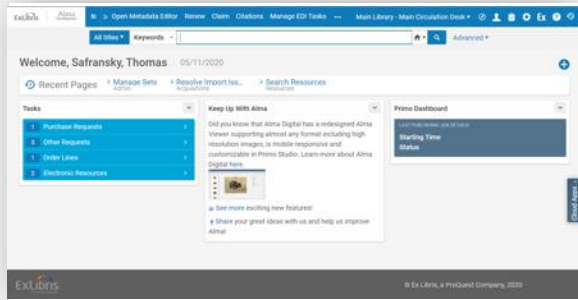
# Experience



*Product experience is a subset of the entire user experience. It focuses on the entirety of the customer journey that takes place within the product itself. It's from the first time a customer logs in until the final time they quit using an application*



# User Experience – An ongoing commitment



1 New UI

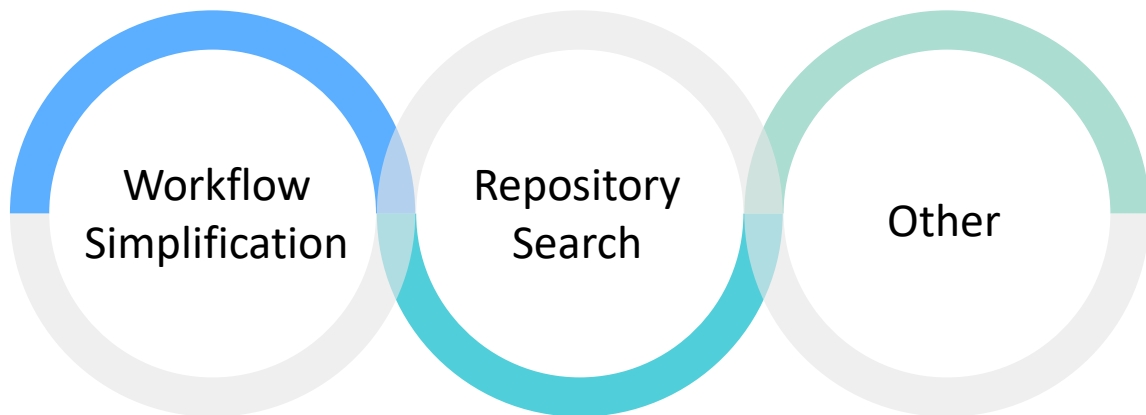
2 New Concepts

3 Apply

- New layout
- Side by side
- Slide out
- Cards

- Acquisitions
- Repository searches
- Configuration
- More...

# User Experience

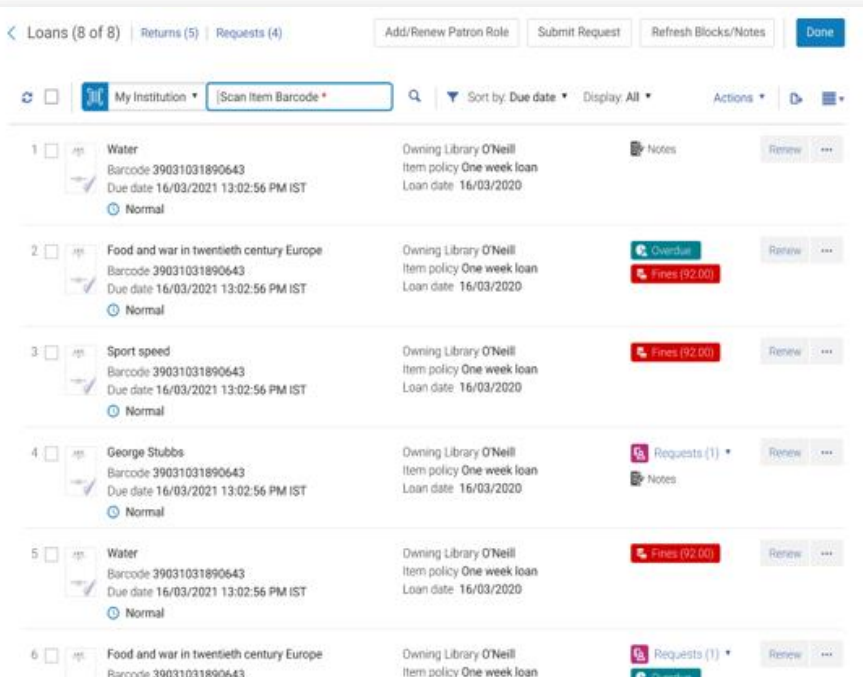


Focusing on:

1. High Use Areas
2. Heavy Volume Work
3. Key Workflows

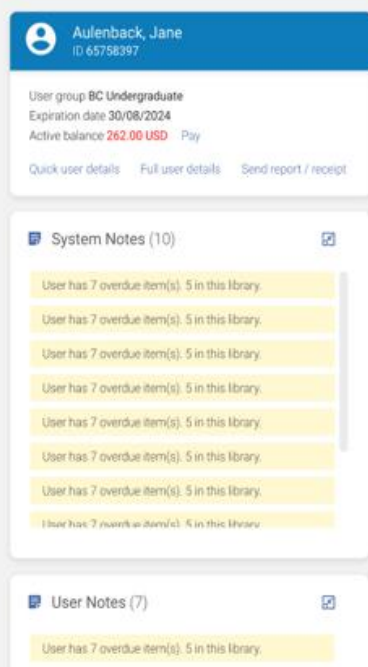
# Workflow Simplification

## PATRON SERVICES



The screenshot shows a library patron services interface. At the top, there are navigation tabs for 'Loans (8 of 8)', 'Returns (5)', and 'Requests (4)'. Below these are buttons for 'Add/Renew Patron Role', 'Submit Request', 'Refresh Blocks/Notes', and 'Done'. A search bar contains 'My Institution' and 'Scan Item Barcode'. The main area displays a list of loans with columns for item details, library information, and actions.

Item	Barcode	Due date	Library	Policy	Loan date	Actions
Water	39031031890643	16/03/2021 13:02:56 PM IST	Owning Library O'Neill	One week loan	16/03/2020	Notes, Renew
Food and war in twentieth century Europe	39031031890643	16/03/2021 13:02:56 PM IST	Owning Library O'Neill	One week loan	16/03/2020	Overdue, Fines (92.00), Renew
Sport speed	39031031890643	16/03/2021 13:02:56 PM IST	Owning Library O'Neill	One week loan	16/03/2020	Fines (92.00), Renew
George Stubbs	39031031890643	16/03/2021 13:02:56 PM IST	Owning Library O'Neill	One week loan	16/03/2020	Requests (1), Notes, Renew
Water	39031031890643	16/03/2021 13:02:56 PM IST	Owning Library O'Neill	One week loan	16/03/2020	Fines (92.00), Renew
Food and war in twentieth century Europe	39031031890643	16/03/2021 13:02:56 PM IST	Owning Library O'Neill	One week loan	16/03/2020	Requests (1), Renew



The screenshot shows a user profile page for Jane Aulenback (ID 65758397). The profile includes user group information (BC Undergraduate), expiration date (30/08/2024), and active balance (262.00 USD). Below the profile are sections for System Notes (10) and User Notes (7), both containing the message: 'User has 7 overdue item(s). 5 in this library.'

## Benefits

1. Quicker access to more information without requiring navigation across screens
2. Visual tips for special conditions such as overdue and lost loans
3. Personalization of screen to meet the special needs of different libraries

# Workflow Simplification

## PO LINE TASK LIST



### Benefits

1. Increase efficiency by working on multiple PO lines within a single screen
2. Unified task list will allow users to search PO line associated with a task list and immediately edit it, preventing the need to "Go to task list" in order to work on the PO line
3. Quick navigation between multiple PO lines (Multi select facet capabilities)

**Borrowing Requests (1 - 20 of 349)**

Refine by: Activity Status: Active

Clear all

Active Partner: Alma ILL Partner (9), BLDSS Test (4), ILLiad (18), More (10)

Activity Status: Active (349)

Status: Cancelled By Pa... (78), Cancelled by sta... (57), Created borrow... (44), More (16)

Creation Date: 4-7 days ago (1), 8-30 days ago (5), Older (343)

Update Date: 2-3 days ago (1), 8-30 days ago (6), Older (342)

Item	Requested	Requester	Created
drama [electronic resource] / edited by David Krasner. by Krasner, David. OU Physically received by library	ISBN: 1-95266-499-9	Requester: Bettina Schmid	Created: 12/06/2017 11:50
7 The Decline and Fall of the Roman Empire by Gibbon BLDSS Test	Requested: Book (Physical)	Requester: Andrew Arai	Created: 01/13/2022 15:10
8 Water / Open University	Requested: Book (Physical) (hardcover)	Requester: Moshe Shechter	Created: 12/14/2021 14:35
9 On the mode of laying the rails, and the adaptation of the carriages on the Baltimore and Ohio rail-road / Journal of the Franklin Institute by Franklin Institute (Philadelphia, Pa.)	Requested: Article (Digital)	ISSN: 00160032	Created: 09/15/2021 13:19
10 Exposition of Foucault's Experiment of the Franklin Institute. by Franklin Institute (Philadelphia, Pa.)	Requested: Article (Digital)	ISSN: 00160032	Created: 11/26/2020 14:57

Request form (as filled by requester)

The sky is the limit ?  
External identifier: EXLDEV10004344  
Shipped Physically

Requester: Ex Libris Staff

# Workflow Simplification

## RESOURCE SHARING TASK LISTS



**Purchase Order Lines (1 - 20 of 47)**

ID	Title	Identifier	Owner	Status	Amount
9	The Worthington history, DReam Publications, 1047-241X, ISSN	1047-241X	O'Neill	In Review	0.0 USD
10	E_Relink_CZ_0104150445, 2014, ISBN0104150445, ISBN	ISBN0104150445	O'Neill	In Review	0.0 USD
11	Canada / Julie Murray, Minneapolis, MN ; ABDO Pub Co, c2014, 9781617838064, ISBN	9781617838064	O'Neill	In Review	0.0 USD
12	RelinkBibWithSeveralURLsToAnotherBib	RelinkBibWithSeveralURLsToAnotherBib	O'Neill	In Review	20.0 USD
13	_Title_15031601221, ISBN_15031601221, ISBN	ISBN_15031601221	O'Neill	In Review	20.0 USD

**Canada / Julie Murray, Minneapolis, MN ; ABDO Pub Co, c2014, 9781617838064, ISBN**

0.0 USD

15-311170

2021-08-29T07:52:43.396+0000In Review  
2021-08-29T07:52:14.087+0000Deferred

**PO Line Information**

PO line owner: O'Neill  
MMS ID: 99135752210001021  
Identifier: 9781617838064  
Acquisition method: Purchase  
Invoice status: No invoice

Material type: Journal  
 Manual packaging  
 Cancellation restriction

**Ordered Portfolios (1)**

Name	Service Type	Service Activation	Activation Date	Access Mod	Additional
1 Canada /	DATABASE	Not active			

## Benefits

1. Right pane work area that allows inline editing
2. Improved faceting capabilities, multiple facets selection, new options
3. Inline handling of note and patron queries in a right pane
4. Easier search across requests in multiple activity statuses and across assignee responsibilities
5. Sliding panel enables full work on requests without losing the requests list context.

# Repository Search

The screenshot displays a library search interface. At the top, there's a search bar with 'All titles' selected and a search icon. Below the search bar, the search scope is set to 'Institution' and the results are for 'All Titles (1 - 20 of 80,448)'. The interface includes a 'Refine by' sidebar on the left with categories like 'Library', 'Item Material Type', 'Collection', and 'Process Type'. The main content area shows a list of search results. The first result is 'Glamour: a history / Stephen Gundle.' by Gundle, Stephen, (Oxford ; New York : Oxford University Press, 2008.). This result is expanded to show a detailed view with a book cover, general information (Material Type: Book, MMS ID: 99124910900121, ISBN: 9780199210985), and holdings information (3 holdings, including ONL / Location STACK / Call number B2799 .H7 B43x with 2 of 2 available).

## Benefits

1. Improve Productivity
2. Save Time
3. Streamlined workflow
4. Consistence experience for all resource types
5. Less Navigation



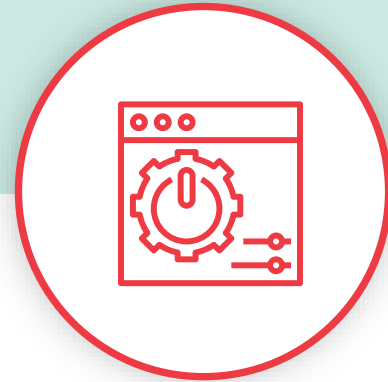
# Other



Analytics



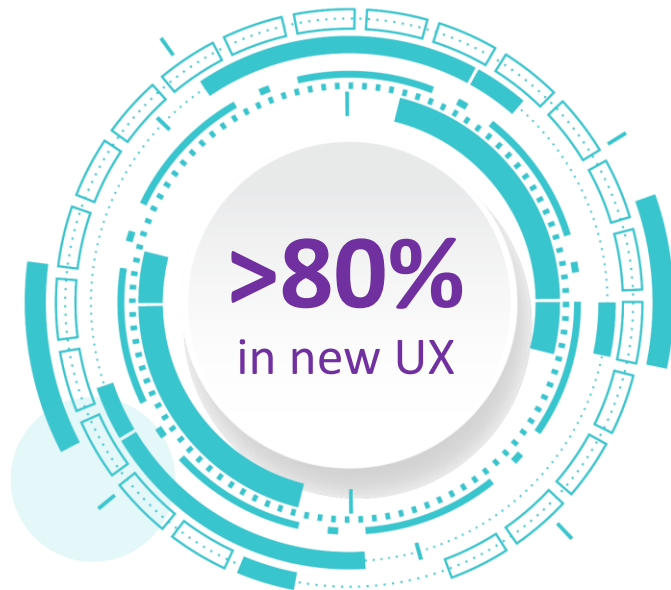
Configuration



Sets

# Target

Effectively transform the user experience in Alma



Most of the day to day work in the system will be done through new and improved UX by the end of 2023





# The Alma User Community

# We depend on your involvement and input



Idea  
Exchange

NERS

Focus Groups and  
Working Groups

UX • Analytics • Authority  
Consortia • Special Focused Group

# Your Ideas..

## Idea Exchange

- 425 Idea Exchange items have the status completed
- 58 Ideas were completed in 2021
- 109 Ideas planned or accepted
- 81 Ideas are tentatively planned for 2022

## NERS

NERS2020 Cycle -6 enhancements  
NERS2021 cycle – 6 enhancements planned  
NERS2020 cycle – in progress





# Just one more thing

# 2022 Roadmap Highlights and Themes

Metadata Management

Electronic Resource Management

Digital Resource Management

Physical Resource Management

Acquisitions

Fulfillment and Resource Sharing

Analytics

Consortia

Open Platform and Administration

User Experience and Accessibility

## Themes

- Library Independence
- Repository Searches - Enhanced UX
- Workflow Simplification
- Linked Open Data

## Alma 2022 Roadmap and Themes Webinar Series

Date (2022)	Session Name and Description	Accompanying Resources	Asia Pacific Registration	The Americas and Europe Registration
January 18	<p><b>The 'Library Independence' Theme in the Alma 2022 Roadmap</b></p> <p>One of the main themes of the 2022 Alma Roadmap is 'Library Independence', whereby each library can act as a separate entity regarding letters, logos, and access to user and fulfillment activities. During this session we will demonstrate</p> <ul style="list-style-type: none"> <li>• Library Independence regarding user and fulfillment activities</li> <li>• Separate patron facing letters per library</li> <li>• Separate letter logos per library for patron facing letters</li> </ul> <p>This session will be delivered by Yoel Kortick and Moshe Shechter</p>	<p>The Library Independence Theme official page</p> <p>Presentation: <a href="#">Library Level Patron Notifications.pptx</a></p> <p>Video: <a href="#">Library Level Patron Notifications</a></p> <p>Presentation: <a href="#">Library Level Patron Notification Logos.pptx</a></p> <p>Video: <a href="#">Library Level Patron Notification Logos</a></p> <p>Presentation: <a href="#">Library Independence Regarding User and Fulfillment Activities.pptx</a></p>	<p><a href="#">Register</a></p> <p><a href="#">Event Times Around the World</a></p>	<p><a href="#">Register</a></p> <p><a href="#">Event Times Around the World</a></p>
February 15	<p><b>The 'Controlled Digital Lending' Theme in the Alma 2022 Roadmap</b></p> <p>One of the main themes of the 2022 Alma Roadmap is 'Controlled Digital Lending', whereby each institution can loan digital resources while complying with copyright restrictions, eg own-to-own ratio, preventing redistribution and more. During this session we will demonstrate existing functionality as well as outline upcoming roadmap features:</p> <ol style="list-style-type: none"> <li>1. CDL strategy at Ex Libris (5 minutes)</li> <li>2. CDL for course resources (30 minutes)</li> <li>3. Roadmap: CDL for long-term loans (25 minutes)</li> </ol> <p>This session will be delivered by Yoel Kortick and Daniel Greenberg</p>	<p>Presentation: <a href="#">Patron Waitlist for Digital Resources (CDL Controlled Digital Lending) in Alma - Configuration and Workflow.pptx</a></p> <p>Video: <a href="#">Patron Waitlist for Digital Resources (CDL Controlled Digital Lending) in Alma</a></p> <p>Video of Webinar recording Aug. 30, 2021: <a href="#">Webinar Patron Waitlist for Digital Resources (CDL Controlled Digital Lending) in Alma</a></p> <p><a href="#">Controlled Digital Lending Whitepaper</a></p>	<p><a href="#">Register</a></p> <p><a href="#">Event Times Around the World</a></p>	<p><a href="#">Register</a></p> <p><a href="#">Event Times Around the World</a></p>
February 22	<p><b>The Catalog Analysis Best Practices</b></p> <p>During this session we will review Catalog Analysis best practices.</p>		<p><a href="#">Register</a></p> <p><a href="#">Event Times Around</a></p>	<p><a href="#">Register</a></p> <p><a href="#">Event Times Around</a></p>

**New update: January 2022** • Updated every 6 months • **NEW (Themes, Webinars)**

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Materials/010Roadmap/](https://knowledge.exlibrisgroup.com/Alma/Product_Materials/010Roadmap/)

# Thank you!

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Part of **Clarivate**