Alma Product Update

Dana Moshkovits | Alma Product Management

Ex Libris Users of North America

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Address Current & Emerging Needs

Optimization

Collaboration

Open Access

Linked Data

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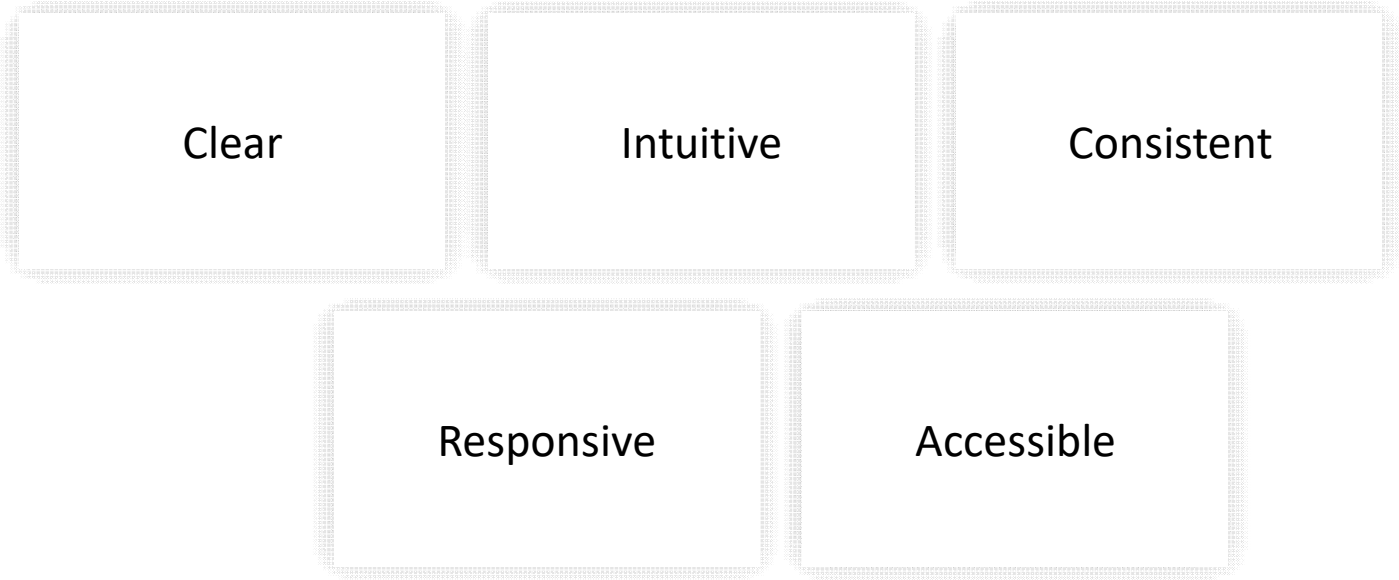
Optimization

- User Experience workflow simplification
  Easy to use, efficient, and enjoyable for users, leading to higher satisfaction and engagement



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Alma UX Projects 2023/2024

Resource Sharing Task Lists

Acquisition – PO Lines

Repository Search

Patron Services

Sets

Analytics

Alma UX: From Idea to Implementation
Thursday, May 11

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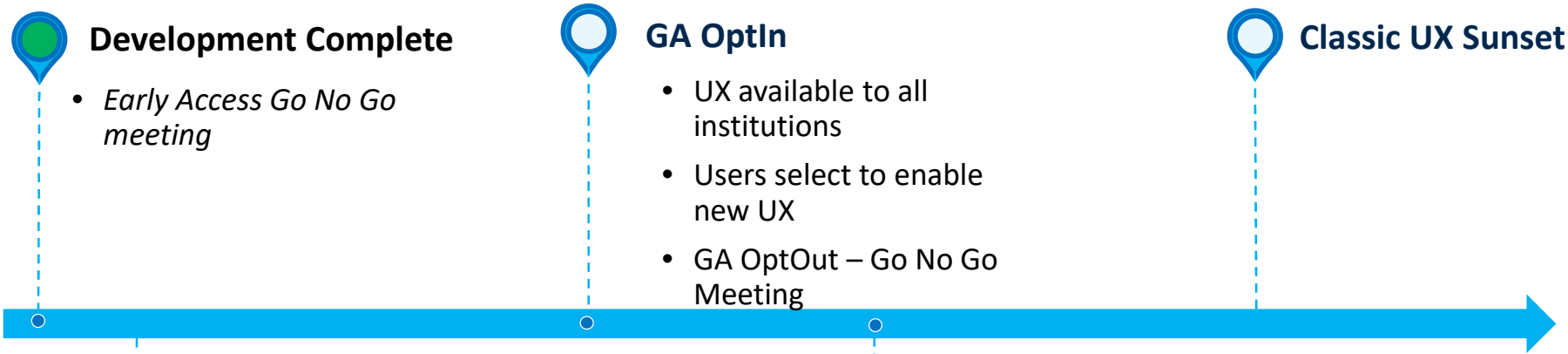
UX Gradual Rollout Milestones



Development Complete

- *Early Access Go No Go meeting*

GA OptIn

- UX available to all institutions
- Users select to enable new UX
- GA OptOut – Go No Go Meeting

Classic UX Sunset

Early Access

- *UX available to a limited set of institutions*
- *Feedback gathering – User Snap*
- *GA OptIn – Go No Go Meeting*

GA OptOut

- *UX available **by default** to all institutions*
- Users can select to disable new UX
- *Classic UX Sunset – Go No Go Meeting*

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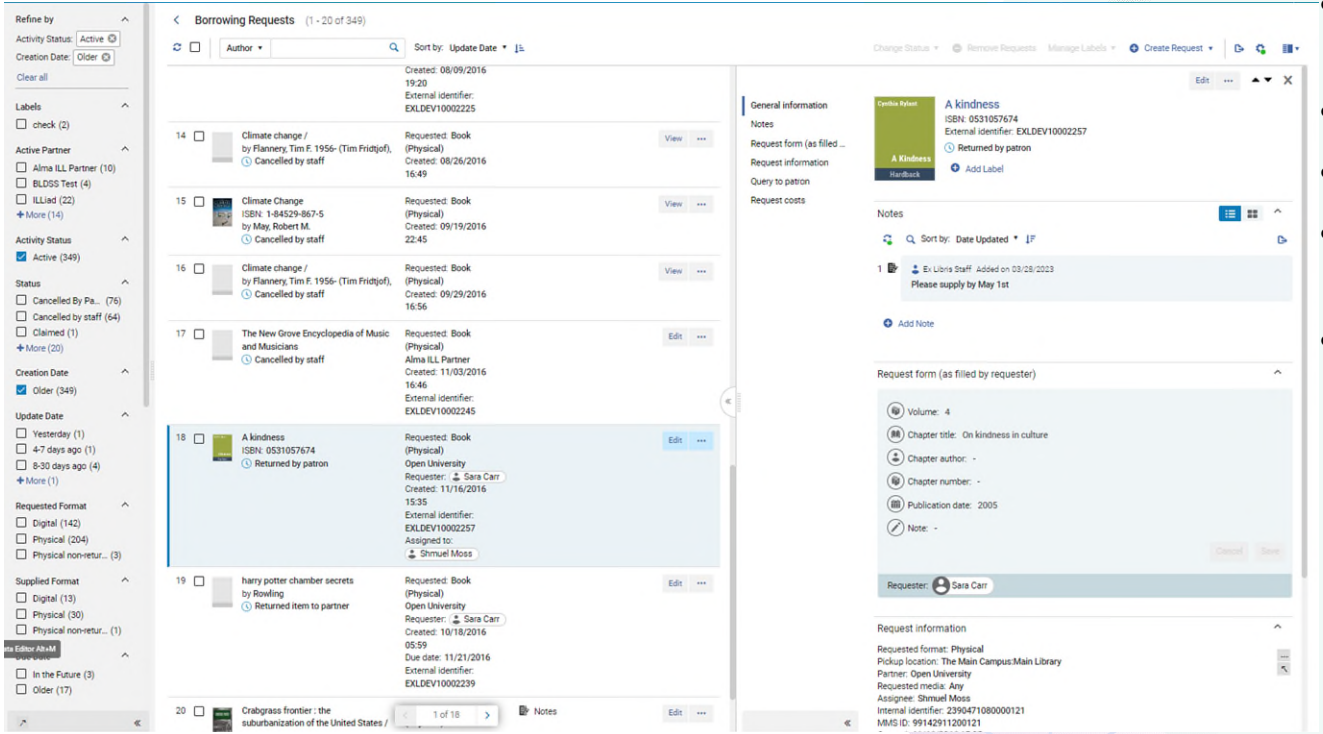
Workflow Simplification

RESOURCE SHARING TASK LISTS
NOW IN PRODUCTION



Benefits

- **Reduction in required clicks for common actions**
- Inline editing
- Improved faceting
- Inline handling of notes and patron queries
- Easier search

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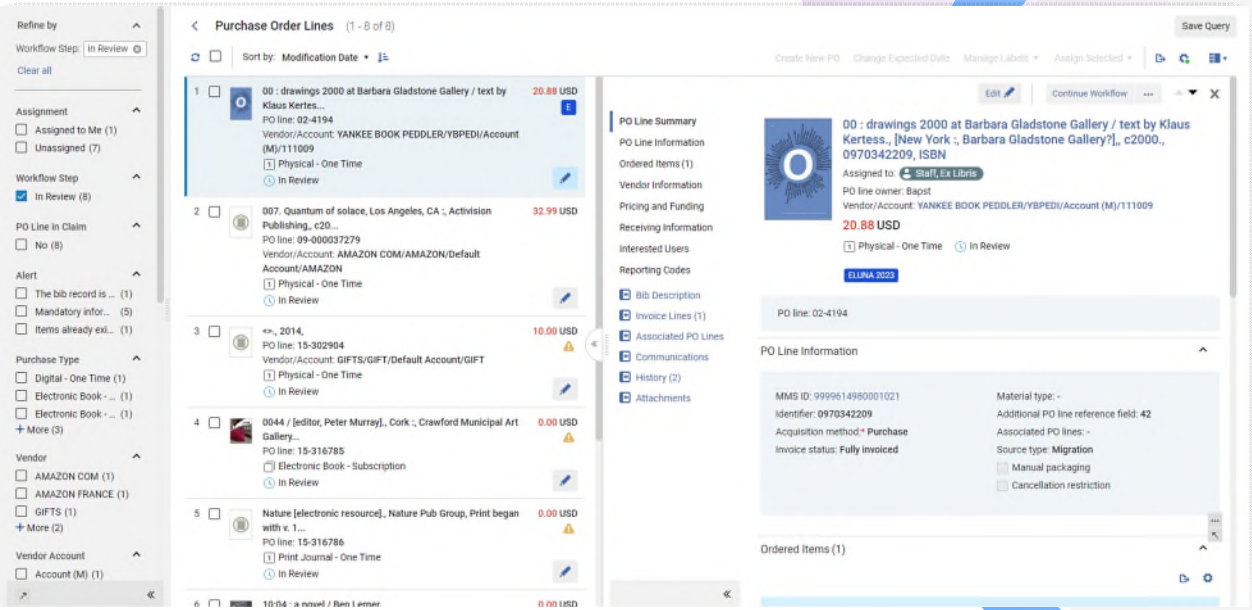
Workflow Simplification

PO LINE TASK LIST
NOW EARLY ACCESS



Benefits

- **Reduction in required clicks for common actions**
- “All PO lines” menu link
- No “GO to task list” action
- “Receive” action from the PO line itself
- Multi select facets
- Labels
- Bulk assignments
- Sliding panel to keep the user oriented
- Section customization

Join Noam Fass Alma Acquisitions Update Wednesday 2:30 PM

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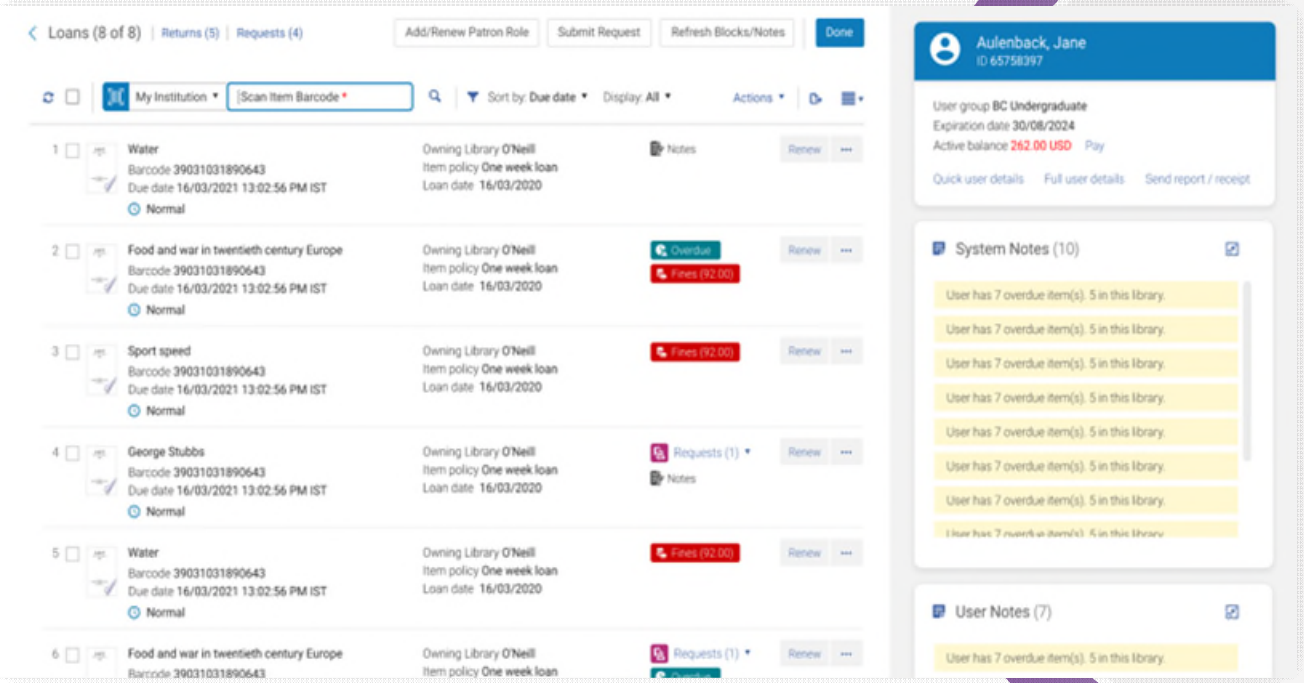
Workflow Simplification

PATRON SERVICES



Benefits

- Quicker access to more information
- Visual tips
- Personalization

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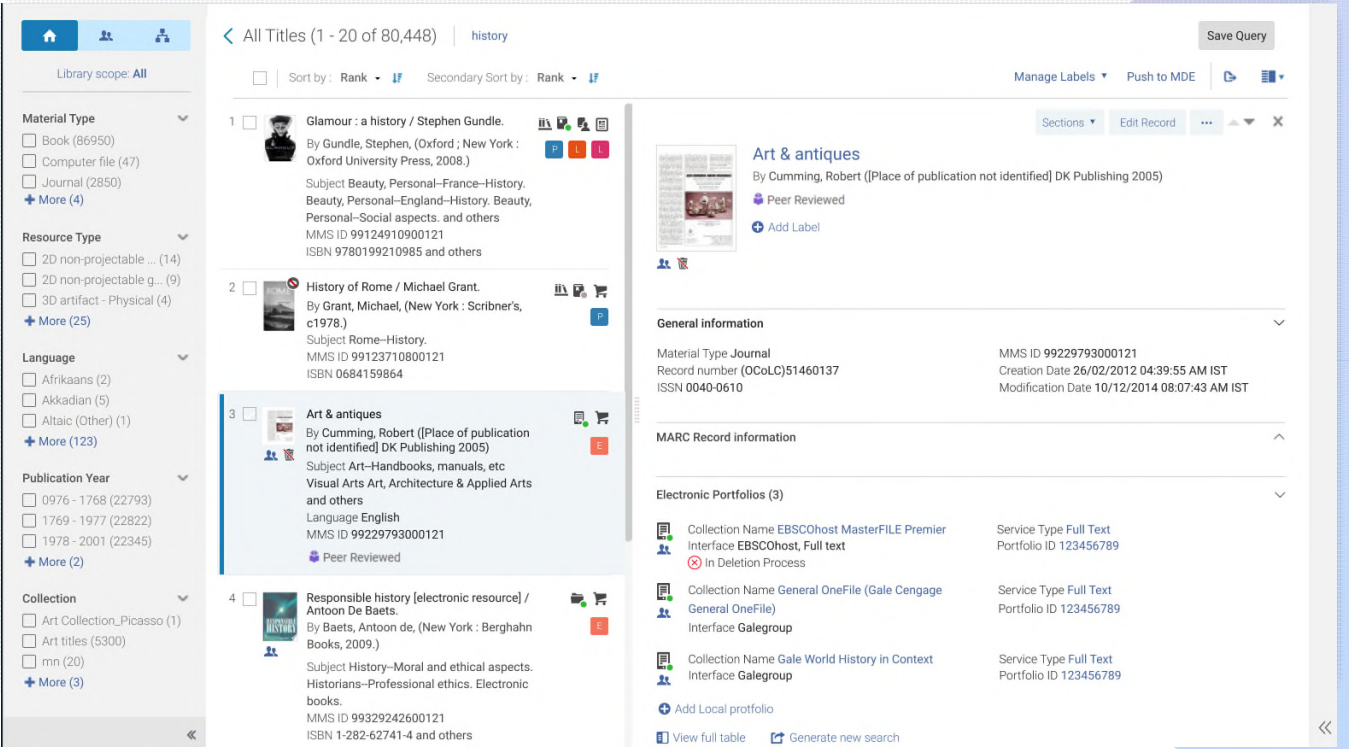
Workflow Simplification

REPOSITORY SEARCH



Benefits

- **Reduction in required clicks for common actions**
- MARC simple view upfront
- New Item Section
- Actionable Inventory Information

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Other

Analytics

Sets

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Linked Data

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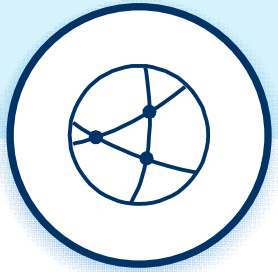
How Does Link Data Help Libraries?

EFFICIENT CATALOGING

Framework that can be adapted to new technologies and use cases as they arise.

IMPROVED DISCOVERABILITY

Granular descriptions of resources allows accurate and relevant results.



IMPROVED INTEROPERABILITY

Integrate Catalog with other data sources in order to provide users with a seamless discovery experience

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What already exists?

Eco system

APIs and Endpoints

Publish and Export to BIBFRAME

Management

URI Enrichment

Alma Refine

Alma

Discovery

Record Enrichment

Recommendations

Search **E**ngine **O**ptimization

Primo

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Linked Data – Plans for 2023/2024

CATALOGING

Ability to store and use Linked Open Data records

User will be able to use APIs to create and upload LC BIBFRAME work and instance.

It will be possible to manage inventory and preform fulfillment workflows for these instances, as well as discover them in Primo VE.

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Linked Data – Plans for 2023/2024

Main Workflows

- One by one resource creation and management (e.g. Special Collections)
- Services: cataloging, acquisition, inventory management, discovery, and fulfillment

Data Scope

- Unique material
- Same authorities as today but using URI as ID base

Main Features

- Collaborative Cataloging via Sinopia (Eco system)
- Authority Linking and Updates (Alma and CZ)
- Core Workflows – Acquisition Inventory and Fulfilment (Alma)
- Discovery and Info Card (Primo)

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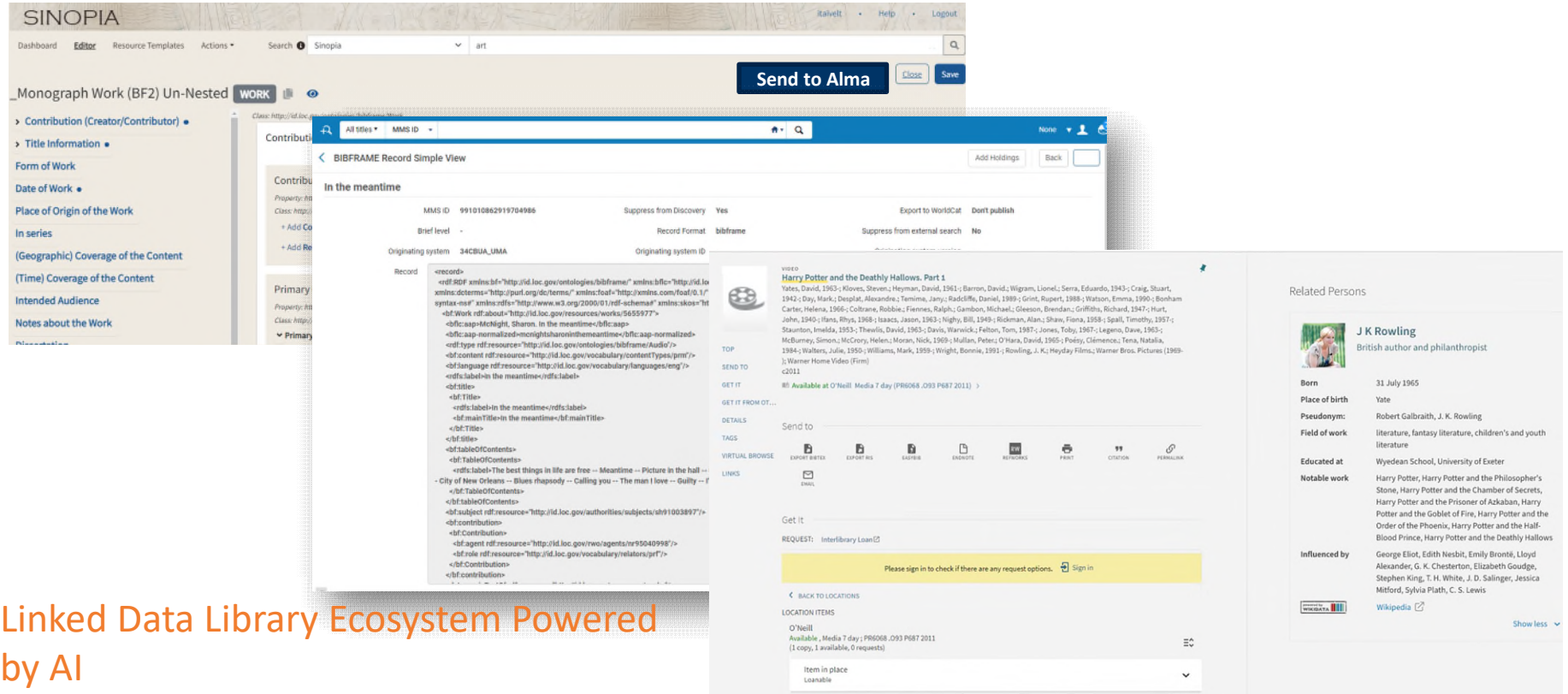
How will it look? From Sinopia via Alma to Primo



Linked Data Library Ecosystem Powered by AI

Wednesday, at 2:30 PM

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MARC & Linked Data

CATALOGING

MARC will continue to exist along side Linked Data
MARC can be enriched with LD elements to be utilized for richer display

MARC 21 Linked Open Data URI enhancements

Catalogers will be able to add URIs in $$1, which will then be searchable in Alma in Real World Object indexes.

Cataloger URIs (starting with Wikidata) will impact the data used for creator info-cards displayed to patrons.

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Open Access

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Open Access - What is the Library Role?

Budget Management

Allocate & manage funds towards publishing models that best serve the institution

Collection Development:

Keep track of which journals are transitioning to open access and adjust their collections accordingly

License Negotiation

Negotiate new types of agreements for optimal budget use

Tracking

- Institution publication as part of Transformative agreements
- Monitor publication outputs
- Monitoring usage of open access resources

Roundtable Discussion: Acquisitions - Open Access Workflow

Thursday, 11:15 AM–12:00 PM

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Drive Research Excellence

Capture & Record

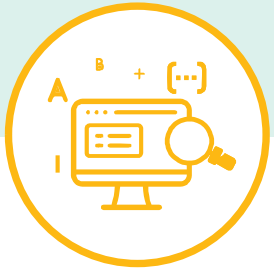
TA details
APC threshold (tokens)
PO line type for TA
PO line type for APC
Reporting Codes

Insights

Provide library with insights about cost per use and APC to inform TA negotiation

Content

Open-Source access rights for Community Zone Journals and CDI articles.



Connect

Integrate with research platforms and publisher platforms to better process TA

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Collaboration

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Collaborative Collection Management

THE CHALLENGE:

- Shelving space
- Budget constraints
- The “long tail”: hard-to-find materials, very useful to few patrons in each library

THE ANSWER:

Cooperation and Collaboration

- Collection Retention Agreements
- Joint Acquisition
- Joint Storage
- Analytical Management

- Consortia:
  Central configuration by central office more centralized operational policies

Consortia Management and Administration of Alma
Wednesday5:45 PM–6:30

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What was done so far?

Analytics

- OTB “Title” overlap reports
- OTB Consortia title reports

Alma

- Overlap Analysis tool (E-Resource and P)
- DARA smart recommendation infrastructure
- RETENTION WORKFLOW

Resource Sharing

- Controlled Digital Lending
- Alma Resource Sharing
- Rapido

Rialto

- Purchase Recommendations

Alma

ORACLE DATA VISUALIZATION

IGELU Conference 12th - 15th September 2022

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Collection Analysis, Management & Development

The current tools demand personal initiative.
Move towards proactive workflows that guide the users towards their goals.

Coming in Alma

- Data Driven insight visualization dashboards (configuration based)
- Collection level Benchmarking
- From Insight to Action: Powerful recommendation system triggered by data

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To Summarize

Optimization

Collaboration

Open Access

Linked Data

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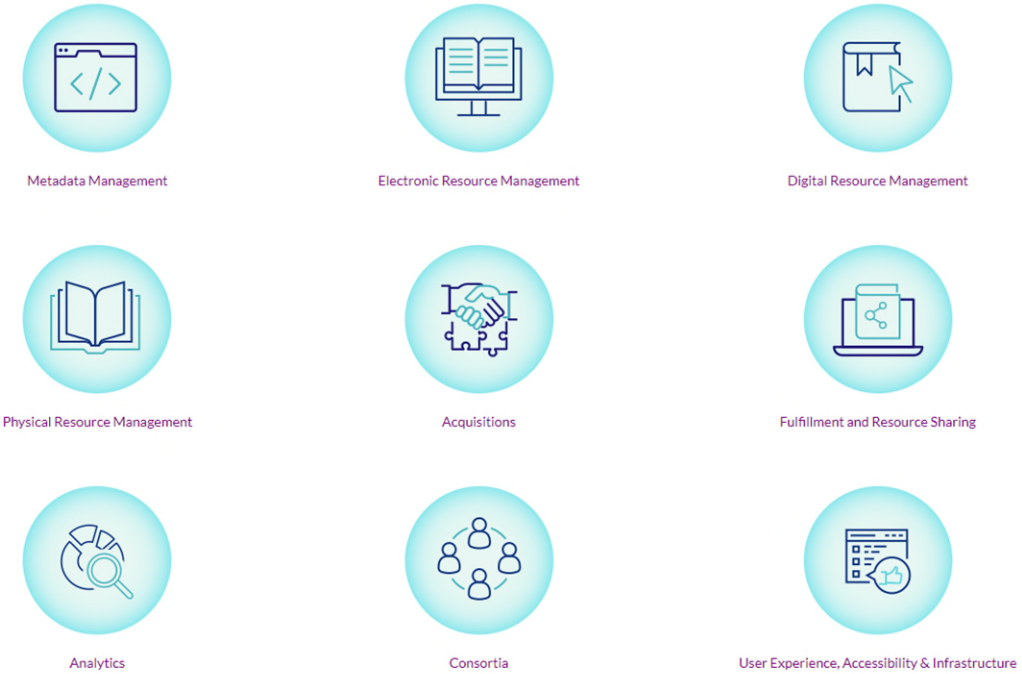
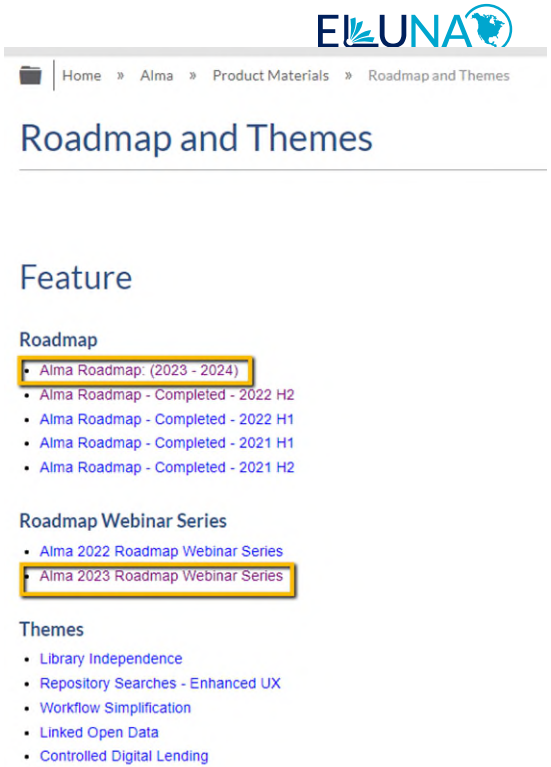
Roadmap Highlights

Alma Roadmap for 2023- 2024 (inclusive) published





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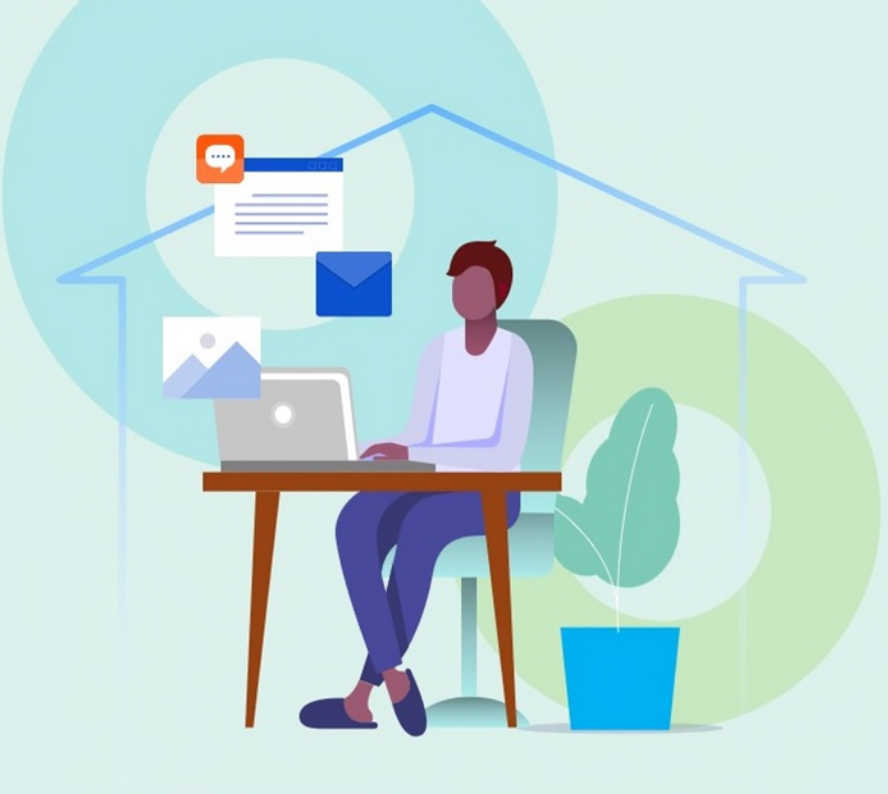
Thank you!



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