



# Alma Product Update

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# Address Current & Emerging Needs

Optimization

Collaboration

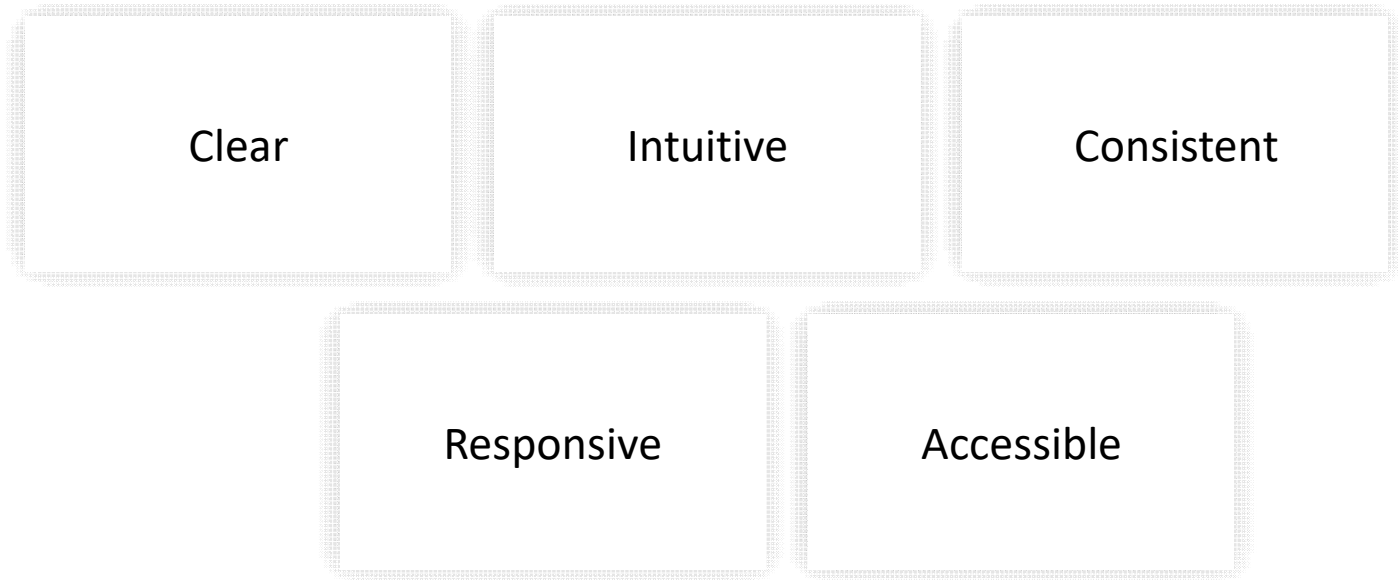
Open Access

Linked Data



# Optimization

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



# Alma UX Projects 2023/2024



Resource Sharing Task Lists



Acquisition – PO Lines



Repository Search



Patron Services



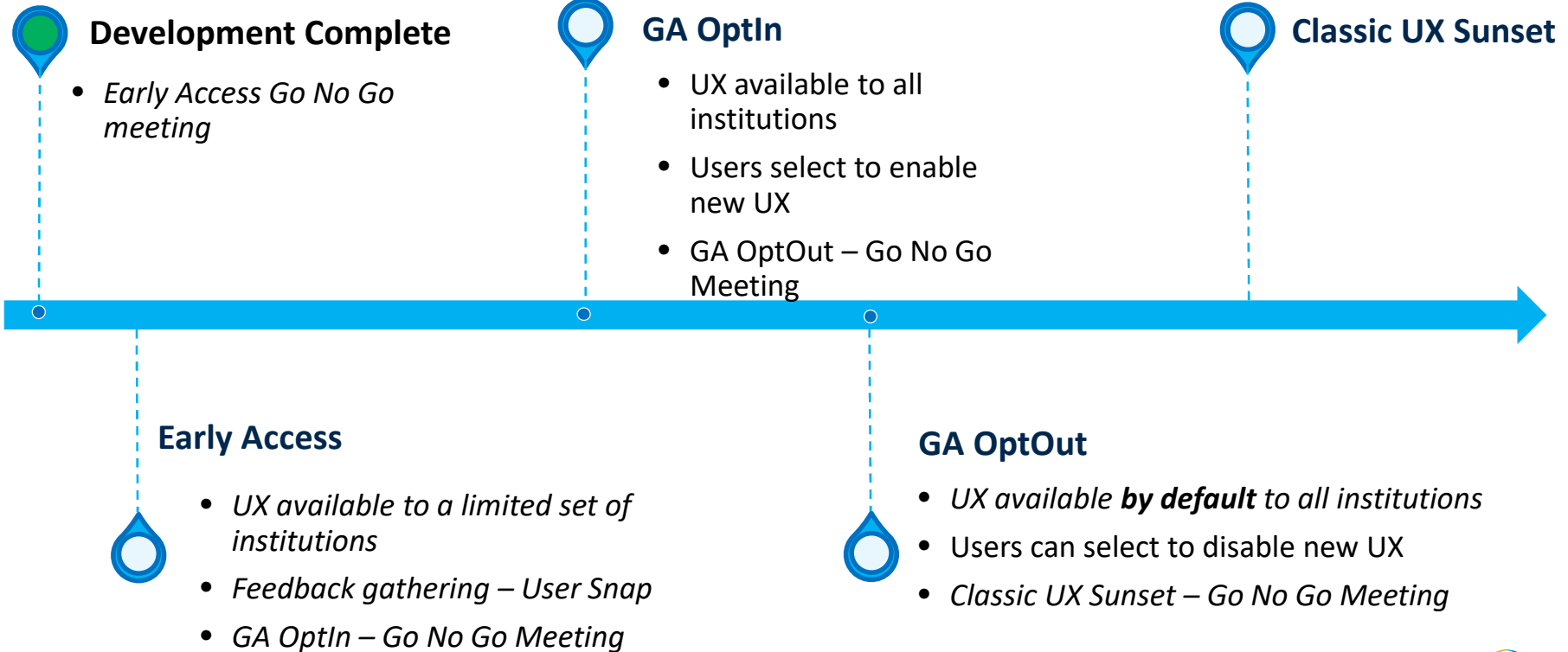
Sets



Analytics

Alma UX: From Idea to Implementation  
Thursday, May 11

# UX Gradual Rollout Milestones



# 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

The screenshot displays the 'Borrowing Requests' interface. On the left, there is a sidebar with various filters such as 'Refine by', 'Activity Status', 'Creation Date', 'Labels', 'Active Partner', 'Activity Status', 'Status', 'Update Date', 'Requested Format', and 'Supplied Format'. The main area shows a list of requests, with request 18, 'A kindness' by Sara Carr, highlighted. To the right, a detailed view of this request is shown, including general information, notes, request form details (Volume: 4, Chapter title: On kindness in culture, etc.), and request information (Requested format: Physical, Pickup location: The Main Campus/Main Library, etc.).

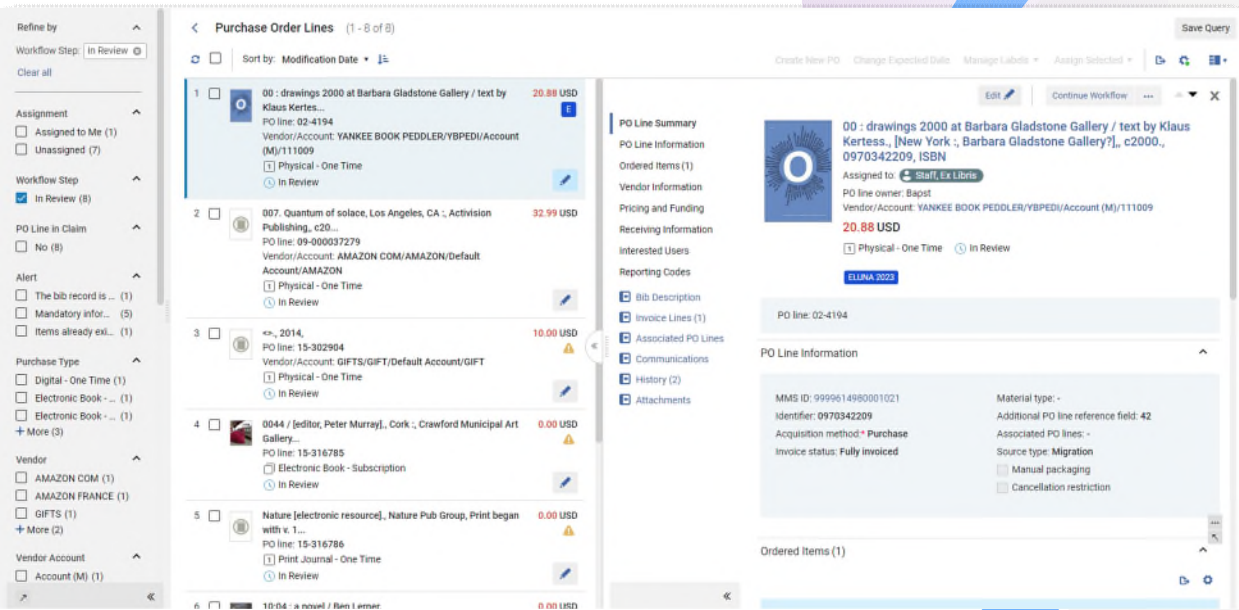
# Workflow Simplification

## 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

# Workflow Simplification

## PATRON SERVICES



Loans (8 of 8) | Returns (5) | Requests (4) | Add/Renew Patron Role | Submit Request | Refresh Blocks/Notes | Done

My Institution | [Scan Item Barcode] | Sort by: Due date | Display: All | Actions

<input type="checkbox"/>	<b>Water</b> Barcode 39031031890643 Due date 16/03/2021 13:02:56 PM IST Normal	Owning Library O'Neill Item policy One week loan Loan date 16/03/2020	Notes	Renew
<input type="checkbox"/>	<b>Food and war in twentieth century Europe</b> Barcode 39031031890643 Due date 16/03/2021 13:02:56 PM IST Normal	Owning Library O'Neill Item policy One week loan Loan date 16/03/2020	Overdue Fines (92.00)	Renew
<input type="checkbox"/>	<b>Sport speed</b> Barcode 39031031890643 Due date 16/03/2021 13:02:56 PM IST Normal	Owning Library O'Neill Item policy One week loan Loan date 16/03/2020	Fines (92.00)	Renew
<input type="checkbox"/>	<b>George Stubbs</b> Barcode 39031031890643 Due date 16/03/2021 13:02:56 PM IST Normal	Owning Library O'Neill Item policy One week loan Loan date 16/03/2020	Requests (1) Notes	Renew
<input type="checkbox"/>	<b>Water</b> Barcode 39031031890643 Due date 16/03/2021 13:02:56 PM IST Normal	Owning Library O'Neill Item policy One week loan Loan date 16/03/2020	Fines (92.00)	Renew
<input type="checkbox"/>	<b>Food and war in twentieth century Europe</b> Barcode 39031031890643	Owning Library O'Neill Item policy One week loan	Requests (1) Overdue	Renew

**Aulenback, Jane**  
ID: 65758397

User group: BC Undergraduate  
Expiration date: 30/06/2024  
Active balance: 262.00 USD [Pay](#)

[Quick user details](#) | [Full user details](#) | [Send report / receipt](#)

**System Notes (10)**

- User has 7 overdue item(s). 5 in this library.
- User has 7 overdue item(s). 5 in this library.
- User has 7 overdue item(s). 5 in this library.
- User has 7 overdue item(s). 5 in this library.
- User has 7 overdue item(s). 5 in this library.
- User has 7 overdue item(s). 5 in this library.
- User has 7 overdue item(s). 5 in this library.
- User has 7 overdue item(s). 5 in this library.

**User Notes (7)**

- User has 7 overdue item(s). 5 in this library.

## Benefits

- Quicker access to more information
- Visual tips
- Personalization



# Workflow Simplification

## REPOSITORY SEARCH

The screenshot displays the Ex Libris repository search interface. On the left, there are filters for Library scope, Material Type, Resource Type, Language, Publication Year, and Collection. The main area shows a list of search results for 'All Titles (1 - 20 of 80,448)'. The selected record is 'Art & antiques' by Robert Cumming, published by DK Publishing in 2005. The detailed view on the right shows the record's general information, MARC record information, and electronic portfolios.

**Search Results:**

- 1 **Glamour : a history / Stephen Gundle.**  
By Gundle, Stephen, (Oxford ; New York : Oxford University Press, 2008.)  
Subject Beauty, Personal--France--History. Beauty, Personal--England--History. Beauty, Personal--Social aspects. and others  
MMS ID 99124910900121  
ISBN 9780199210985 and others
- 2 **History of Rome / Michael Grant.**  
By Grant, Michael, (New York : Scribner's, c1978.)  
Subject Rome--History.  
MMS ID 99123710800121  
ISBN 0684159864
- 3 **Art & antiques**  
By Cumming, Robert ([Place of publication not identified] DK Publishing 2005)  
Subject Art--Handbooks, manuals, etc  
Visual Arts Art, Architecture & Applied Arts and others  
Language English  
MMS ID 99229793000121  
Peer Reviewed
- 4 **Responsible history [electronic resource] / Antoon De Baets.**  
By Baets, Antoon de, (New York : Berghahn Books, 2009.)  
Subject History--Moral and ethical aspects. Historians--Professional ethics. Electronic books.  
MMS ID 99329242600121  
ISBN 1-282-62741-4 and others

**Record Details: Art & antiques**  
By Cumming, Robert ([Place of publication not identified] DK Publishing 2005)  
Peer Reviewed  
Add Label

**General information**

Material Type Journal  
Record number (OCoLC)51460137  
ISSN 0040-0610

MMS ID 99229793000121  
Creation Date 26/02/2012 04:39:55 AM IST  
Modification Date 10/12/2014 08:07:43 AM IST

**MARC Record information**

**Electronic Portfolios (3)**

- Collection Name EBSCOhost MasterFILE Premier Interface EBSCOhost, Full text  
Service Type Full Text  
Portfolio ID 123456789  
In Deletion Process
- Collection Name General OneFile (Gale Cengage General OneFile)  
Service Type Full Text  
Portfolio ID 123456789  
Interface Galegroup
- Collection Name Gale World History in Context Interface Galegroup  
Service Type Full Text  
Portfolio ID 123456789

Add Local portfolio  
View full table Generate new search

## Benefits

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



# Other



Analytics



Sets



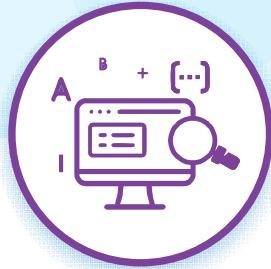
# Linked Data

# How Does Link Data Help Libraries?



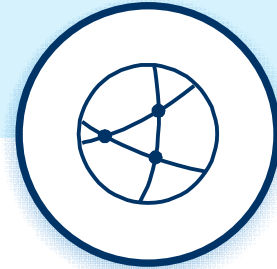
## EFFICIENT CATALOGING

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



## IMPROVED DISCOVERABILITY

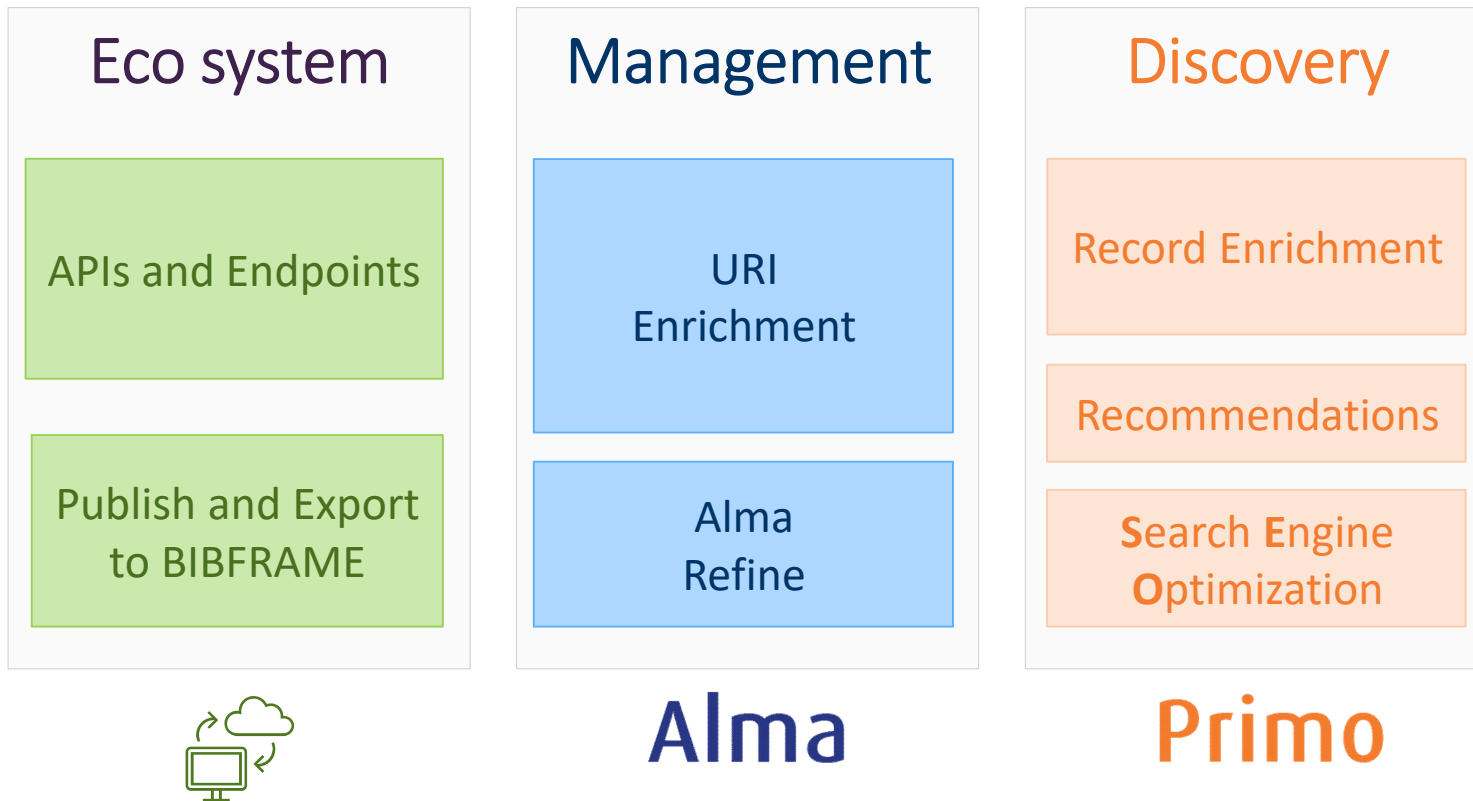
Granular descriptions of resources allows accurate and relevant results.



## IMPROVED INTEROPERABILITY

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

# What already exists?



# 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 perform fulfillment workflows for these instances, as well as discover them in Primo VE.



# Linked Data – Plans for 2023/2024

## Main Workflows

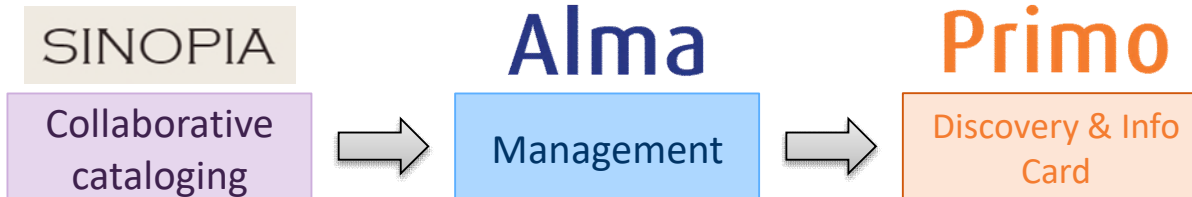
- One by one resource creation and management (e.g. Special Collections)
- Services: cataloging, acquisition, inventory management, discovery, and fulfillment

## 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)



# How will it look? From Sinopia via Alma to Primo

The image displays three overlapping screenshots of library catalog systems. The top-left screenshot shows the Sinopia interface with a 'Send to Alma' button. The middle screenshot shows the Alma 'BIBFRAME Record Simple View' for a record with MMS ID 991010862919704986, featuring fields for Suppress from Discovery, Record Format (bibframe), and Suppress from external search. The bottom-right screenshot shows the Primo interface for the record 'Harry Potter and the Deathly Hallows. Part 1', including a 'Related Persons' section for J.K. Rowling and a 'Sign in' prompt.

Linked Data Library Ecosystem Powered by AI

Wednesday, at 2:30 PM





## 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.





# Open Access

# 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

# Drive Research Excellence



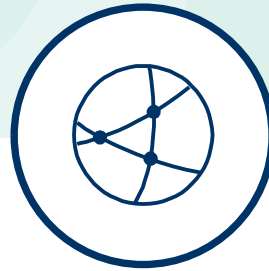
## Capture & Record

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



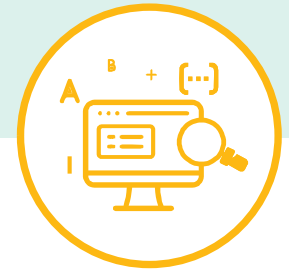
## Insights

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



# Collaboration

# Collaborative Collection Management

## THE CHALLENGE:

- Shelving space
  - Budget constraints
  - The “long tail”: hard-to-find materials, very useful to few patrons in each library
- 
- Consortia:  
Central configuration by central office  
more centralized operational policies



## THE ANSWER:

- Cooperation and Collaboration
- Collection Retention Agreements
  - Joint Acquisition
  - Joint Storage
  - Analytical Management

Consortia Management and  
Administration of Alma  
Wednesday 5:45 PM–6:30

# 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

# Alma

## Resource Sharing

Controlled Digital  
Lending

Alma Resource  
Sharing

Rapido

**ORACLE**  
DATA VISUALIZATION

## Rialto

Purchase  
Recommendations

 **IGELU**  
Conference  
12th -15th September 2022

# 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



# To Summarize

Optimization

Collaboration

Open Access

Linked Data



# Roadmap Highlights

## Alma Roadmap for 2023- 2024 (inclusive) published



Metadata Management



Electronic Resource Management



Digital Resource Management



Physical Resource Management



Acquisitions



Fulfilment and Resource Sharing



Analytics



Consortia



User Experience, Accessibility & Infrastructure

## Roadmap and Themes

### Feature

#### Roadmap

- Alma Roadmap: (2023 - 2024)
- Alma Roadmap - Completed - 2022 H2
- Alma Roadmap - Completed - 2022 H1
- Alma Roadmap - Completed - 2021 H1
- Alma Roadmap - Completed - 2021 H2

#### Roadmap Webinar Series

- Alma 2022 Roadmap Webinar Series
- Alma 2023 Roadmap Webinar Series

#### Themes

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

# Thank you!

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