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*International Group of Ex Libris Users*

# Alma Product Update

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# Address Current & Emerging Needs



**Optimization**



**Collaboration**



**Open Access**




**Linked Data**

# Optimization

User Experience(UX)  
workflow  
simplification

Easy to use, efficient,  
and enjoyable for  
users, leading to  
higher satisfaction  
and engagement

  
Clear

  
Intuitive

  
Consistent

  
Responsive

  
Accessible

# Alma UX Projects 2023/2024



Resource Sharing Task Lists



Acquisition PO Lines



Repository Search



Patron Services

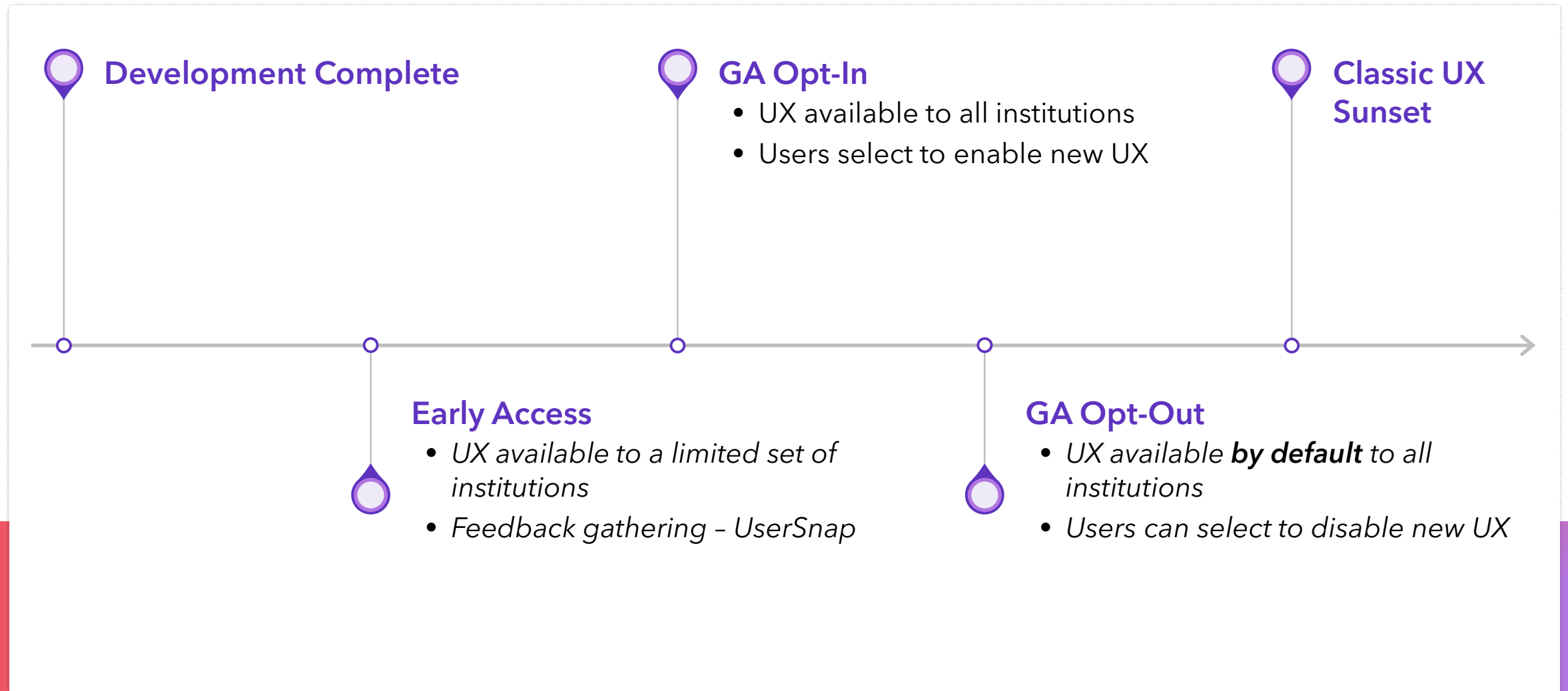


Sets



Analytics

# UX Gradual Rollout Milestones





# Workflow Simplification

## RESOURCE SHARING TASK LISTS - NOW IN PRODUCTION

The screenshot displays the 'Borrowing Requests' interface. On the left, there is a 'Refine by' sidebar with filters for Activity Status (Active), Creation Date (Older), Labels (check), Active Partner (Alma ILL Partner, BLDSS Test, ILLiad), Activity Status (Active), Status (Cancelled By Patron, Cancelled by staff, Claimed), Creation Date (Older), Update Date (Yesterday, 4-7 days ago, 8-30 days ago), Requested Format (Digital, Physical, Physical non-retur...), and Supplied Format (Digital, Physical, Physical non-retur...). The main area shows a list of borrowing requests, with request 18 highlighted. The detailed view for request 18 shows the following information:

- General information:** Requested Book (Physical), Requested: 11/03/2016 16:46, External Identifier: EXLDEV10002245.
- Notes:** Ex Libris Staff Added on 03/28/2023: Please supply by May 1st.
- Request form (as filled by requester):** Volume: 4, Chapter title: On kindness in culture, Chapter author: -, Chapter number: -, Publication date: 2005, Note: -.
- Request information:** Requested format: Physical, Pickup location: The Main Campus:Main Library, Partner: Open University, Requested media: Any, Assignee: Shmuel Moss, Internal identifier: 2390471080000121, MMS ID: 99142911200121.

## Benefits

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

# Workflow Simplification

## PO LINE TASK LIST - NOW IN PRODUCTION

The screenshot displays the 'Purchase Order Lines' interface. On the left, a 'Refine by' sidebar includes filters for 'Workflow Step' (set to 'In Review'), 'Assignment', 'Workflow Step' (checked 'In Review'), 'PO Line in Claim', 'Alert', 'Purchase Type', 'Vendor', and 'Vendor Account'. The main area shows a list of 6 purchase order lines. The first line is selected, and its details are shown in a right-hand panel. The details panel includes a 'PO Line Summary' with a table of contents (Bib Description, Invoice Lines, Associated PO Lines, Communications, History, Attachments) and a 'PO Line Information' section with fields for MMS ID, Identifier, Acquisition method, Invoice status, and Material type.

Line #	Description	Amount (USD)	Status
1	00 : drawings 2000 at Barbara Gladstone Gallery / text by Klaus Kertes...	20.88	In Review
2	007. Quantum of solace, Los Angeles, CA ; Activision Publishing,, c20...	32.99	In Review
3	<-, 2014, PO line: 15-302904	10.00	In Review
4	0044 / [editor, Peter Murray], Cork ; Crawford Municipal Art Gallery...	0.00	In Review
5	Nature [electronic resource], Nature Pub Group, Print began with v. 1...	0.00	In Review
6	10:04 : a novel / Ben Lerner.	0.00	In Review

## 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

# Workflow Simplification

PATRON SERVICES - NOW IN EARLY ACCESS

The screenshot displays a library patron services interface. At the top, there are navigation links 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 a 'Scan Item Barcode' button. The main area shows a list of six loans, each with a checkbox, a book cover icon, the title, barcode, due date, and loan details. The right sidebar shows the user profile for 'Aulenback, Jane' (ID 65758397), including their user group 'BC Undergraduate', expiration date '30/08/2024', and active balance of '262.00 USD'. Below the profile are sections for 'System Notes (10)' and 'User Notes (7)', both containing yellow notification cards about overdue items.

Item #	Title	Barcode	Due Date	Loan Policy	Loan Date	Notes	Actions
1	Water	39031031890643	16/03/2021 13:02:56 PM IST	One week loan	16/03/2020	Notes	Renew
2	Food and war in twentieth century Europe	39031031890643	16/03/2021 13:02:56 PM IST	One week loan	16/03/2020	Overdue Fines (92.00)	Renew
3	Sport speed	39031031890643	16/03/2021 13:02:56 PM IST	One week loan	16/03/2020	Fines (92.00)	Renew
4	George Stubbs	39031031890643	16/03/2021 13:02:56 PM IST	One week loan	16/03/2020	Requests (1) Notes	Renew
5	Water	39031031890643	16/03/2021 13:02:56 PM IST	One week loan	16/03/2020	Fines (92.00)	Renew
6	Food and war in twentieth century Europe	39031031890643	16/03/2021 13:02:56 PM IST	One week loan	16/03/2020	Requests (1) Notes	Renew

## Benefits

- Quicker access to more information
- Visual tips
- Personalization



# Workflow Simplification

REPOSITORY SEARCH - NOW IN DEVELOPMENT

The screenshot displays a library repository search interface. On the left, there is a sidebar with filters for Material Type, Resource Type, Language, Publication Year, and Collection. The main area shows a list of titles, with the third item, 'Art & antiques', selected. A detailed view of this record is shown on the right, including general information, MARC record information, and electronic portfolios.

**Library scope:** All

**Material Type**

- Book (86950)
- Computer file (47)
- Journal (2850)
- [+ More \(4\)](#)

**Resource Type**

- 2D non-projectable ... (14)
- 2D non-projectable g... (9)
- 3D artifact - Physical (4)
- [+ More \(25\)](#)

**Language**

- Afrikaans (2)
- Akkadian (5)
- Altaic (Other) (1)
- [+ More \(123\)](#)

**Publication Year**

- 0976 - 1768 (22793)
- 1769 - 1977 (22822)
- 1978 - 2001 (22345)
- [+ More \(2\)](#)

**Collection**

- Art Collection\_Picasso (1)
- Art titles (5300)
- mn (20)
- [+ More \(3\)](#)

**All Titles (1 - 20 of 80,448) | history**

Sort by: Rank | Secondary Sort by: Rank

Manage Labels | Push to MDE

Save Query

Sections | Edit Record

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

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

**General information**

Material Type **Journal** MMS ID **99229793000121**  
Record number (OCoLC)**51460137** Creation Date **26/02/2012 04:39:55 AM IST**  
ISSN **0040-0610** Modification Date **10/12/2014 08:07:43 AM IST**

**MARC Record information**

**Electronic Portfolios (3)**

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

[+ 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 UX Projects



**Analytics**



**Sets**



# Open Access

# Open Access and the Role of the Library



## Budget Management

- Allocate and 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 use of budget



## Tracking

- Institution publication as part of Transformative agreements
- Monitoring publication outputs
- Monitoring usage of Open Access resources



# Drive Research Excellence



## Capture & Record

- Transformative Agreements details
- APC threshold (tokens)
- PO line type for Transformative Agreements
- PO line type for APC
- Reporting Codes



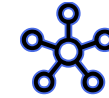
## Insights

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



## Content

- Open Access rights for Community Zone Journals and CDI articles



## Connect

- Integrate with research platforms and publisher platforms to better process Transformative Agreement



# Collaboration



# Collaborative Network - Central Administration

# Optimize Consortia Services

## Central Administration

Efficient and centralized management of settings, preferences and configurations across consortia members

- ✓ "One stop shop" dashboard
- ✓ Easy access to consortia member configurations
- ✓ Unified & enhanced distribution mechanism
- ✓ Configuration mode - 'Proposed' vs 'Imposed'
- ✓ Centralized discovery configuration
- ✓ Additional centralized configuration options

## Support Services

Empower the Consortia Central Office by providing support services to its members using maintenance tools and problem troubleshooting utilities

The screenshot displays the 'Consortia Configuration Management' interface. The top navigation bar includes 'Authorities', 'MMS ID', and 'Resource Sharing Library - Resource Sharing Desk'. The main menu has tabs for 'Acquisition', 'Administration', 'Fulfillment', 'Resource Sharing', 'User Management', 'Discovery', and 'Services'. A red box highlights the 'Configuring: Network Zone' dropdown menu. Below this, the 'Terms Of Use' section is visible, showing a table with 10 rows. The table columns are 'Name', 'Type', 'TOU Owner', and 'Description'. The rows list various terms of use, including 'Default terms of use', '4 Week Fjernlån', and '4 Weeks RS Ansatte - with Personal Delivery'. A 'Distribute network fulfillment changes to members' button is visible on the right side of the interface.

Name	Type	TOU Owner	Description
1 Default terms of use	Booking	Generic	Default Booking Terms
2 Default terms of use	User Registration	Generic	Default User Registration Terms
3 Default terms of use	Request	Generic	Non-Requestable Default
4 Default terms of use	Loan	Generic	Non-Circulating Default
5 Default terms of use	Lending Resource Sharing	Generic	Default No Incoming Resource Sharing Requests From Other Institutions
6 4 Week Fjernlån	Loan	Institution	For bruk på innlånte eksemplarer som lånes ut til låner
7 4 Weeks Fjernlån tilrett	Request	Institution	-
8 4 Weeks RS Ansatte - with Personal Delivery	Borrowing Resource Sharing	Institution	This is to support employees that use Primo for requesting RS, with personal delivery. BIBSYS uses RS to support both traditional RS as well as printouts. Patrons of group 'Egne ansatte' should have this support.
9 4 Weeks RS Bibliotek - with Personal Delivery	Borrowing Resource Sharing	Institution	This is to support external libraries that use Primo for requesting printouts of articles. BIBSYS uses RS to support this. Patrons of group 'libraries' should have this Personal Delivery support, not the students.
10 4 week RS	Borrowing Resource Sharing	Institution	-





# Collection Analysis

# What We Have Already Done

Analytics	Alma	Resource Sharing	Rialto
OTB "Title" overlap reports	Overlap analysis tool (e-resource and physical)	Controlled Digital Lending	Purchase Recommendations
OTB Consortia title reports	DARA smart recommendation infrastructure	Alma Resource Sharing	
	Retention Workflow	Rapido	

# Collection Analysis, Management and Development



**The current tools demand personal initiative**  
**We are moving to proactive workflows that guide 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



# 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

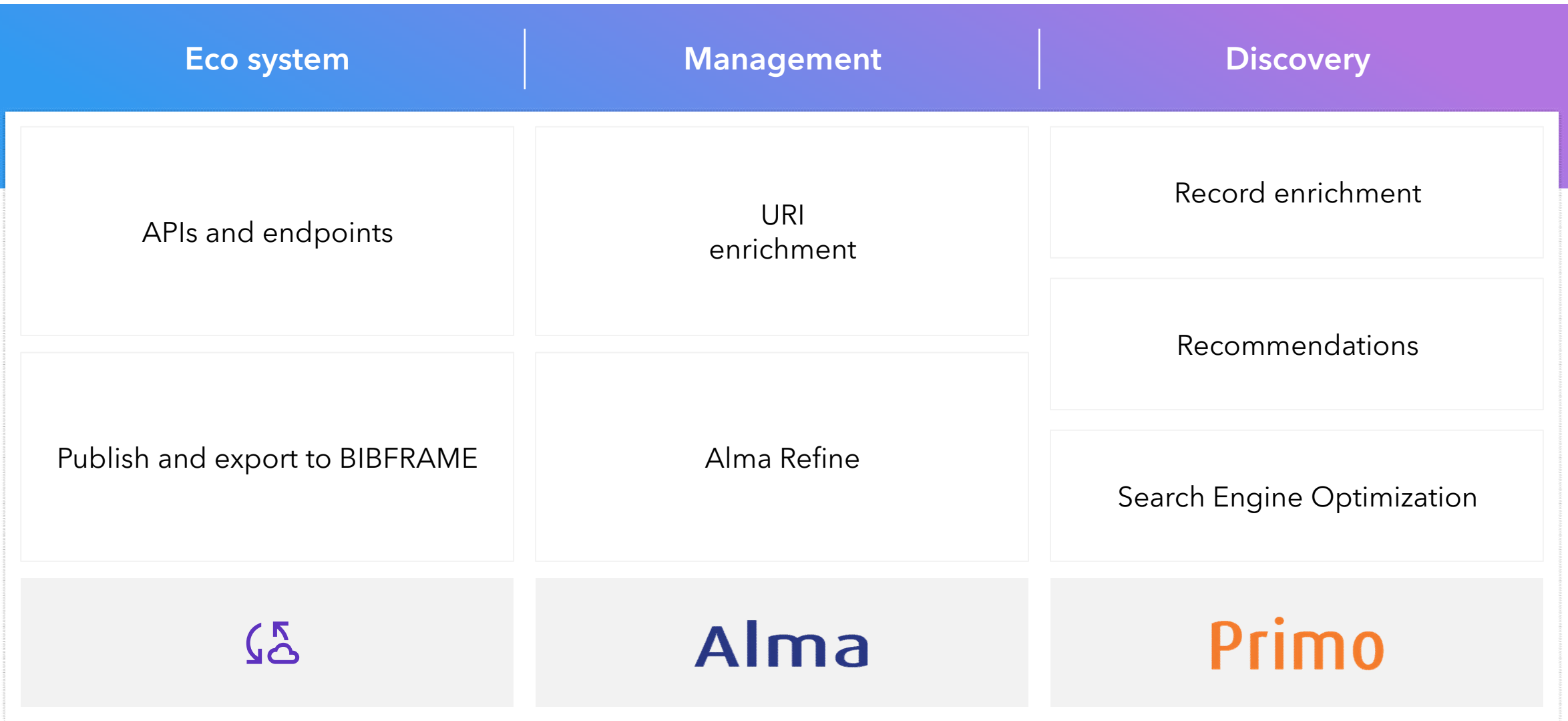
Granular descriptions of resources promoting accurate and relevant results



## IMPROVED INTEROPERABILITY

Integrating catalogs with other data sources in order to provide users with a seamless Discovery experience

# What Already Exists



# Linked Data - Plans for 2023/2024

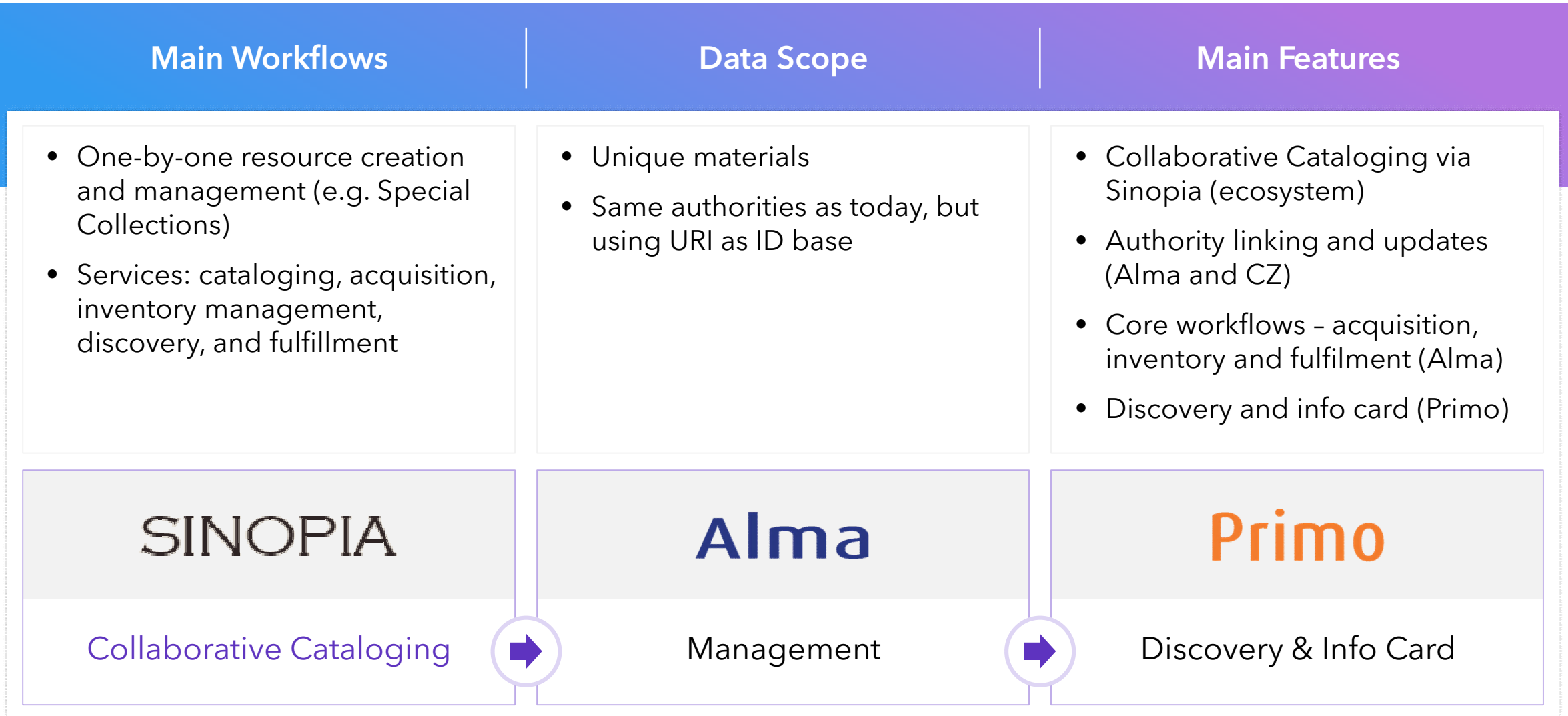


## CATALOGING

### 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 preform fulfillment workflows for these instances, as well as discover them in Primo

# Linked Data - Plans for 2023/2024





# What it Will Look Like - from Sinopia, via Alma to Primo

The image illustrates the migration of a library record from Sinopia to Alma and then to Primo. It is divided into three main sections:

- Sinopia (Left):** Shows a record for "Monograph Work (BF2) Un-Nested". The left sidebar contains various tabs like "Contribution (Creator/Contributor)", "Title Information", "Form of Work", "Date of Work", "Place of Origin of the Work", "In series", "(Geographic) Coverage of the Content", "(Time) Coverage of the Content", "Intended Audience", and "Notes about the Work". A "Send to Alma" button is visible in the top right.
- Alma (Center):** Displays a "BIBFRAME Record Simple View" for the record "In the meantime". It includes a table with fields like "MMS ID", "Brief level", "Record Format", "Export to WorldCat", and "Don't publish". Below the table is a "Record" section with XML metadata, including titles and subjects. A "Send to" section offers various export options like "EXPORT BIBTEX", "EXPORT RIS", "EASYFEB", "ENDNOTE", "REWORKS", "PRINT", "CITATION", and "PERMALINK".
- Primo (Right):** Shows a record for "Harry Potter and the Deathly Hallows. Part 1". It includes a "Related Persons" section for "J K Rowling", listing her birth date (31 July 1965), place of birth (Yate), and notable works like "Harry Potter and the Philosopher's Stone".

# MARC and Linked Data



## CATALOGING

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

### MARC21 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

## To Summarize



**Optimization**



**Collaboration**



**Open Access**



**Linked Data**

# Roadmap Highlights

## Alma Roadmap for 2023-2024 published

The image displays a grid of nine icons representing various library management areas, alongside a screenshot of the Alma website's 'Roadmap and Themes' page.

**Grid of Icons:**

- Metadata Management
- Electronic Resource Management
- Digital Resource Management
- Physical Resource Management
- Acquisitions
- Fulfillment and Resource Sharing
- Analytics
- Consortia
- User Experience, Accessibility & Infrastructure

**Website Screenshot:**

Home » Alma » Product Materials » Roadmap and Themes

### 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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