Alma Product Update

ELUNA | Montreal, CA| April-May 2014

Dvir Hoffman

Director, Marketing & Product Management

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What a 2013 We Had…

60
New Live Customers

2,200+
Staff members served

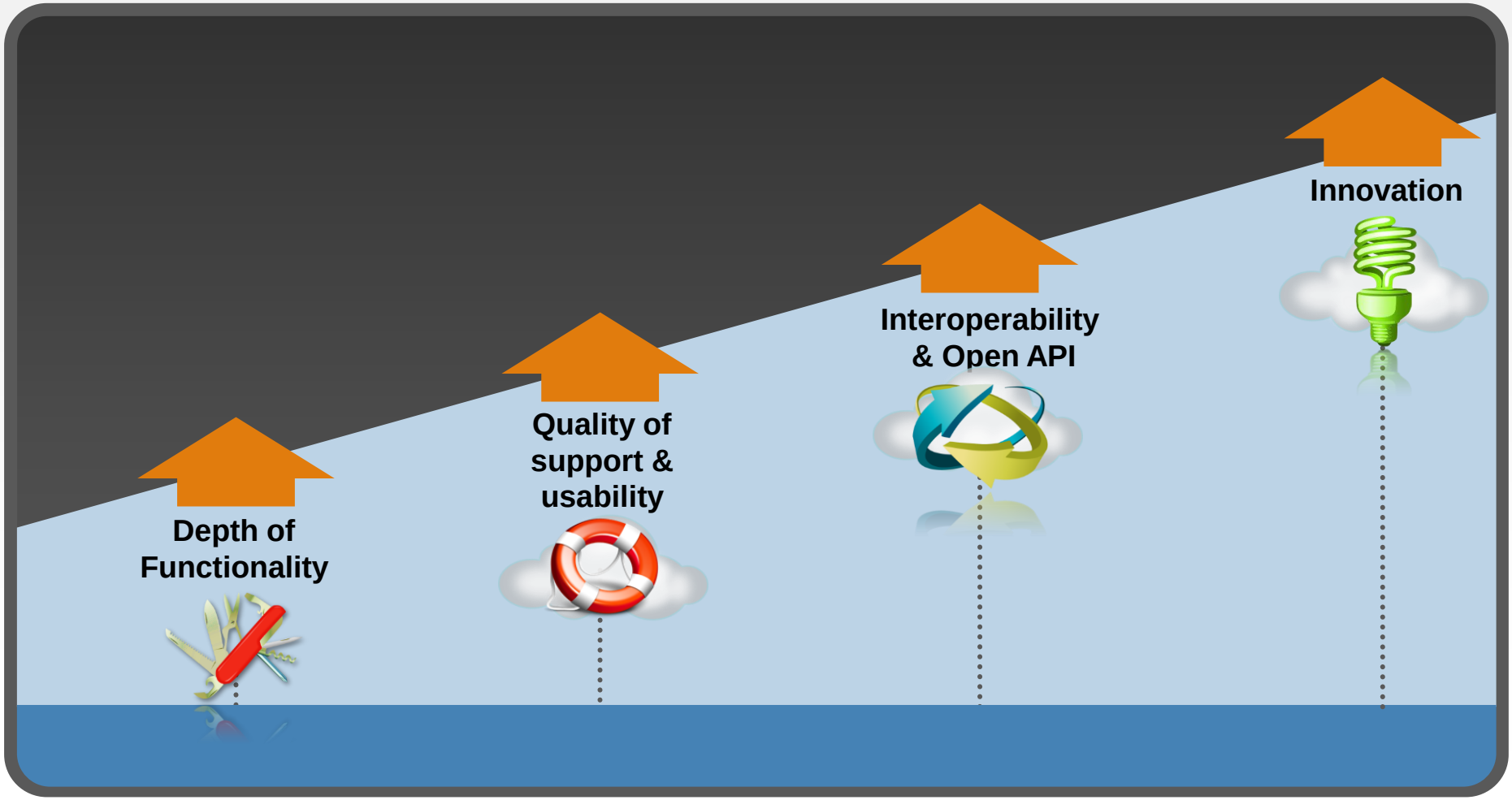
3,000,000+
Loan transactions

509
New Enhancements !

176
New customers

773
OLH and RN pages

Key Focus Areas



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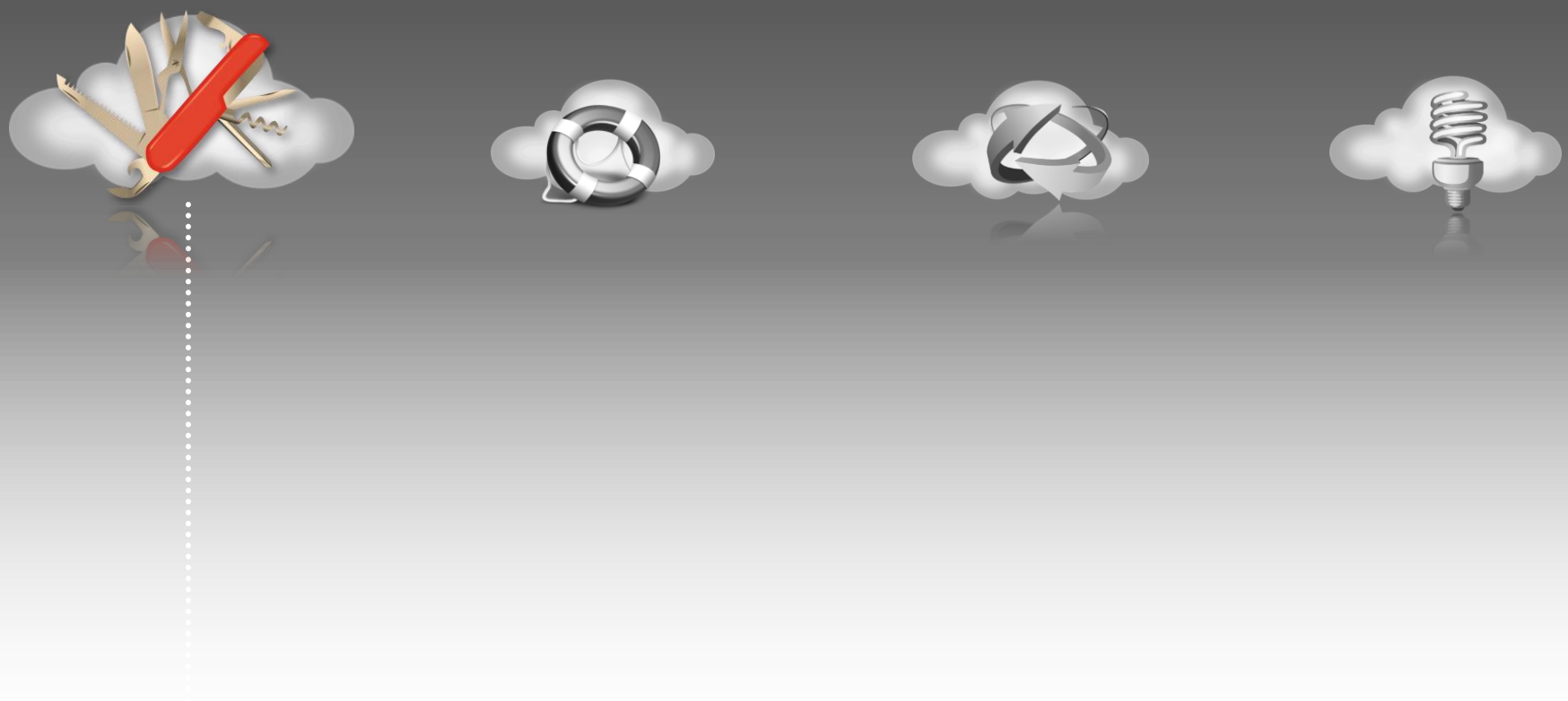
Depth of Functionality



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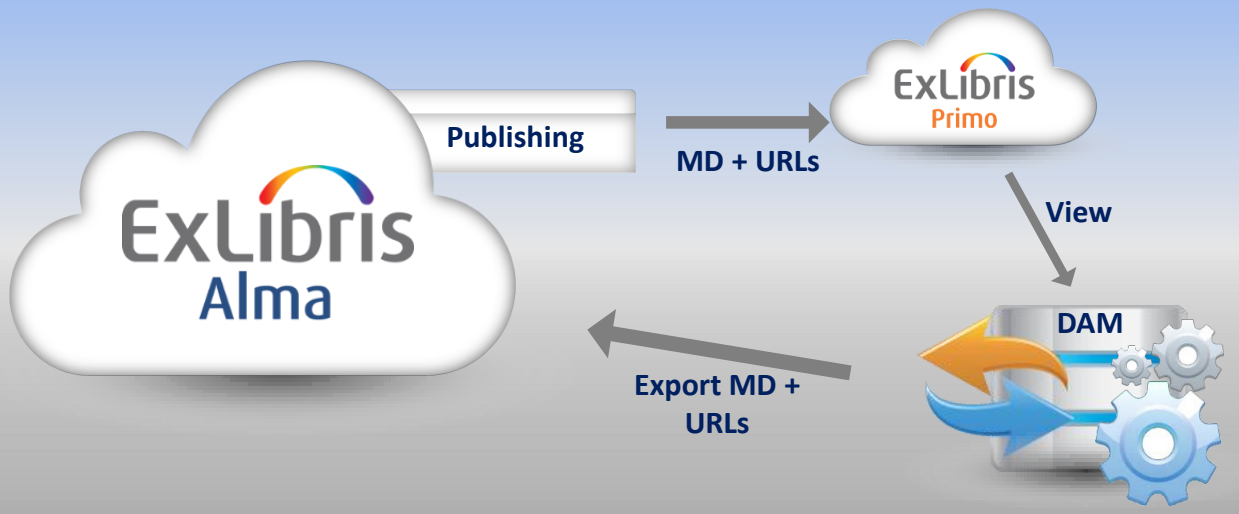
Alma Remote Digital Functionality

- OAI-PMH Harvesting by Alma (file or URL)
- Creation of Digital representation when bib records are found and creation of new bib records having digital representation when bib records are not found (using matching and normalization rules).
- 'View It' is available for remote digital items

How it will work



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Connecting the Dots - EResources

Customer Value

Metadata & Res. Mng.

Provide a comprehensive set of tools and functions that will support ongoing management of E-Resources as part of collections, with options to link them to the Community Zone. This will ease the daily management and maintenance of these resources, and allow libraries to benefit from centrally managed updates in the Community Zone

Feature

- **Manage Titles as part of a Collection**
  - *Import of portfolios to existing local package*
  - *Retrospective updates*
- **From Local into Linked**
  - *Utilities to link a local collection to the CZ*
- **Unify Databases and Packages**
  - *A single entity – Electronic collection*

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Community Zone

Customer Value

Metadata & Res. Mng.

Provide a comprehensive community catalog with high quality metadata records (starting with ebooks and adding print during 2015) that will reduce investment in local activities for common content .

- Governed **by our** customer **community**, **for our** customer **community**
- Benefit from record correction contributed by libraries world wide
- Benefit from expert additions: subject, translations, identifiers

Feature

- Alma CZ Advisory group about to complete its work by end of June and publish conclusions
- Community enrichment and contribution will be deployed gradually starting from July\August releases
- Moving ahead with vendors signing the Alma CZ program and contributing their MARC records:
  - Loaded by now: EBL, SkillSoft, Cassalini Libri
  - To be loaded soon: ProQuest , Springer, CUP, ACLS

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Connecting the Dots - Publishing

Customer Value

Metadata & Res. Mng.

Provide a robust infrastructure that will support ongoing publishing of repository resources in various formats and methods, thereby allowing a library to effectively share content with third parties

Feature

- Set based, Generic profiles for incremental, ongoing publishing of content
- Available via OAI-PMH
- Enrichment with Inventory information
- Enrichment with Physical item information added on May 14' release

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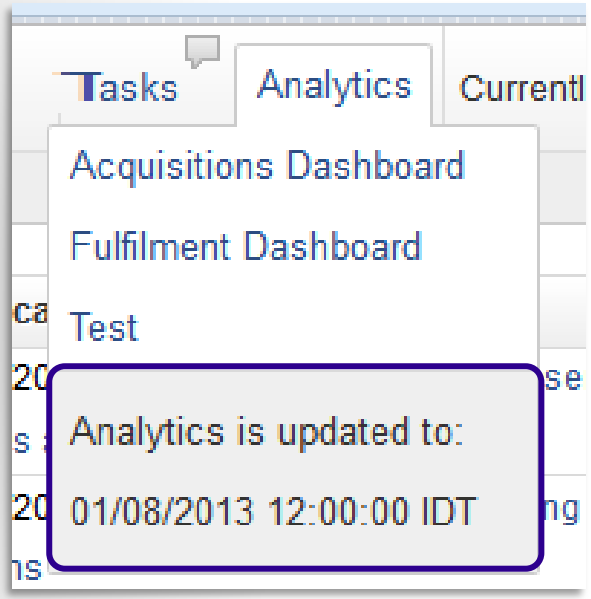
Daily Update of Analytics

- One of our main activities in 2013
- Rolled out to all Data Centers
- Continuing effort into insuring scalability of infrastructure



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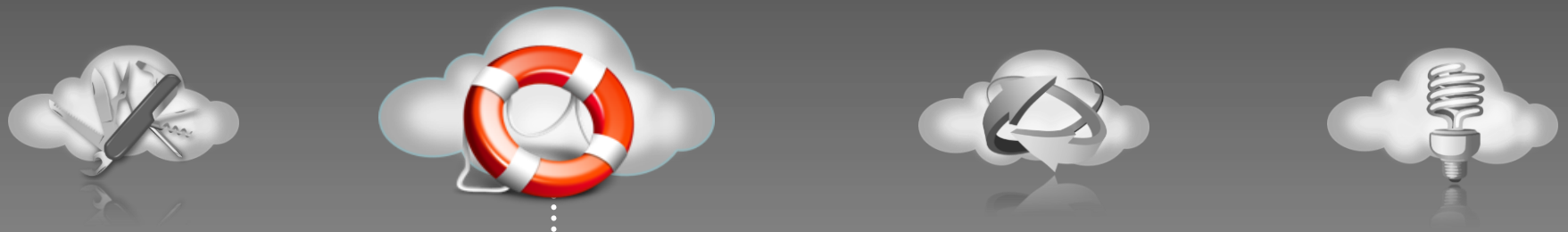
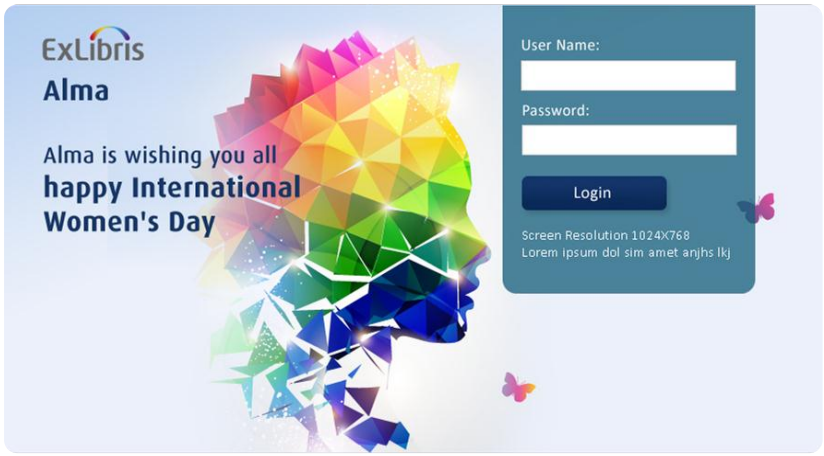
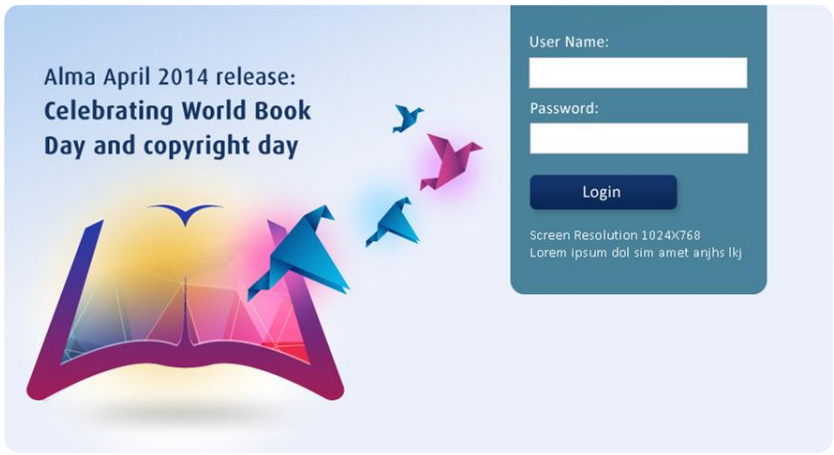
Quality of Support and Usability



Improvements to the Alma Release Process

- New releases of Alma are deployed ***on the first Sunday of every month.***
- ***A week prior to the monthly release date*** – i.e. the last Sunday of the previous month:
  - Deploy the new release in **all the sandbox environments** in all regions.
  - The **monthly Release Notes will published**.





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Improved issues and Bugs reporting

Includes a comprehensive list of bugs and issues resolved in the release.

Category	Description	Case Number
Acquisitions	In certain cases, it is not possible to export from the Analytics Dashboard. A workaround has been developed for this problem. For detailed information, refer to the *Alma Analytics Guide* (as of March 2, 2014)	41216, 32107, 38168, 37501, 46246, 40787
Acquisitions	The Purchase Manager could not delete PO lines owned by the library for which the Purchase Manager was scoped. This issue has been fixed and the Purchase Manager can now delete PO lines properly.	49884
Acquisitions	Currency can now be saved as part of the PO line template. This feature will apply only to new templates or templates saved after the March release.	30982
Acquisitions	When creating or updating a PO line, the material type was not applied to the item. This has been fixed and the item material type is now properly updated.	23543

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Ask the Alma Expert

Ask the Expert

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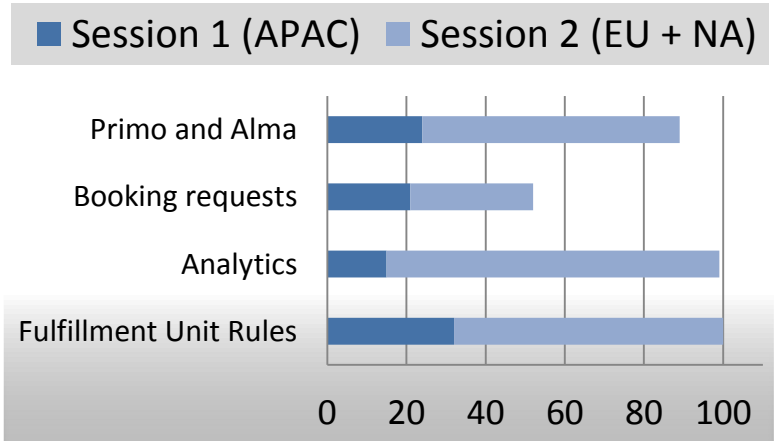
Weekly since December 2013, with a holiday break

Average of 70 participants over 9 worldwide sessions

Ask the Expert Participation



Topics Presented (Partial):

- E-Resources Workflows
- E-Resources Architecture and Concepts (Part 2)
- E-Resources Architecture and Concepts (Part 1)
- Resource Sharing Setup and Workflows
- Work Orders and Item Process Management
- Discovery Interface Display Logic
- Letter Configuration
- Normalization Rules
- Primo and Alma
- Booking Requests
- Tips and Tricks in Analytics
- Fulfillment Unit Rules

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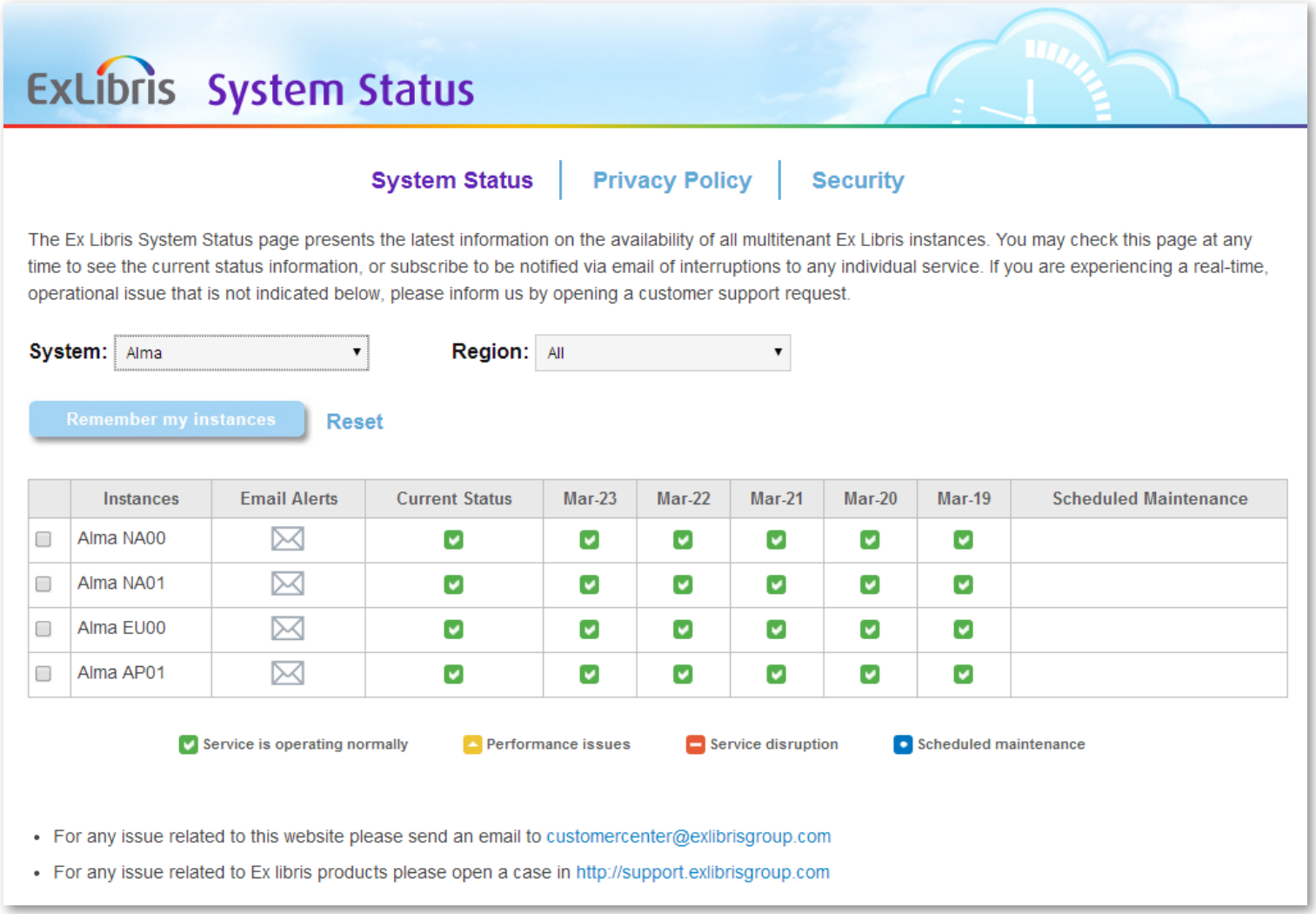
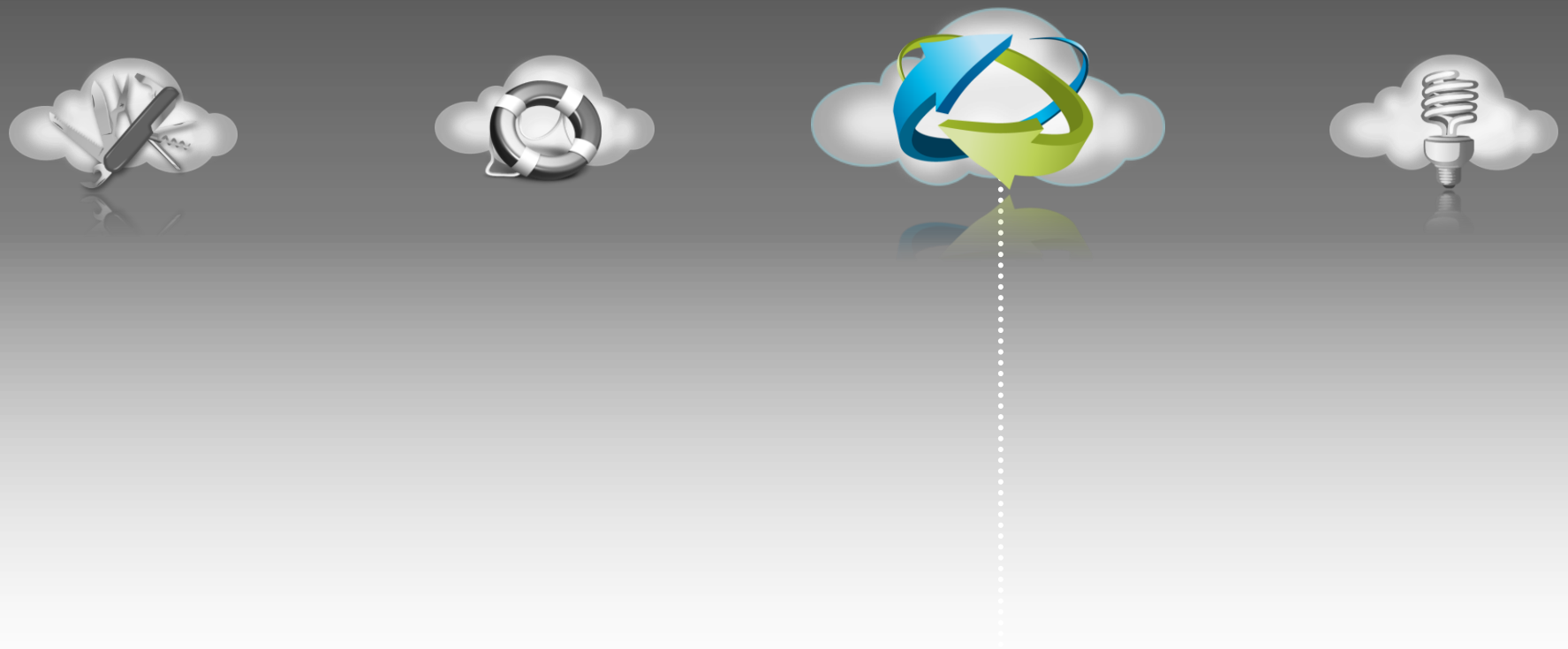
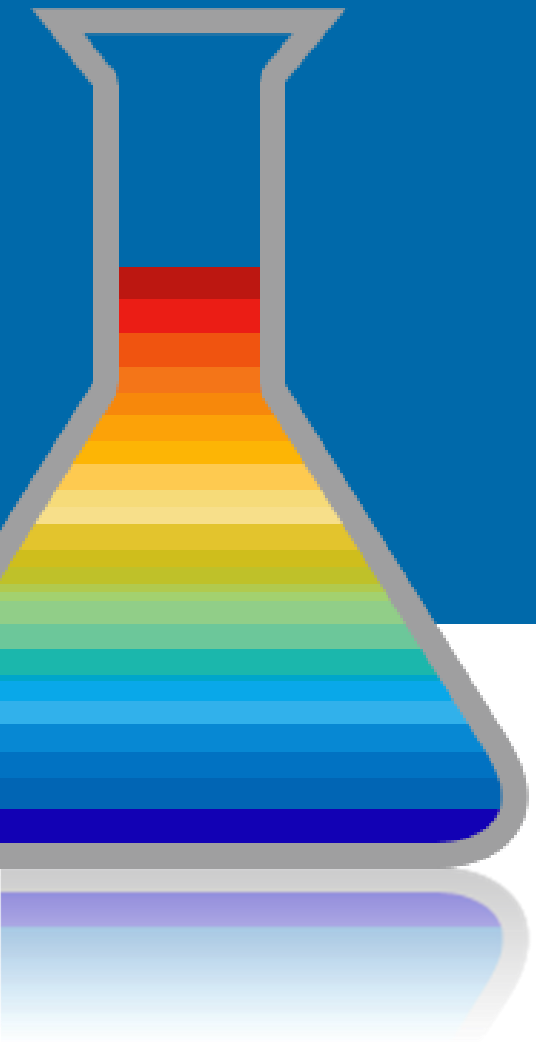
New System Status Portal



Interoperability and Open Platform





Ex Libris Developers Network

Develop. Experiment. Collaborate

The Must-Have of an Open SaaS System

ACCESS

Providing far-reaching access to our systems via well defined secured open interfaces

INTEROPERABILITY

Increasing interoperability through advanced integrations with other systems

COMMUNITY

Encouraging and supporting a vibrant developer community

INCREASED DEVELOPER PRODUCTIVITY

Easing the developer experience and increasing productivity

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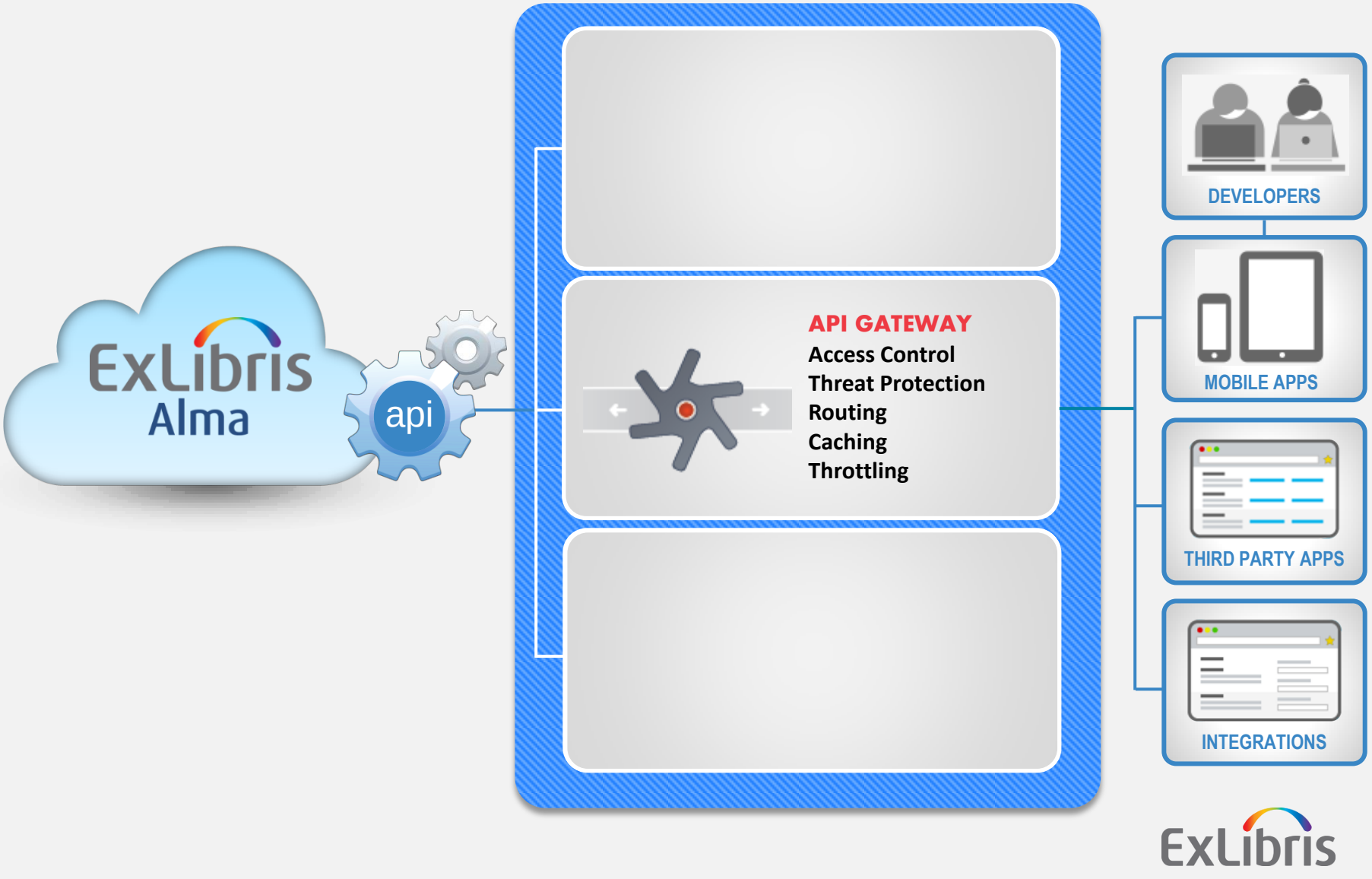
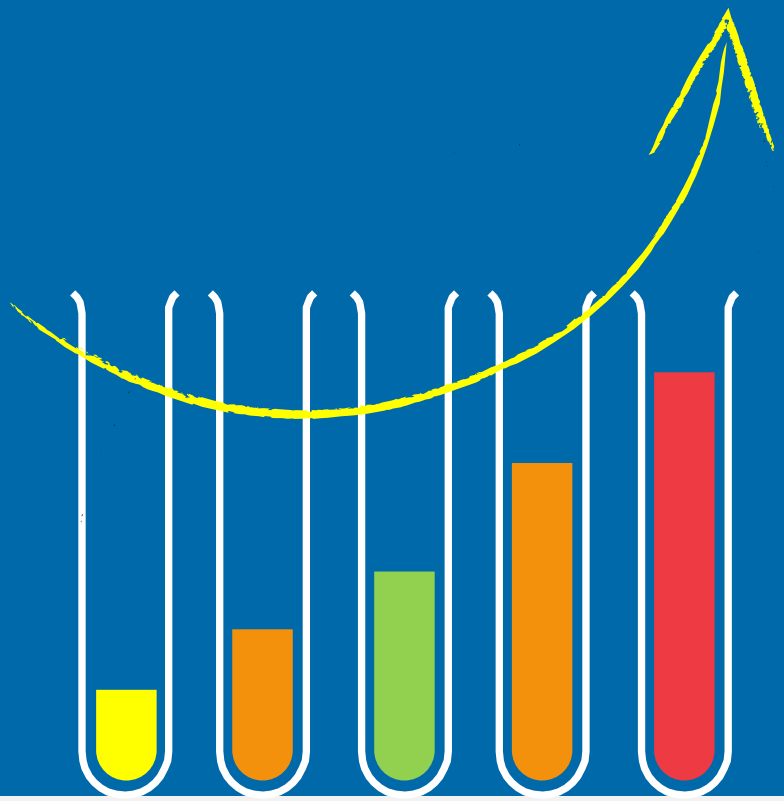
Ex Libris API Platform
a Secured & Scalable API Infrastructure



Ex Libris Developer Network

Develop. Experiment. Collaborate



Allow customers to leverage their investment in Ex Libris products by integrating them with existing systems and by extending them with additional functionality.

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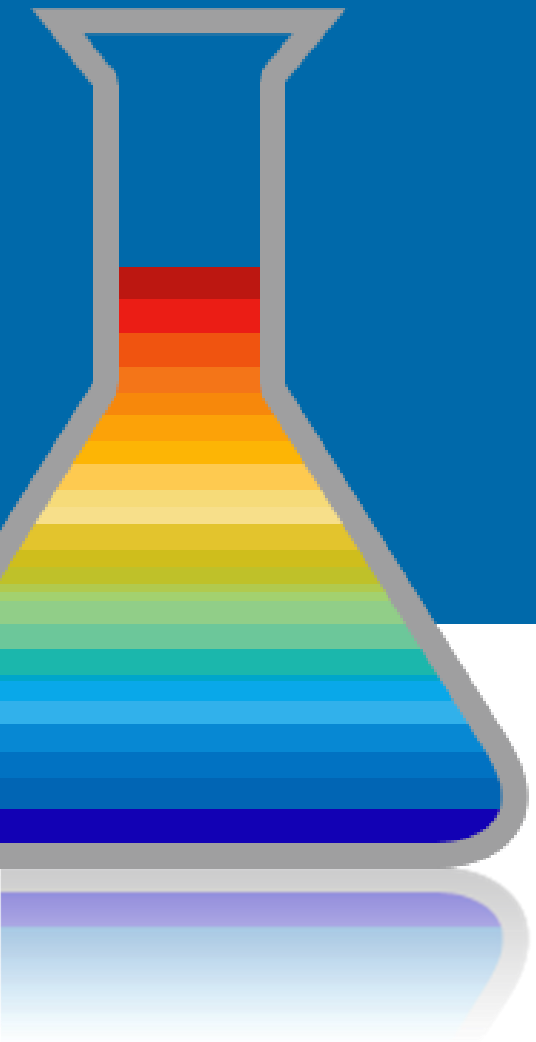

Develop. Experiment. Collaborate

Addressing Key Developers' Challenges

Ex Libris Developer Network – Addressing Key Challenges

How easy are these APIs to work with?

How easily can I learn these APIs?

How long until I get the key?

Is there a community I can learn from?

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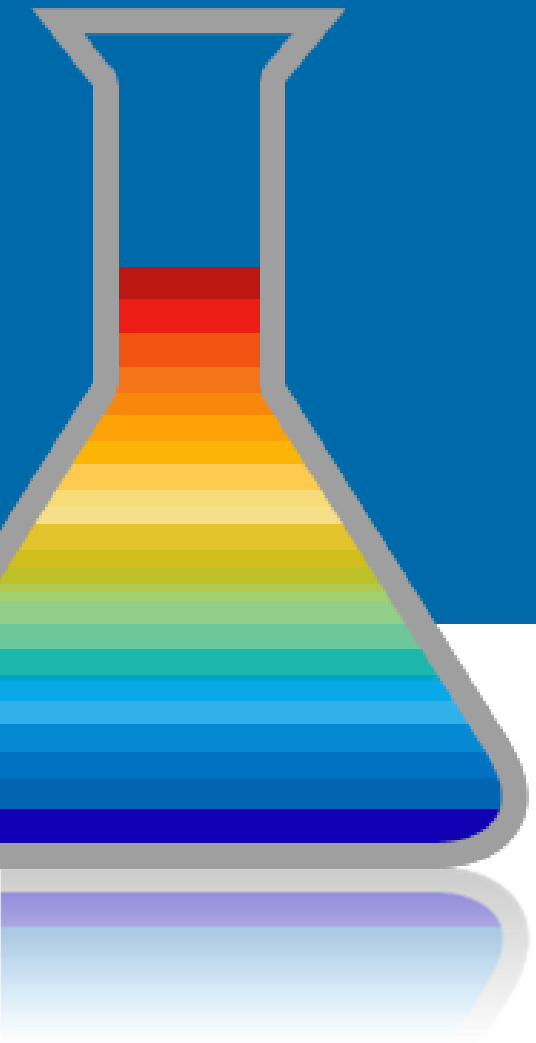
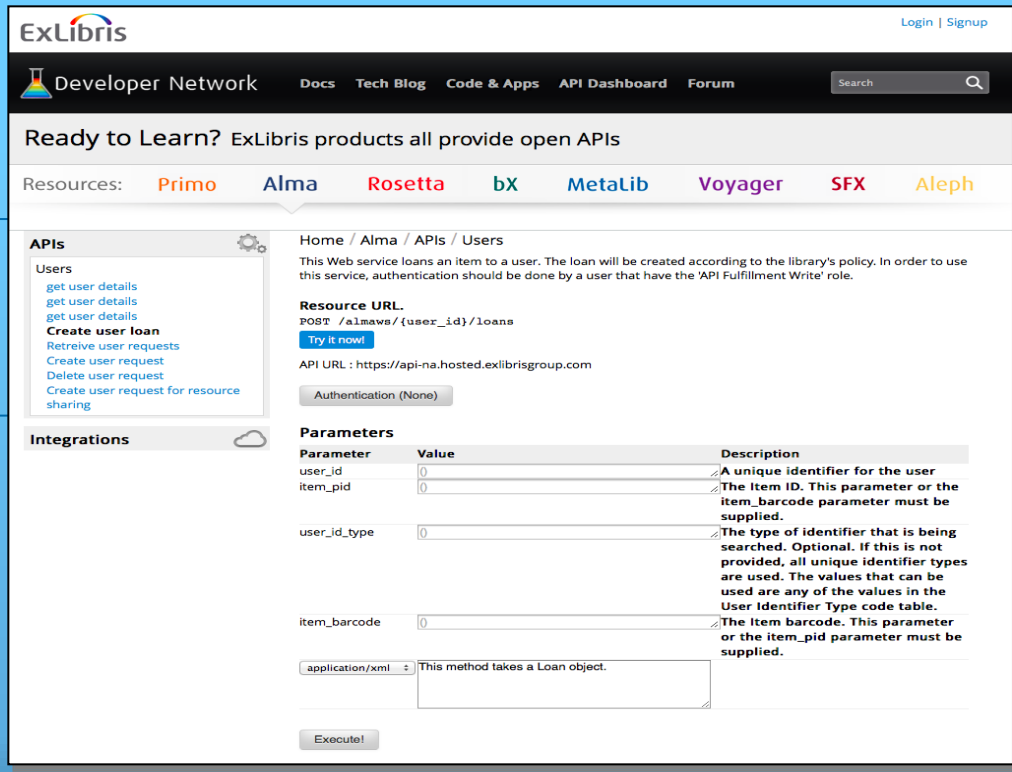


Develop. **Experiment.** Collaborate

The Ultimate Developers Sandbox

- Developers console: experiment the APIs in real time
- Experiment using your real data by connecting to your sandbox
- Get your Restful API calls in different development languages: Java, PHP, Python, Java Script in a click of button



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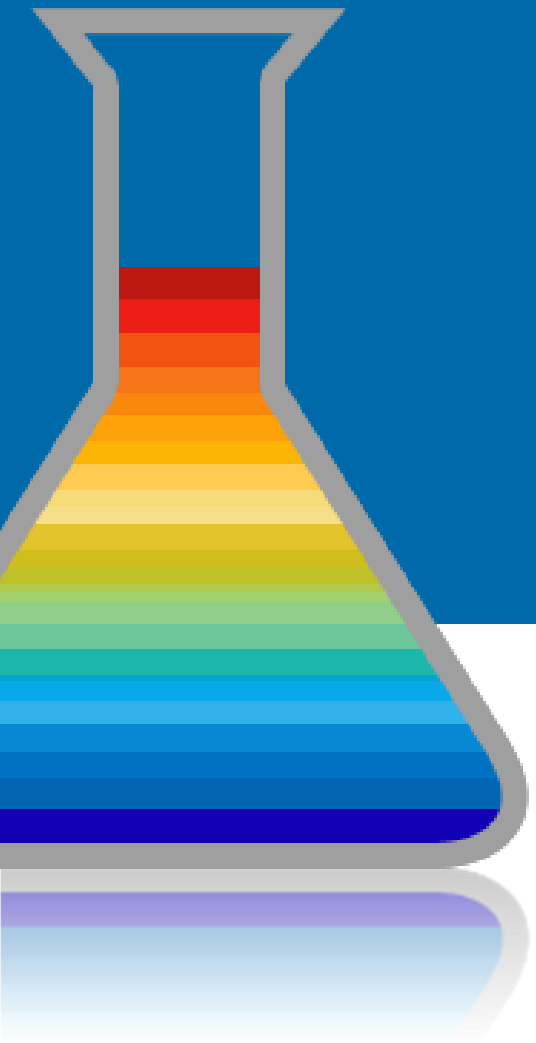
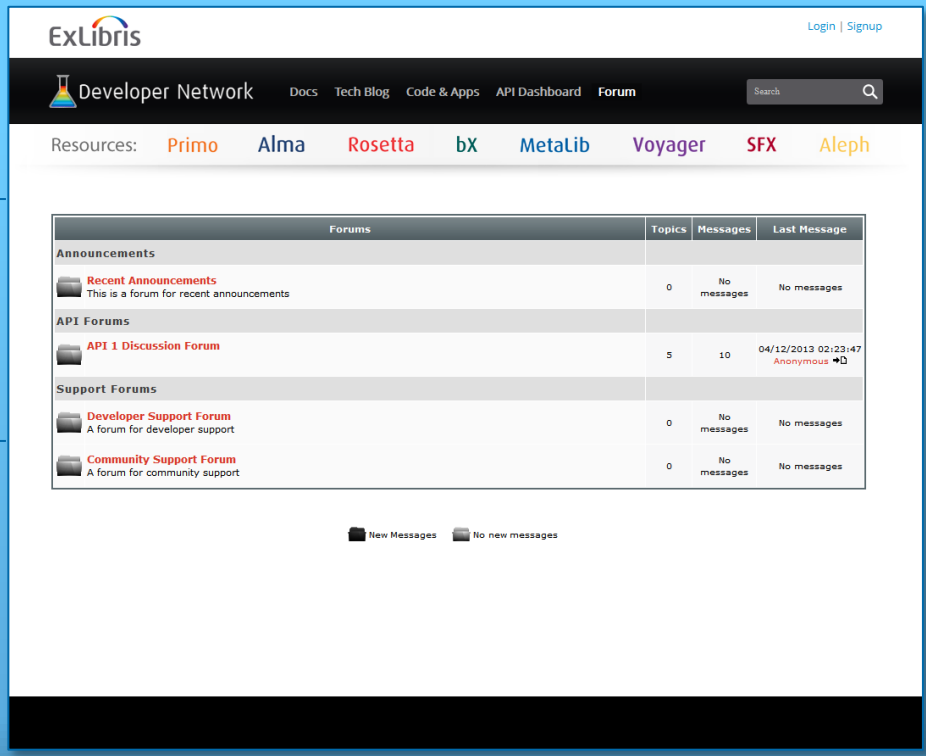


Develop. Experiment. **Collaborate**

Collaborate.
Forums, Blogs, Code Share

- Collaborate and interact with peers using Forums
- Post your development descriptions and get feedback from others using a modern Tech Blog
- Share your code using industry leading code share platform GitHub



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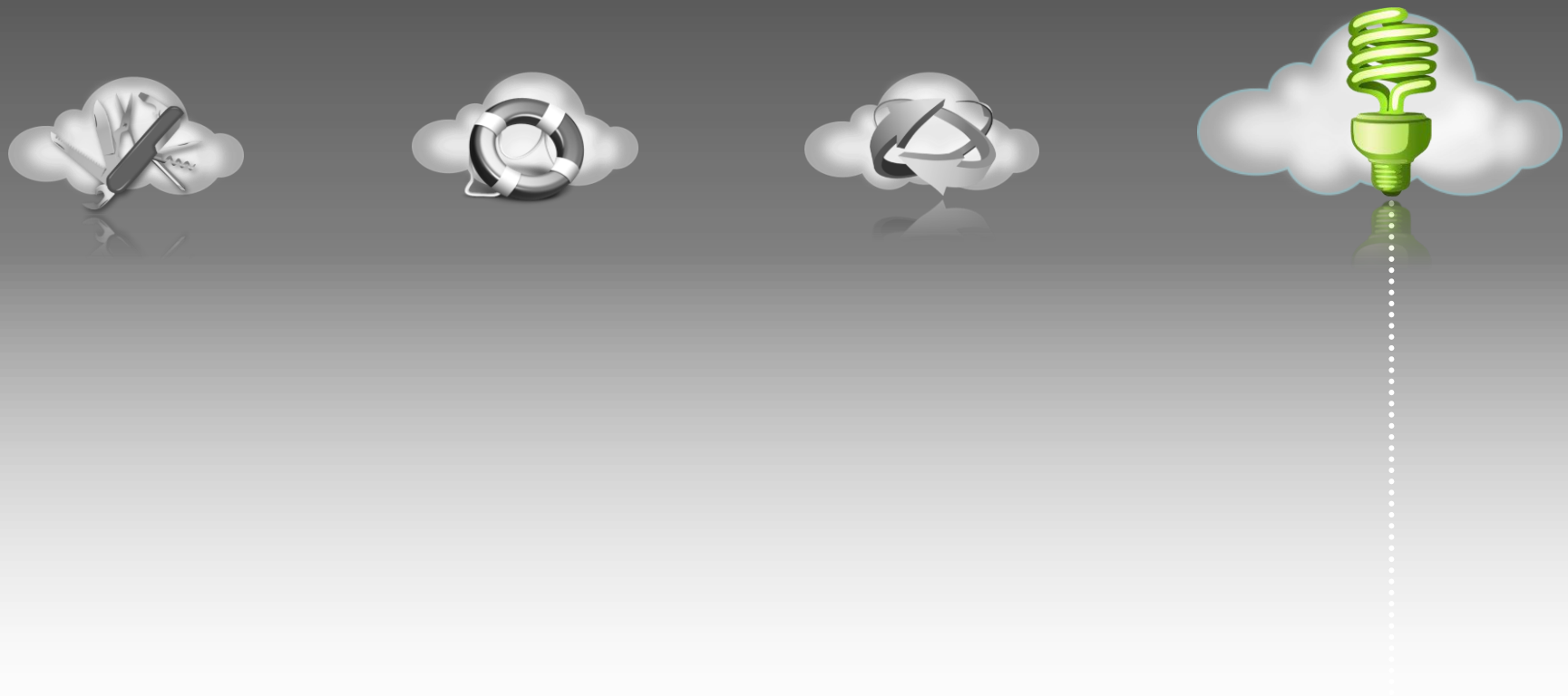
Innovation



Ex Libris Collaboration with SWETS and YBP

Ex Libris collaborates with SWETS and YBP to streamline library operations and deliver efficient acquisitions and resource management workflows

swetswise | ExLibris The bridge to knowledge | BAKER & TAYLOR YBP Library Services

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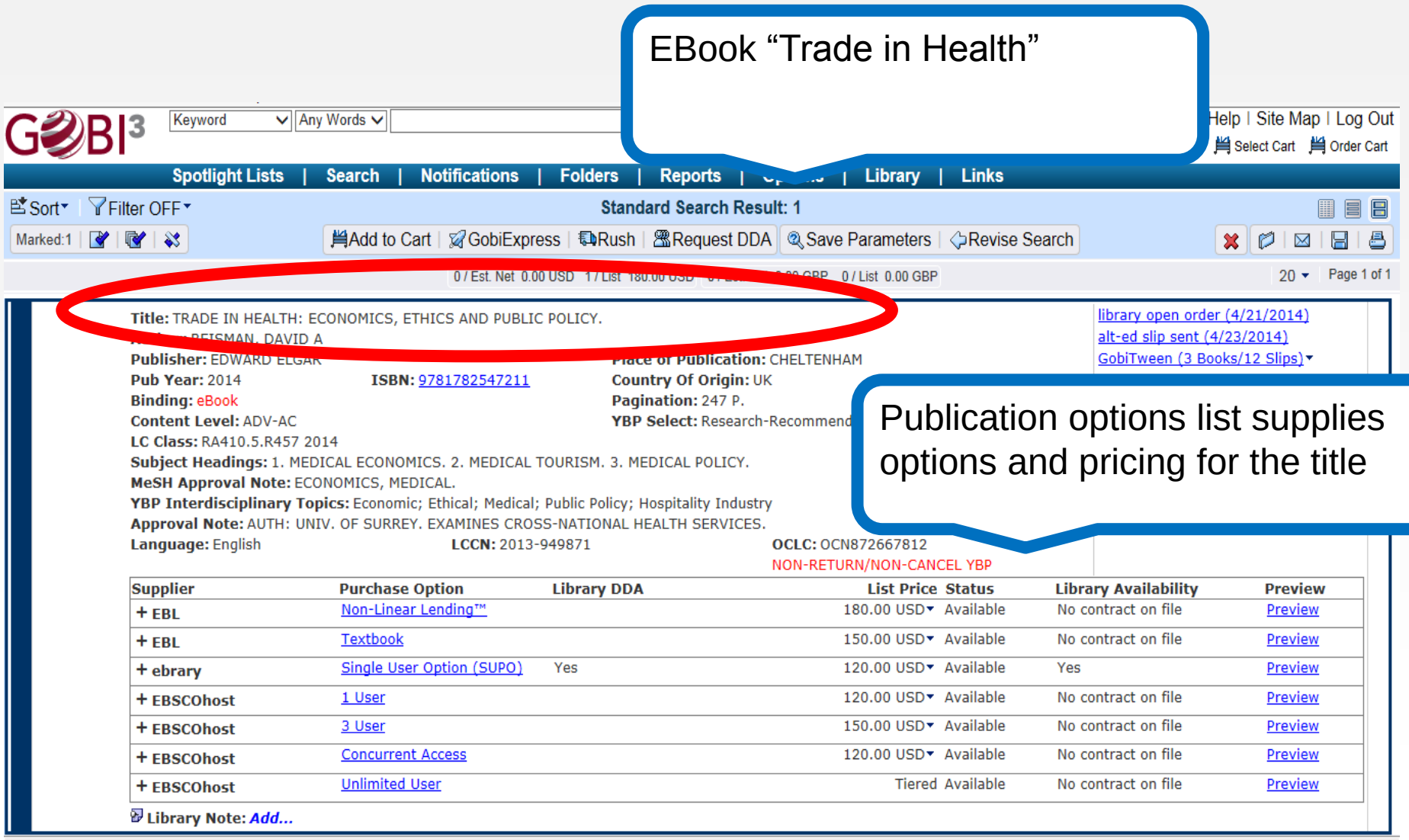
Ex Libris Collaboration with SWETS and YBP

- Addressing disadvantages through advanced integration
- First delivery is focused on streamlining the acquisition process
- We are engaged in functional discussions involving mutual customers
- Currently planned to be delivered during **Q2 2014**

swetswise | ExLibris The bridge to knowledge | BAKER & TAYLOR YBP Library Services

eBook Order: GOBI Bib



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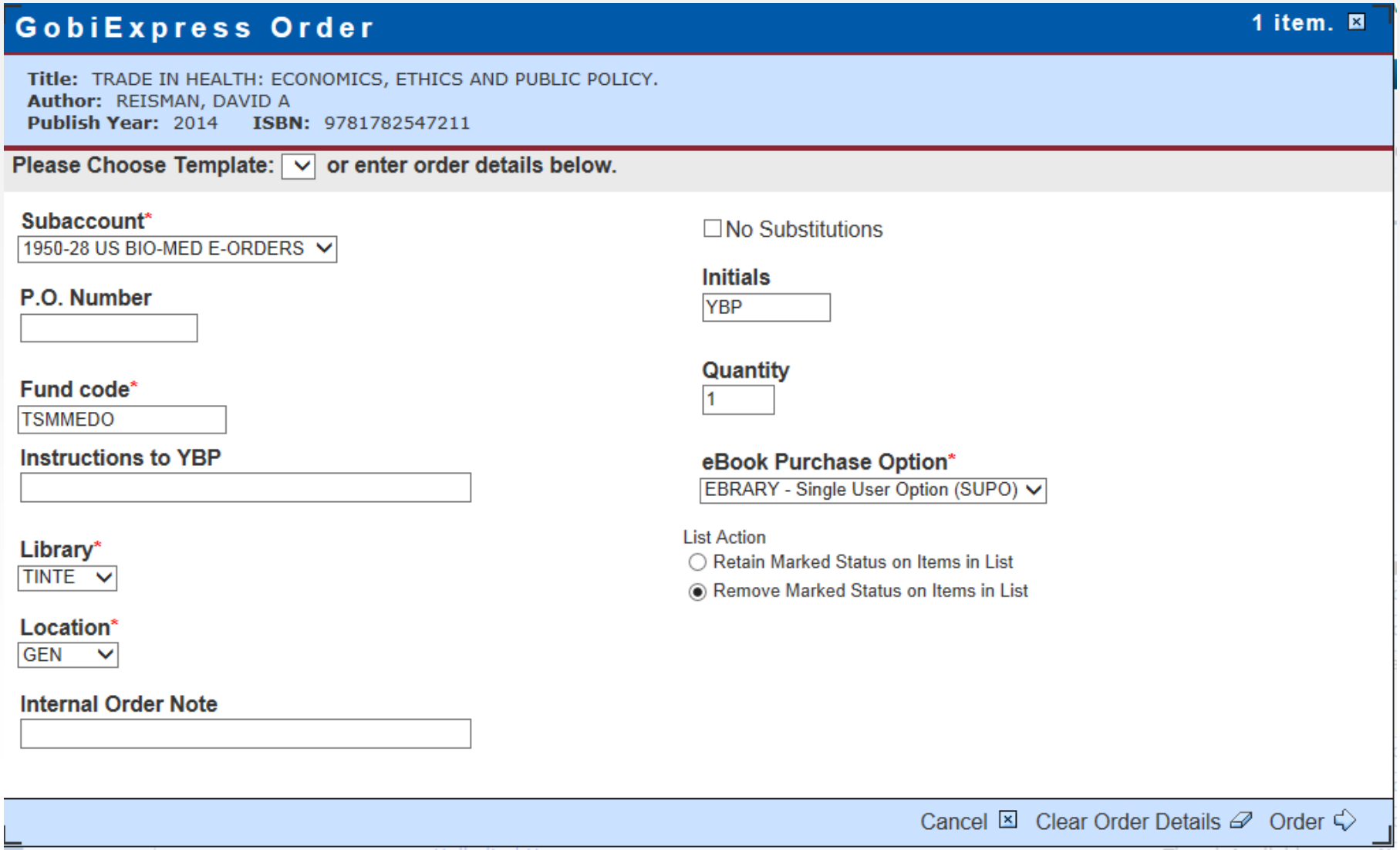
eBook Order: GOBI Order Screen



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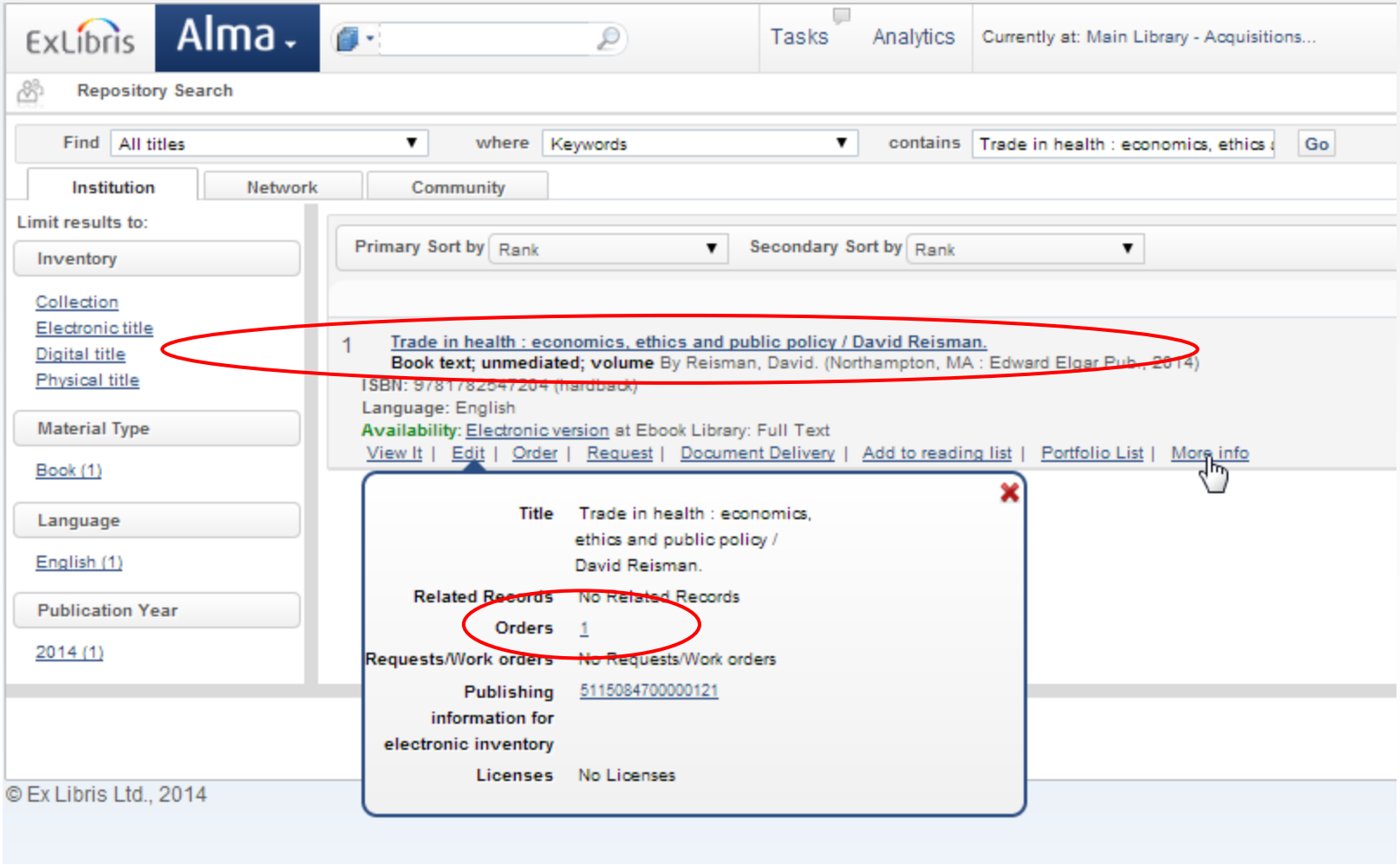
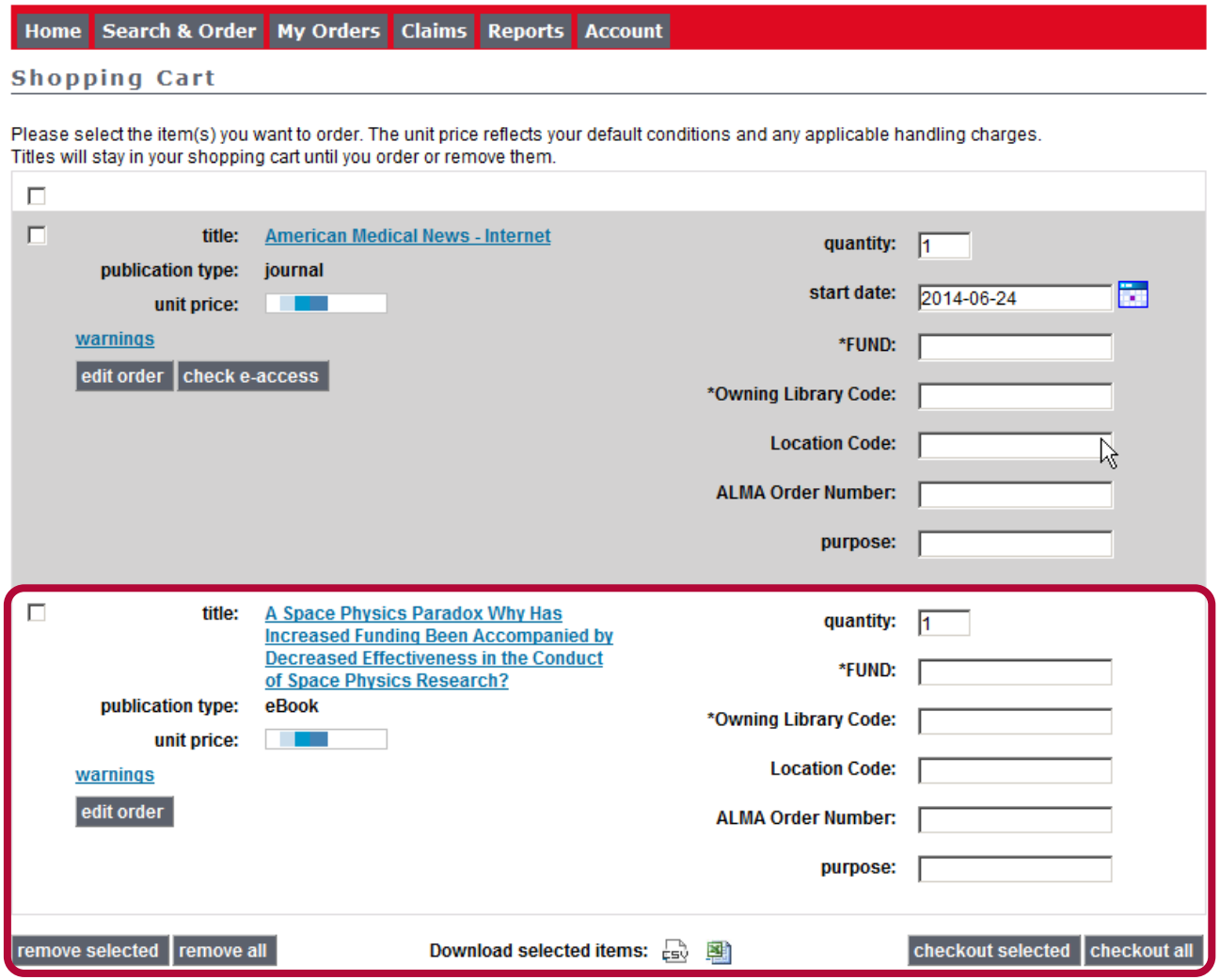
eBook Order in Alma



Alma & SwetsWise Collaboration



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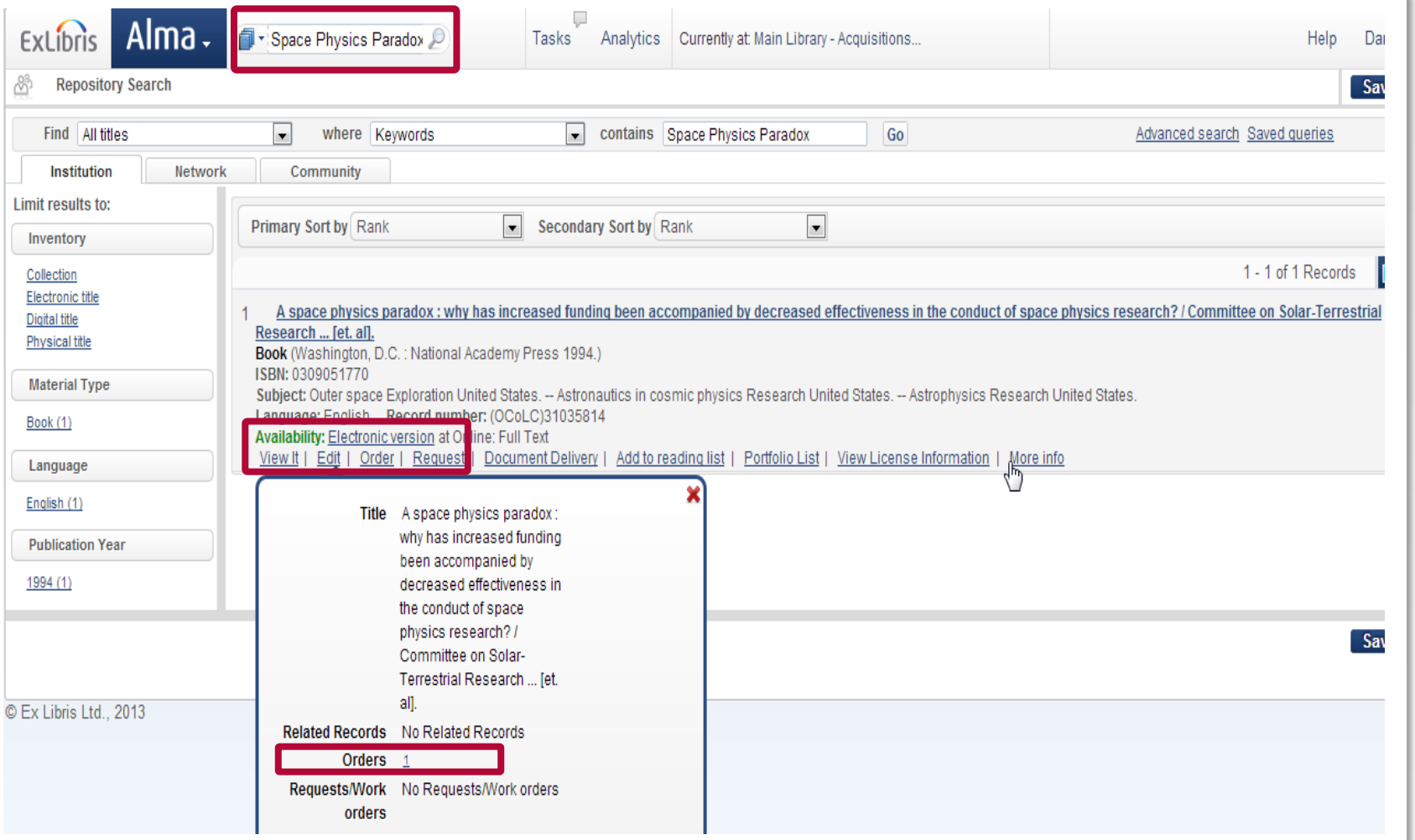
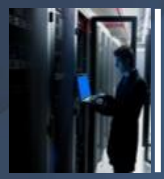
Alma & SwetsWise Collaboration



Delivering Value for All Stakeholders

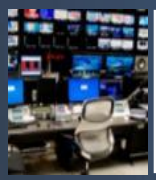
FACULTY MEMBERS

LIBRARY DIRECTOR



CIO

PATRONS



CONSORTIA CENTRAL OFFICE

LIBRARY MANAGERS

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Library Managers

- **Increase efficiency through collaboration**
  - *Shared cataloging*
  - *Joint acquisitions*
  - *Collection development and more*
- **Improve your operations and services**
  - *Benchmark against other consortia members*
  - *Leverage consortia expertise in your library*
  - *Share resources across the consortia*
- **Streamline processes**
  - *Through automated rule based workflows*
  - *Leverage unified solution for all resource types, across all institutions*

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Smart Collaborations Driven by a Flexible Network

Network Zone

Central Catalog, Shared Catalog	Joint acquisitions and negotiations	ILL via broker, directly between partners	Direct patron interaction
CATALOGING	ACQUISITIONS	RESOURCE SHARING	FULFILLMENT

ANALYTICS

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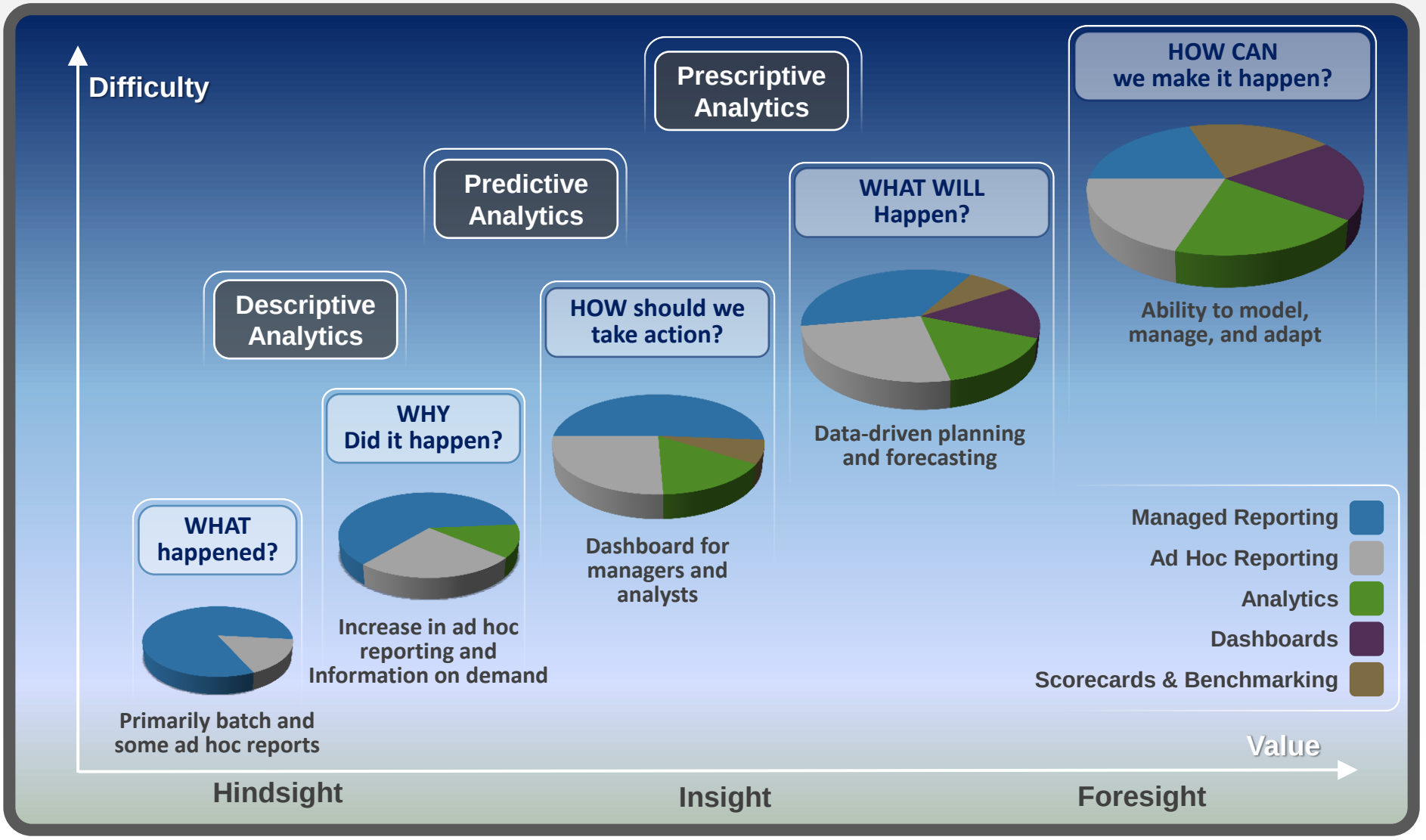
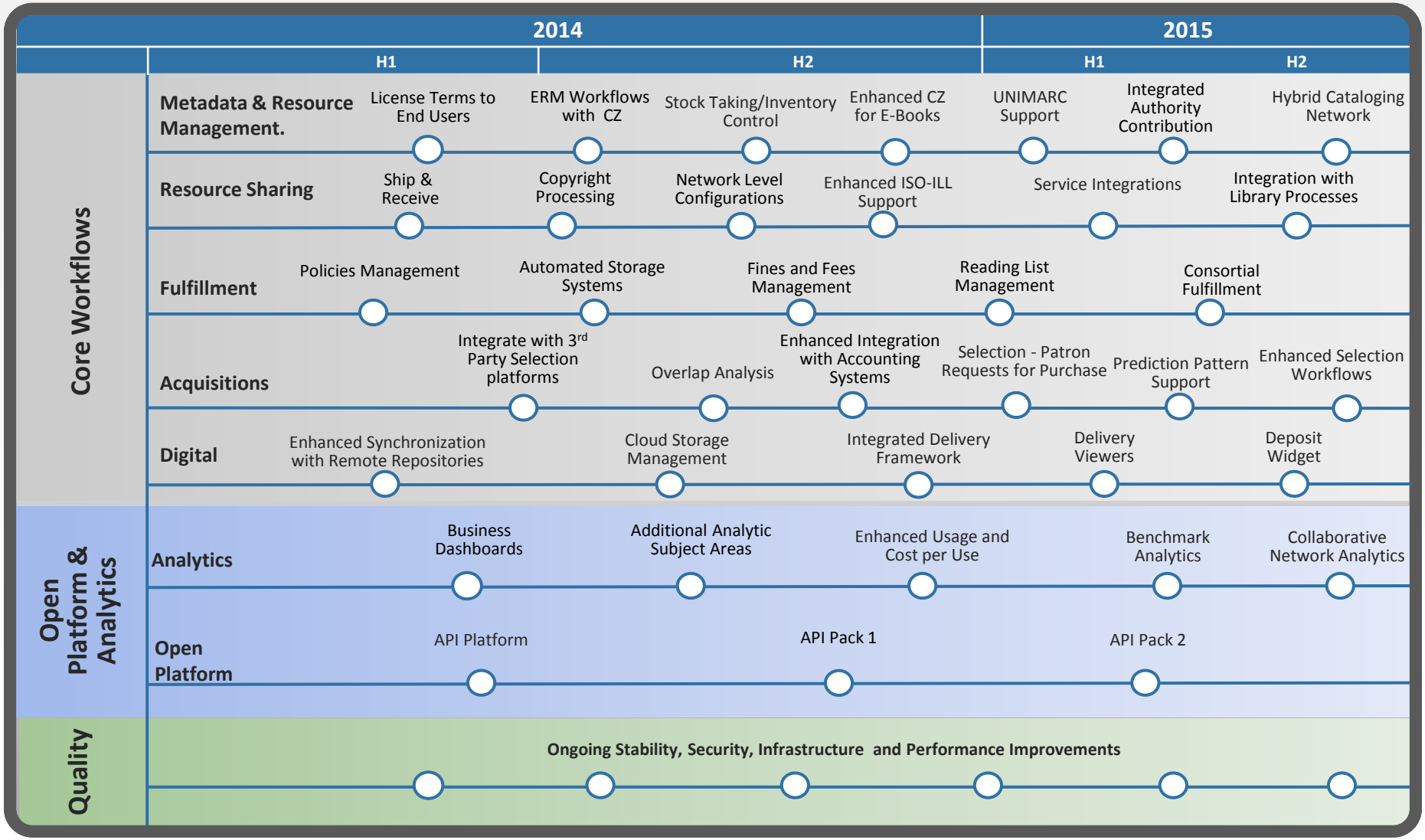
Analytics - Developing According to our Vision



Alma Master Roadmap Plan



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Sessions You Don't Want to Miss...

Wednesday, April 30th		
Managing Digital Access In Alma	**Nir Sherwinter**	**3:45pm -4:30pm | Hochelaga**
Thursday, May 1st		
Alma Smart Collaborative Networks	**Asaf Kline**	**11:15am -12:00pm | Gatineau**
Next Generation Analytics in Action	**Sharona Sagi**	**1:30pm-2:15pm | Saint-Laurent**
Streamlining Resource Sharing	**Moshe Shechter**	**1:30pm-2:15pm | Hochelaga 5**
Streamlining Acquisitions and E-resource Management	**Dana Sharvit**	**3:45pm-4:30pm | Saint-Laurent**

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Thank You