



**Alma Product Update**  
**ELUNA | Montreal, CA | April-May 2014**

**Dvir Hoffman**

**Director, Marketing & Product Management**



# What a 2013 We Had...

**60**

**New Live Customers**

**2,200+**

**Staff members served**

**3,000,000+**

**Loan transactions**

**509**

**New Enhancements !**

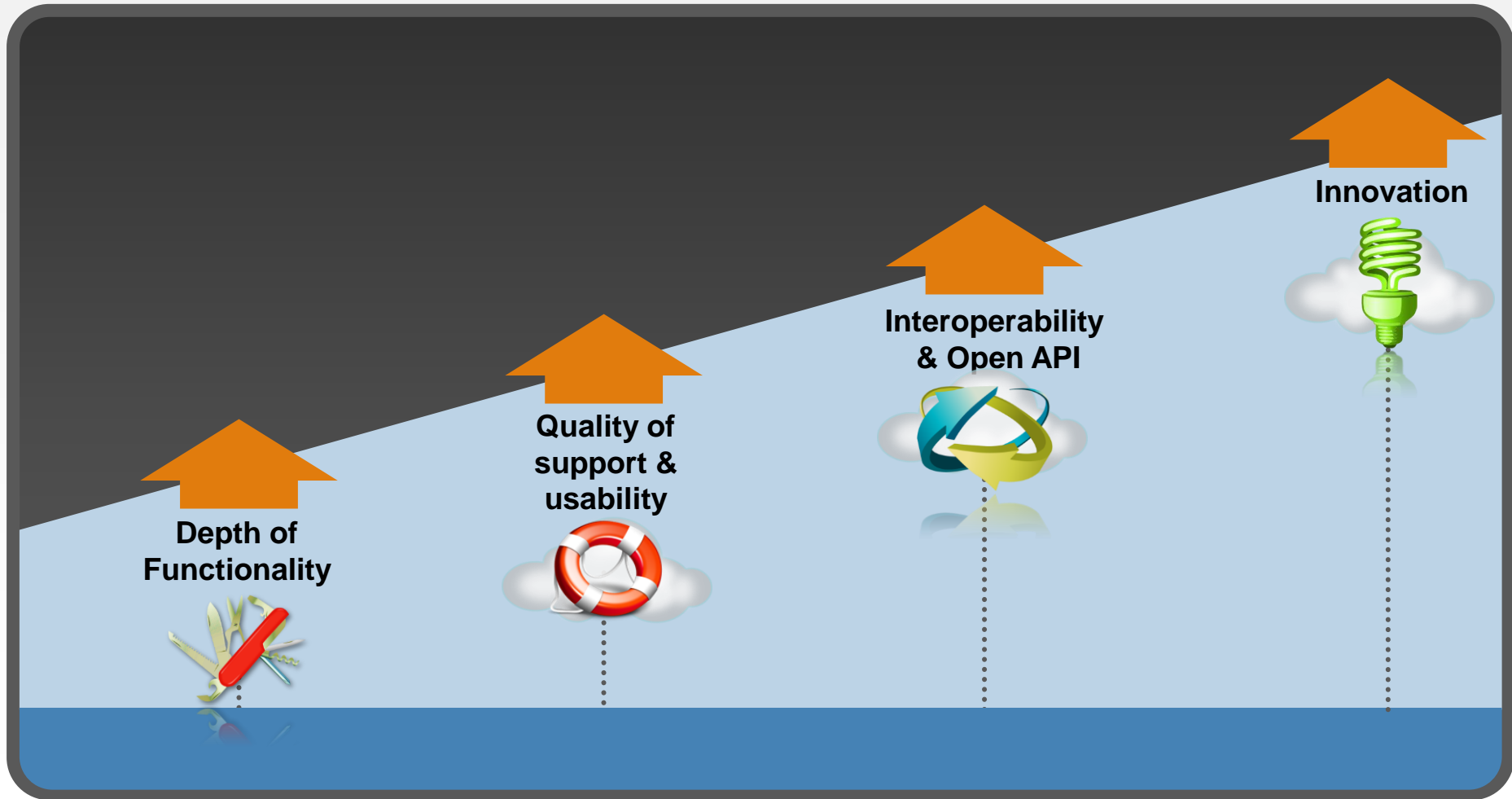
**176**

**New customers**

**773**

**OLH and RN pages**

# Key Focus Areas



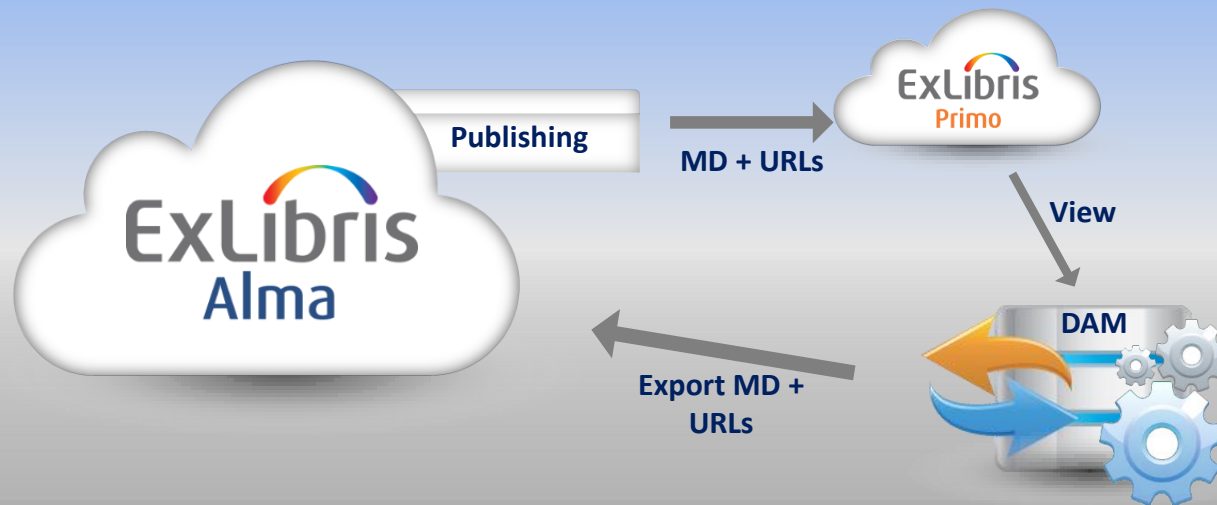
# Depth of Functionality



# 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



## 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*

## 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

## 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

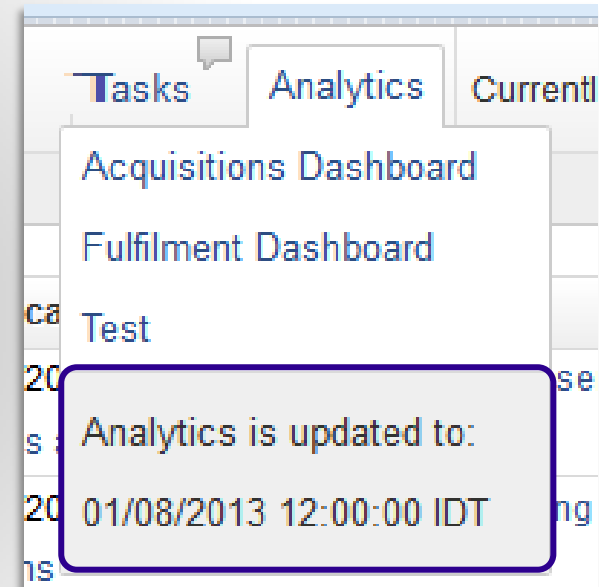


# Daily Update of Analytics

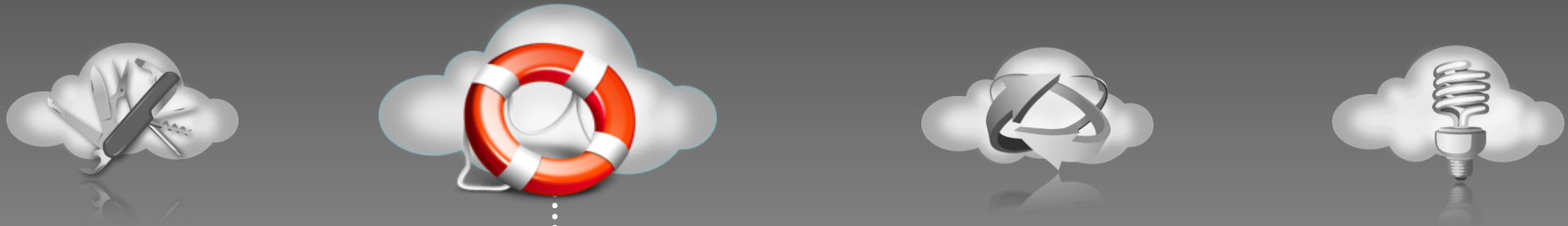
One of our main activities in 2013

Rolled out to all Data Centers

Continuing effort into insuring scalability of infrastructure

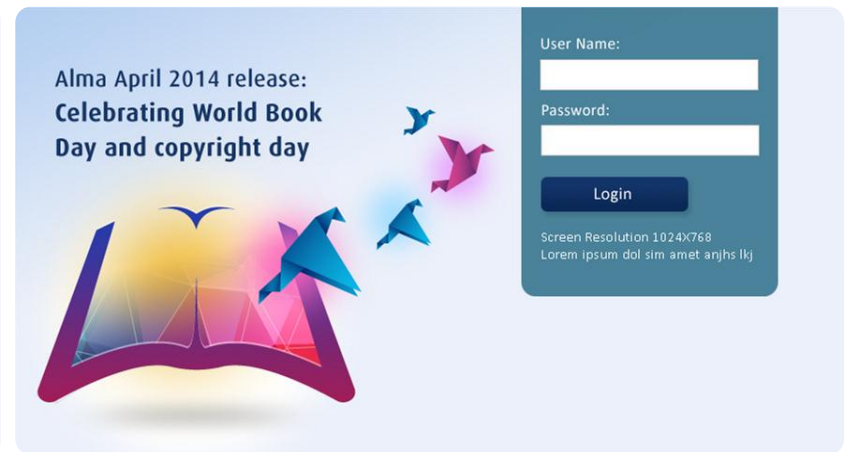


# Quality of Support and Usability



# 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 be published.



# 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 <i>Alma Analytics Guide</i> (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



Ask the Expert

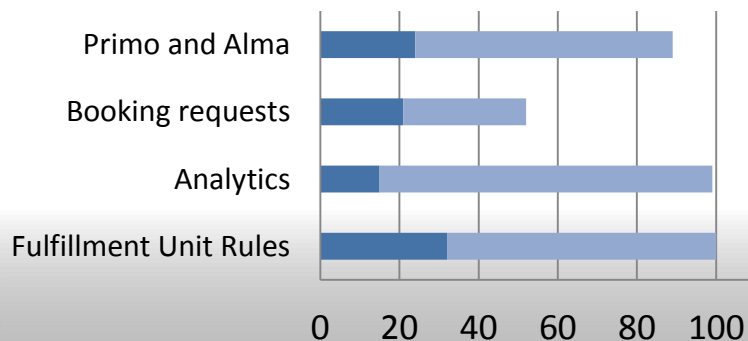
ExLibris  
The bridge to knowledge

Weekly since December 2013,  
with a holiday break

Average of 70 participants over  
9 worldwide sessions

## Ask the Expert Participation

■ Session 1 (APAC) ■ Session 2 (EU + NA)



## 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

# New System Status Portal

## ExLibris System Status

[System Status](#) | [Privacy Policy](#) | [Security](#)

The Ex Libris System Status page presents the latest information on the availability of all multitenant Ex Libris instances. You may check this page at any time to see the current status information, or subscribe to be notified via email of interruptions to any individual service. If you are experiencing a real-time, operational issue that is not indicated below, please inform us by opening a customer support request.

System:

Region:

Remember my instances

[Reset](#)

	Instances	Email Alerts	Current Status	Mar-23	Mar-22	Mar-21	Mar-20	Mar-19	Scheduled Maintenance
<input type="checkbox"/>	Alma NA00								
<input type="checkbox"/>	Alma NA01								
<input type="checkbox"/>	Alma EU00								
<input type="checkbox"/>	Alma AP01								

Service is operating normally

Performance issues

Service disruption

Scheduled maintenance

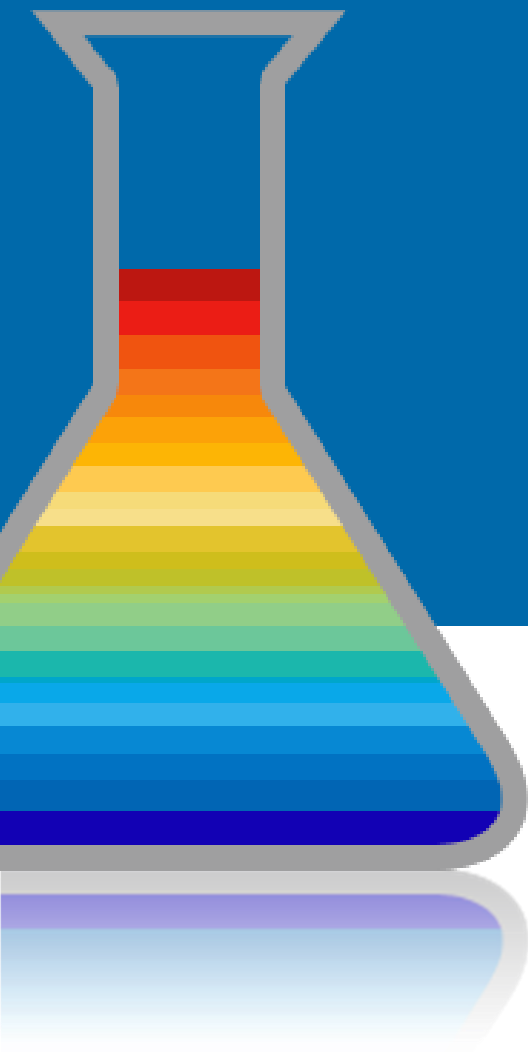
- For any issue related to this website please send an email to [customercenter@exlibrisgroup.com](mailto:customercenter@exlibrisgroup.com)
- For any issue related to Ex libris products please open a case in <http://support.exlibrisgroup.com>

# Interoperability and Open Platform



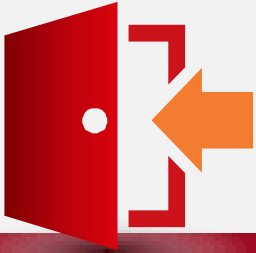
# Ex Libris Developers Network

**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

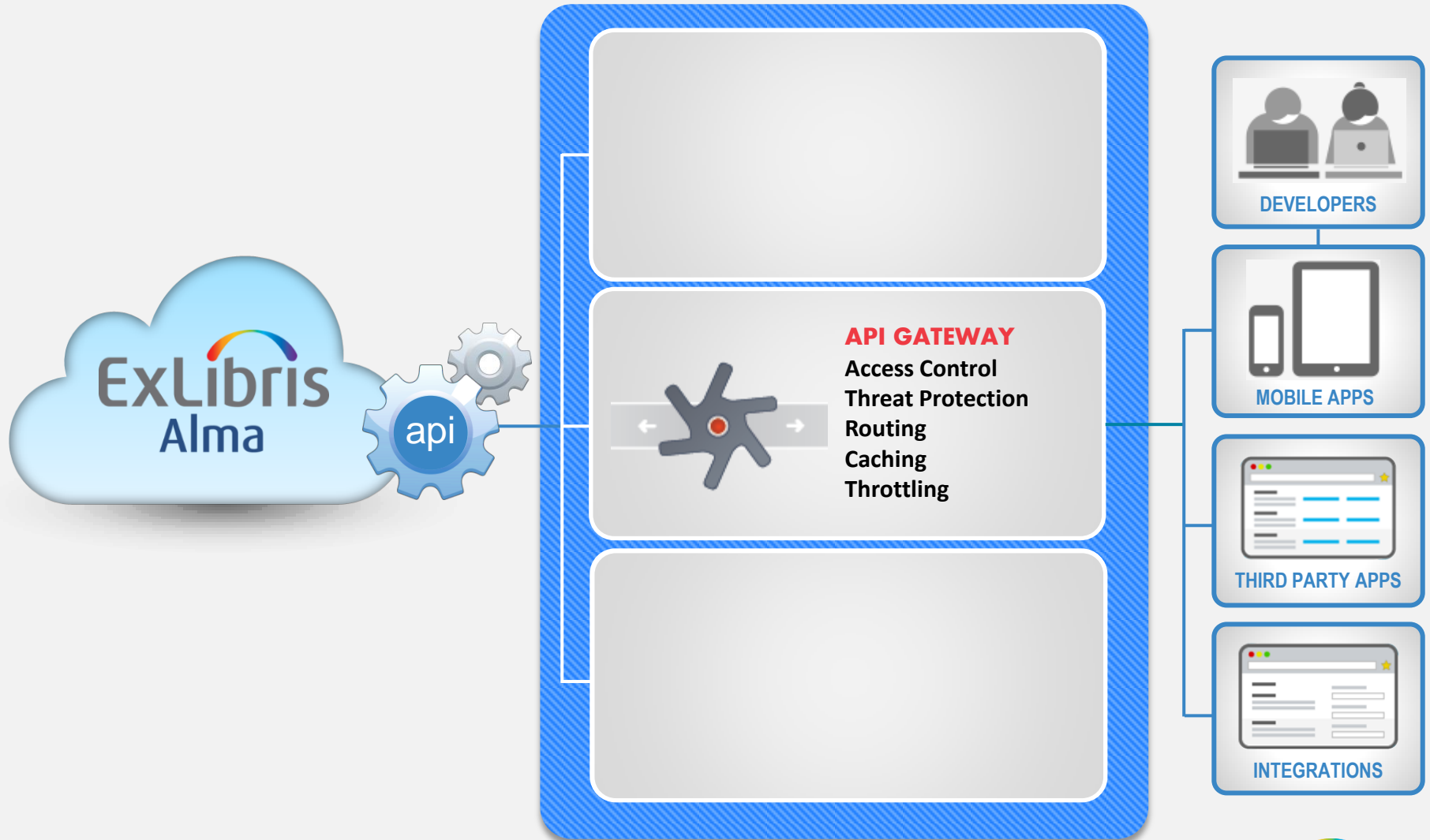


## INCREASED DEVELOPER PRODUCTIVITY

Easing the developer experience and increasing productivity

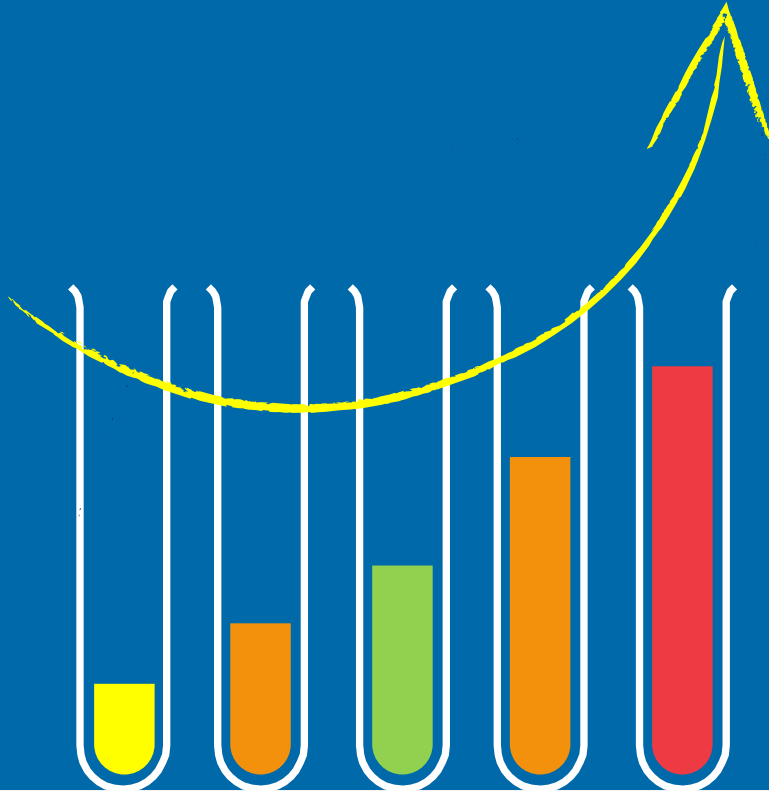
# Ex Libris API Platform

## a Secured & Scalable API Infrastructure



# Ex Libris Developer Network

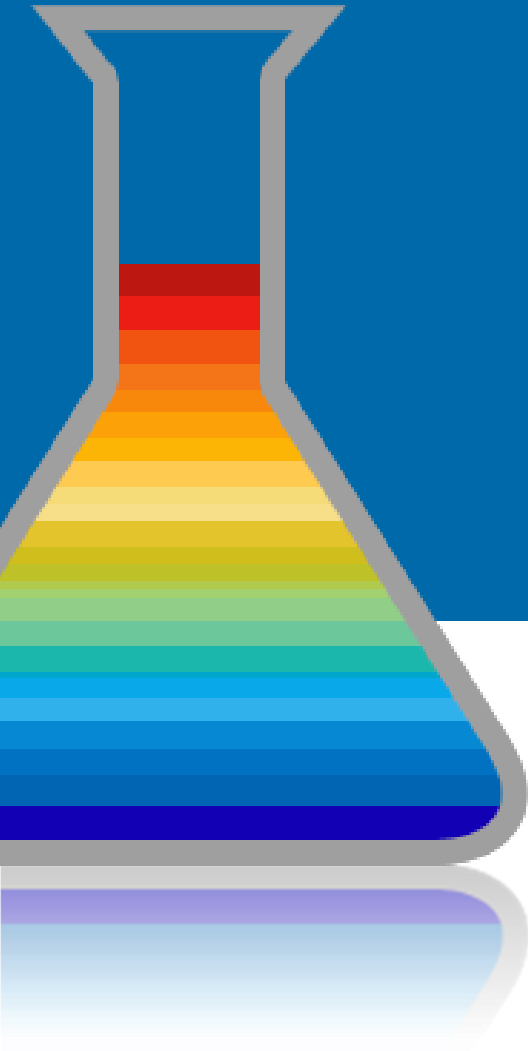
*Develop. Experiment. Collaborate*



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



**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?

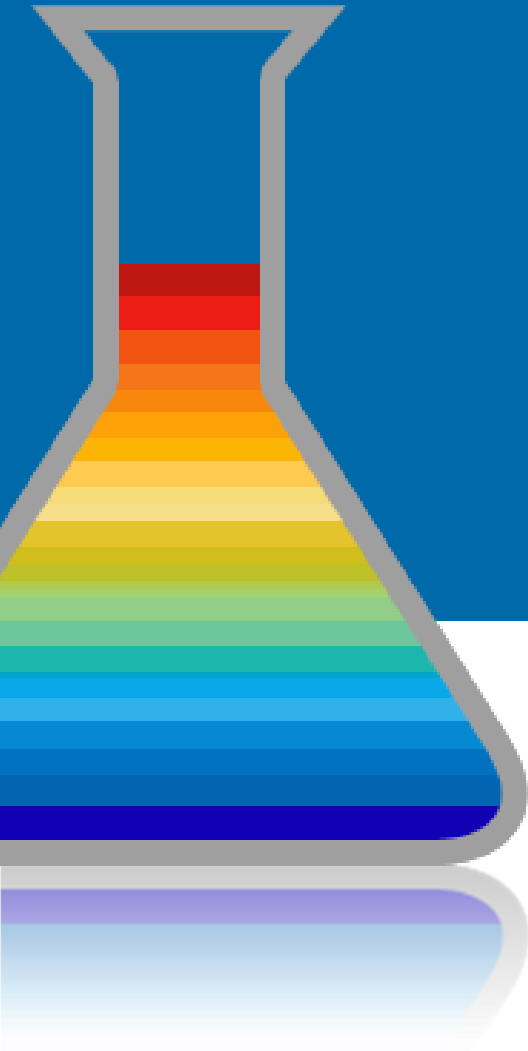
How long until I get the key?

Is there a community I can learn from?





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

The screenshot displays the ExLibris Developer Network interface. At the top, there's a navigation bar with 'ExLibris' logo, 'Developer Network', and links for 'Docs', 'Tech Blog', 'Code & Apps', 'API Dashboard', and 'Forum'. A search bar is also present. Below the navigation, a banner reads 'Ready to Learn? ExLibris products all provide open APIs'. A row of product logos follows: 'Resources: Primo Alma Rosetta bX MetaLib Voyager SFX Aleph'. The main content area is titled 'APIs' and shows a list of endpoints under the 'Users' category, including 'get user details', 'Create user loan', and 'Retrieve user requests'. The 'Create user loan' endpoint is selected, showing its details: 'Resource URL: POST /almaws/{user\_id}/loans', 'API URL: https://api-na.hosted.exlibrisgroup.com', and 'Authentication: (None)'. A 'Parameters' table is shown with columns for 'Parameter', 'Value', and 'Description'. The table includes parameters for 'user\_id', 'item\_pid', 'user\_id\_type', and 'item\_barcode'. A text area for 'application/xml' contains the note 'This method takes a Loan object.' and an 'Execute!' button is at the bottom.

ExLibris

Developer Network Docs Tech Blog Code & Apps API Dashboard Forum

Ready to Learn? ExLibris products all provide open APIs

Resources: Primo Alma Rosetta bX MetaLib Voyager SFX Aleph

APIs

Users

- get user details
- get user details
- get user details
- Create user loan**
- Retrieve user requests
- Create user request
- Delete user request
- Create user request for resource sharing

Integrations

Home / Alma / APIs / Users

This Web service loans an item to a user. The loan will be created according to the library's policy. In order to use this service, authentication should be done by a user that have the 'API Fulfillment Write' role.

**Resource URL.**  
POST /almaws/{user\_id}/loans  
[Try it now!](#)

API URL : https://api-na.hosted.exlibrisgroup.com

Authentication (None)

**Parameters**

Parameter	Value	Description
user_id	0	A unique identifier for the user
item_pid	0	The Item ID. This parameter or the item_barcode parameter must be supplied.
user_id_type	0	The type of identifier that is being searched. Optional. If this is not provided, all unique identifier types are used. The values that can be used are any of the values in the User Identifier Type code table.
item_barcode	0	The Item barcode. This parameter or the item_pid parameter must be supplied.

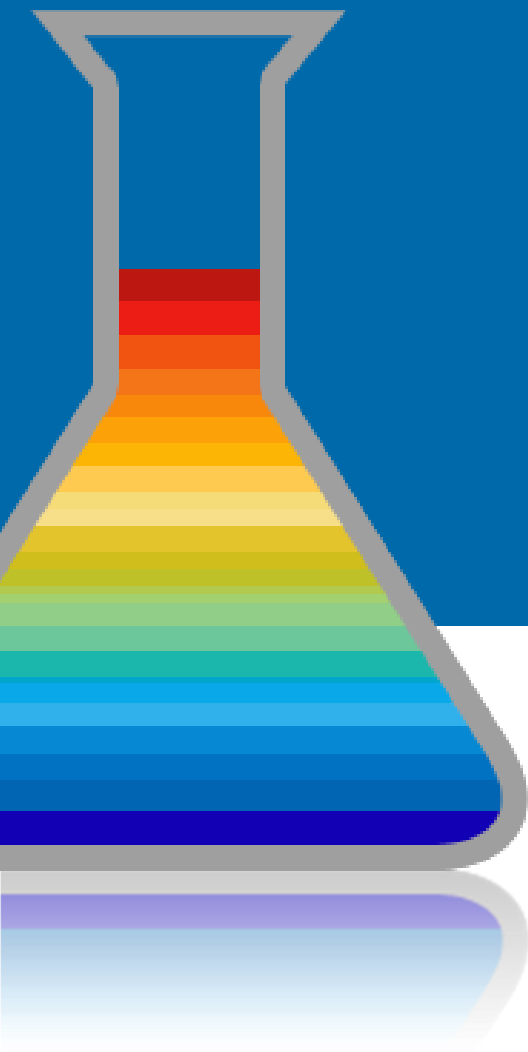
application/xml : This method takes a Loan object.

Execute!

ExLibris



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

Forums	Topics	Messages	Last Message
<b>Announcements</b>			
<b>Recent Announcements</b> This is a forum for recent announcements	0	No messages	No messages
<b>API Forums</b>			
<b>API 1 Discussion Forum</b>	5	10	04/12/2013 02:23:47 Anonymous
<b>Support Forums</b>			
<b>Developer Support Forum</b> A forum for developer support	0	No messages	No messages
<b>Community Support Forum</b> A forum for community support	0	No messages	No messages

# 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

**SWETS**wise

**ExLibris**  
The bridge to knowledge

**BAKER & TAYLOR**  
YBP Library Services

# 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

**ExLibris**

# eBook Order: GOBI Bib

EBook "Trade in Health"



Keyword  Any Words

Help | Site Map | Log Out  
[Select Cart](#) [Order Cart](#)

Spotlight Lists | Search | Notifications | Folders | Reports | Library | Links

Sort  Filter OFF

Standard Search Result: 1

[Add to Cart](#) [GobiExpress](#) [Rush](#) [Request DDA](#) [Save Parameters](#) [Revise Search](#)

0 / Est. Net 0.00 USD 1 / List 180.00 USD 0 / List 0.00 GBP 0 / List 0.00 GBP

20 Page 1 of 1

**Title:** TRADE IN HEALTH: ECONOMICS, ETHICS AND PUBLIC POLICY.

**Author:** REISMAN, DAVID A

**Publisher:** EDWARD ELGAR

**Pub Year:** 2014

**ISBN:** [9781782547211](#)

**Binding:** eBook

**Content Level:** ADV-AC

**LC Class:** RA410.5.R457 2014

**Subject Headings:** 1. MEDICAL ECONOMICS. 2. MEDICAL TOURISM. 3. MEDICAL POLICY.

**MeSH Approval Note:** ECONOMICS, MEDICAL.

**YBP Interdisciplinary Topics:** Economic; Ethical; Medical; Public Policy; Hospitality Industry

**Approval Note:** AUTH: UNIV. OF SURREY. EXAMINES CROSS-NATIONAL HEALTH SERVICES.

**Language:** English

**LCCN:** 2013-949871

**OCLC:** OCN872667812

**NON-RETURN/NON-CANCEL YBP**

[library open order \(4/21/2014\)](#)

[alt-ed slip sent \(4/23/2014\)](#)

[Gobitween \(3 Books/12 Slips\)](#)

Publication options list supplies options and pricing for the title

Supplier	Purchase Option	Library DDA	List Price	Status	Library Availability	Preview
+ EBL	<a href="#">Non-Linear Lending™</a>		180.00 USD	Available	No contract on file	<a href="#">Preview</a>
+ EBL	<a href="#">Textbook</a>		150.00 USD	Available	No contract on file	<a href="#">Preview</a>
+ ebrary	<a href="#">Single User Option (SUPO)</a>	Yes	120.00 USD	Available	Yes	<a href="#">Preview</a>
+ EBSCOhost	<a href="#">1 User</a>		120.00 USD	Available	No contract on file	<a href="#">Preview</a>
+ EBSCOhost	<a href="#">3 User</a>		150.00 USD	Available	No contract on file	<a href="#">Preview</a>
+ EBSCOhost	<a href="#">Concurrent Access</a>		120.00 USD	Available	No contract on file	<a href="#">Preview</a>
+ EBSCOhost	<a href="#">Unlimited User</a>			Tiered Available	No contract on file	<a href="#">Preview</a>

[Library Note: Add...](#)



# eBook Order: GOBI Order Screen


## GobiExpress Order

1 item. 

**Title:** TRADE IN HEALTH: ECONOMICS, ETHICS AND PUBLIC POLICY.  
**Author:** REISMAN, DAVID A  
**Publish Year:** 2014 **ISBN:** 9781782547211

Please Choose Template:  or enter order details below.

### Subaccount\*

1950-28 US BIO-MED E-ORDERS 


### P.O. Number

### Fund code\*


TSMMEDO

### Instructions to YBP

### Library\*

TINTE 

### Location\*

GEN 

### Internal Order Note

No Substitutions


### Initials

YBP

### Quantity




1

### eBook Purchase Option\*

EBRARY - Single User Option (SUPO) 

### List Action

- Retain Marked Status on Items in List  
 Remove Marked Status on Items in List

Cancel  Clear Order Details  Order 

# eBook Order in Alma

The screenshot displays the ExLibris Alma interface. At the top, the ExLibris logo and 'Alma' are visible. The main navigation bar includes 'Tasks', 'Analytics', and 'Currently at: Main Library - Acquisitions...'. Below this is the 'Repository Search' section with a search bar containing 'Trade in health : economics, ethics...' and a 'Go' button. The search results are filtered by 'All titles' and 'Keywords'. The left sidebar shows filters for 'Institution', 'Network', 'Community', and 'Limit results to:' with options like 'Inventory', 'Collection', 'Electronic title', 'Digital title', 'Physical title', 'Material Type', 'Book (1)', 'Language', 'English (1)', 'Publication Year', and '2014 (1)'. The main results area shows a single result: '1 Trade in health : economics, ethics and public policy / David Reisman. Book text; unmediated; volume By Reisman, David. (Northampton, MA : Edward Elgar Pub., 2014)'. A red circle highlights the title. Below the title, there are links for 'View It', 'Edit', 'Order', 'Request', 'Document Delivery', 'Add to reading list', 'Portfolio List', and 'More info'. A mouse cursor is pointing at the 'More info' link. A pop-up window is open, showing details for the selected record: 'Title: Trade in health : economics, ethics and public policy / David Reisman.', 'Related Records: No Related Records', 'Orders: 1', 'Requests/Work orders: No Requests/Work orders', 'Publishing information for electronic inventory: 5115084700000121', and 'Licenses: No Licenses'. A red circle highlights the 'Orders: 1' field.

# Alma & SwetsWise Collaboration

[Home](#) [Search & Order](#) [My Orders](#) [Claims](#) [Reports](#) [Account](#)

## Shopping Cart

Please select the item(s) you want to order. The unit price reflects your default conditions and any applicable handling charges. Titles will stay in your shopping cart until you order or remove them.

<input type="checkbox"/>									
<input type="checkbox"/>	title:	<a href="#">American Medical News - Internet</a>	quantity:	<input type="text" value="1"/>					
	publication type:	journal	start date:	<input type="text" value="2014-06-24"/>					
	unit price:	<input type="text"/>	*FUND:	<input type="text"/>					
	<a href="#">warnings</a>		*Owning Library Code:	<input type="text"/>					
	<input type="button" value="edit order"/>	<input type="button" value="check e-access"/>	Location Code:	<input type="text"/>					
			ALMA Order Number:	<input type="text"/>					
			purpose:	<input type="text"/>					
<input type="checkbox"/>	title:	<a href="#">A Space Physics Paradox Why Has Increased Funding Been Accompanied by Decreased Effectiveness in the Conduct of Space Physics Research?</a>	quantity:	<input type="text" value="1"/>					
	publication type:	eBook	*FUND:	<input type="text"/>					
	unit price:	<input type="text"/>	*Owning Library Code:	<input type="text"/>					
	<a href="#">warnings</a>		Location Code:	<input type="text"/>					
	<input type="button" value="edit order"/>		ALMA Order Number:	<input type="text"/>					
			purpose:	<input type="text"/>					
<input type="button" value="remove selected"/>	<input type="button" value="remove all"/>	Download selected items:			<input type="button" value="checkout selected"/>	<input type="button" value="checkout all"/>			



# Alma & SwetsWise Collaboration

The screenshot displays the ExLibris Alma search interface. At the top, the search bar contains the text "Space Physics Paradox". Below the search bar, the search results are displayed, showing a single record for the book "A space physics paradox : why has increased funding been accompanied by decreased effectiveness in the conduct of space physics research? / Committee on Solar-Terrestrial Research ... [et. al.].". The record details include the title, author, ISBN, and subject. The "Availability" section shows "Electronic version at Online: Full Text". A red box highlights the "Orders" field in the record view, which shows a value of "1".

ExLibris Alma

Space Physics Paradox

Repository Search

Find All titles where Keywords contains Space Physics Paradox Go

Advanced search Saved queries

Institution Network Community

Limit results to:

Inventory

Collection

Electronic title

Digital title

Physical title

Material Type

Book (1)

Language

English (1)

Publication Year

1994 (1)

Primary Sort by Rank Secondary Sort by Rank

1 - 1 of 1 Records

1 [A space physics paradox : why has increased funding been accompanied by decreased effectiveness in the conduct of space physics research? / Committee on Solar-Terrestrial Research ... \[et. al.\]](#)

[View It](#) | [Edit](#) | [Order](#) | [Request](#) | [Document Delivery](#) | [Add to reading list](#) | [Portfolio List](#) | [View License Information](#) | [More info](#)

**Title** A space physics paradox : why has increased funding been accompanied by decreased effectiveness in the conduct of space physics research? / Committee on Solar-Terrestrial Research ... [et. al].

**Related Records** No Related Records

**Orders** 1

**Requests/Work orders** No Requests/Work orders

© Ex Libris Ltd., 2013

# Delivering Value for All Stakeholders



# 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*



# Smart Collaborations Driven by a Flexible Network

## Network Zone

Central Catalog,  
Shared Catalog



CATALOGING

Joint acquisitions  
and negotiations



ACQUISITIONS

ILL via broker,  
directly between  
partners



RESOURCE SHARING

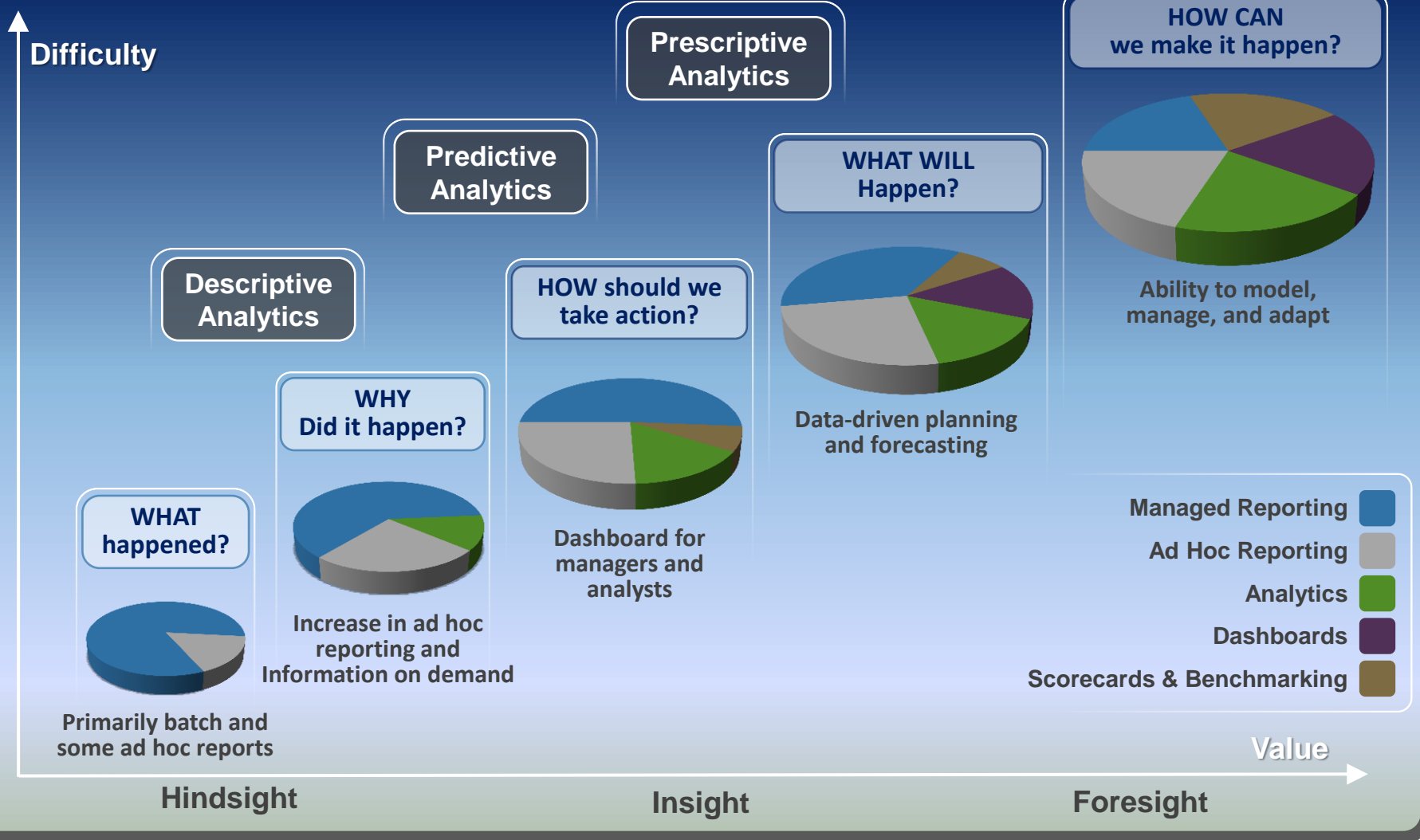
Direct patron  
interaction



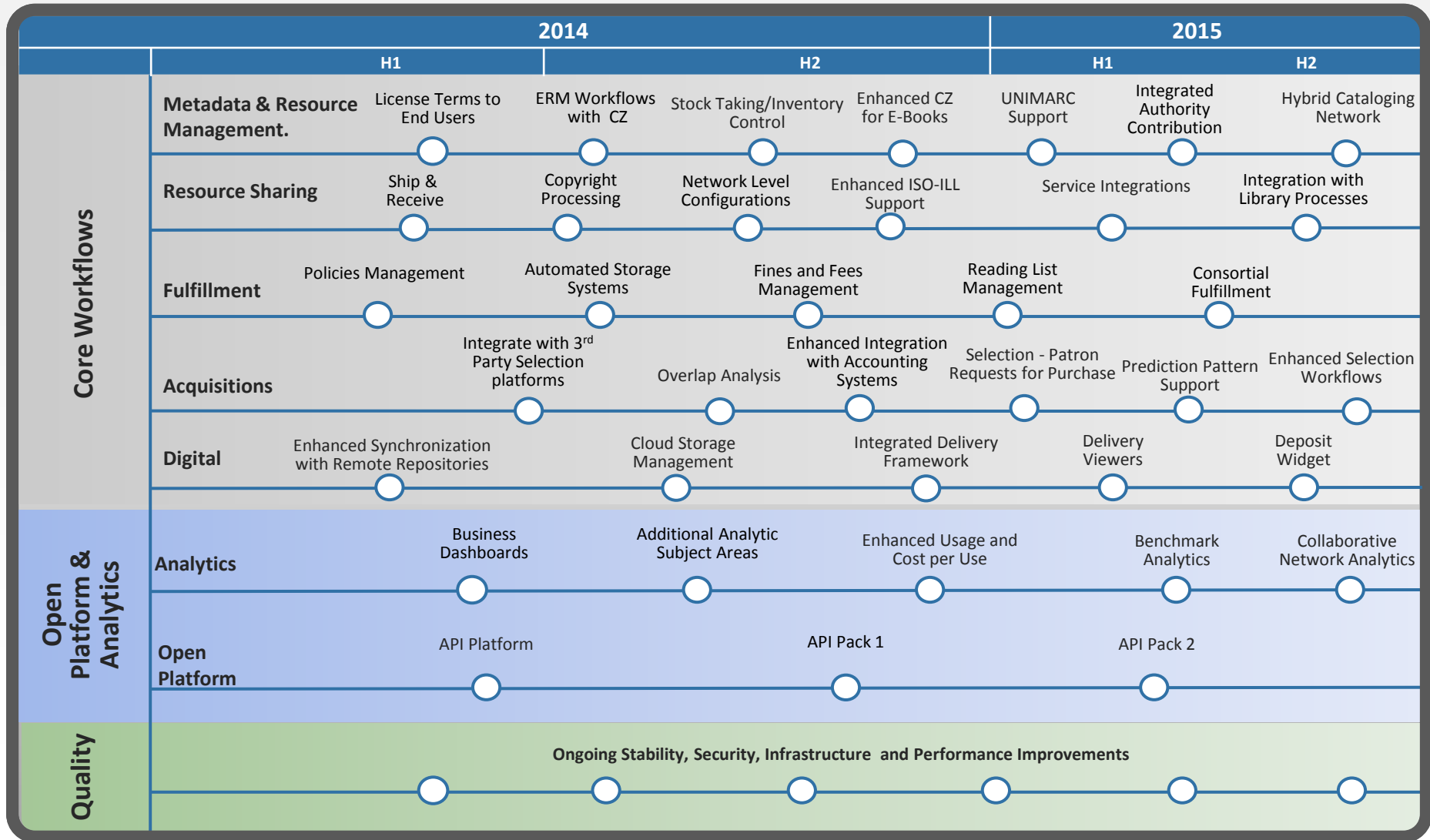
FULFILLMENT

ANALYTICS

# Analytics - Developing According to our Vision



# Alma Master Roadmap Plan



# Sessions You Don't Want to Miss...

## Wednesday, April 30<sup>th</sup>

**Managing Digital Access In Alma**

**Nir Sherwinter**

**3:45pm -4:30pm | Hochelaga**

## Thursday, May 1<sup>st</sup>

**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**

# Thank You

