

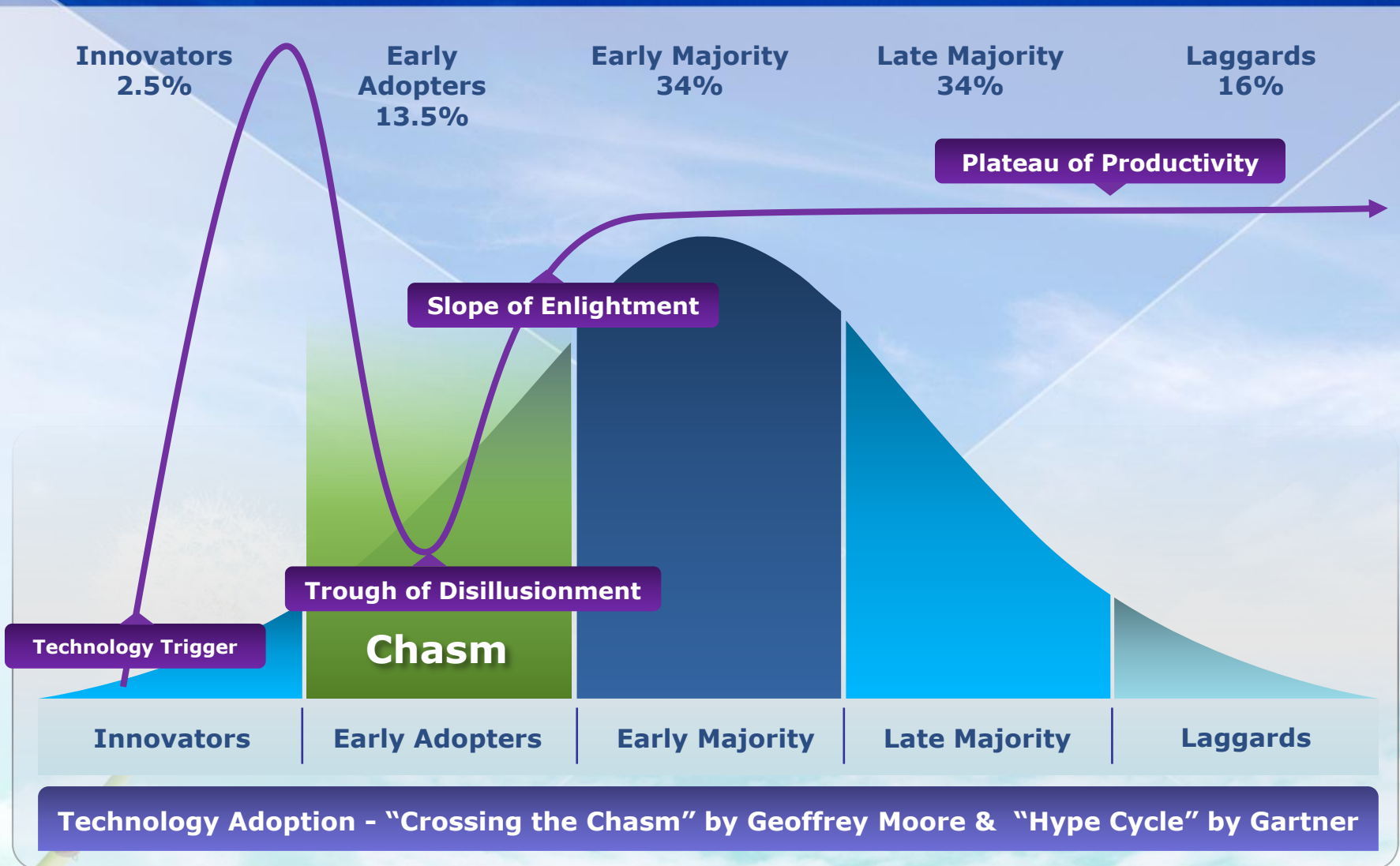


# Next-Gen Library Services Update

**Bar Veinstein - VP  
Resource Management**

**Shlomi Kringel – VP  
Discovery & Delivery**

# Alma is Crossing the Chasm



# Addressing Alma Adoption Concerns



**Data Security  
& Privacy**

**Configurability  
& Customization**



**Performance  
& Availability**

**Loss of  
Control**



**Depth of  
Functionality**

**Ease of  
Implementation**



**Interoperability  
& Integrations**

**Support  
& Education**



# Data Security & Privacy



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# Goal - Relentless on Security



	<b>Physical</b>	24/7 security, biometric authentication, video surveillance, authorized personnel
	<b>Infrastructure</b>	Hardening, change management procedures , patch management, password policy
	<b>Network</b>	Vulnerability scans, Intrusion Prevention System (IPS), TLS/SSL encrypted communication
	<b>Application</b>	Security Development Lifecycle (SDL), Penetration tests, OWASP Top10
	<b>Data</b>	Data isolation (Oracle VPD), encryption, media sanitization (DoD 5220.22-M)
	<b>Identity &amp; Access Control</b>	SSO, S/LDAP, SAML/Shibboleth, Role-Based Access Control (RBAC)
	<b>Business Continuity</b>	High availability, database cluster, storage redundancy, frequent snapshots, offsite backups, 24x7 HUB
	<b>Monitoring &amp; Incident Mgmt</b>	24x7 monitoring, Chief Security Officer (CSO), security breach notification
	<b>Human Resources</b>	Security awareness training, confidentiality agreements, adherence to regulations
	<b>Compliance &amp; Audit</b>	ISO 27001, SSAE-16 , EU Safe Harbor, Data processing agreements, independent audit

# Performance & Availability



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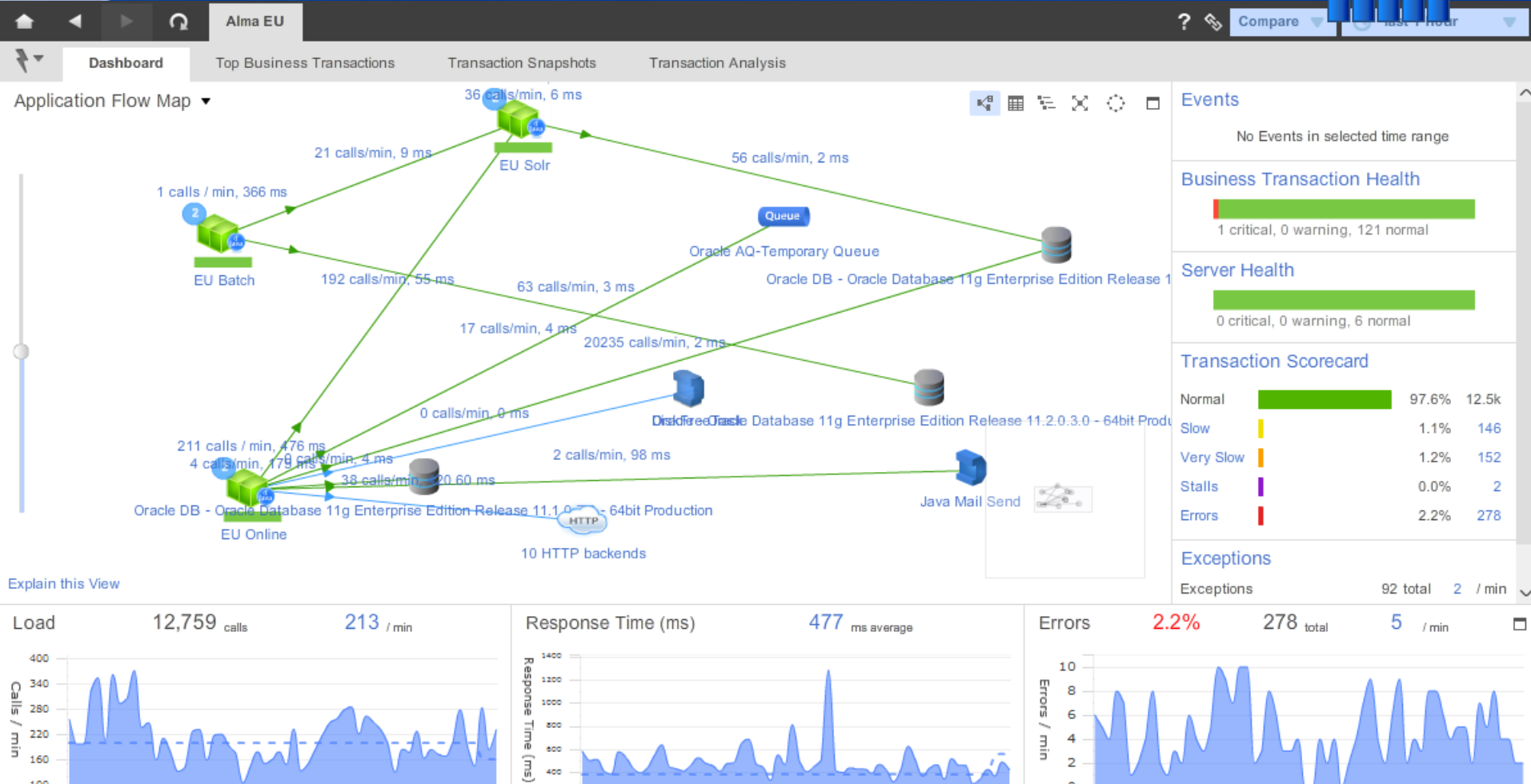


**Interoperability  
& Integrations**

**Support  
& Education**



# Proactive Performance Monitoring



- Understand what is really happening in the system

# Monitoring User Experience per Transaction



Alma NA Business Transactions

View Dashboard More Actions View Options

Name	Health	End User Time (ms)	Page Render Time (ms)	Network Time (ms)	Server Time (ms)	Calls	Calls / min
RTA					662	218	15
PG-loan...							14

Name	Health	End User Time (ms)	Page Render Time (ms)	Network Time (ms)	Server Time (ms)	Calls	Calls / min
RTA	✓	0	0	0	662	218	15
PG-loan.fulfillment_checkout.xml	✓	609	200	178	362	212	14
PG-search.mms_results.xml	✓	930	338	233	528	200	13

PG-mms.marc_record_simple_view.xml	✓	2012	1367	216	631	151	10
Z39	✓	0	0	0	229	137	9
URResolver-External.CTO	✓	0	0	0	695	124	8
PG-po.poline_receiving_list.xml	✓	1351	348	147	918	117	8
PG-loan.fulfillment_patron_workspace_loan.x	✓	1435	188	179	1132	116	8
PG-resource_editor.physical.items_list.xml	✓	849	226	125	475	115	8
URResolver-External.getit	✓	0	0	0	404	98	7
PG-loan.fulfillment_discharge_item.xml	✓	1099	189	205	735	90	6
PG-resource_editor.physical.item_general.xr	✓	1097	246	162	724	85	6
PG-po.create_new_serial_item.xml	✓	1444	422	123	809	77	5
PG-po.poline_summary.xml	✓	803	136	126	464	72	5
mdeditor open	✓	809	366	98	461	71	5
PG-user_management	✓	493	66	122	319	65	4
PG-resource_editor.physical.holdings_list.xr	✓	688	378	106	287	65	4
PG-search.physical_ie_results.xml	✓	734	456	114	729	51	3
WS-CourseWebServices	✓	0	0	0	1560	40	3
PG-po.poline_receiving_items_list.xml	✓	2109	301	150	1685	36	2
PG-invoice.invoice_wizard_lines_tab.xml	✓	1135	96	198	604	32	2
URResolver-External.single_service	✓	0	0	0	1066	30	2



# 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	Apr-14	Apr-13	Apr-12	Apr-11	Apr-10	Scheduled Maintenance
<input type="checkbox"/>	Alma NA00								
<input type="checkbox"/>	Alma NA01								
<input type="checkbox"/>	Alma EU00								
<input type="checkbox"/>	Alma AP01								
<input type="checkbox"/>	Primo NA00								
<input type="checkbox"/>	Primo NA01								

Service is operating normally

Performance issues

Service disruption

Scheduled maintenance

# Depth of Functionality



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# Value - Pace of Innovation



Alma Release Highlights

## February 2014

- Quick Add for Items and Funds to PO Lines
- Create a PO Line Set from an Imported EOD
- Mapping an ISBN Value from EOD to PO Line
- Physical Item Sort Routines
- Preferred Term Correction Enhancements
- Improved OCLC Number Matching with Alma Resolver
- Home/Office Personal Delivery
- On-the-Fly Calculation of Terms of Use
- Alma Resolver – Sorting Enhancement



Alma Release Highlights

## March 2014

- Display License Information in the View It Tab
- Add Item Policy from PO Line Summary Page
- Change Vendor in PO Line
- Un-receiving an Item
- Additional DLF License Fields
- Combining Search Sets
- Normalization Rule Improvements
- Configuring Hold Request Limits
- Fulfillment Configuration Utilities
- COUNTER Release 4 Support for JR1 Reports



Alma Release Highlights

## April 2014

- Specific Fine Payment for Patrons
- Additional Notices Sent Using SMS
- Creating and Updating User Sets
- Analytics Requests subject area
- Combining Databases and Packages into Electronic Collections
- Import Profiles for Multiple Vendors
- Linking Local Electronic Collections to Community Zone Electronic Collections
- Associating a License on the Portfolio Level

# Alma Roadmap Highlights



2013

Collaborative Networks



## Ex Libris Alma Product Update

**Dvir Hoffman**  
Wednesday @ 1:30pm

2014

Analytics



## Next Generation Analytics in Action

**Sharona Sagi**  
Thursday @ 1:30pm

2015

Advanced Acq & Selection:



## Managing Digital Access in Alma

**Nir Sherwinter**  
Wednesday @ 3:45pm



## Streamlining Resource Sharing with Alma

**Moshe Shechter**  
Thursday @ 1:30pm



## Alma Smart Collaborative Networks

**Asaf Kline**  
Thursday @ 11:15am



## Streamlining Acquisitions and E-resource Management

**Dana Sharvit**  
Thursday @ 3:45pm

# Interoperability & Integrations



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# The Alma Developers Platform



Cloud Integration Templates 

Web Services



Publishing Services



Adapters & Interfaces



Export & Import Services



Apps & Extensions



Alma Developers Network



Alma Extensible Architecture 

# New Ex Libris Developer Network



Put Ex Libris products at the center of your library ecosystem.

[Learn](#)

[Code & Apps](#)



Resources: [Primo](#)   [Alma](#)   [Rosetta](#)   [bX](#)   [SFX](#)   [MetaLib](#)   [Aleph](#)   [Voyager](#)

## From the Tech Blog

APR 27 [Creating a Student Portal with the New Alma APIs](#)  
Josh Weisman

APR 13 [Using Thunderbird as a print proxy](#)  
Tamar Fuches

APR 09 [1st experiences](#)  
Marcus Kemper

## Top Code & Apps

[Creating a Student Portal with the New Alma APIs](#)

[CODE & APPS](#) [ALMA](#)

[Return User Name/Address as JSON via getUserDetails REST API](#)

[CODE & APPS](#) [ALMA](#)

[Integrating JW Player as a Rosetta Viewer](#)

[CODE & APPS](#) [ROSETTA](#)

## Get Help

Got Questions?

The Ex Libris Developer Network Forum is the place to go. Search the forum for instant help, or ask a question and get help from knowledgeable customers and Ex Libris staff.

[Join a discussion](#)

# API Console – Easy to Learn & Test APIs



Developer Network

[Docs](#)

[Tech Blog](#)

[Code & Apps](#)

[API Dashboard](#)

[Forum](#)

Search



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

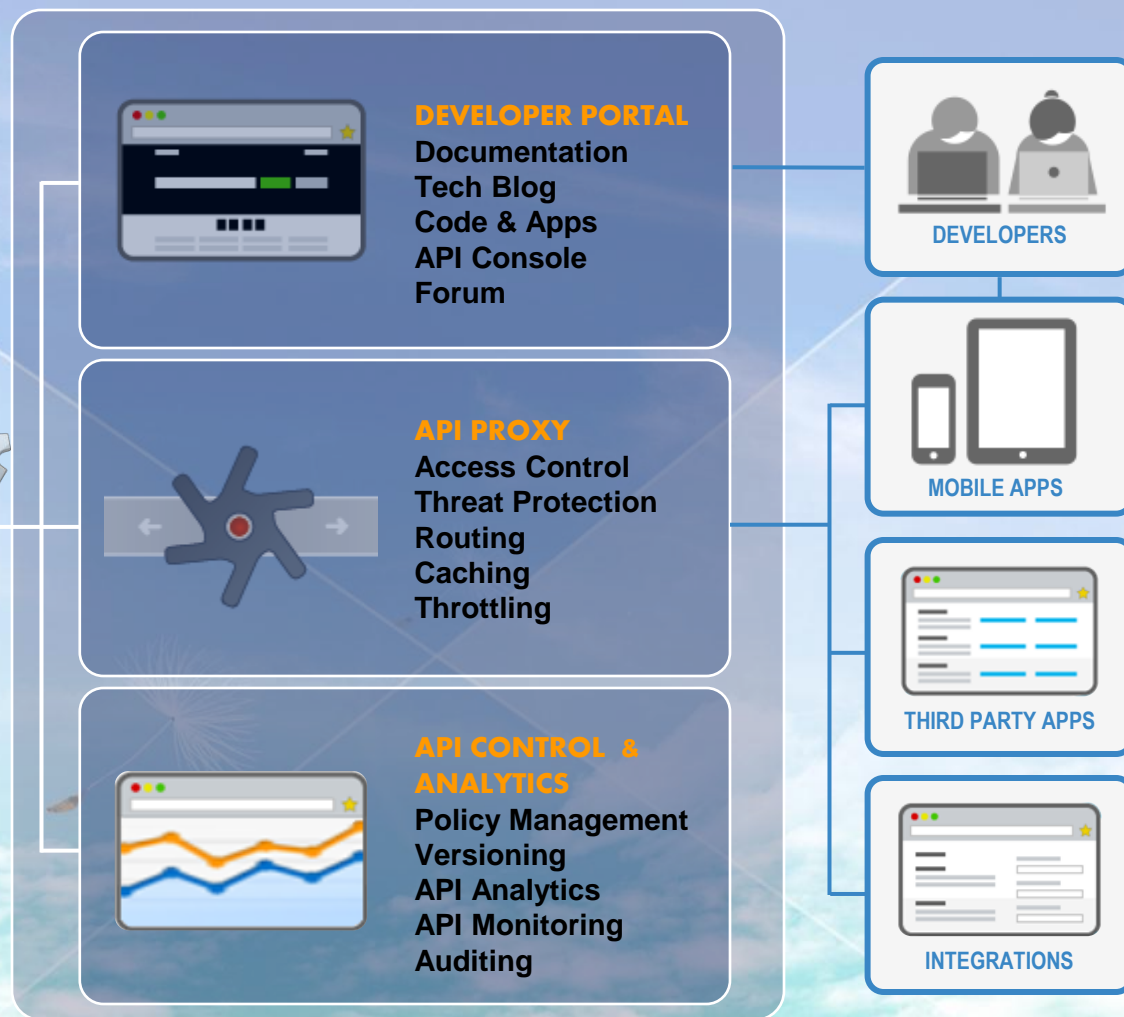
Parameter	Value	Description
user_id	<input type="text" value="0"/>	A unique identifier for the user
item_pid	<input type="text" value="0"/>	The Item ID. This parameter or the item_barcode parameter must be supplied.
user_id_type	<input type="text" value="0"/>	The type of identifier that is being searched. 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	<input type="text" value="0"/>	The Item barcode. This parameter or the item_pid parameter must be supplied.

application/xml

This method takes a Loan object.



# API Platform – Deploying a Secure Scalable API Infrastructure



# Configurability & Customization



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# From Highly-Customizable On-Premise to Highly-Configurable SaaS



ExLibris Alma - Sandbox

Tasks Analytics Currently at: Main Library - Main Library...

Configuration

You are configuring: Training - Sandbox

**Fulfillment Configuration**

- Library
  - Opening Hours
  - Relationships
  - Transit Time
  - Circulation Desks
  - SIP2 Bin Configuration
- Physical Locations
  - Remote Storage
- Physical Fulfillment
  - Fulfillment Units
  - Terms of Use and Policies
  - Block Preferences
  - Auto Loan Renewal Rules
  - Item Policy
  - Advanced Policy Configuration
  - Lost Loan Profile
  - Loan Recalls Configuration
  - Request Task Name
- Patron Configurations

ExLibris Alma - Sandbox

Tasks Analytics Currently at: Main Library - Main Library...

Lost Loan Profile Record [Cancel](#) [Save](#)

**Lost Loan Profile**

Name \* Lost Loan Rules

Description

Active

Days After Due Date 90

Loan Status

- Automatic renewed
- Claim returned
- Normal**
- Claim returned with overdue charge
- Lost with overdue charge

Library

Item policy

- Special
- Manuscript
- Restricted
- 1 Day Loan
- Two Day Loan

Letter send format Both

Notification Only

Days After Status Date 30

User Group

- Faculty
- Staff
- Graduate Student**
- Undergraduate Student
- Guest

Locations

Material Type

- Art Original
- Art Reproduction
- Audiobook
- Audio cassette
- Bachelor Thesis

Printer Training - Sandbox - Alma Printing

[Cancel](#) [Save](#)

# Loss of Control



Data Security & Privacy

Configurability & Customization



Performance & Availability

Loss of Control



Depth of Functionality

Ease of Implementation



Interoperability & Integrations

Support & Education



# 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:
  - Ex Libris deploys the new release in all the sandbox environments in all regions.
  - The monthly Release Notes are published with the sandbox deployment

ExLibris  
Alma

Alma is wishing you all  
**happy International  
Women's Day**

User Name:

Password:

Login

Screen Resolution 1024X768  
Lorem ipsum dol sim amet anjhs lkj

Alma April 2014 release:  
**Celebrating World Book  
Day and copyright day**

User Name:

Password:

Login

Screen Resolution 1024X768  
Lorem ipsum dol sim amet anjhs lkj

# Ease of Implementation



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# Rapid Implementation Methodology



Handoff  
from Sales to  
Project Team

Dedicated Project Team  
(Avg. 3-6 months Implementation)

Customer  
Support &  
Success teams

Getting  
Started



Rapid On-Boarding (Implementation Project) 

Define



Build



Deploy



Life in  
Production



Organizational  
Planning

Current Workflows  
Review

Data Preparation

Getting Ready Kit  
Review

- Additional onsite visits during implementation
- Configuration training as part of initial training
- Alma training enhanced with structured follow-up functional calls
- Switch-to-Support – 2 months after go-live (instead of 1 month)
- Switch-to-Support only if positive “Health Check Report”
- “Next gen”, Web-based project management tool (Basecamp)
- New “Certified Administrator” Program

Support Helpdesk &  
eServices

Best Practices  
Sharing

Value of Investment  
(VOI) Analysis

New Releases &  
Roadmap

Customer Education

## Noam Zeidman

---

Has successfully completed all requirements to become an  
**Ex Libris Alma Certified Administrator**

January 25, 2014



Bar Veinstein, Corporate VP URM Solutions  
Ex Libris Group



**ExLibris Alma**  
Certified Administrator



# Basecamp (Web-based Project Mgmt.)



## University of \*\*\*\*\* Alma Project ☆

[Invite more people](#)  
21 people on this project

[Catch up](#)  
on recent changes









[40 Discussions](#) [12 To-dos](#) [27 Files](#) [9 Text documents](#) [Dates](#)

### Latest project updates

- 8:02am** Marina S. commented on [Miscellaneous migration questions](#)
- 6:12am** Marina S. commented on [Migration of order questions, batch 1](#)
- 5:26am** Maria B. changed a document title from '\*\*\* call 9/10/2013' to '\*\*\* call 9/10/2013 (record call)': [\\*\\*\\* call 9/10/2013 \(record call\)](#)

[See all updates](#)

### Discussions

-  Marina S. [Miscellaneous migration questions](#) - ExL responses are attached.   8:02am 1
-  Marina S. [Migration of order questions, batch 1](#) - ExL response is attached   6:12am 1
- \*\*\*\*\*** [ERP - in progress](#) - Testing of posting to the ERP server should begin after September 16, date as yet undetermined. More details later. Sep 7 2
- \*\*\*\*\*** [Patron load - SIS -started](#) - We are in the process of getting permission from our Identity Management department to get access to directory information. We Sep 7 1
-  **\*\*\*\*\*** [More Miscellaneous Migration Questions](#)  Sep 3

[35 more discussions](#)

### Upcoming Events

#### Today

- [\\*\\*\\* Alma Call](#)
- [Chen - Out of Office](#)

#### September 17

- [\\*\\*\\* Alma Call](#)

#### September 24

- [\\*\\*\\* Alma Call](#)

[All upcoming events...](#)

# Support & Education



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# Ask the Alma Expert Program



Ask the Expert

**ExLibris**  
The bridge to knowledge

Weekly since December 2014,  
with a holiday break

Average of 70 participants per  
each session

## 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

# Perceptions 2013: An International Survey of Library Automation



## Satisfaction Score for ILS

Alma	<b>6.92</b>
System A	6.83
System B	6.54
System C	6.10
System D	6.09
System E	6.02
All Responses	6.34

## Electronic Functionality

Alma	<b>6.69</b>
System A	6.24
System C	5.17
System E	4.73
System D	4.69
System B	4.23
All Responses	5.07

## Satisfaction with Support

Alma	<b>7.08</b>
System D	6.81
System B	6.48
System A	6.41
System E	5.87
System C	5.59
All Responses	6.23

## Customer Loyalty

Alma	<b>7.86</b>
System A	6.53
System B	6.50
System E	6.38
System C	5.65
System D	5.09
All Responses	6.06

***“Overall the survey reflects well on Alma in its critical target category of larger academic libraries. The rankings show strong support for the company itself, its support for Alma , and the strength of the product to manage electronic resources which are the dominant area of concern for these libraries.” -- Marshall Breeding. February 3, 2014***

# Addressing Concerns of Adopting Alma



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# So...Why to Implement Alma Now?

## Streamline Workflows

Single unified solution for Print, Electronic and Digital

## Enhance Patron Experience

Sophisticated discovery integration (Primo)

## Improve Productivity

Workflow Automation (Exception-based tasks list)

## Optimize Collection Usage

Comprehensive Analytics (Data-Driven Decisions)

## Decrease Complexity & Silos

Unified Resource Management (multi-format metadata)

## Focus on New Initiatives

Interoperability (open platform) & Extended Services

## Reduce Total Cost of Ownership

Cloud-based SaaS, Systems Consolidation

## Access Next Gen Functionality

Best practice functionality & High degree of configurability

## Accelerate Collaboration

Smart Collaborative Networks



Thank You