IGeLU Conference & Ex Libris Systems Seminar

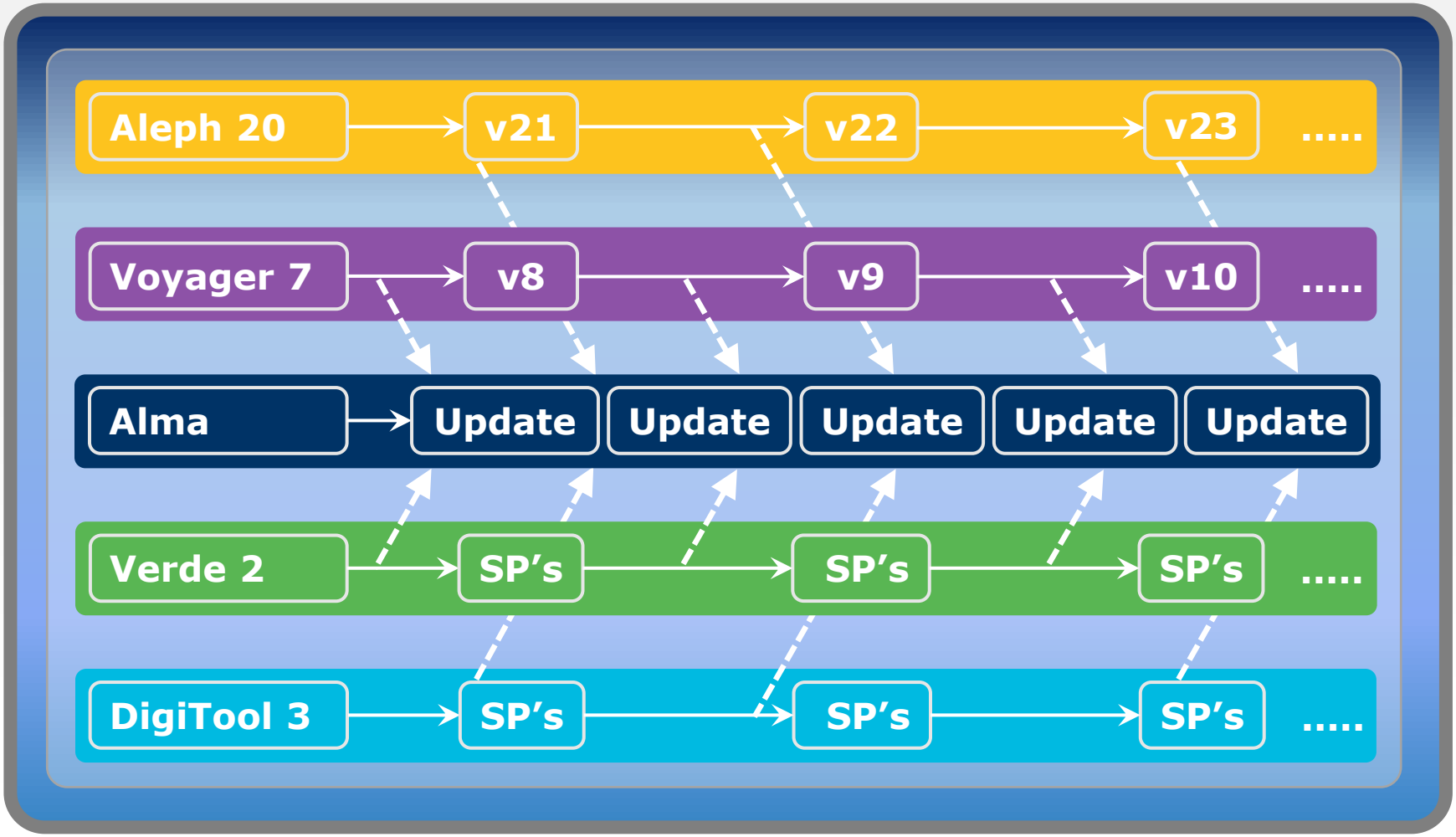
Oxford, September 15-19 2014

Alma Product Update, Roadmap and Q&A

Bar Veinstein - Corporate VP, RM Solutions

Dvir Hoffman - VP, Product Mgmt. & Marketing, RM Solutions

Development and Support for Years to Come...



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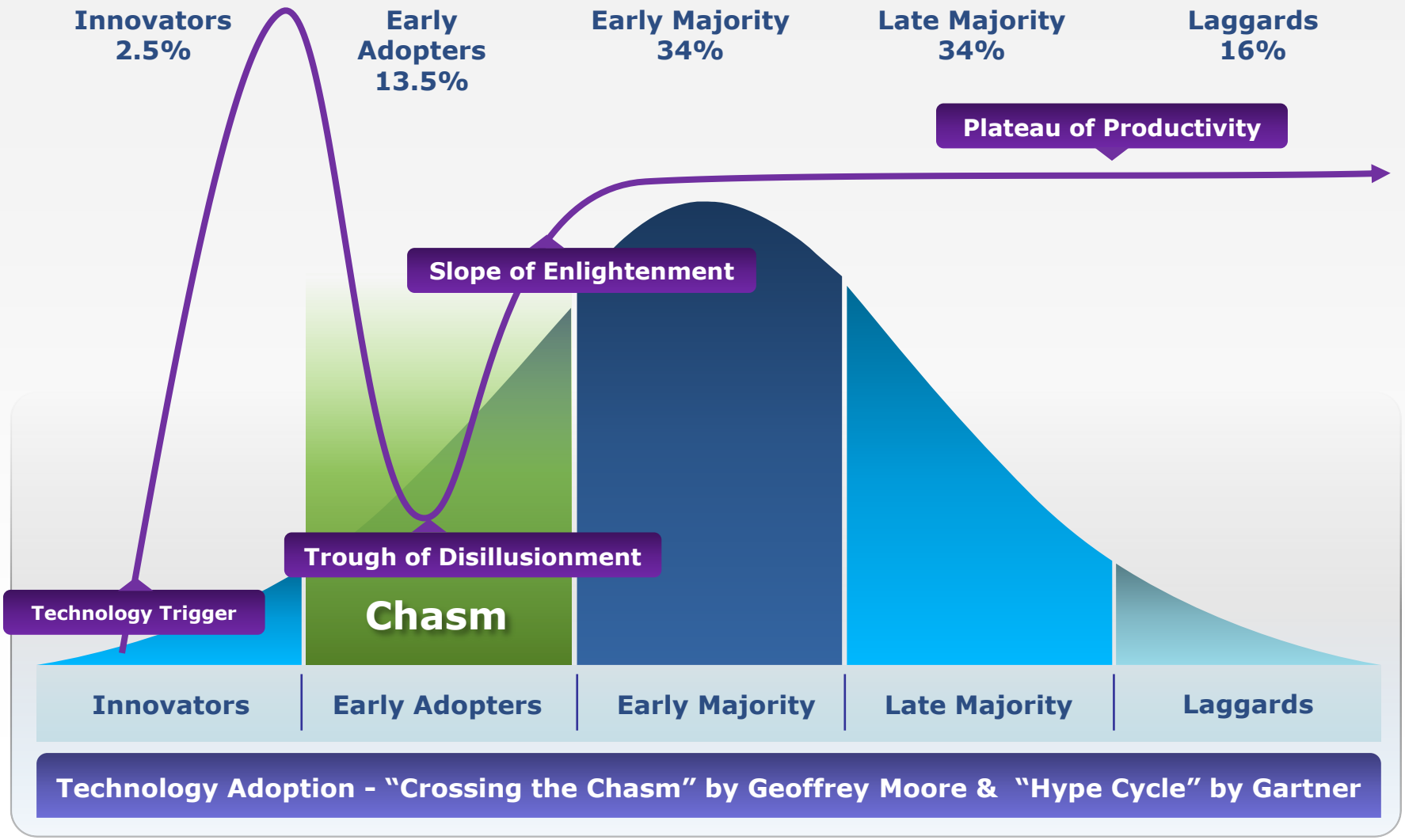
Where is Alma Today?



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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

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Continues Investment and Focus Areas

Release Methodology

Depth of Functionality

Interoperability & Open Platform

Continuous Innovation

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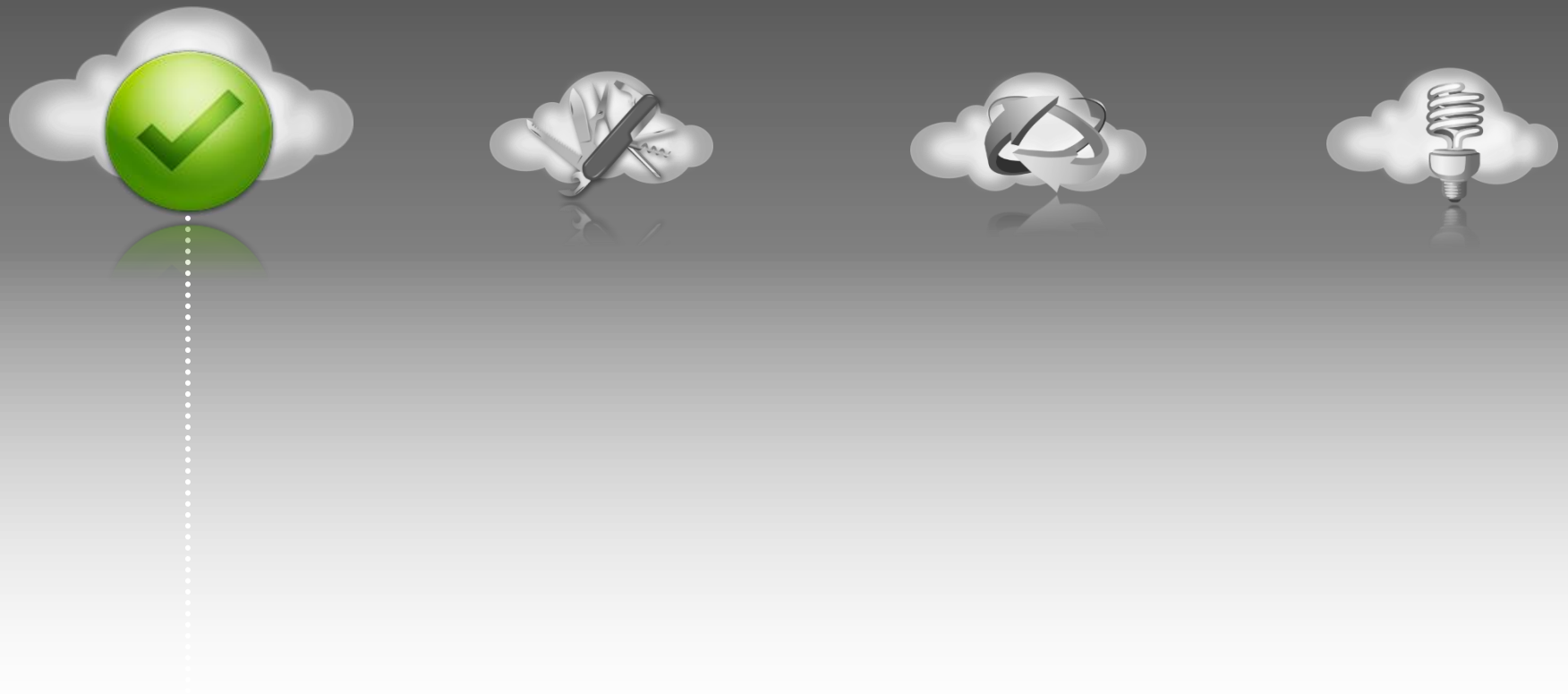
Release Methodology



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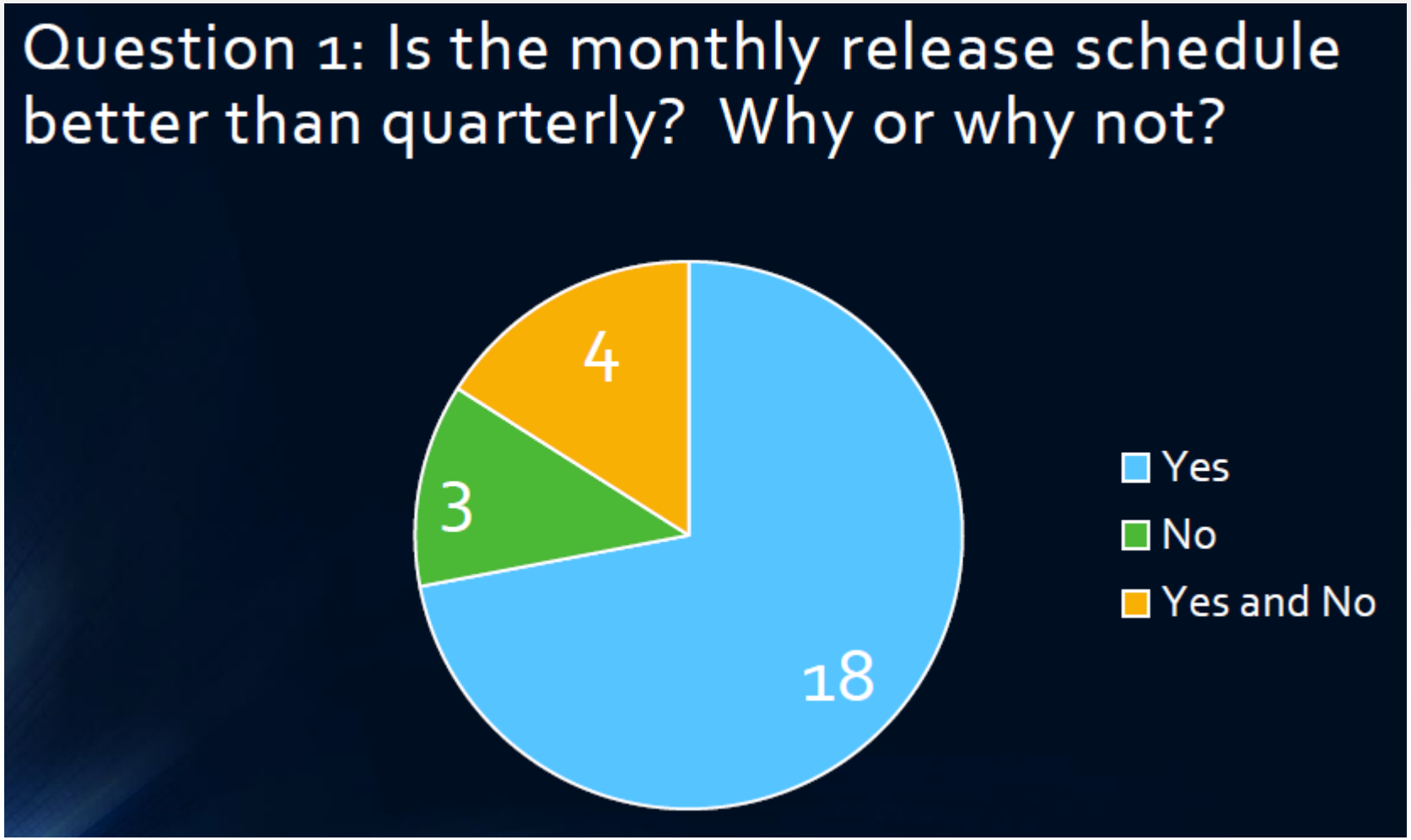
Monthly vs. Quarterly Release Cycles?



Managing change in Alma: Do monthly updates matter?

-- Thomas McNulty, Virginia Commonwealth University

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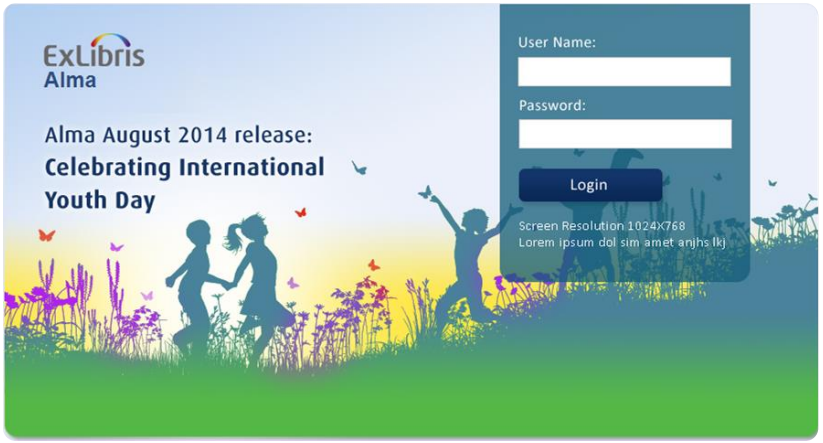
Improvements to the Alma Release Process

- 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



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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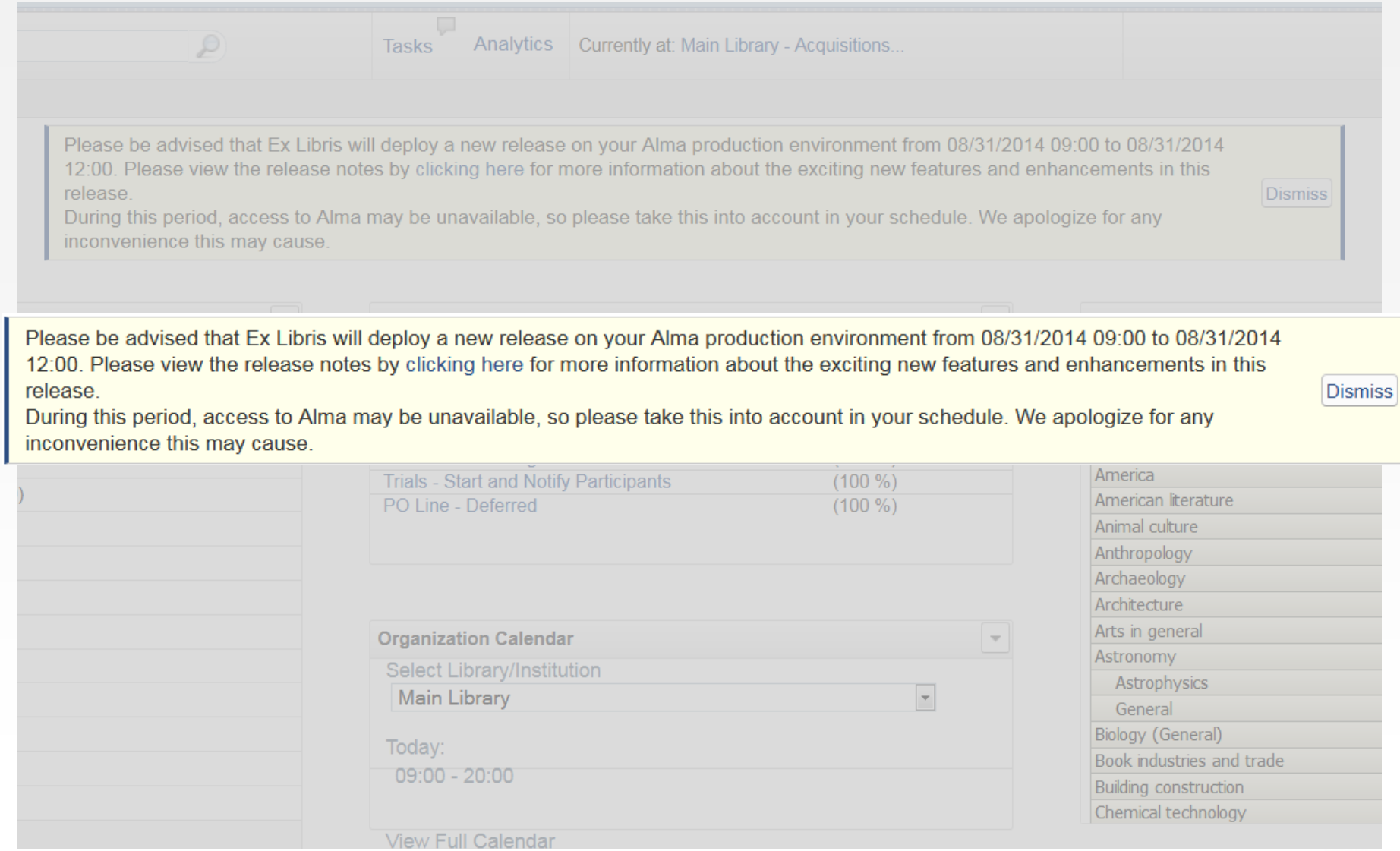
End User System Maintenance Notifications



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Education Initiatives

Certification Program

ExLibris Alma
Certified Administrator

- 5 Monthly online courses, 22 recorded sessions, Q&A webinars and an online exam
- 58 new certified administrators worldwide
- 25 institutions in implementation; 4 live customers

FEB 2014

Administration Fundamentals

- New module released in June 2014
- Configuration considerations clips
- 13 short recordings

JUN 2014

Ask the Expert

- 16 Bi weekly live Q&A webinars
- 50 customers per session

DEC 2013

New Release Education

- Monthly videos
- 37 What's New Videos

DEC 2012

- Monthly walkthroughs
- 26 Show Me How walkthroughs

OCT 2012

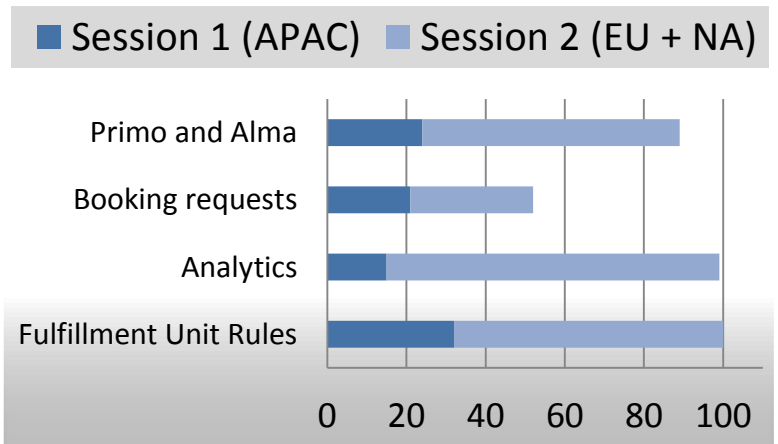
Ask the Alma Expert

Ask the Expert

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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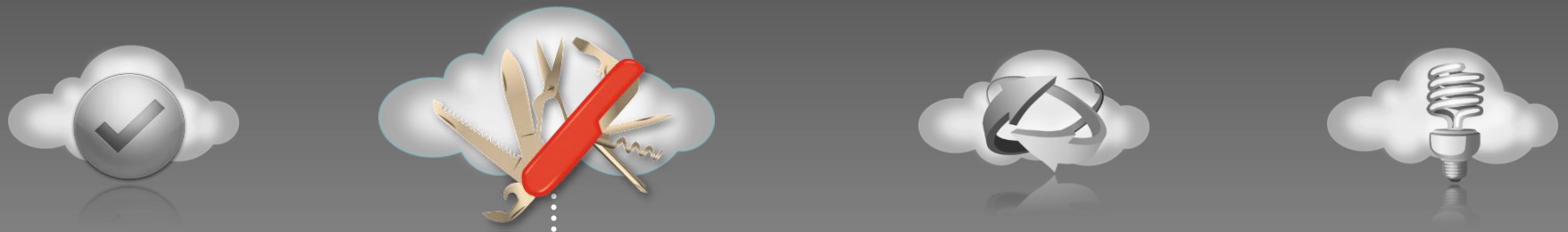
Depth of Functionality



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Alma Master Roadmap Plan

Metadata & Res. Mng.

H2 2014	H1 2015	H2 2015 – H1 2016
• Publishing Platform • Integrated Authority Contribution	• Stock Taking/Inventory Control • UNIMARC Support • Electronic Collections Overlap Analysis • Community Zone Contribution • Cataloger Level Support	• Bibliographic Heading Browse • Duplicate Record Detection Tool

Acquisitions

H2 2014	H1 2015	H2 2015 – H1 2016
• Integrate Alma with 3rd Party Selection platforms • Prediction Pattern – Open Cycle • Central Negotiation • ONIX-PL License Loader	• Integrate Alma with 3rd Party Selection platforms • Prediction Pattern – Claims • Central Negotiation • ONIX-PL License Loader	• Patron Purchase Requests • Enhanced Acquisitions Searching and Facet support • Support Additional EDI types and workflows

Integrated Authority Contribution

Metadata & Res. Mng.

Customer Value

- Libraries working with any national authority registries will be able to share their work on authority records by contributing them to the national authority registry

Feature

- Enable catalogers to catalog draft authority record in Alma and contribute them to the national authority registry

Community Zone Contribution

Metadata & Res. Mng.

Customer Value

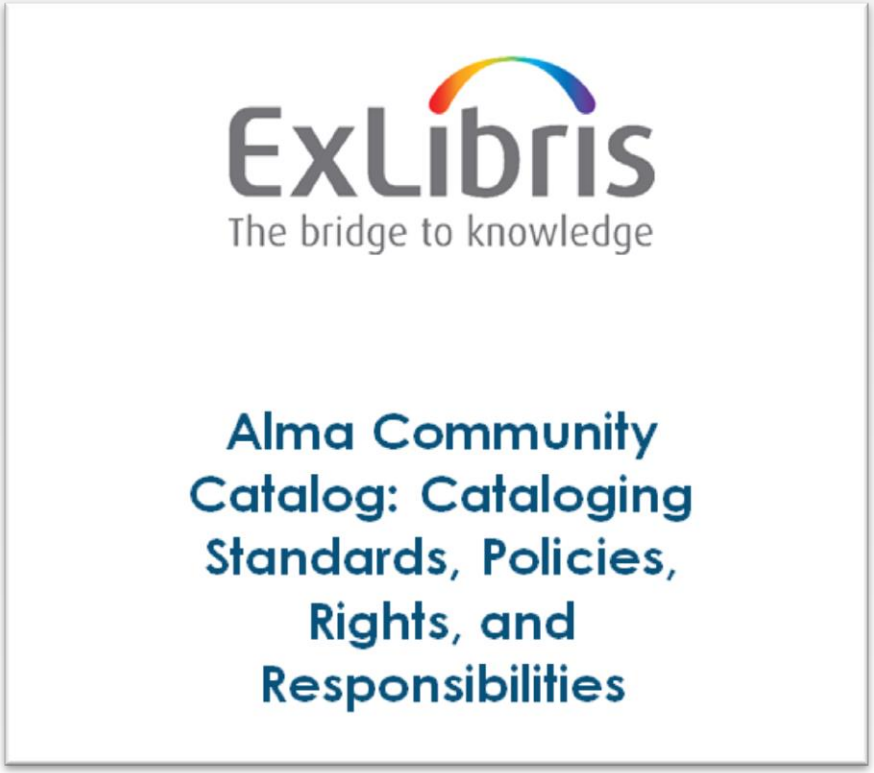
- Improve customer efficiencies by leveraging community effort to enrich and enhance eBook records
  - Loaded by now: EBL, SkillSoft, Cassalini Libri
  - To be loaded soon: ProQuest , Springer, CUP, ACLS

Feature

- Alma catalogers will be able to edit eBook descriptive records in the Alma CZ which have been blocked from editing until now, including
  - Fixing errors – title typos, wrong values
  - Enriching records by adding missing data
  - Adding identifiers (e.g. OCN)
- Records edited will be instantly updated in the CZ and will distributed to all items linked to the CZ record

Community Zone Advisory Group - Conclusion

- Held monthly meetings until June 2014
- Accepted the single record concept
- Decided on open contribution to all institutions to be done as seamless as possible
- Worked on the final version of the policies documents



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Central Negotiation

Acquisitions

Customer Value

- Enable consortia central office to manage vendor negotiation details for electronic resource purchases on behalf of the consortia members
- Empowering the consortia central office to receive best value for electronic resource purchases and managing the negotiation and purchases in an efficient manner.

Feature

- Alma will support the recording of vendor negotiation details for electronic resources
- Negotiation details will be recorded as part of the Alma license entity and will include:
  - Members for which the resource is negotiated for
  - Price
  - Contact information
  - License start/end date
  - Renewal cycle
  - License terms
- Negotiation details will be available for the members upon purchasing

ONIX-PL License Loader

Acquisitions

Customer Value

- Support loading license details in ONIX-PL for ease of license management

Feature

- Alma will support the loading of license details in ONIX-PL resulting in the creation of Alma license which is based on DLF

Patron Requests for Purchase

Acquisitions

Customer Value

- Better service for patrons, by enabling them to submit a purchase request for material that is not part of the library collection

Feature

- When the requested resource is not part of the library collection, a patron will be able to submit a purchase request for the desired material. The request will include citation information.
- Selectors will receive and process the purchase request.
- The selection workflow will allow for communication with the patron – for example, request for more information, the decision to purchase (or not), etc.

Alma Master Roadmap Plan

Resource Sharing

H2 2014	H1 2015	H2 2015 – H1 2016
• Network Level Configuration – Resource Sharing • InnReach Integrations • Advanced Peer to Peer Workflow • Fulfillment Network Service Policies	• New Resource Sharing Integrations • Smart Fulfillment Workflows • Enhanced Fulfillment Network Patron Services • Optimized Resource Sharing Request Processing	• Copyright Management for Resource Sharing requests • Improved Staff Management of Requests • Enhanced Broker Support

Fulfillment

H2 2014	H1 2015	H2 2015 – H1 2016
• Automated Storage Solutions • Extended Support of Flexible Campus Level Policies • Network Level Configuration - Fulfillment • Optimized Request Processing	• Improved Support for Mobile Applications • Enhanced Courses and Reading List Management • EReserve Systems Integrations • Return Anywhere • Enhanced Patron Notifications	• Pickup Anywhere • Copyright Management for Digitization Requests • Hold Shelf management for Booking Requests

Network Level Configuration – Resource Sharing

Resource Sharing

Customer Value

- **Unified Policies** – Consortia may enforce centrally set policies for all member institutions, creating unified level of service and workflows for all consortia members
- **Ease of Configuration** - Easier maintenance of consortial resource sharing policies by managing a single configuration interface

Feature

- All elements of the resource sharing configuration will be centrally configurable at the Network Zone, waiving the need to manage separate configurations at each institution. That includes central configurations of:
  - Partners list
  - Rota Templates list
  - Rota Assignment rules
  - Locate Profiles
  - Automatic Send Rules

Smart Fulfillment Workflows

Resource Sharing

Customer Value

- Fully Integrated Fulfillment Services – Users will enjoy seamless and smart requesting, by letting the system choose the best method of fulfillment a request

Feature

The resource sharing processing workflows will be further integrated with the fulfillment services, allowing a mediated or rule based non mediated promotion of unfilled hold requests to external suppliers by utilizing resource sharing processes

Copyright Management for Resource Sharing requests

Resource Sharing

Customer Value

- Efficient and automated processing of requests for copyright restricted resources
- System enforced compliance with copyright regulations

Feature

- It will be possible to set copyright compliance rules that will also be enforced for resource sharing requests for digital material
- Requests that are determined to require copyright clearance will be blocked from further processing, and require a manual processing to clear copyright issues

Alma Master Roadmap Plan

Alma Ex APIs

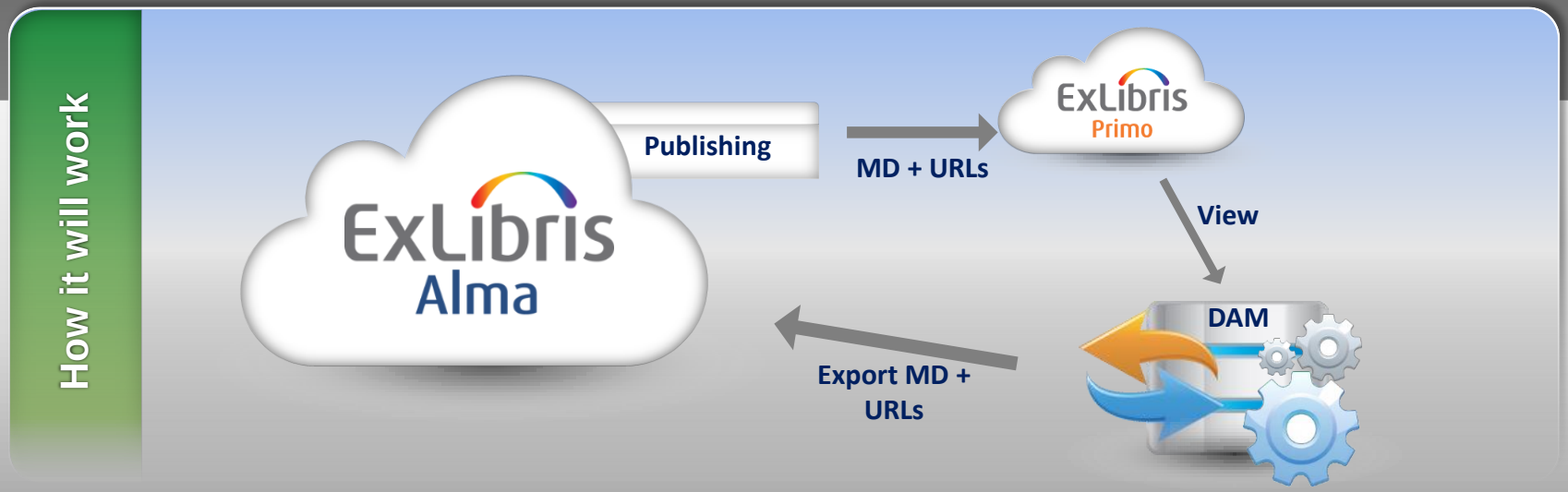
H2 2014	H1 2015	H2 2015 – H1 2016
• Acquisitions API Pack • Fulfillment API Pack • Repository API Pack • Language Support Pack	• Inventory API Pack • Acquisitions API Pack • Language Support Pack	• Repository Integration API Pack • Move of SOAP Services to REST

Alma Ex Regional

H2 2014	H1 2015	H2 2015 – H1 2016
• Library Digitization Integration • Legal Deposit Receiving Integration • Enhanced User Synchronization	• NCIP Based Resource Sharing • Integration with German Central Catalogs (CBS) • Integration with LIBRIS Catalog & ILL	• Enhanced Korean Support in Repository Search • Integration with Aleph Based Central Catalog • Enhanced SRU support

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



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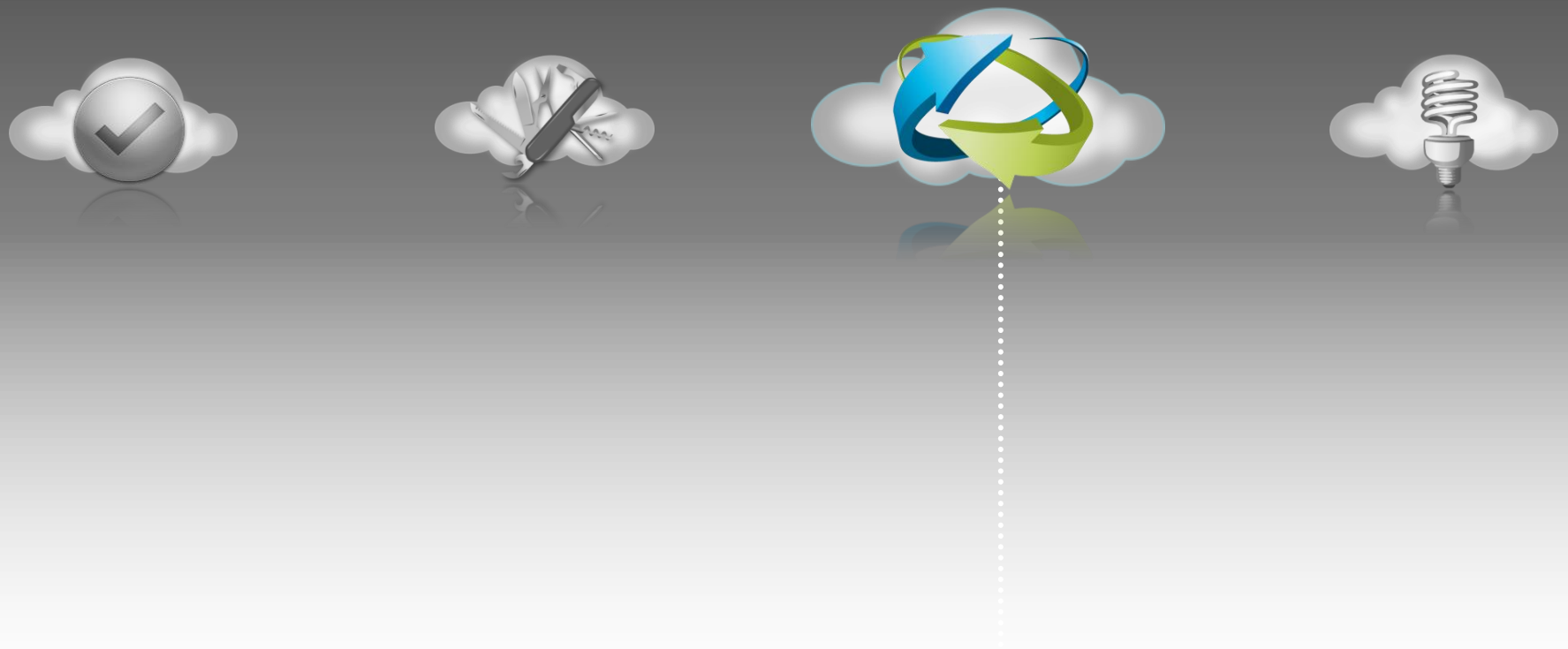
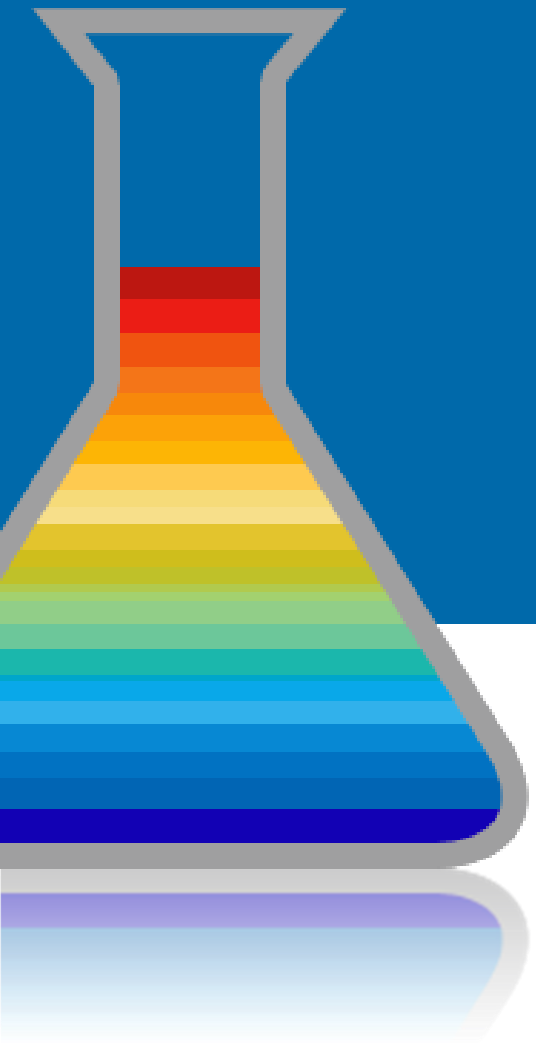
Interoperability and Open Platform





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

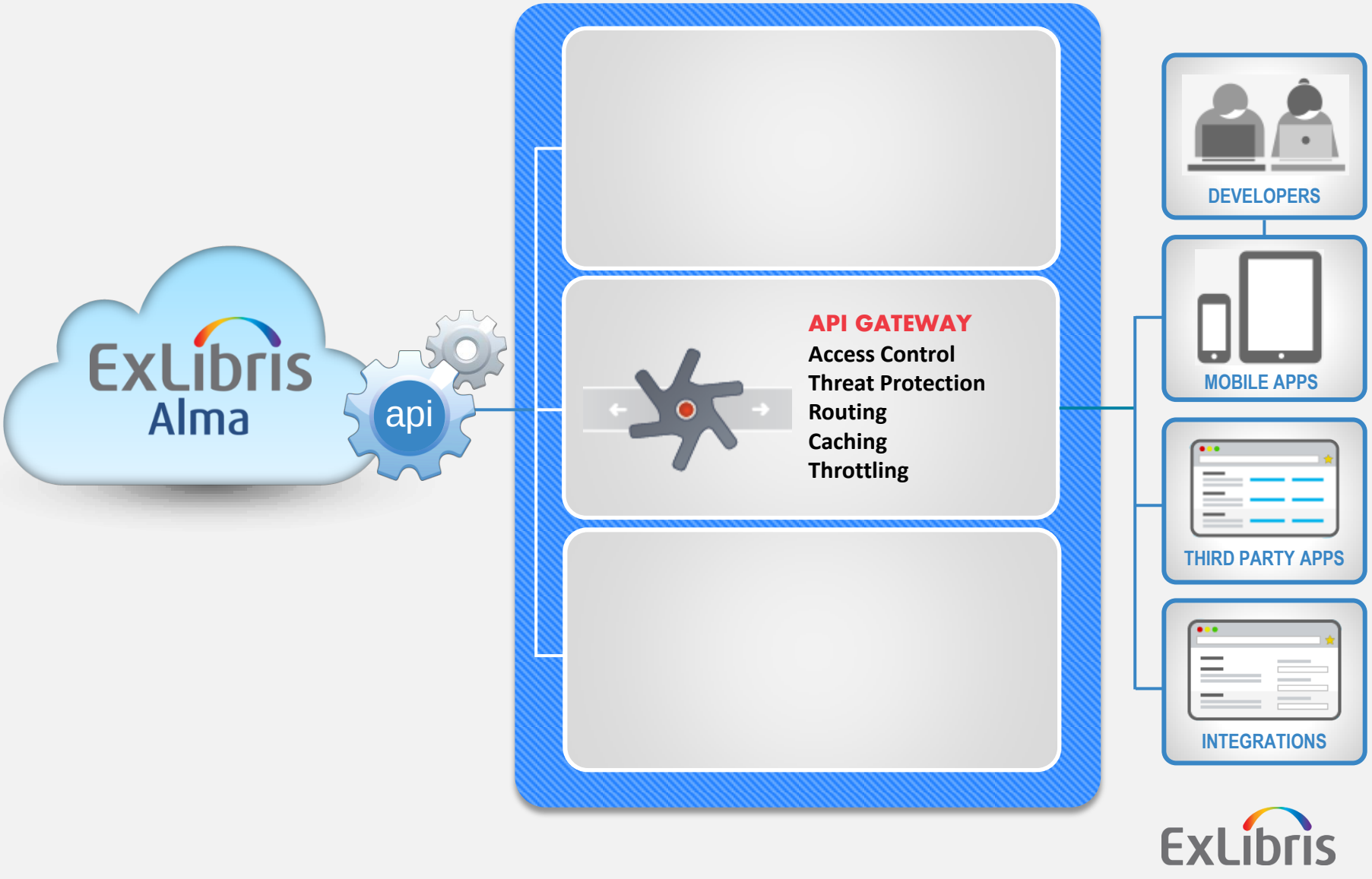
Encouraging and supporting a vibrant developer community

INCREASED DEVELOPER PRODUCTIVITY

Easing the developer experience and increasing productivity

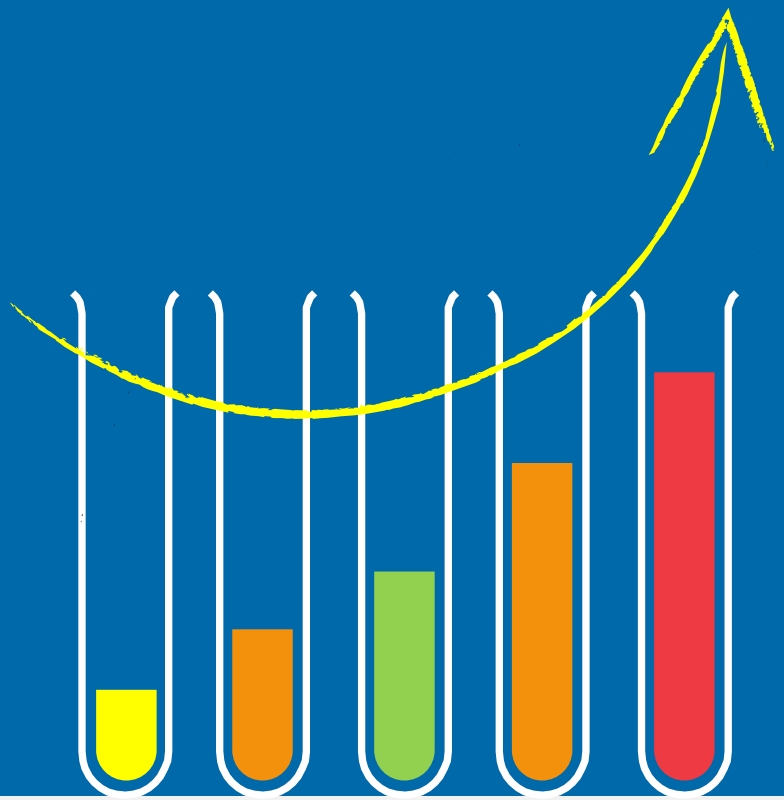
ExLibris

Ex Libris API Platform
a Secured & Scalable API Infrastructure



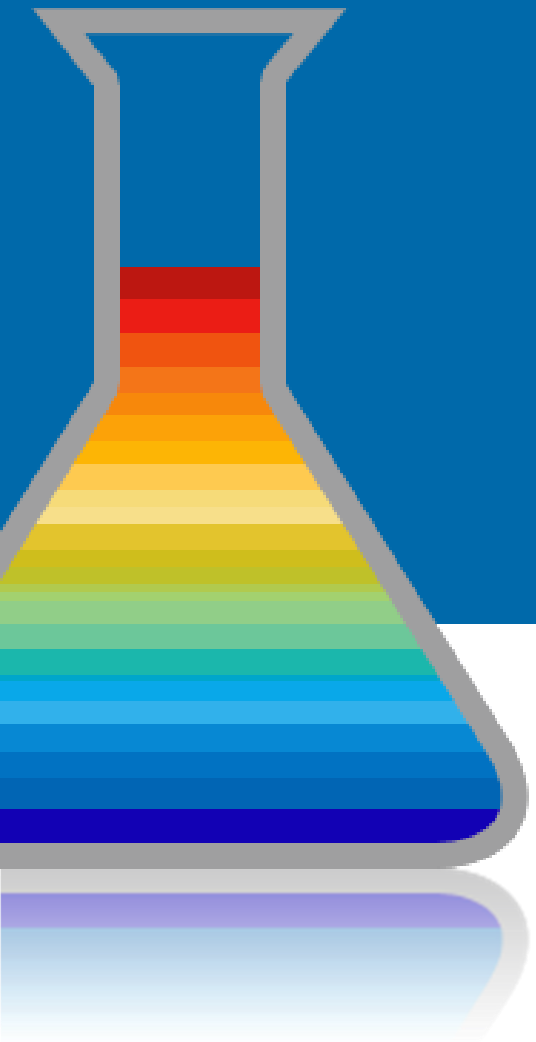
Ex Libris Developer Network

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.

ExLibris



Develop. Experiment. Collaborate

Addressing Key Developers' Challenges

Ex Libris Developer Network – Addressing Key Challenges

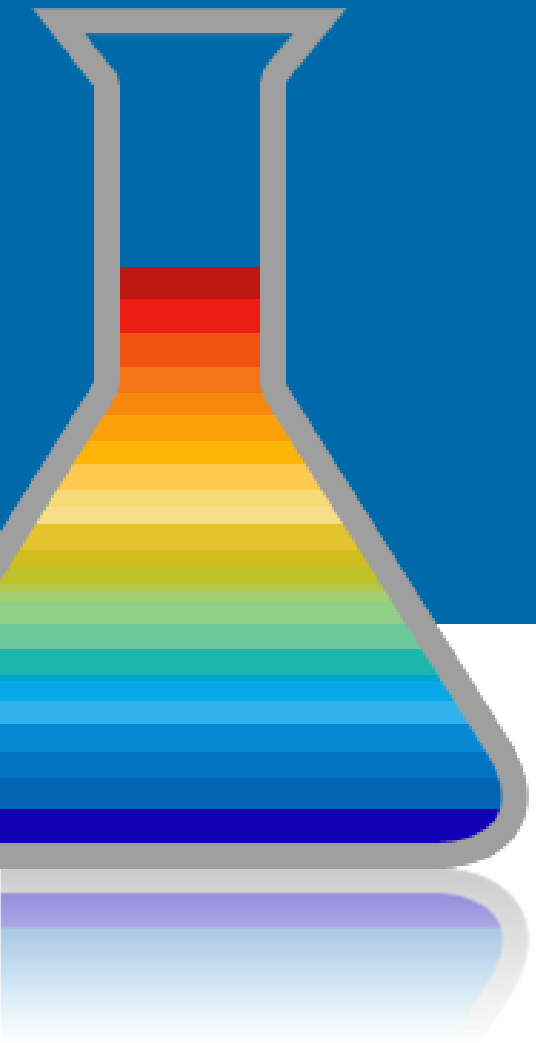
How easy are these APIs to work with?

How easily can I learn these APIs?

How long until I get the key?

Is there a community I can learn from?

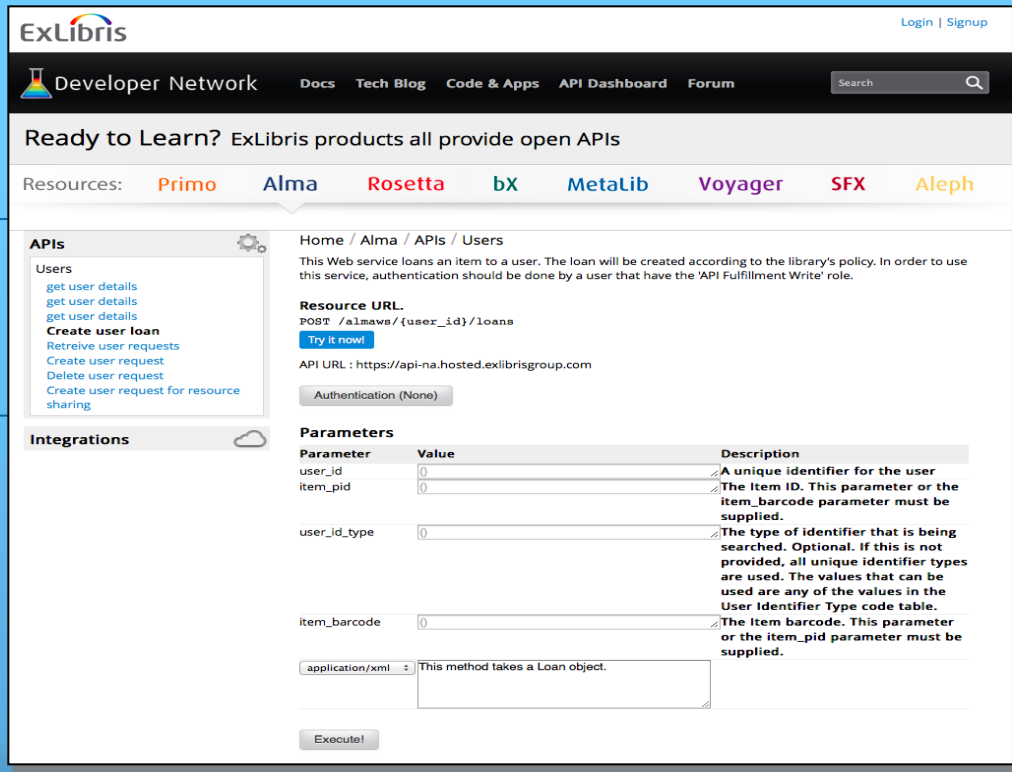
ExLibris



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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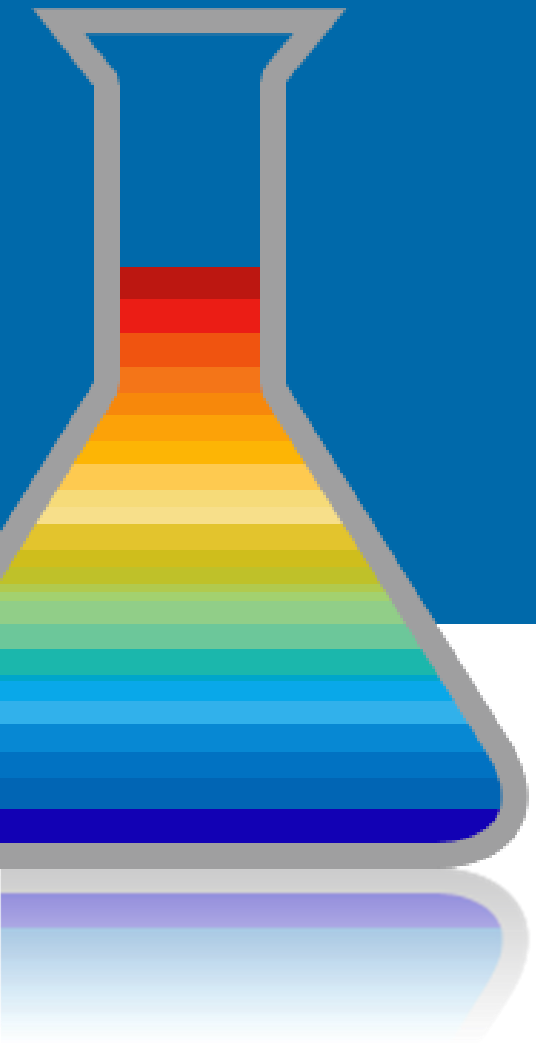
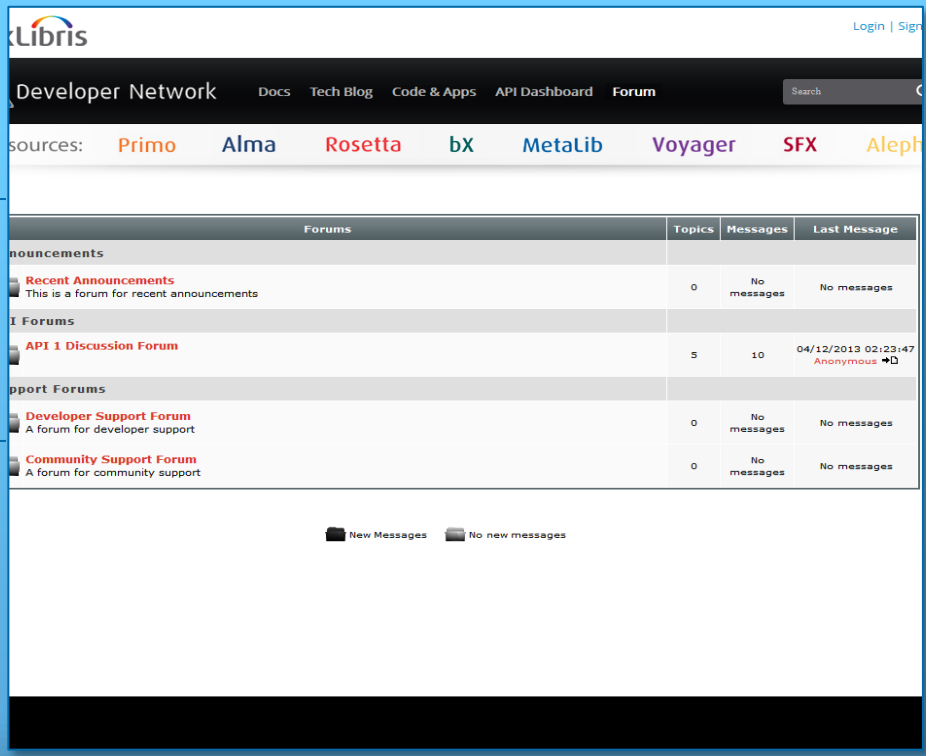


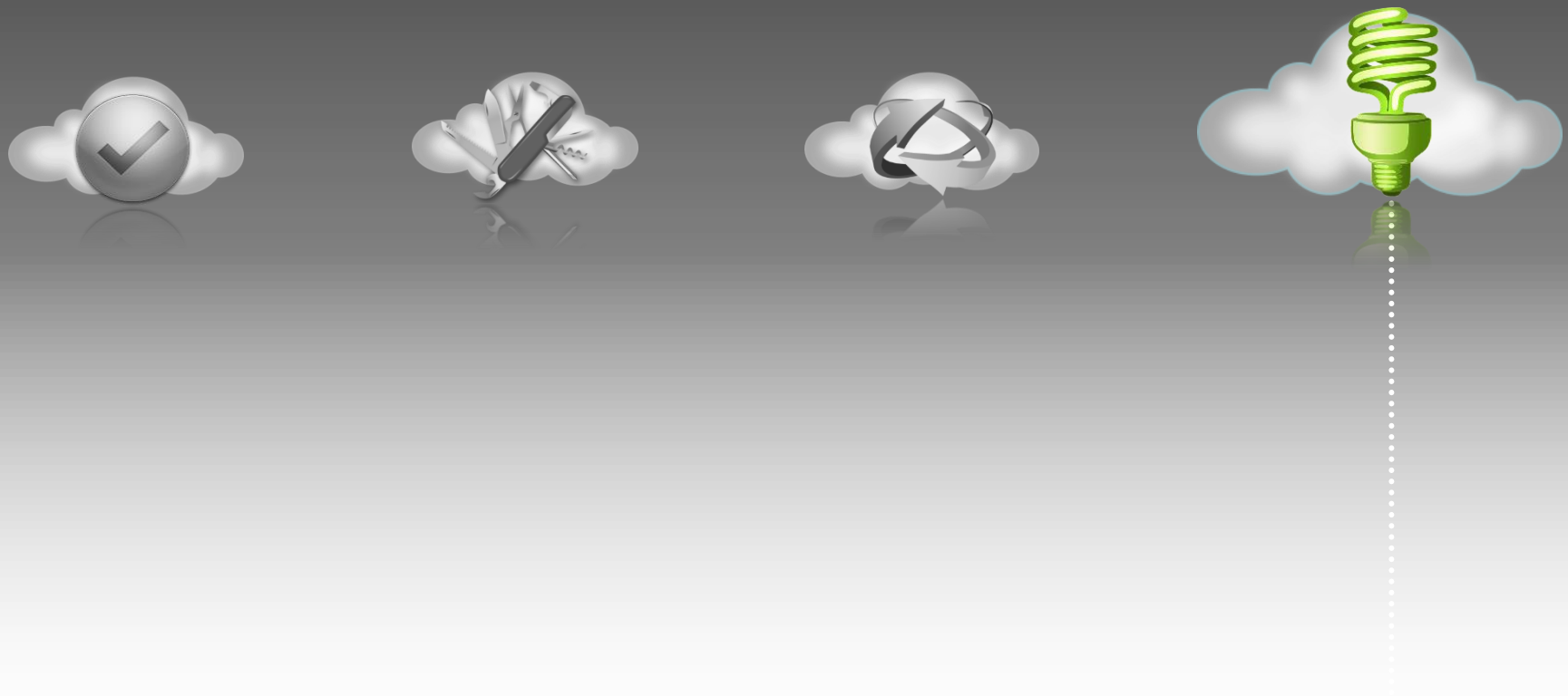
Develop. Experiment. **Collaborate**

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



Continuous Innovation



Ex Libris Collaboration with SWETS and YBP

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

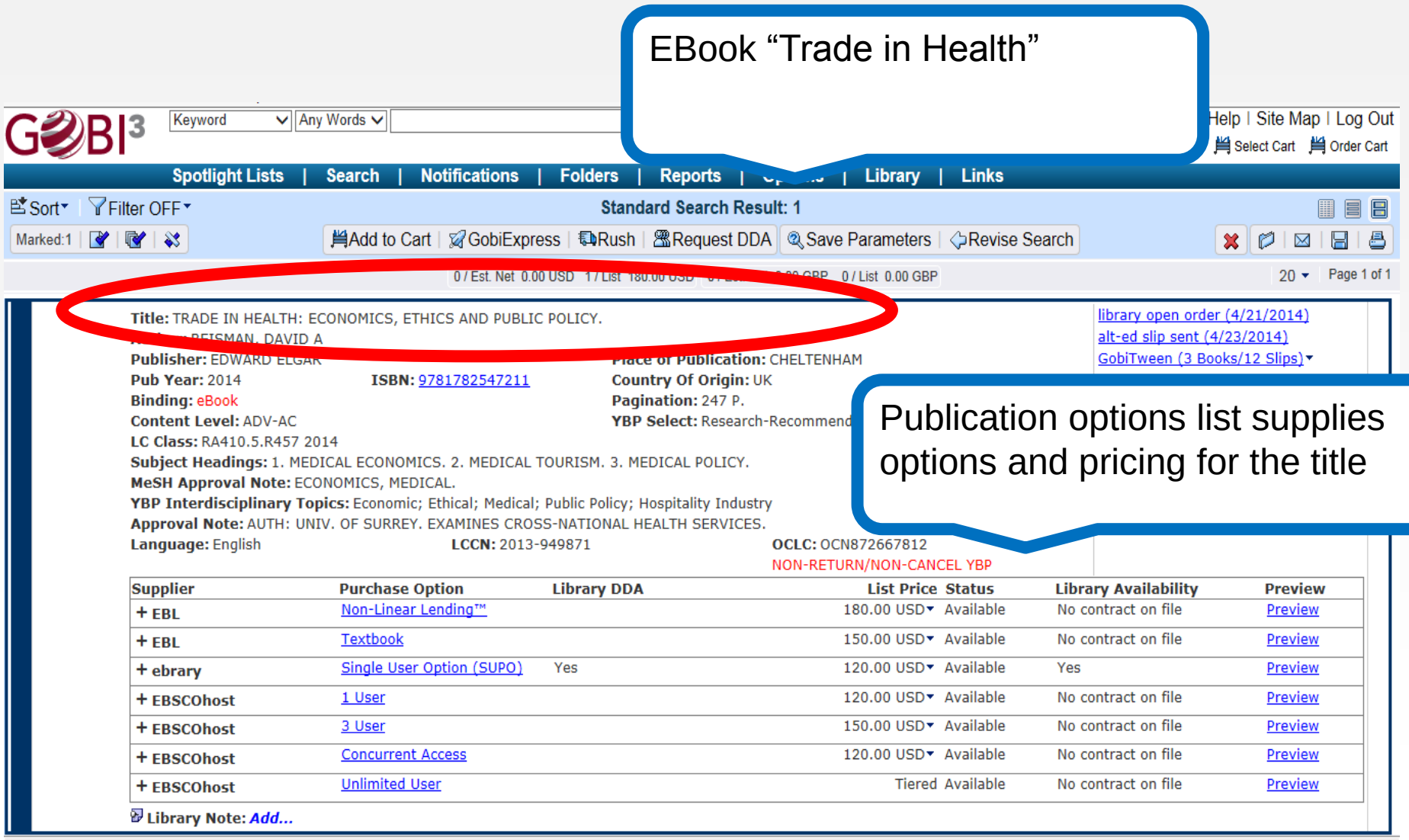
swetswise | ExLibris The bridge to knowledge | BAKER & TAYLOR YBP Library Services

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 early **Q4 2014**

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

eBook Order: GOBI Bib



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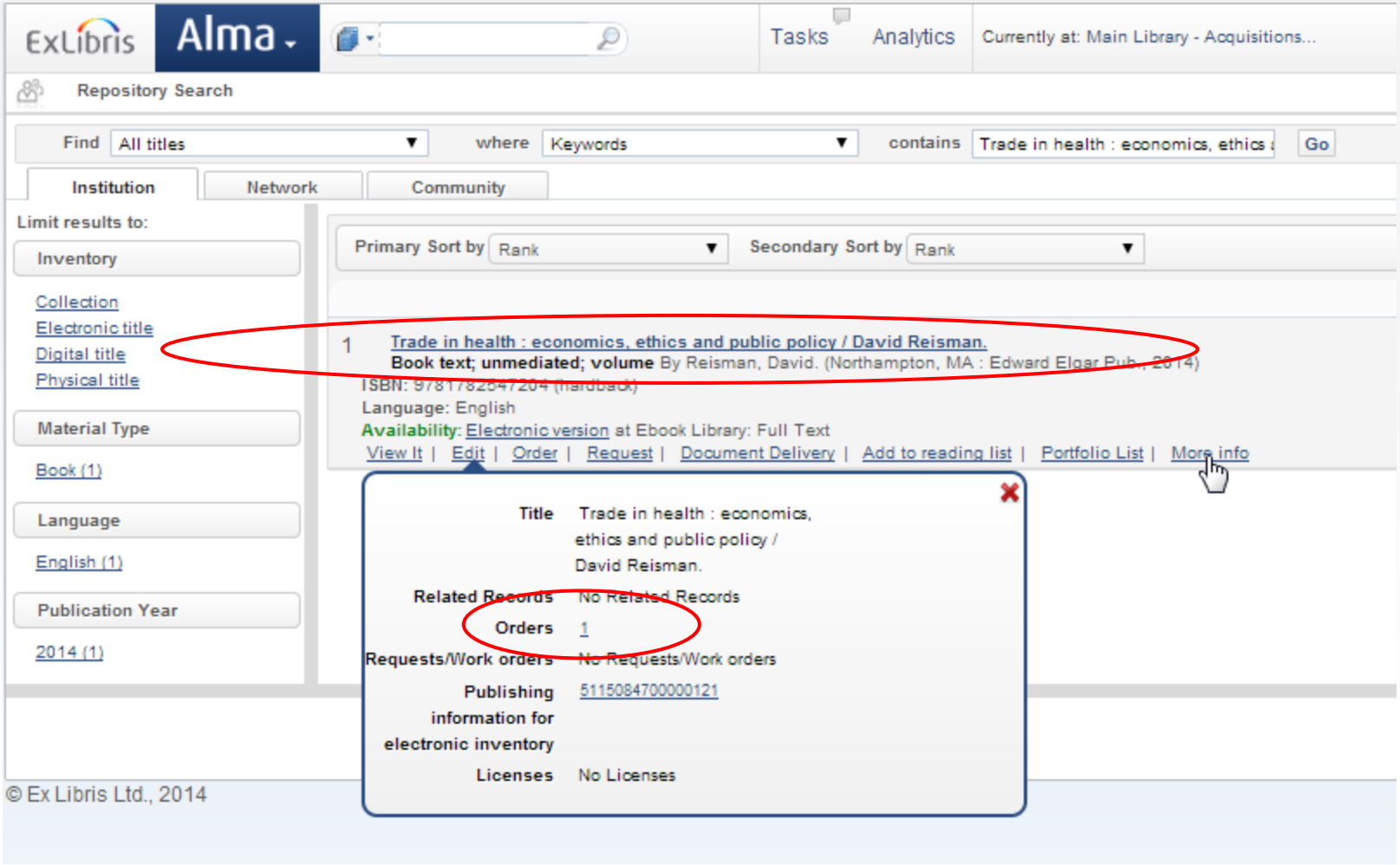
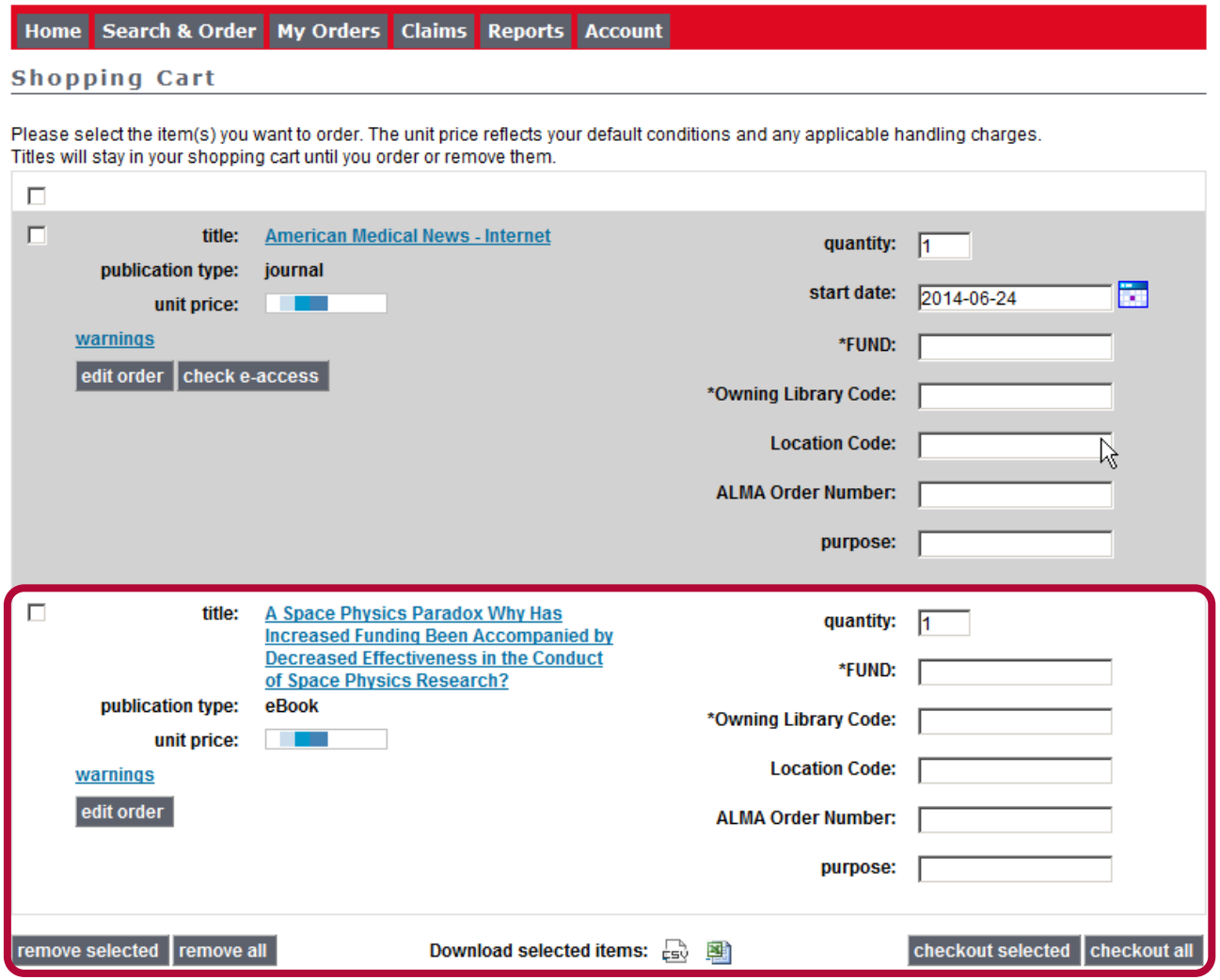
eBook Order in Alma



Alma & SwetsWise Collaboration



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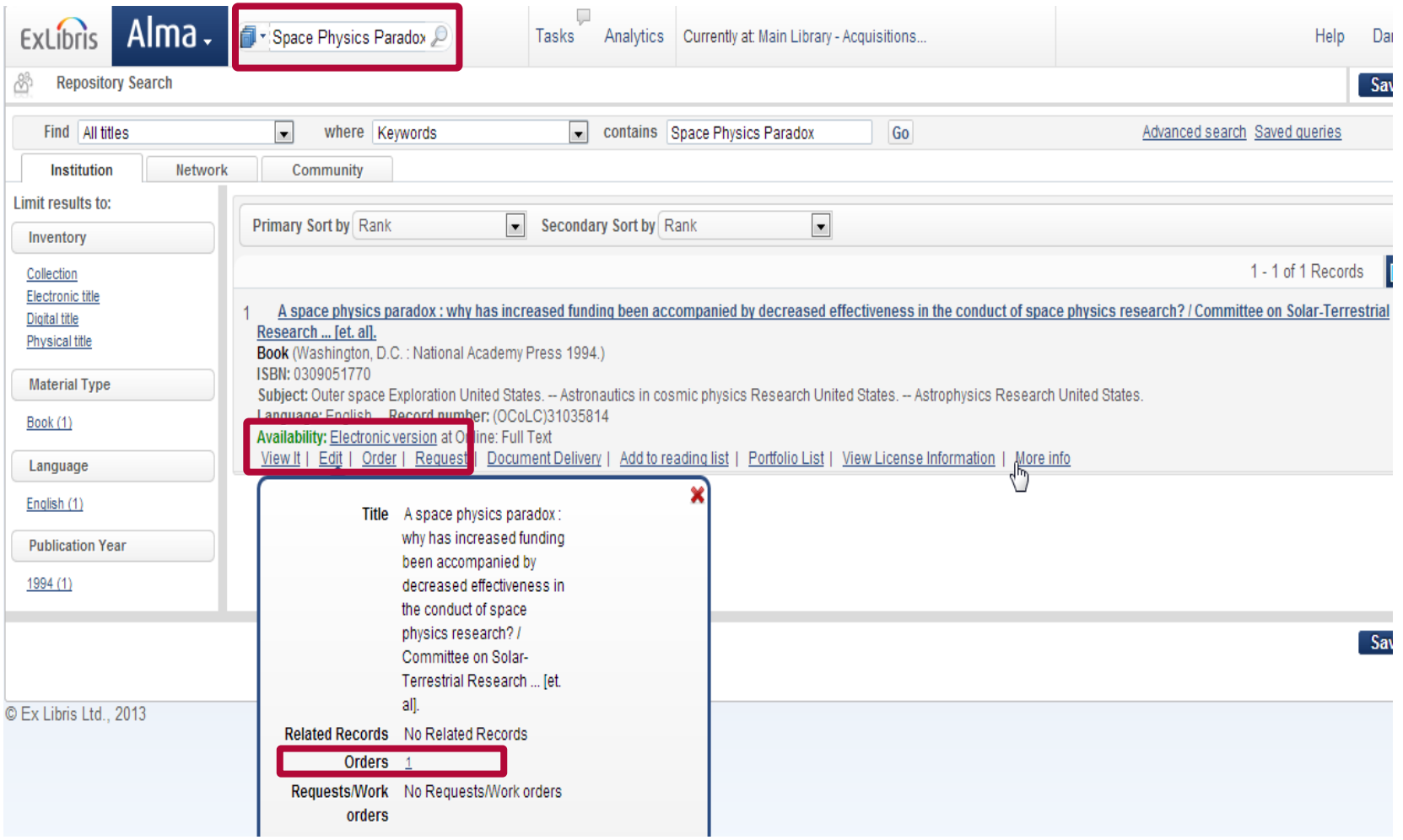
Alma & SwetsWise Collaboration



On the Roadmap…

- **Duplication detection**
  Check Alma automatically and alert if the resource is already part of the library collection

- **Access activation details**
  Alert Alma when the purchased e-resource is available at publisher site for access

- **E-Access claiming**
  Quick, easy and efficient way to check on the status of an order for material

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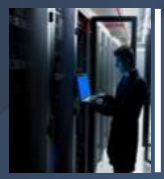
Delivering Value for All Stakeholders

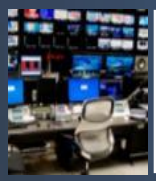
FACULTY MEMBERS

LIBRARY DIRECTOR



CIO

PATRONS



CONSORTIA CENTRAL OFFICE

LIBRARY MANAGERS

ExLibris
The bridge to knowledge

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*

ExLibris
The bridge to knowledge

Smart Collaborations Driven by a Flexible Network

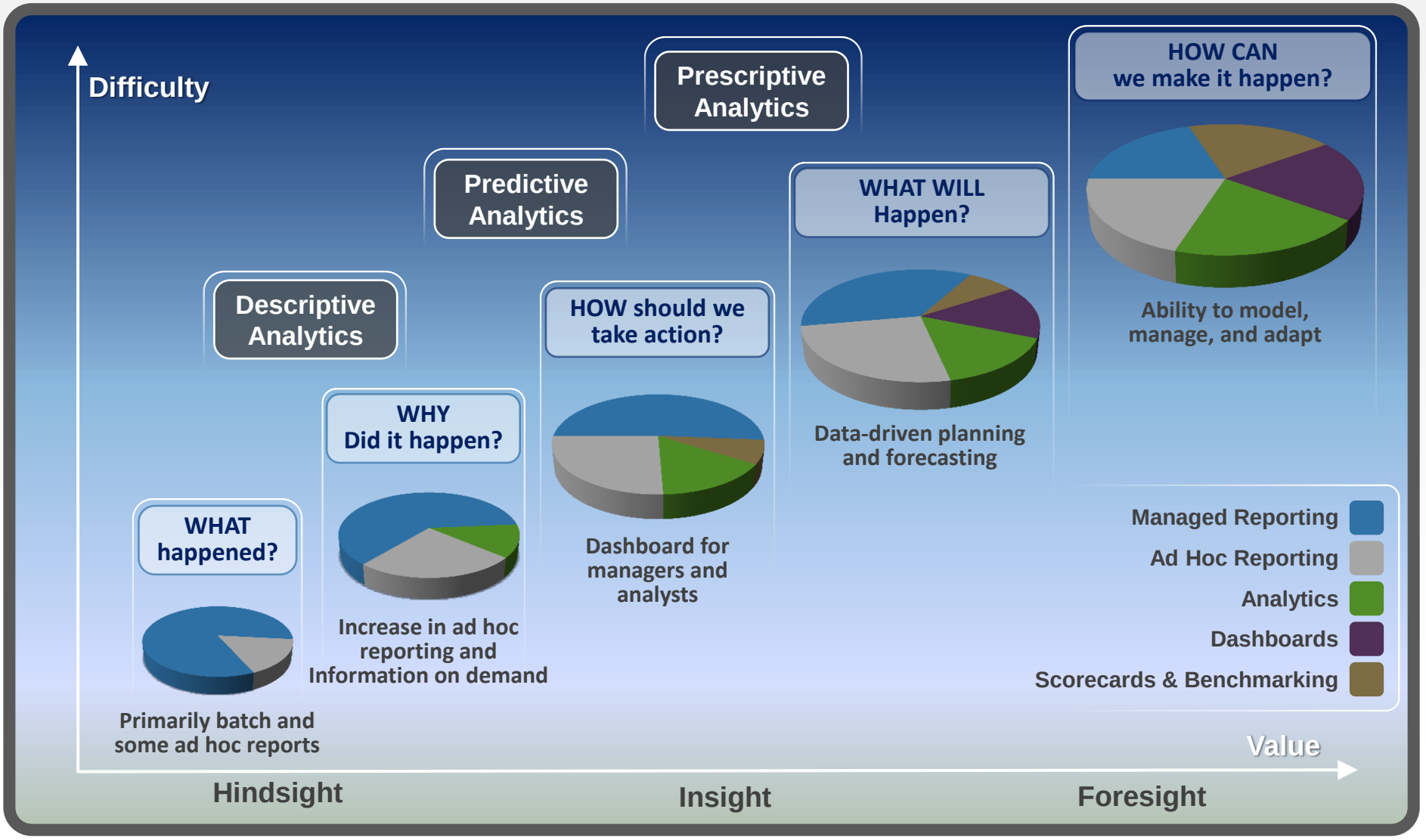
Network Zone

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

ANALYTICS

ExLibris
The bridge to knowledge

Analytics - Developing According to our Vision



THANK YOU!

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IGeLU Conference & Ex Libris Systems Seminar

Oxford, September 15-19 2014