

# Next-Generation Library Services Update

Bar Veinstein | Corporate VP, Management Solutions

# Alma Today

910

Institutions  
Signed for Alma

621

Live  
Institutions

648M

Bibs  
Managed

26k

Daily Active  
Staff

34

Consortia  
Signed

35

ARL Libraries



910

Institutions  
Signed for Alma

621

Live  
Institutions

648M

Bibs  
Managed

The numbers are great but they don't tell the whole story

26k

Daily Active  
Staff

34

Consortia  
Signed

35

ARL Libraries

The numbers are great but they don't tell the whole story



The numbers are great but they don't tell the whole story



Customer eXperience

EX AX UX CX LX

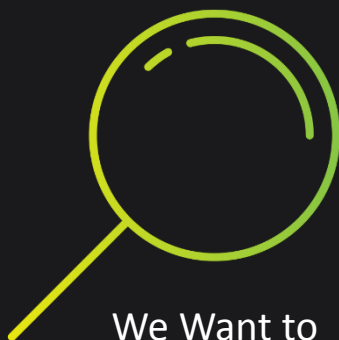
EX AX UX CX LX

EX Libris will invest in the Alma eXperience by improving the User eXperience and implementing Customer eXperience initiatives to enable the transformation of the Library eXperience

# Shifting Focus to the Strategic - Together



We Want to  
Work More  
Efficiently



We Want to  
Focus on Areas  
of Value



We Want to  
Drive New  
Services






We Want to  
Work More Efficiently

# We Want to Work More Efficiently

## We Want To...



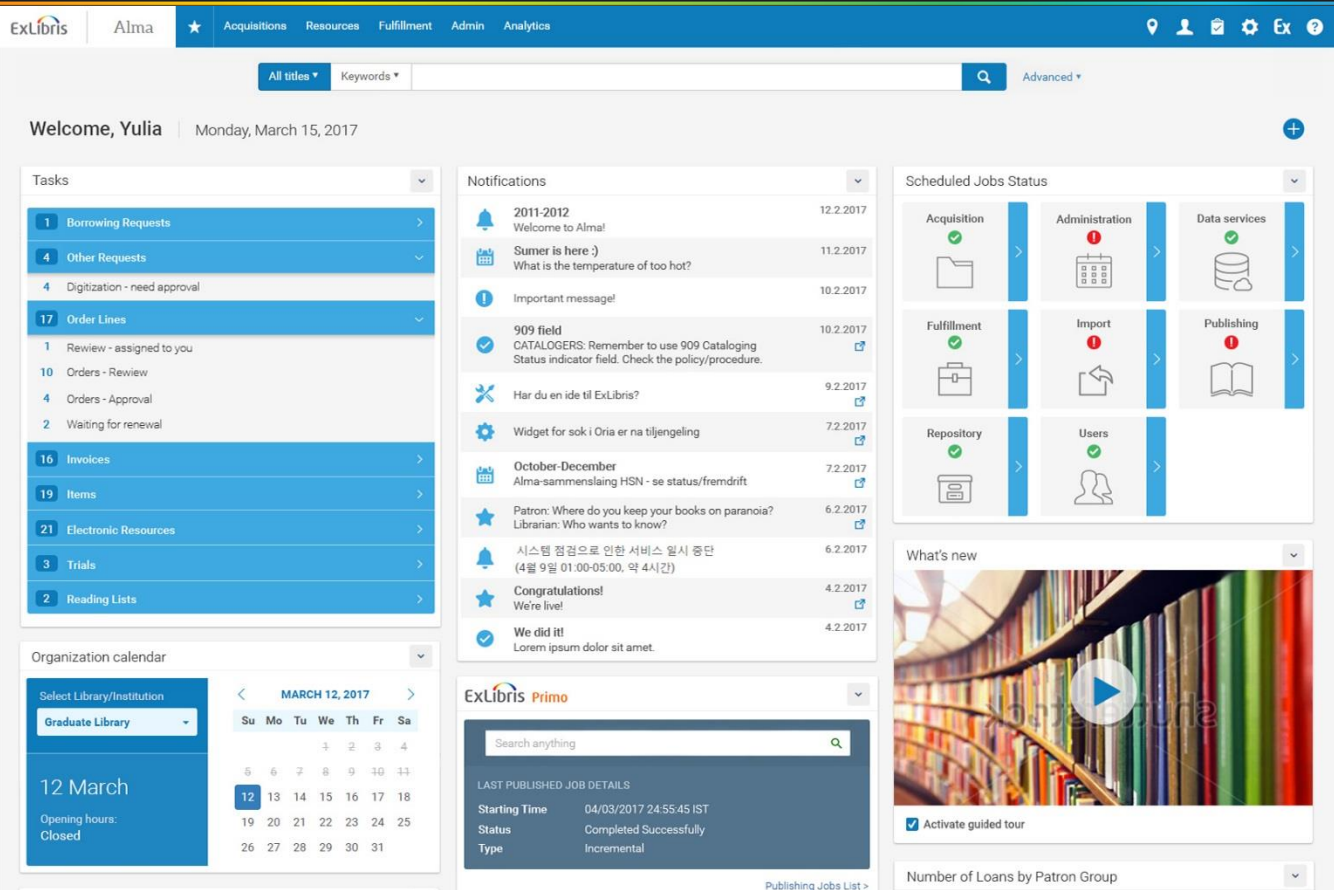
Streamline  
Staff  
Workflows

Collaborate  
With the  
Community of  
Users

Provide  
Highly  
Available  
Services

Quickly  
Address  
Staff Needs

# Completely New Visual Design



The screenshot displays the ExLibris Alma user interface. At the top is a blue navigation bar with the ExLibris Alma logo, a star icon, and menu items: Acquisitions, Resources, Fulfillment, Admin, and Analytics. On the right side of the bar are icons for location, user, notifications, settings, and a help icon. Below the navigation bar is a search area with a dropdown menu set to 'All titles', a text input field, and a search button. The main content area is divided into several sections. On the left, a 'Welcome, Yulia' message is followed by the date 'Monday, March 15, 2017'. Below this is a 'Tasks' section with a list of items: 'Borrowing Requests', 'Other Requests', 'Digitization - need approval', 'Order Lines', 'Invoices', 'Items', 'Electronic Resources', 'Trials', and 'Reading Lists'. To the right of the tasks is a 'Notifications' section containing a list of messages with timestamps, such as '2011-2012 Welcome to Alma!', 'Summer is here :)', 'Important message!', '909 field CATALOGERS: Remember to use 909 Cataloging Status indicator field.', 'Har du en ide til ExLibris?', 'Widget for sok i Orija er na tiljengeling', 'October-December Alma-sammenslaing HSN - se status/fremdrift', 'Patron: Where do you keep your books on paranoia? Librarian: Who wants to know?', '시스템 점검으로 인한 서비스 일시 중단 (4월 9일 01:00-05:00, 약 4시간)', 'Congratulations! We're live!', and 'We did it! Lorem ipsum dolor sit amet.'. Further right is a 'Scheduled Jobs Status' section with a grid of job categories: Acquisition, Administration, Data services, Fulfillment, Import, Publishing, Repository, and Users. Each category has a status icon (green checkmark or red exclamation mark) and a right arrow. Below the tasks is an 'Organization calendar' section showing a calendar for March 12, 2017, with the date '12 March' highlighted. To the right of the calendar is a 'What's new' section featuring a large image of a library interior with a play button overlay and the text 'Activate guided tour'. At the bottom right is a section titled 'Number of Loans by Patron Group'. On the far left of the dashboard, there is a large, stylized graphic consisting of two overlapping chevron shapes, one orange and one green.

ExLibris Alma

★ Acquisitions Resources Fulfillment Admin Analytics

All titles Keywords

Welcome, Yulia Monday, March 15, 2017

Tasks

- 1 Borrowing Requests
- 4 Other Requests
- 4 Digitization - need approval
- 17 Order Lines
- 1 Review - assigned to you
- 10 Orders - Review
- 4 Orders - Approval
- 2 Waiting for renewal
- 16 Invoices
- 19 Items
- 21 Electronic Resources
- 3 Trials
- 2 Reading Lists

Organization calendar

Select Library/Institution

Graduate Library

12 March

Opening hours: Closed

Notifications

- 2011-2012 Welcome to Alma! 12.2.2017
- Summer is here :) What is the temperature of too hot? 11.2.2017
- Important message! 10.2.2017
- 909 field CATALOGERS: Remember to use 909 Cataloging Status indicator field. Check the policy/procedure. 10.2.2017
- Har du en ide til ExLibris? 9.2.2017
- Widget for sok i Orija er na tiljengeling 7.2.2017
- October-December Alma-sammenslaing HSN - se status/fremdrift 7.2.2017
- Patron: Where do you keep your books on paranoia? Librarian: Who wants to know? 6.2.2017
- 시스템 점검으로 인한 서비스 일시 중단 (4월 9일 01:00-05:00, 약 4시간) 6.2.2017
- Congratulations! We're live! 4.2.2017
- We did it! Lorem ipsum dolor sit amet. 4.2.2017

Scheduled Jobs Status

- Acquisition
- Administration
- Data services
- Fulfillment
- Import
- Publishing
- Repository
- Users

What's new

ExLibris Primo

Search anything

LAST PUBLISHED JOB DETAILS

Starting Time 04/03/2017 24:55:45 IST

Status Completed Successfully

Type Incremental

Activate guided tour

Number of Loans by Patron Group

# Personalized & Customizable



ExLibris Alma

★ Acquisitions Resources Fulfillment Admin Analytics

All titles Keywords love

Sort by Rank

Material Type  
Book (78784)  
Music (3)  
Visual material (5)

Resource Type  
Audio musical - Electronic (3)  
Book - Electronic (78753)  
Book - Physical (22)  
More (2)

Language  
Abkhaz (1)  
Adangme (1)  
English, Old (ca. 450-1100) (4)  
More (34)

Publication Year  
1753 - 2005 (15822)  
2006 - 2008 (18033)  
2009 - 2011 (15548)  
More (3)

Collection  
Art Collection (243)  
qqq (3)

Customize view

Restore list defaults Cancel Save

Title information order

Columns

Column1	Column2	Column3
<input checked="" type="checkbox"/> Creator/Publisher	<input checked="" type="checkbox"/> Medium Type	<input checked="" type="checkbox"/> Orders
<input checked="" type="checkbox"/> Subject	<input checked="" type="checkbox"/> Availability	<input checked="" type="checkbox"/> Requests
<input checked="" type="checkbox"/> Series	<input checked="" type="checkbox"/> Availability (Network)	
<input checked="" type="checkbox"/> Collections	<input checked="" type="checkbox"/> Language	
<input checked="" type="checkbox"/> Relation	<input checked="" type="checkbox"/> Library Unit	
<input checked="" type="checkbox"/> Edition	<input checked="" type="checkbox"/> ISBN	
	<input checked="" type="checkbox"/> Record number	

Action order

Button 1

Edit Record

Button 2

Holdings

More

Items

Representations

Collection

Order

Request

Resource sharing request

Document Delivery

Add to reading list

Add to collection

Add Reminder

Remove

More info

Delete

Linked Data

View It

Reminders

Physical Electronic Digital Other details

5 Sex, Love and Hedonism [electronic resource].  
BK [Book - Electronic] text; computer; online resource By Mandeville, Amy.  
(Chichester : Summersdale Publishers Ltd 2004.)  
Subject: Hedonism -- Miscellanea. Love -- Miscellanea. Sex -- Miscellanea. and others  
Series: Gift

Medium Type: [electronic resource].  
Language: English  
ISBN: 1-84024-119-5 and others  
Record number: (CKB)100000000338920

Edit Record Portfolio List ...


# Responsive Design - Improved Experience on Tablets

ExLibris Alma

★ Acquisitions Resources Fulfillment Admin Analytics

Physical items Keywords Advanced

< Physical Item Editor Cancel Save

 **Women who run with the wolves : myths and stories of the wild woman archetype / cohen**  
Ballantine Books New York : 1992. [9780345377449]

<b>Holding</b>	Main Library: General; GR470 .E88 1...	<b>Holdings ID</b>	2210069990000121	<a href="#">View all holdings</a>
<b>Barcode</b>	-	<b>Item ID</b>	2311459850000121	<a href="#">View all items</a>
<b>Process type</b>	Acquisition	<b>Status</b>	Item not in place	<a href="#">Browse shelf listing</a>

General Information ENUM/CHRON Information Notes History

Barcode	<input type="text"/>	Generate	Copy ID	<input type="text"/>
Material type	Book		Item policy	
Provenance			Is magnetic	
PO Line	POL-362		Issue date	
Receiving date			Expected receiving date	
Enumeration A			Enumeration B	
Chronology I			Chronology J	
Description		Generate		

ExLibris Alma

★ All titles Keywords Advanced

Welcome, Yulia Monday, March 15, 2017

Tasks

- 1 Borrowing Requests
- 4 Other Requests
- 4 Digitization - need approval
- 17 Order Lines
- 1 Review - assigned to you
- 10 Orders - Review
- 4 Orders - Approval
- 2 Waiting for renewal
- 16 Invoices
- 19 Items
- 21 Electronic Resources
- 3 Trials
- 2 Reading Lists

Notifications

- 2017 Welcome to Alma! 12.2.2017
- Summer is here :) What is the temperature of too hot? 11.2.2017
- Important message! 10.2.2017
- 909 field CATALOGERS: Remember to use 909 Cataloging Status indicator field. Check the policy/procedure. 10.2.2017





## Alma's New UX

Dana Sharvit

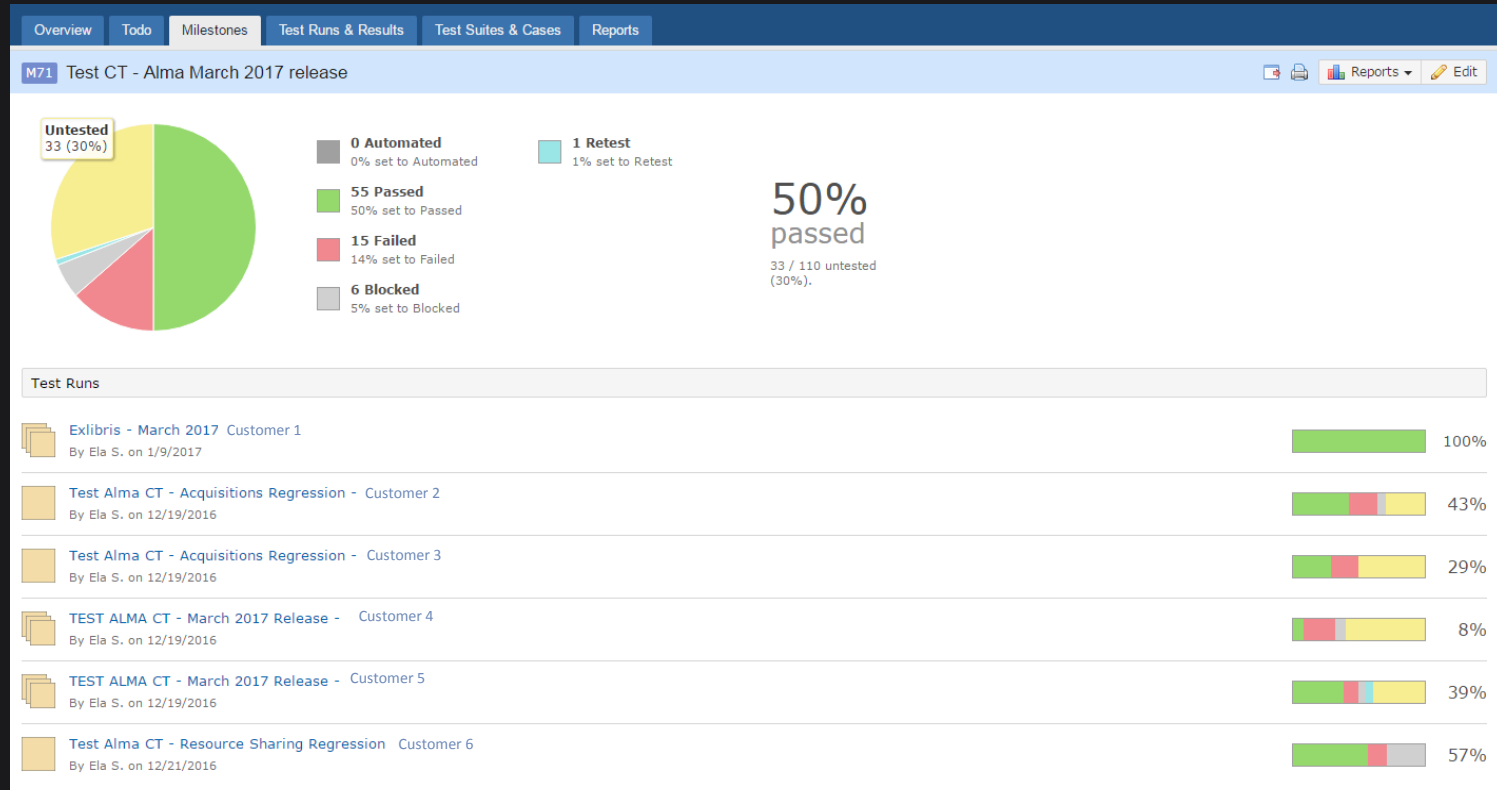
Mike Rogers, UT

Wednesday @ 1:30pm

# CREATING THE NEW UX TOGETHER

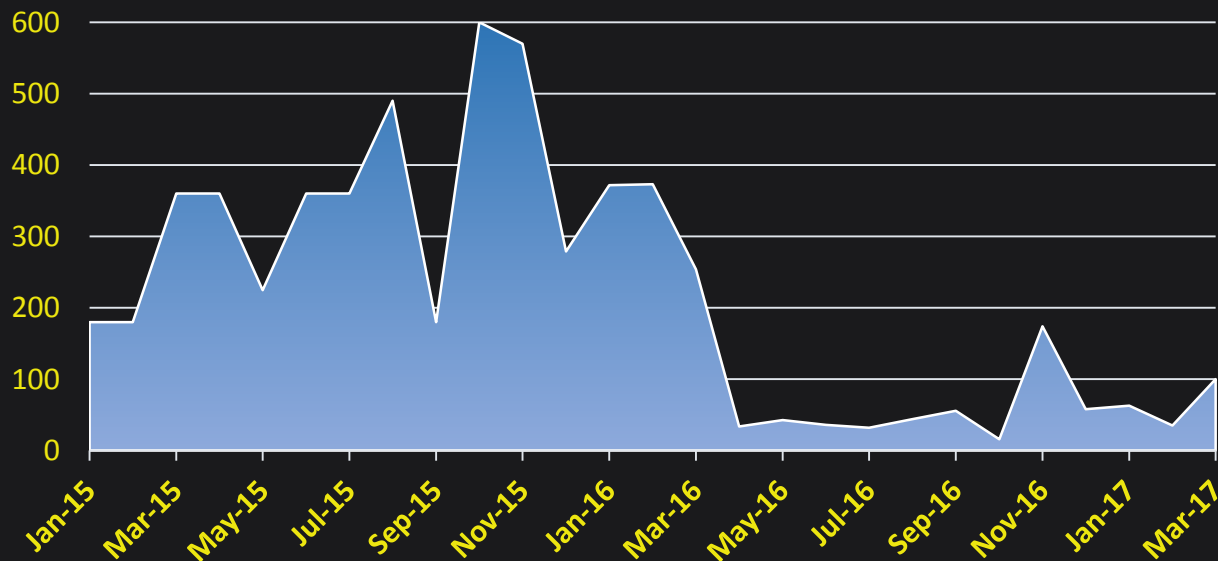
# Open Testing Framework

## Platform for community collaboration: testing of monthly releases



# Highly Available Services

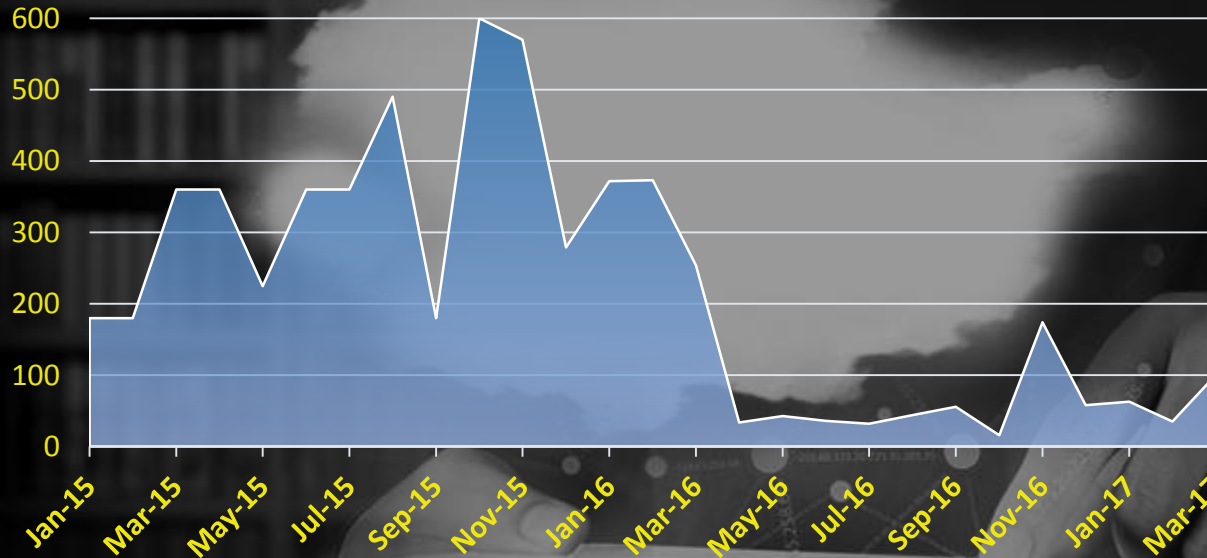
## Scheduled Maintenance Time (mins)



**67%**  
improvement  
in scheduled  
maintenance time

# Highly Available Services

## Scheduled Maintenance Time (mins)



**67%**  
improvement  
in scheduled  
maintenance time

# Idea Exchange – Your Ideas Matter

The screenshot shows a web browser window displaying the ExLibris Alma Idea Exchange forum. The browser's address bar shows the URL `ideas.exlibrisgroup.com/forums/308173-alma`. The page header features the ExLibris logo (a rainbow arc over the word 'ExLibris') and the text 'a ProQuest Company' and 'idea|exchange'. Below the header, the word 'Alma' is displayed in a large blue font. A paragraph of text follows: 'Your feedback matters to us. Help us improve Alma by telling us what you'd like to see using the message areas below. You can also support something already posted.' Another paragraph states: 'We would love to be able to respond to every idea that is submitted, but this is not feasible. We are, however, committed to responding to the most popular ideas—those that have received the most points.' A third paragraph says: 'For more information please review our [FAQ](#) and [guidelines](#). Thank you.'

Below this text is a section titled 'How can we improve Alma?' which contains a text input field with the placeholder 'Enter your idea'. Underneath the input field are several filter buttons: 'Hot ideas' (highlighted in dark blue), 'Top', 'New', 'Category' (with a dropdown arrow), 'Status' (with a dropdown arrow), and 'My feedback'.

At the bottom left, a post is partially visible, showing '141 votes' and the title 'Improved claiming functionality for resource sharing'. The post content begins with 'There is a need for improving claiming functionality in resource sharing. When items are borrowed by library A'.

On the right side of the page, there is a sidebar. At the top of the sidebar, it says 'New and returning users may [sign in](#)'. Below this is a section titled 'Alma' which lists various categories with their respective vote counts: 'Post a new idea...', 'All ideas', 'My feedback', 'Acquisitions' (112), 'Analytics' (49), 'APIs and Integrations' (28), 'Fulfillment' (163), 'Link Resolver' (7), 'Mobile' (1), 'Other' (53), 'Preview Mode Features' (1), 'Resource Management' (214), 'Resource Sharing' (42), and 'User Management' (29).



# Idea Exchange – Your Ideas Matter

We listen to your ideas:

20

votes instead  
of 10

Display call number in all work benches in circulation and in all relevant user notifications.

Ability to move item record(s) from one bib record to another.

36

ideas developed  
so far

Add a button to "Add Holdings" in the List of Holdings screen.

There should be a way for institutions to share normalization rules amongst each other.

38

ideas already  
in the roadmap

Payment option on user Fines/Fees tab

Create request from the patron's record



**We Want to  
Focus on Areas of value**

# We Want to Focus on Areas of values

## We Want To...



**Address User  
Needs with  
OnDemand Models**

**API**

**Connect with  
Institutional  
Initiatives**



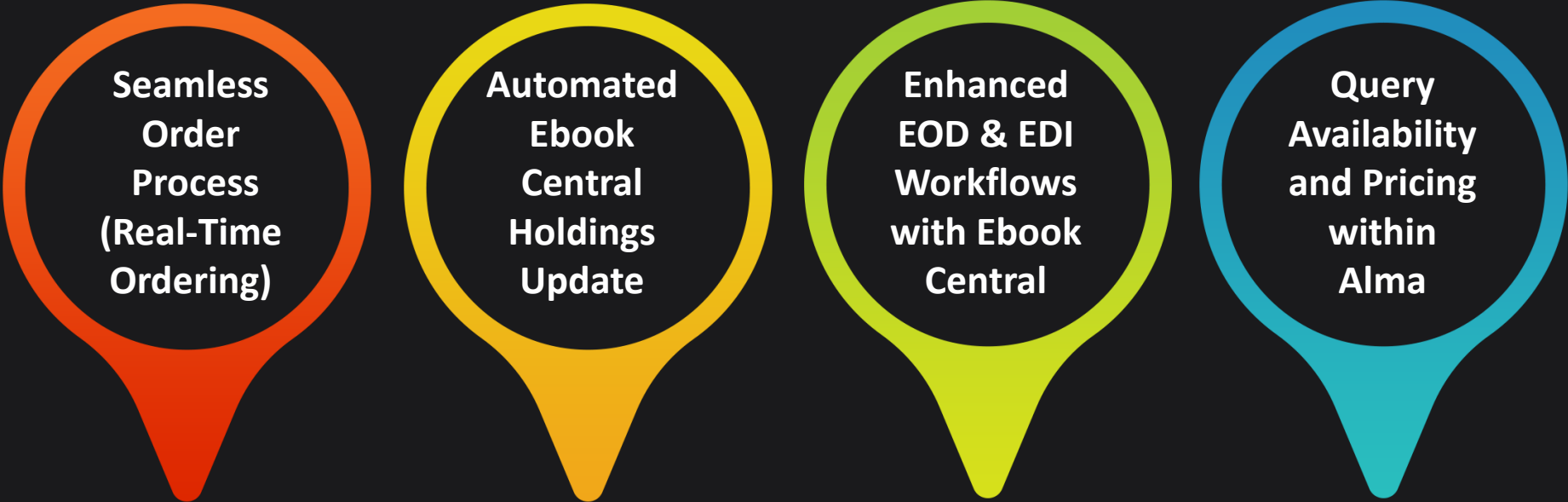
**Foster the  
Use of Digital  
Resources**



**Cultivate a Climate  
Of Assessment**

# Deeper Integrations with Selection Platforms

Integrate **Ebook Central**, **Oasis**, and **Alma** functions for seamless workflow



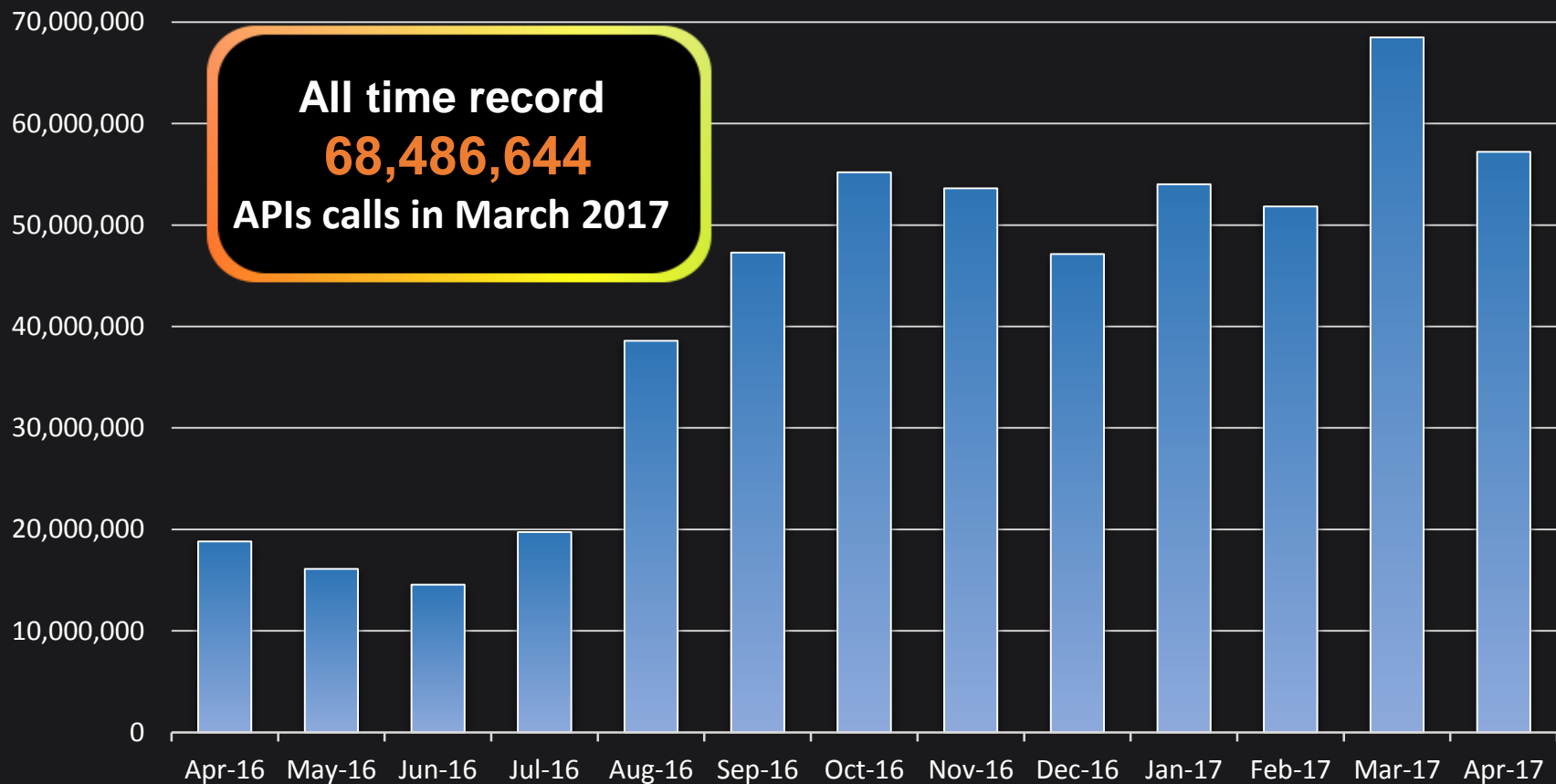
Seamless  
Order  
Process  
(Real-Time  
Ordering)

Automated  
Ebook  
Central  
Holdings  
Update

Enhanced  
EOD & EDI  
Workflows  
with Ebook  
Central

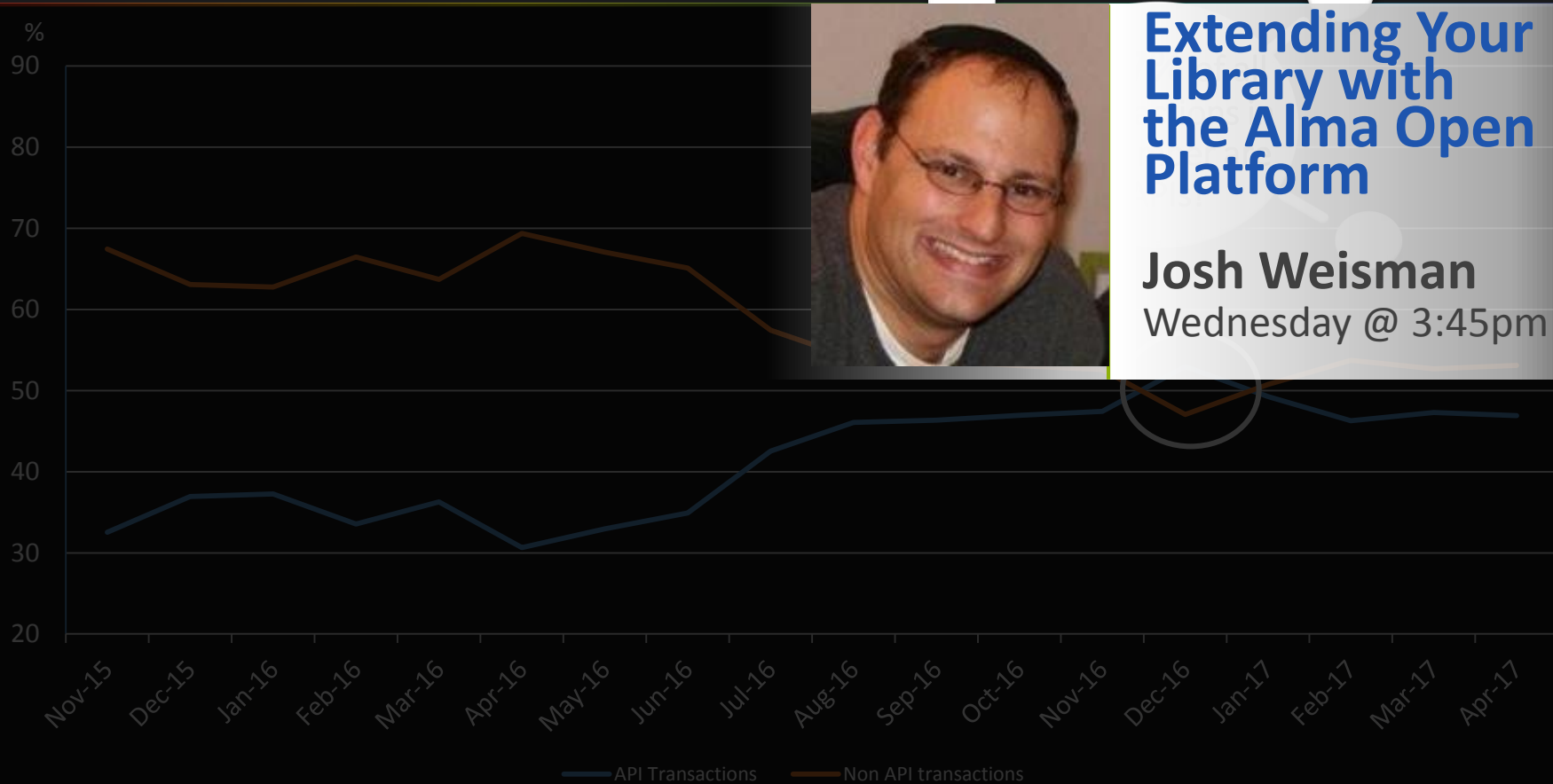
Query  
Availability  
and Pricing  
within  
Alma

# Growth in APIs Transactions: April 2016 – April 2017





# APIs are Critical to Libraries' Success



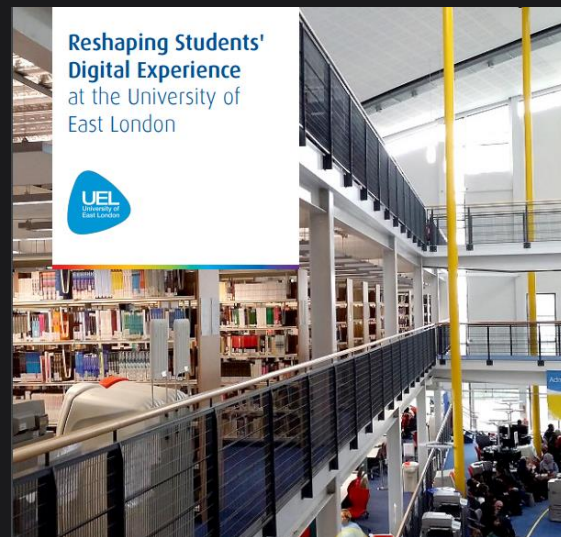
# Managing Digital Resources in Alma



With a single interface and an integrated approach to all source material-electronic, print, and digital-Alma is breaking down collection silos in the library



Boston University libraries shifted to using Alma for managing their digital collections, which increased efficiency, streamlined workflows, changed organizational structures and allowed them to develop new services



UEL's libraries manage their digital assets using Ex Libris Alma, including professional materials used by specific schools, dissertations, and learning materials in alternative accessible formats

# Managing Digital Resources – Cloud Storage

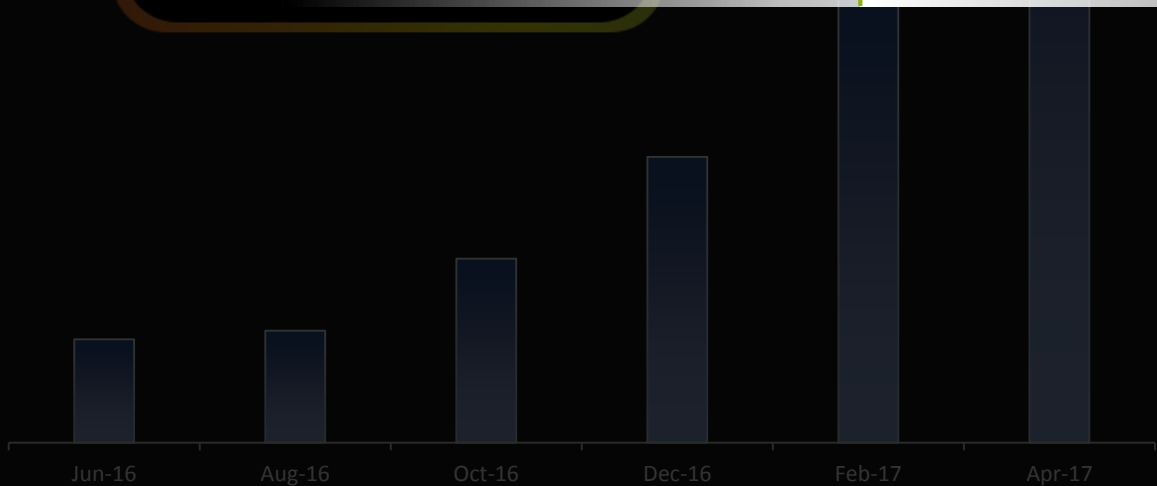
Amazon  
used gre  
since 199



## Moving Your Digital Collections to Alma

**Asaf Kline & Amy Pemble**

Thursday @ 4:15 pm



# Analytics – Managing Electronic Resources

Survey question: Assessing usage statistics OUTSIDE library system

Alma

56%

Competitor 1

87%

Competitor 2

71%

“ER&L 2017: S072 – Finding the Gaps – Electronic Resource Management” study

Jane Natches, Tufts University

Emily Singley, Boston College

## 14 COUNTER 4.0 Reports Templates:

<b>JR1</b>	Journal Report: Successful Full-Text Article Requests by Month and Journal
<b>JR1 GOA</b>	Journal Report: Successful Gold Open Access Full-Text Article Requests by Month and Journal
<b>JR1a</b>	Journal Report: Successful Full-Time Article Requests from an Archive by Month and Journal
<b>JR2</b>	Journal Report: Access Denied to Full-Text Articles by Month, Journal, and Category
<b>JR5</b>	Journal Report: Successful Full-Text Article Requests by Year-of-Publication (YOP) and Journal
<b>DB1</b>	Database Report: Searches, Result Clicks, and Record Views by Month and Platform
<b>DB2</b>	Database Report: Access Denied by Month, Database, and Category
<b>PR1</b>	Total searches, result clicks, and record views by Month and Platform (previously DB3)
<b>BR1</b>	Book Report: Successful Title Requests by Month and Title
<b>BR2</b>	Book Report: Successful Section Requests by Month and Title
<b>BR3</b>	Book Report: Access Denied to Content Items by Month, Title, and Category
<b>BR4</b>	Book Report: Access Denied to Content Items by Month, Platform, and Category
<b>BR5</b>	Book Report: Total searches by Month and Title
<b>MR1</b>	Multimedia Report: Successful Full Multimedia Content Unit Requests by Month and Collection

**23**

default dashboards  
("out of the box"  
ready to use and  
change if desired)

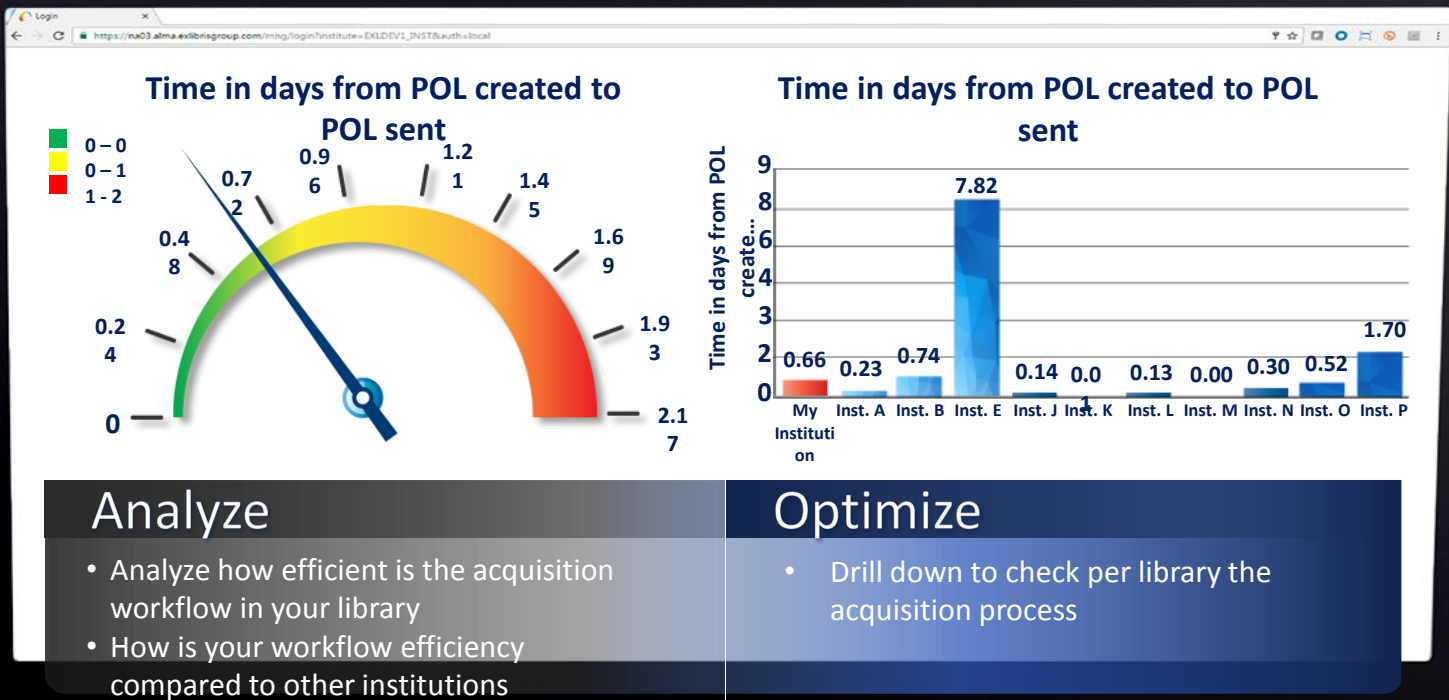
**224**

default reports  
("out of the box"  
ready to use and  
change if desired)



# Benchmark Analytics

How efficient is our acquisition process compared to other institutions?

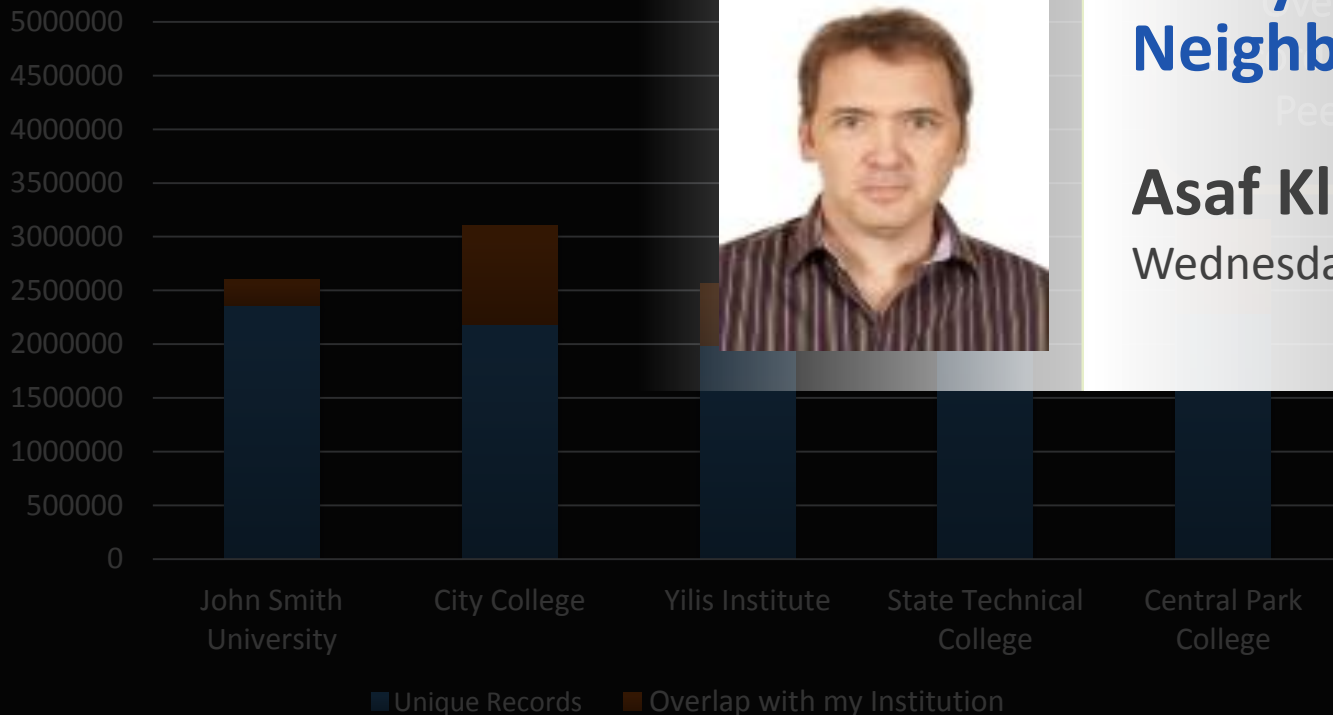


# Comparative Collection Analytics

## Analytics and Your Neighbors

**Asaf Kline**

Wednesday @ 2:30pm



# We Want to Drive New Services



# We Want to Drive New Services

## We Want To...

**Respond to  
Changing  
Priorities and  
Emerging  
Needs**

**Strengthen  
the Connection  
with Teaching  
and Research**

**Become the  
Hub for  
Innovation on  
Campus**

# Alma Roadmap – Agile Innovation

## Strategic

New UX  
project

NERS &  
IdeaExchange

## Analytic

Benchmark  
Analytics &  
KPIs

Comparative  
Collection  
Analysis



## Alma Product Update

**Dvir Hoffman &  
Asaf Kline**

Thursday @ 3:15 pm

BIBFRAME &  
Linked Data

Dublin Core  
Application  
profiles

**Metadata  
Management**

Integration with  
copyright  
licensing agencies

Automated  
fulfillment network

**Fulfillment**

Vendor's Pricing  
& Availability

Integrations  
with OASIS &  
Ebook Central

**Acquisitions**

Integrated  
funding for RS

Hybrid Rotas

**Resource  
Sharing**

# BIBFRAME & Linked Data


★ Acquisitions Resources Fulfillment Admin Analytics

All titles ▾ Keywords ▾

< All Titles (1 - 3 of 3) Title Contains Keywords cry the beloved country

Institution Community

1 - 3 of 3

1  **Cry, the Beloved Country**  
BK (Book - Physical) (2008) Language: English

Physical ● Electronic (1) Digital Other details

**Linked Data**

Context	<a href="https://open-na.hosted.exlibrisgroup.com/alma/contexts/bib">https://open-na.hosted.exlibrisgroup.com/alma/contexts/bib</a>	
bibo:isbn10	<a href="http://www.isbnsearch.org/isbn/1433243180">http://www.isbnsearch.org/isbn/1433243180</a>	1-4332-4318-0
bibo:isbn10	<a href="https://open-na.hosted.exlibrisgroup.com/resolver/wikidata/isbn10/1433243180">https://open-na.hosted.exlibrisgroup.com/resolver/wikidata/isbn10/1433243180</a>	1-4332-4318-0
dct:language	<a href="http://id.loc.gov/vocabulary/iso639-2/eng">http://id.loc.gov/vocabulary/iso639-2/eng</a>	—



## Linked Open Data Collaboration

Josh Weisman  
Laura Akerman, Emory  
Thursday @ 11:15am

# Expand Your Services

Library  
Services  
(Alma)

Teaching  
Services  
(Leganto)

Research  
Services  
(To be named)

Alma-as-a-Platform



Our SaaS platform –  
allowing you to “get off the ground” quickly

# Research Support Services





# University of Oklahoma Libraries – Innovation Hub



# Thank You



“It is not enough that we build products that function, that are understandable and usable, we also need to build products that bring joy and excitement, pleasure and fun, and, yes, beauty to people’s lives.”

*Don Norman -  
User Experience  
Pioneer*