

Primo-Alma Workflow Optimization

Primo VE

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Goal: Simplifying & expediting Primo back office processes by leveraging Alma admin capabilities



Planned key enhancements



Single back office management



Elimination of duplicated efforts & processes

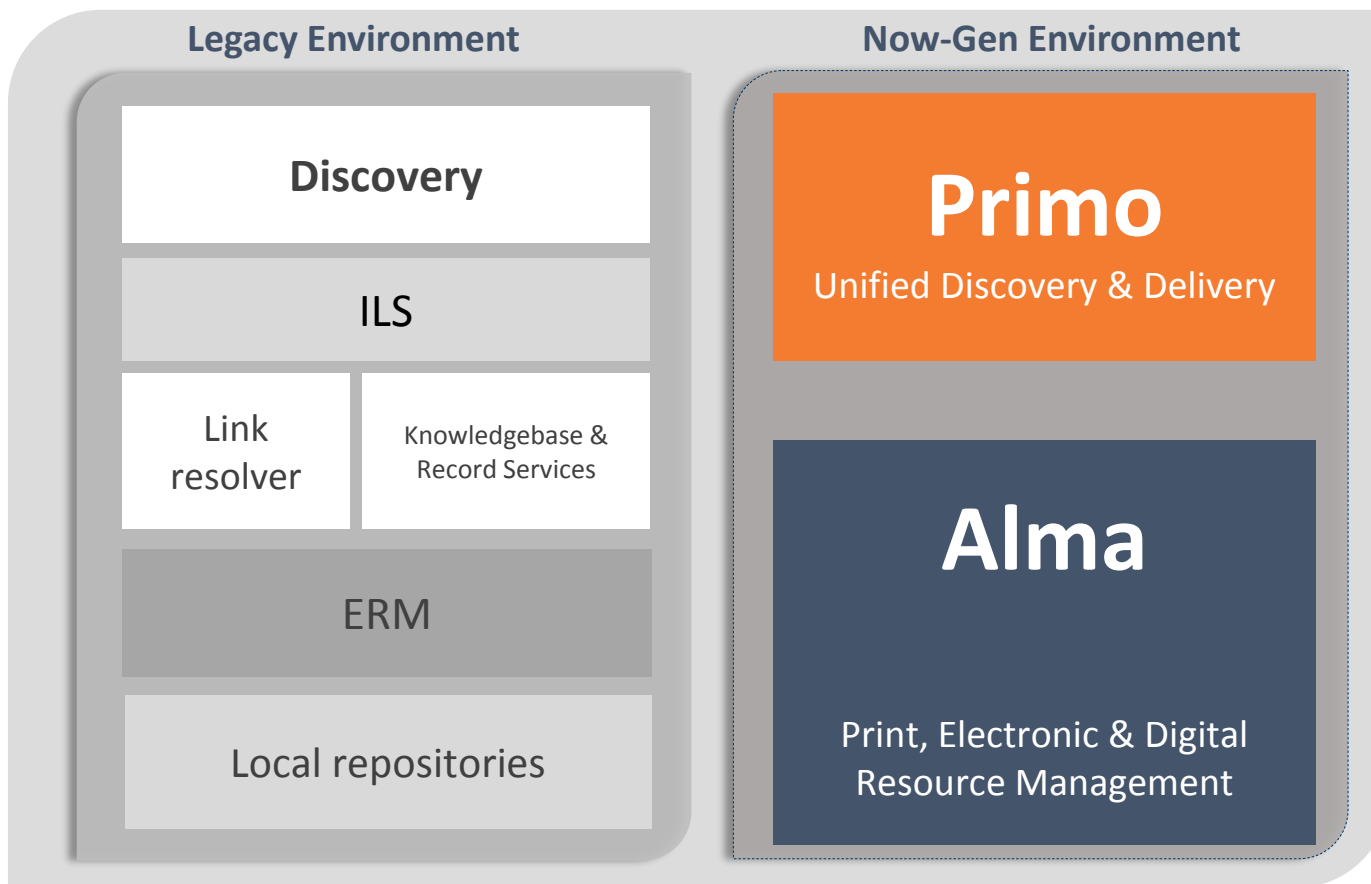


Simplified publishing / loading processes

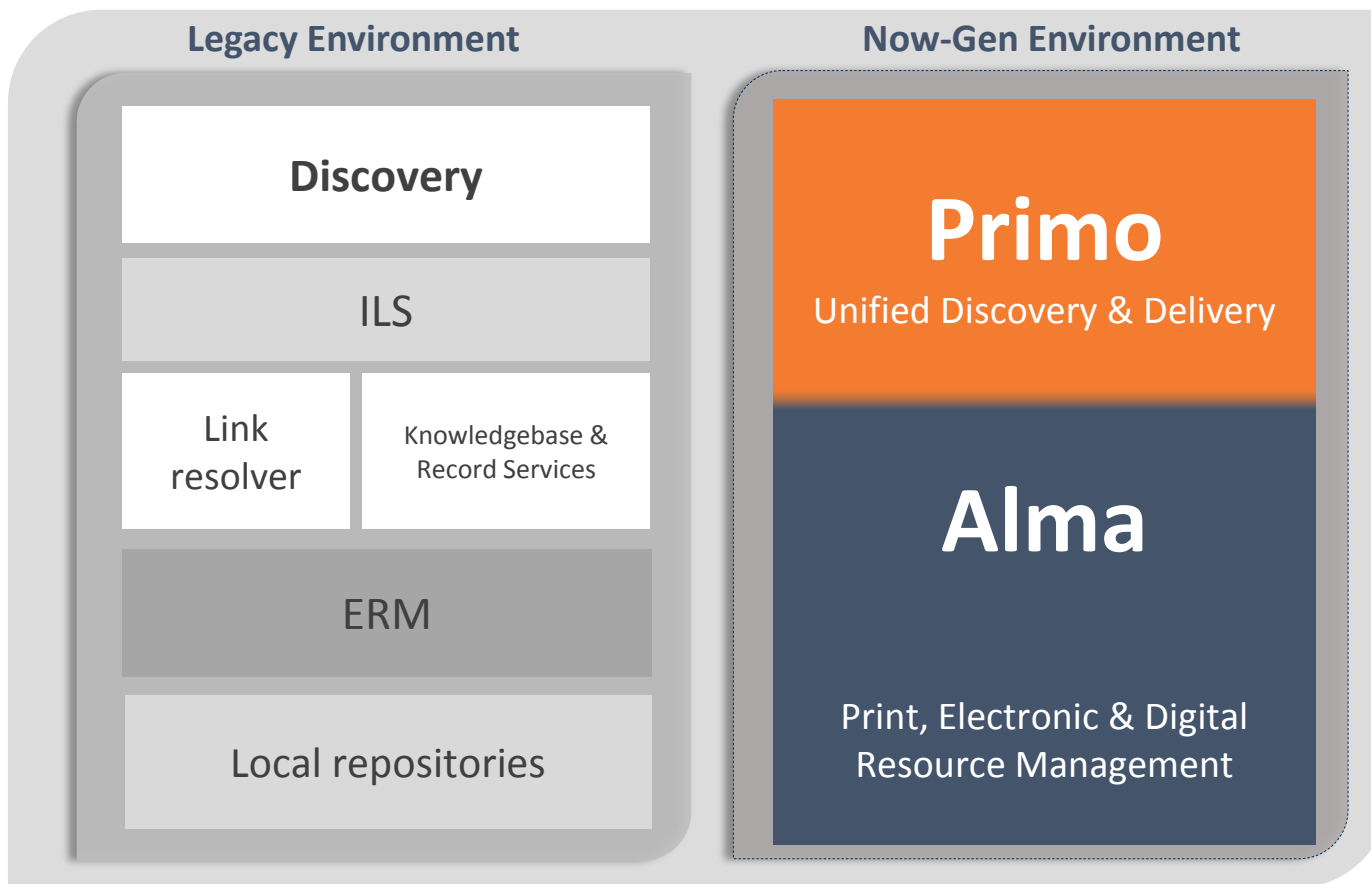


Simplified configuration and setup

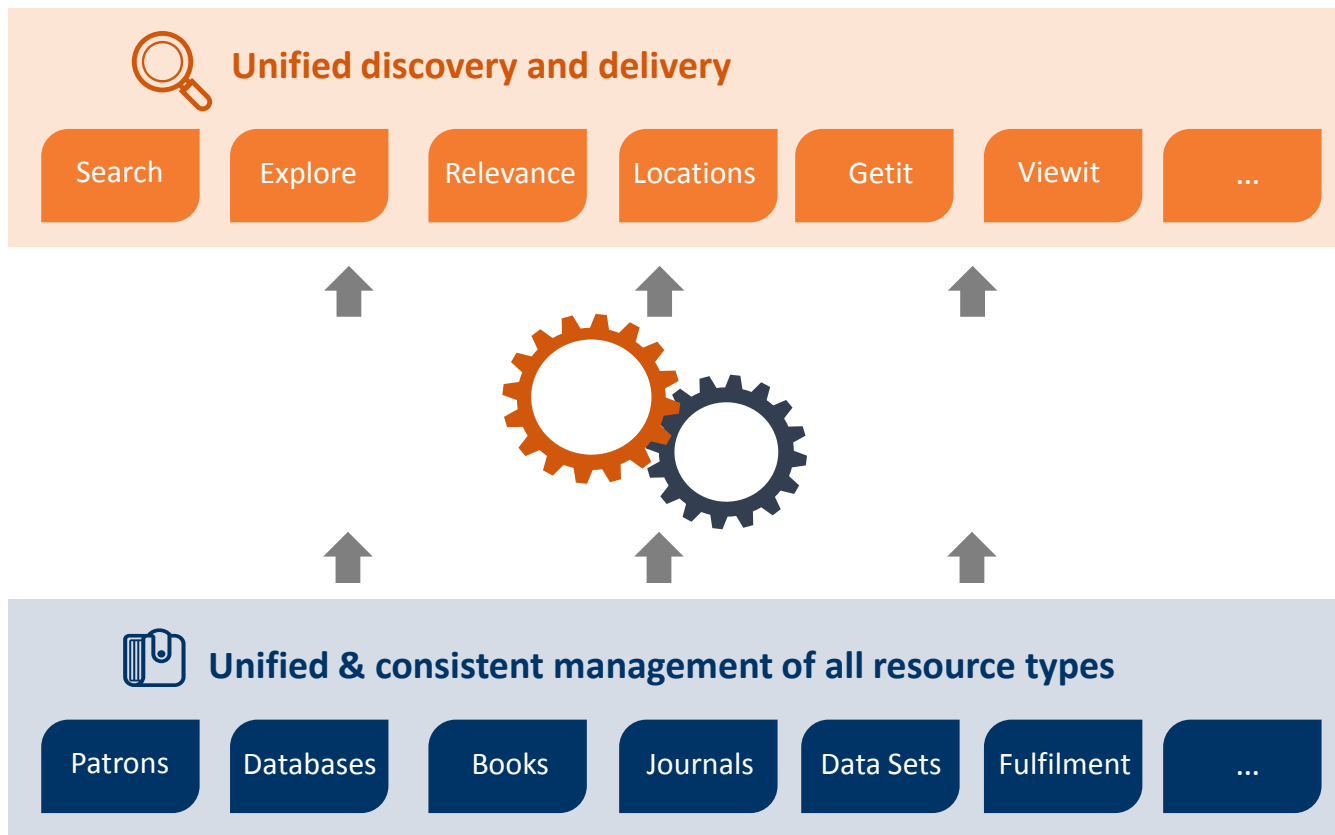
Alma and Primo: From Siloed to Unified Environment



Alma and Primo: Moving Even Closer

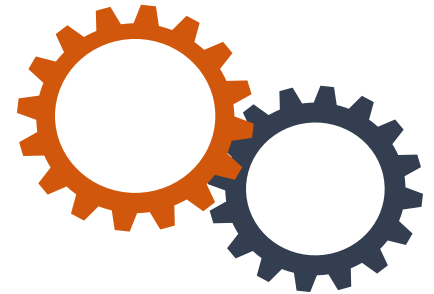


Integrated Resource Management & Discovery

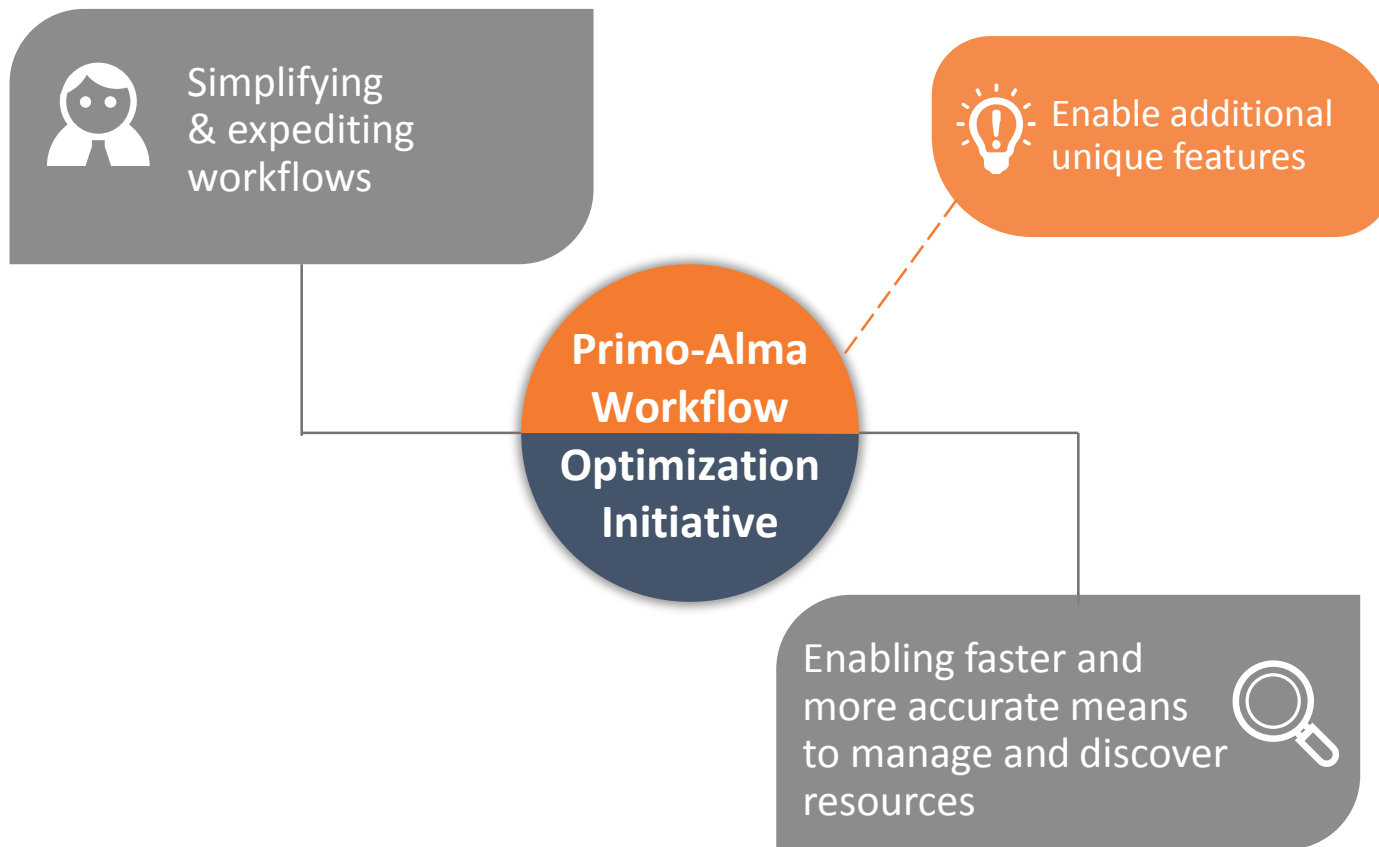




Our Focus: Workflow Optimization



Primo-Alma Workflow Optimization Initiative



Simplifying & Expediting Workflows

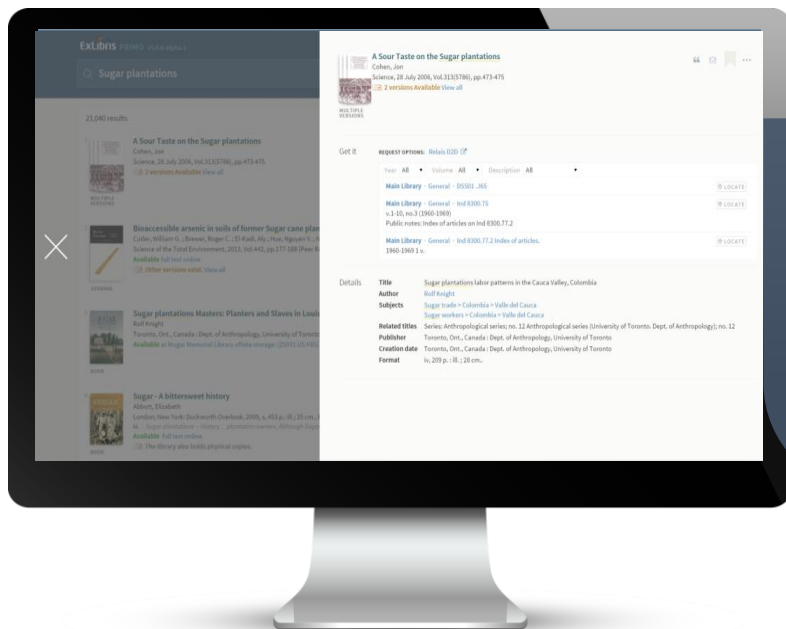
- Single streamlined admin interface for all library management
- Reduce duplicate setup
 - Utilize configuration already in Alma
 - Configure definitions once i.e. campus, library, IPs, authentication etc.
- Simplify publishing/loading processes
- Simplified 'task oriented' configuration and setup

Fast & Accurate Resource Management & Discovery

- Real time data discovery → catalogue and discover
- Real Availability. Always.
- Fully Synced (less moving parts and processes)
- Changes pushed out instantaneously
 - Data elements for search/display
 - Configuration
- Enable additional unique features

Utilize and Deploy New Primo UI

- Primo-Alma Workflow Optimization Initiative utilizes the new Primo UI
- Further enhanced user interface - inherent locations and delivery interfaces



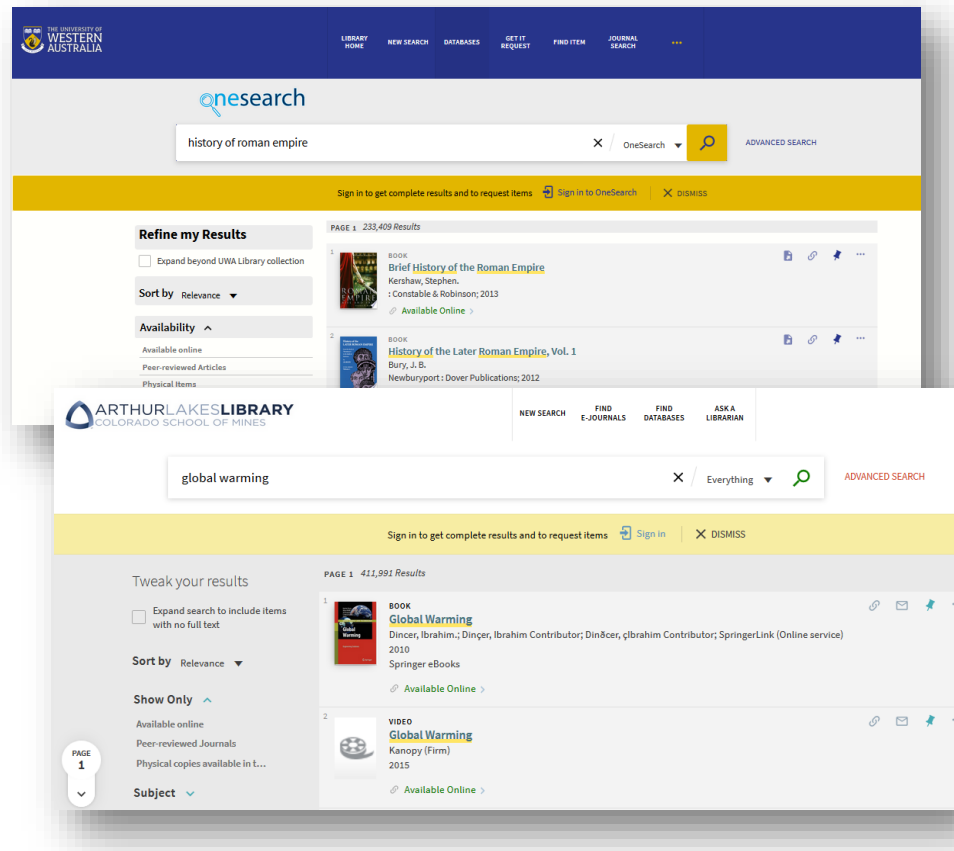
- Fresh, fast and intuitive
- New technologies based on RESTful APIs
- One experience for all devices
- Integrated exploration flow
- Flexible and easy to customize

Our Partners

Collaboration with our
development partners



Currently implementing early
adopters throughout 2017



Rolling Out

- Documentation and training materials later in the year (under Primo VE)
- A FAQ document will be made public to help clarify questions that are often raised
- New Primo-Alma projects from 2018 will use this deployment model
- Existing customers that may be interested – from mid 2018

Let's Take a Peak

The screenshot displays the ExLibris Alma QA user interface. At the top, the ExLibris logo and 'Alma QA' are visible on the left, and a search bar and 'Tasks' section are on the right. The 'Tasks' section shows 'Currently at: None'. Below the header, a 'Welcome' message is partially visible. The main content area features a navigation menu with four primary categories: ACQUISITIONS, RESOURCE MANAGEMENT, DISCOVERY, and ADMINISTRATION. Each category has a list of sub-links. A large, tilted 'Demo' watermark is overlaid on the right side of the menu.

ExLibris Alma QA

Tasks Currently at: None

Welcome

Back to Home Page

ACQUISITIONS

- Purchase Requests
- Create Purchase Request

RESOURCE MANAGEMENT

- Search
- Repository Search
- Manage Exports

DISCOVERY

- Search Configuration
- Search Profiles
- Display Configuration
- Configure Views
- Manage Local Fields
- Local Resource Types
- Labels
- Request Configuration
- Digitization Request
- Hold and Booking Request
- Purchase Request
- Resource Sharing Request
- Authentication
- User Authentication
- Other
- Central Index and proxy set-up
- Primo Deep-Link Re-Direct Configuration

ADMINISTRATION

- Analytics
- Subscribe to Analytics

Demo

THANK YOU
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