

Respect the past,
Improve the present,
Embrace the future

igelu
International
Group of Ex Libris Users



Dvir Hoffman, VP Resource Management Solutions

Asaf Kline, Director Product Management Resource Management Solutions

ExLibris
a ProQuest Company

Before we start...





1000

signed institutions!

LOAN TRANSACTIONS
IN 2017:

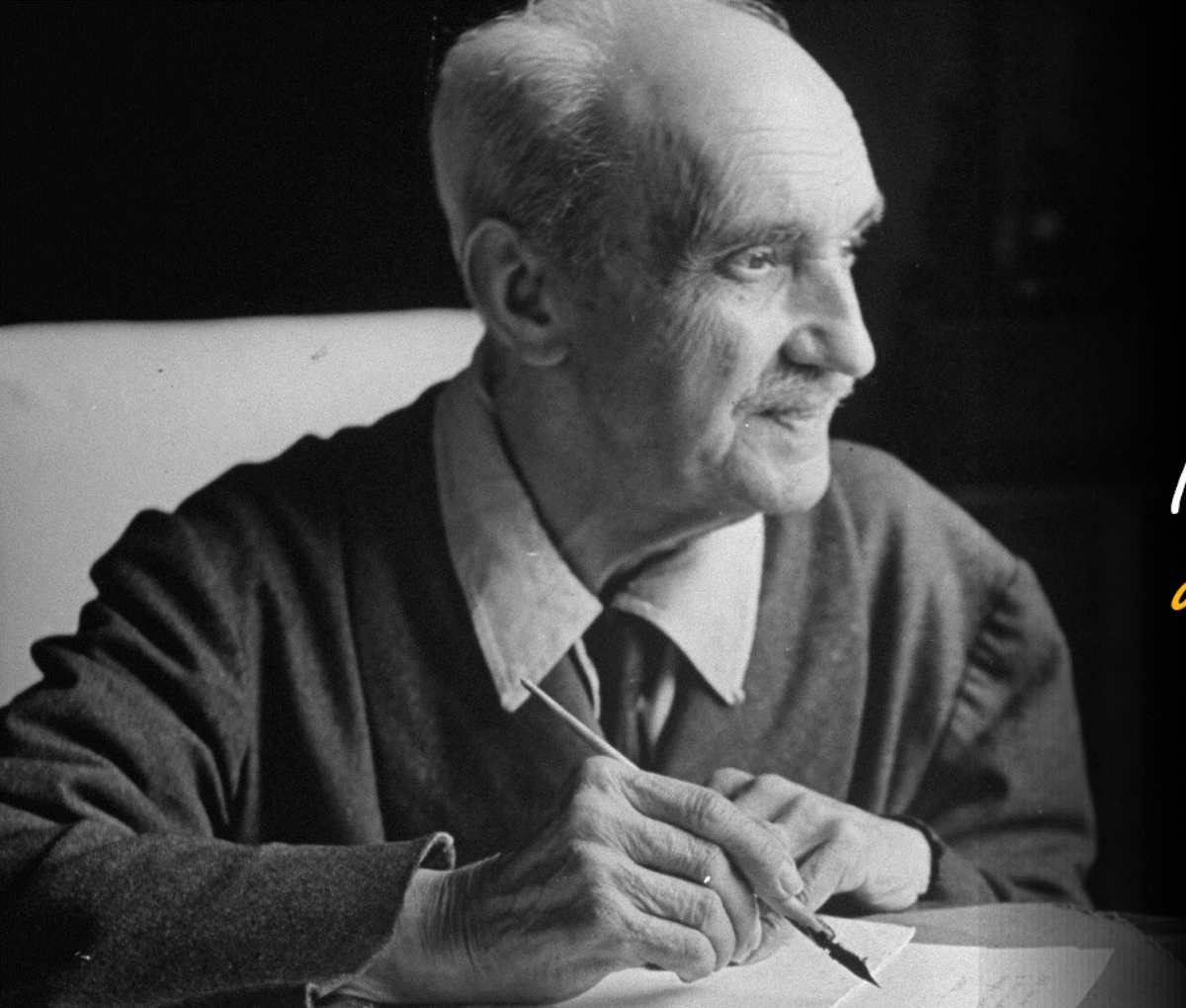
21,560,798

COUNTRIES:

33

#BIBS:

688,307,959



RESPECT THE PAST

*"Those who do not
learn from history are
doomed to repeat it."*

George Santayana

philosopher, essayist, poet, and novelist



Yesterday's
libraries were
standalone

A person wearing a VR headset is shown from the chest up, with their hands raised in front of them. The background is a complex digital overlay featuring a glowing globe, a network of interconnected nodes and lines, and various numerical data points. The overall color scheme is dominated by blues, purples, and oranges, creating a futuristic and technological atmosphere.

Today, libraries are all about collaboration



Libraries are all about collaboration

ExLibris Alma

Joint Collection
Development

Joint Acquisition

Metadata

Administration &
Configuration

Analytics

Open Testing
Framework

Open testing framework

← Return to Dashboard

Alma

Overview | Todo | Milestones | Test Runs & Results | Test Suites & Cases | Reports

R8502 Regression - RM - Authorities

2017-08 - Regression

99% Passed
0 / 87 untested (0%).

0 In Progress (0%)
86 Passed (99%)
0 Failed (0%)
0 Blocked (0%)
0 Deferred (0%)
0 Automated (0%)
0 Retest (0%)
0 No Go (0%)
0 Regression (0%)
1 N.A. (1%)

T3736057 Institution

Created by Ela Shachar. Belongs to milestone

Type	Priority	Estimate	Milestone
Manual	Medium	None	June 2017
References	Automation candidate	Subtype	Environment type
None	Yes	Regression	Member of consortium

Preconditions

URM-53571
URM-53006

Steps

1 Open RM menu and click on "Browse Bibliographic Headings"

Tests & Results

Activity

Progress

Defects

Selected

- Copy CZ AUTH - MARC21 text
- Copy CZ AUTH - MARC21 ID
- MARC21 MD Editor
- MARC21 Browse Order
- MARC21 Special Fields - 600
- MARC21 Browse Bib Headings

Sort: Section | Filter: None

Add Results

MARC21 Browse Bib Headings (3)

Title	Autotest name
Institution	
Network	
Uniform Title	

Passed


Names
Subjects

MARC21 ID import
MARC21 ID Prefix link update delete

SOLUTION:

- Shared testing platform
- Reduced test effort via collaboration





Yesterday's
libraries were
limited by
routines

Today, libraries are focused on **efficiency & innovation**



ExLibris
Alma

Automation:

- Holdings update
- Cataloging

Real time
Ordering

Publishing &
Importing

Efficient user
experience

ALMA'S NEW USER INTERFACE

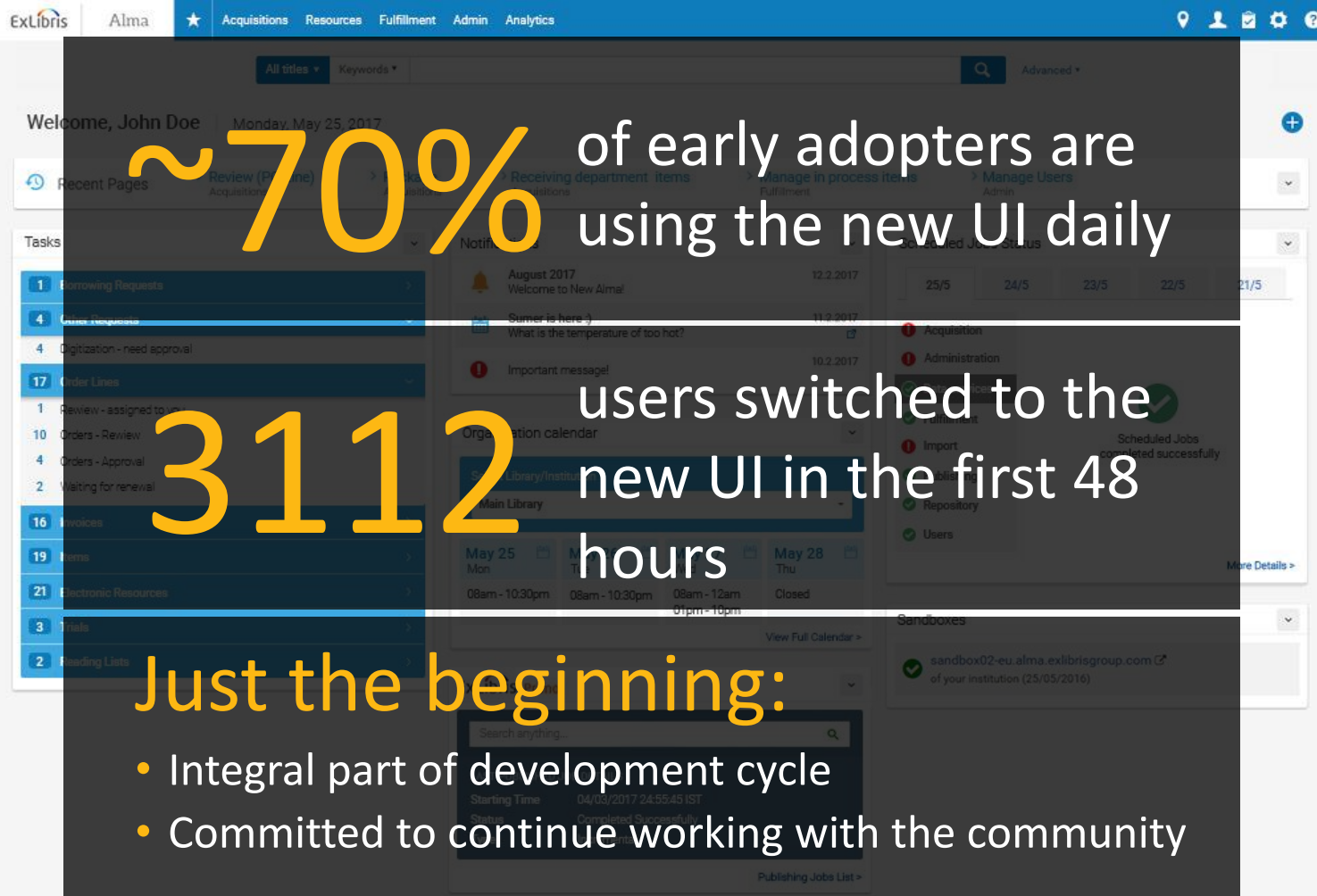
Completely new visual design

Personalized & Customizable

Responsive - works on any device

Intelligent – adapts to your behavior

Intuitive & user friendly




~70% of early adopters are using the new UI daily

3112 users switched to the new UI in the first 48 hours

Just the beginning:

- Integral part of development cycle
- Committed to continue working with the community



In the past, libraries
had limited ways to
connect to the
institutional ecosystem



Today libraries are
equipped with
multiple means to
become connected

ExLibris Alma

- Open platform
- Industry standards
 - Linked data
 - BIBFRAME
- APIs

Ex Libris Live API Dashboard

THE POWER OF CONNECTIVITY

4 7 2 , 4 5 8 , 9 6 1

API Calls

January 2017 - To Date

Use the power of open APIs to connect your library to the academic ecosystem to improve user experience, enhance efficiencies, and provide greater value to the academic institution. This live dashboard presents how the Ex Libris community uses Ex Libris APIs in real time.



DATE DUE		
MAR 14 1968		
10/21/63	DEC 14	1024
NOV 4		
NOV 18		
DEC 12		
FEB 3		
FEB 20		
MAR 30		
APR 6		
MAY 18		
OCT 6	1-1	
OCT 20	23	
NOV 3	23	
NOV 17	23	
FEB 17	102-6	
OCT 24	164-2	
NOV 15		74

PRINTED IN U.S.

Yesterday libraries
were about
MY library

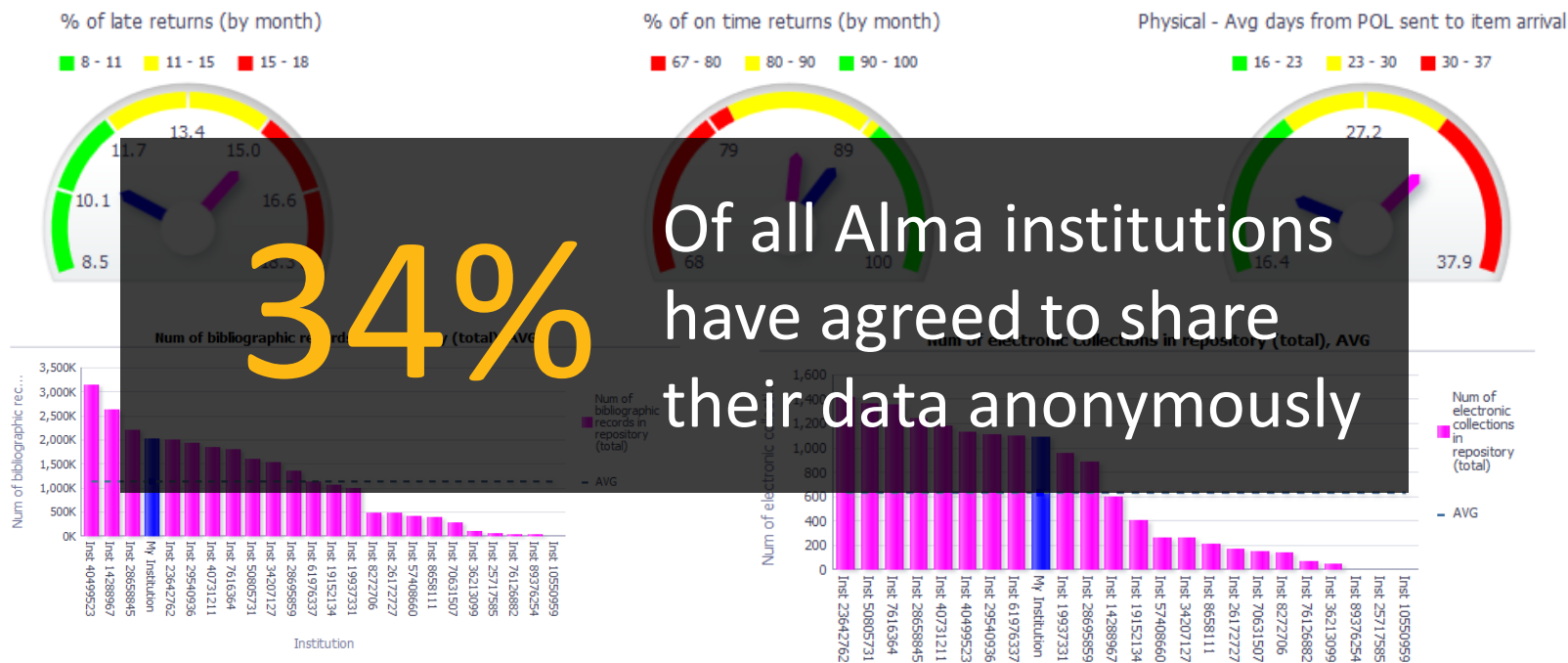
A background image showing a group of people in a meeting. In the foreground, a man in a blue and white checkered shirt is pointing at a document on a clipboard. A woman in a pink striped shirt is also looking at the document. Other people are visible in the background, some looking at a tablet. The document on the clipboard features a blue bar chart and some text. There are also some papers with line graphs on the table.

Today, libraries are
about comparing and
improving

The logo for ExLibris Alma, featuring a rainbow-colored arc above the text "ExLibris Alma".

Benchmark and
comparative analytics

Alma's benchmark analytics – How am I doing?



Great adoption of benchmark analytics



A woman with dark, wavy hair, wearing a maroon blazer over a black top, is speaking and gesturing with her right hand. The background is a light-colored, textured wall.

IMPROVE THE PRESENT

The present moment, if you think about it, is the only time there is. No matter what time it is, it is always now.

Marianne Deborah Williamson

teacher, author and lecturer

The present is **YOU!**



What do we hear from you?

COLLABORATIVE NETWORKS

We need to work together better

ANALYTICS

I need to know more about what's going on

RESOURCE MANAGEMENT

I need better tools to manage my catalog/resources

NEW UI

I want a 'better' Alma

IDEA EXCHANGE & NERS

I have a great suggestion

DIGITAL RESOURCES

I want all of my resources to be managed together

ACQUISITION WORKFLOWS

I want less manual work

RES. SHARING AND FULFILLMENT

I want to provide my users with better services



*I want a
better Alma –
New “UI”*

- Finish full deployment
- Handle open issues

EOY 2017

- Work with FG on next phases
- Identify workflows and system-wide elements

Q1 2018

- Incremental improvements
- New/Enhanced workflows

2018
(and beyond)

“

*I have a great
suggestion*
Idea Exchange

”

Ideas (Alma)

824 Open ideas

- 36 Created in last 30 days

20 Already supported

58 Completed

40 Planned

Users (Alma)

2915 Total users

2167 active this year



“
*I have a great
suggestion*
Idea Exchange
”

Completed

- Add the option to display call number in all tabs (loans, returns, requests) of the patron account.
- Batch job for deleting holding records
- Allow reactivation of withdrawn items
- RESTful API for the Alma Link Resolver

Planned

- Add Functionality to the Scan In Function in the Alma App
- Physical item recall: option to recall more than one copy
- Add "Previous User" in Manage Patron Services
- Alternative process for resource-sharing borrowing requests rejected by last partner on rota

“

*I have a great
suggestion*
NERs

”

2016

ADMINISTRATION:

Excel exports from Alma for titles and items - adding MMS ID

3512 VOTES**ADMINISTRATION**

Expand Repository advanced search options

2231 VOTES**ANALYTICS:**

Add ability to report on past events

1584 VOTES**FULFILLMENT:**

Alert / message for non-renewed patron loans

1426 VOTES**RESOURCE MANAGEMENT:**

Improve bound width architecture

1328 VOTES

eps 10

“

*I have a great
suggestion*
NERs

”

2017

E-RESOURCE MANAGEMENT

Simplify process to remove, relink, and delete portfolios in electronic collections

3469 VOTES**ACQUISITIONS**

More flexibility to update order records

2615 VOTES**RESOURCE SHARING**

DOI and PMID in a resource-sharing request

2462 VOTES**RESOURCE SHARING**

Alternative process for resource-sharing borrowing requests rejected by last partner on rota

2348 VOTES**FULFILLMENT**

loan embargo parameters needed

1856 VOTES**FULFILLMENT**

Show the number of holds on an item in Primo's Get It tab, status

1745 VOTES**RESOURCE SHARING**

When placing a resource sharing request item requestability as well as loans availability must display in Primo

1327 VOTES**FULFILLMENT**

Ability to send hourly overdue notices

1294 VOTES**FULFILLMENT**

Display request history in Item Fulfillment history

1132 VOTES**E-RESOURCE MANAGEMENT**

Perpetual access indication and coverage needed at portfolio level




1112 VOTES

“

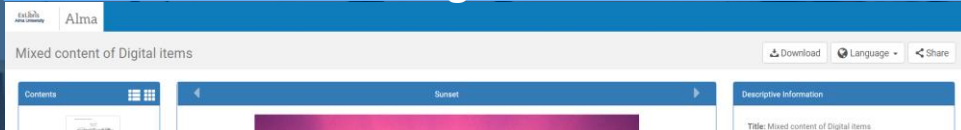
*I want all of my
resources to be
managed together -
Digital*

ExLibris
Alma

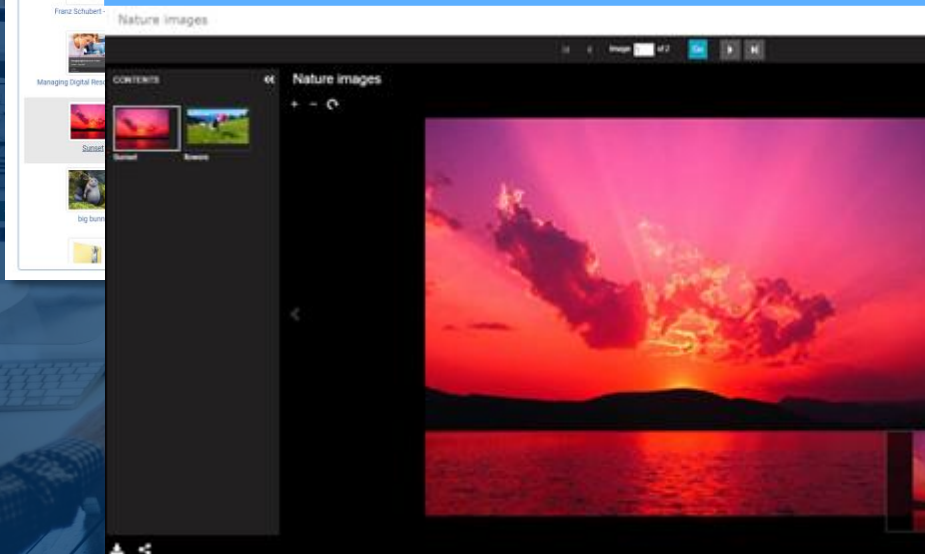
The Only Solution For Managing
Electronic, Print & Digital Assets

1		99 fables by William March ; edited with an introduction by William T. Going ; illustrated by Richard Brough. Book (Book - Electronic) still image; computer; online resource By March, William, (2016) Subject: Fables.	Edit Record Representations ...
<div> Physical Electronic Digital (1) Collections (1) Other details </div>			
2		99 fables [electronic resource] / by William March ; edited with an introduction by William T. Going ; illustrated by Richard Brough. Book (Book - Physical) text; computer; online resource By March, William, (Tuscaloosa, Ala. : University of Alabama Press ©1988.) Subject: FICTION--General. Fables. Electronic books. Series: Library of Alabama classics.	Edit Record Holdings ...
<div> Physical (1) Electronic Digital Other details </div>			
3		99 Fables [electronic resource]. Book (Book - Electronic) text; computer; online resource By March, William. (Alabama : University of Alabama Press 2011.) Subject: Electronic books. English Languages & Literatures and others Series: Library Alabama Classics	Edit Record Portfolio List ...
<div> Physical Electronic (1) Digital Other details </div>			

Alma Digital Viewer



IIIF Viewer



Custom Viewer



*I want all of my
resources to be
managed together -
Digital*

“

*I want all of my
resources to be
managed together -
Digital*

”

Curating Unique Content

- Dublin Core application profiles
- Normalization rules
Support for Dublin Core
- Persistent identifier generation and integration

Exposing Digital Content

- Publish to Google Scholar
- Enhanced delivery
- Streaming delivery
- Social tagging

Data Safeguarding

- Extended audit history
- Grace period for content reverting

Flexible Implementation

- Migration Tools

Analytics

- Deposit status notification
- New digital subject areas
- Send periodical deposit reports

“

*I want all of my
resources to be
managed together -
Digital*

”

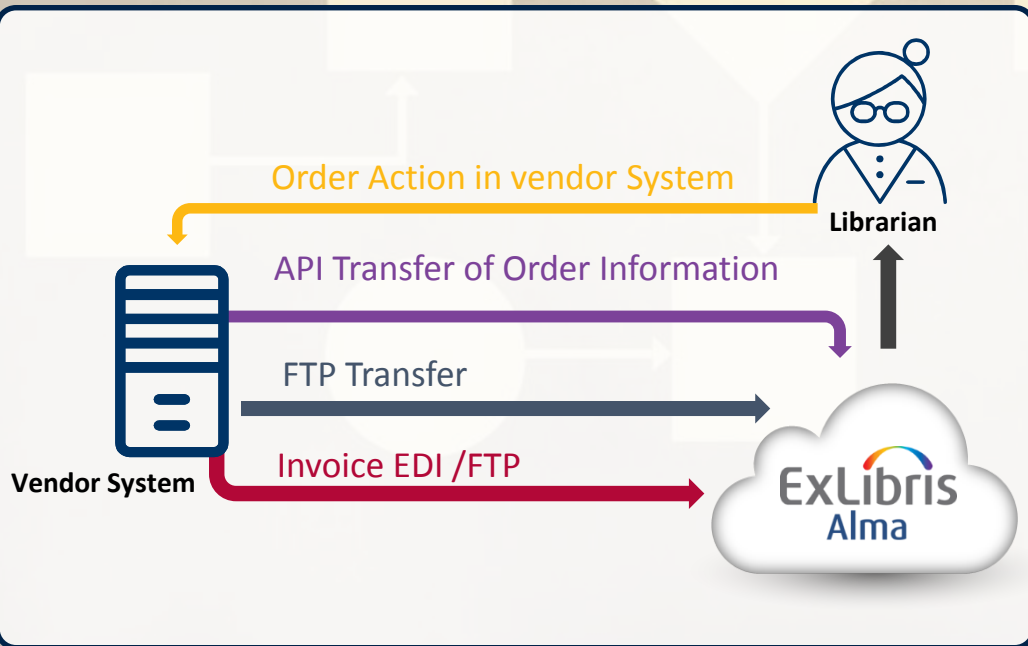
Join this session!

Moving your digital collections to Alma

Adi Alter, Director of Product Management, Digital Resources

Tuesday, 12:30 – 13:00

I want less manual work - **Acquisition Workflows**



1

User searches vendor system and builds list of books to order or picks from an approval list

2

Order is placed **in vendor System** which causes order data to be sent via API to Alma. An order line and a bibliographic record is created in Alma

3

Optional: Overnight a more complete MARC record is sent to Alma via FTP which overlays the bib record created by the API

4

Invoice data and MARC records flow to Alma ILS system via EDI/FTP when book is shipped

“

*I want less manual
work - **Acquisition
Workflows***

”



casalini**libri**

OASIS
New and Improved

HARRASSOWITZ

ERASMUS
Amsterdam • Paris

GOBI[®]

“

*I want less manual
work - **Acquisition
Workflows***

”

Objective:

Streamline the process of managing institution entitlements in Alma

Solution:

Automatic service that regularly updates institution entitlements with information retrieved from vendor on a scheduled basis

Coming Soon: Ebook Central

Activate/Deactivate
relevant titles



“
*I want less manual
work - **Acquisition
Workflows***
”

Join this session!

**Just What You Ordered:
Real-Time Ordering with Alma and ProQuest Book Platforms**

Yoel Kortick, Senior Librarian, Ex Libris

Aine Rice, Director Book Sales EMEA, ProQuest

Tuesday, 13:45 – 14:30

“

*I want to provide my users with better services – **Resource Sharing and Fulfillment***

”

2015

	North America	Europe	Asia Pacific / Australia	Sum
Borrowing Requests	332,425	70,839	12,793	416,057
Lending Requests	288,546	6,982	10,088	305,616

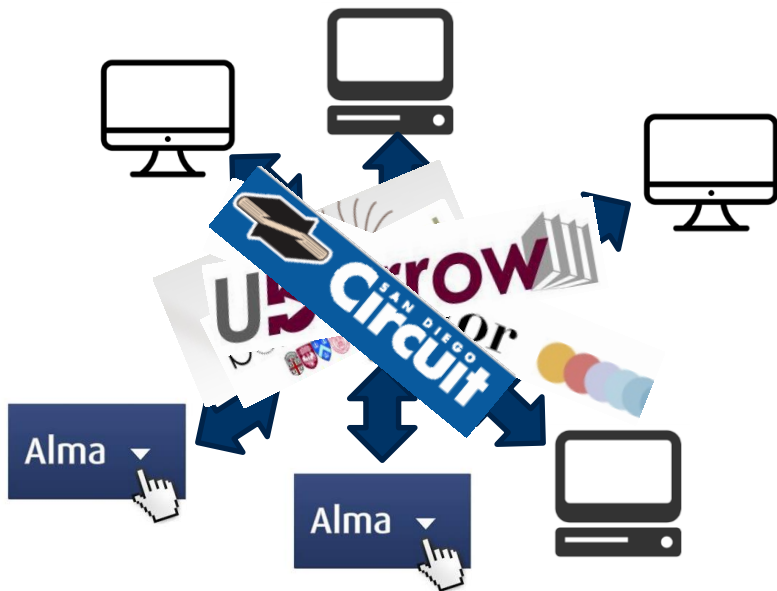
2016

	North America	Europe	Asia Pacific / Australia	Sum
Borrowing Requests	386,579	189,732	24,028	600,339
Lending Requests	380,414	110,064	21,941	512,419

“

*I want to provide my users with better services – **Resource Sharing and Fulfillment***

”



ILLiad

SLNP ILL

SLNP (Simple Library Network Protocol) is a protocol used for communication between libraries.

single text-based

mentales

doc

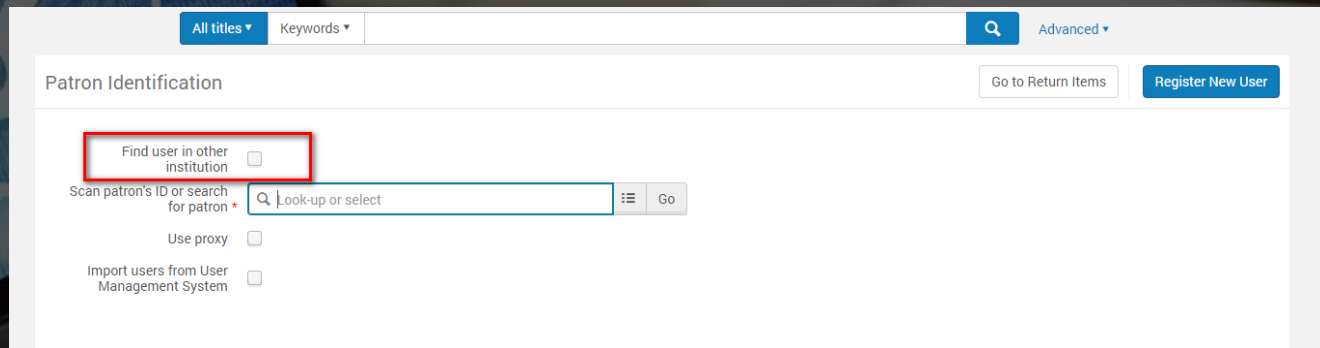
“

*I want to provide my users with better services – **Resource Sharing and Fulfillment***

”

Functional Highlights:

- Walk-In loans
- Return anywhere
- Direct requesting
- Pick up anywhere
- Consortial patron card in Primo



The screenshot shows the 'Patron Identification' section of a library system interface. At the top, there are tabs for 'All titles' and 'Keywords', and a search bar with a magnifying glass icon and the text 'Advanced'. Below the tabs, the 'Patron Identification' section is highlighted. It contains a search bar with the placeholder text 'Find user in other institution' and a checkbox. Below this, there is a section for 'Scan patron's ID or search for patron' with a search bar containing the text 'Look-up or select' and a 'Go' button. There are also checkboxes for 'Use proxy' and 'Import users from User Management System'. On the right side of the 'Patron Identification' section, there are two buttons: 'Go to Return Items' and 'Register New User'.

“

*I want to provide my users with better services – **Resource Sharing and Fulfillment***

”

Fulfillment Network (Consortial)



P2P (regional)



Broker (regional)



P2P



Broker

“

*I want to provide my users with better services – **Resource Sharing and Fulfillment***

”

Join this session!

Resource Sharing: Local, Regional, National, and Global
*Moshe Shechter, Product Manager, Resource Management,
Ex Libris*

Tuesday, 15:00 – 15:45

— “ —
I need to know more about
what's going on — **Analytics** —
” —



Already supported

- DB1 Release 3
- DB1 Release 4
- BR1 Release 4
- BR2 Release 4
- BR3 Release 4
- PR4 Release 4
- JR1 Release 3
- JR1 Release 4
- JR1 GOA Release 4
- JR1a Release 4
- JR1a Release 3
- JR5 Release 4
- MR1 Release 4
- PR1 Release 4



Planned to be added

- BR4 (SUSHI)
- BR5 (SUSHI)
- CR1
- DB2
- JR2
- MR1 (SUSHI)

– “ I need to know more about what’s going on – Analytics ” –

Location /Shared Folders/Alma/Titles/Reports

Type All Sort Name A-Z Show More

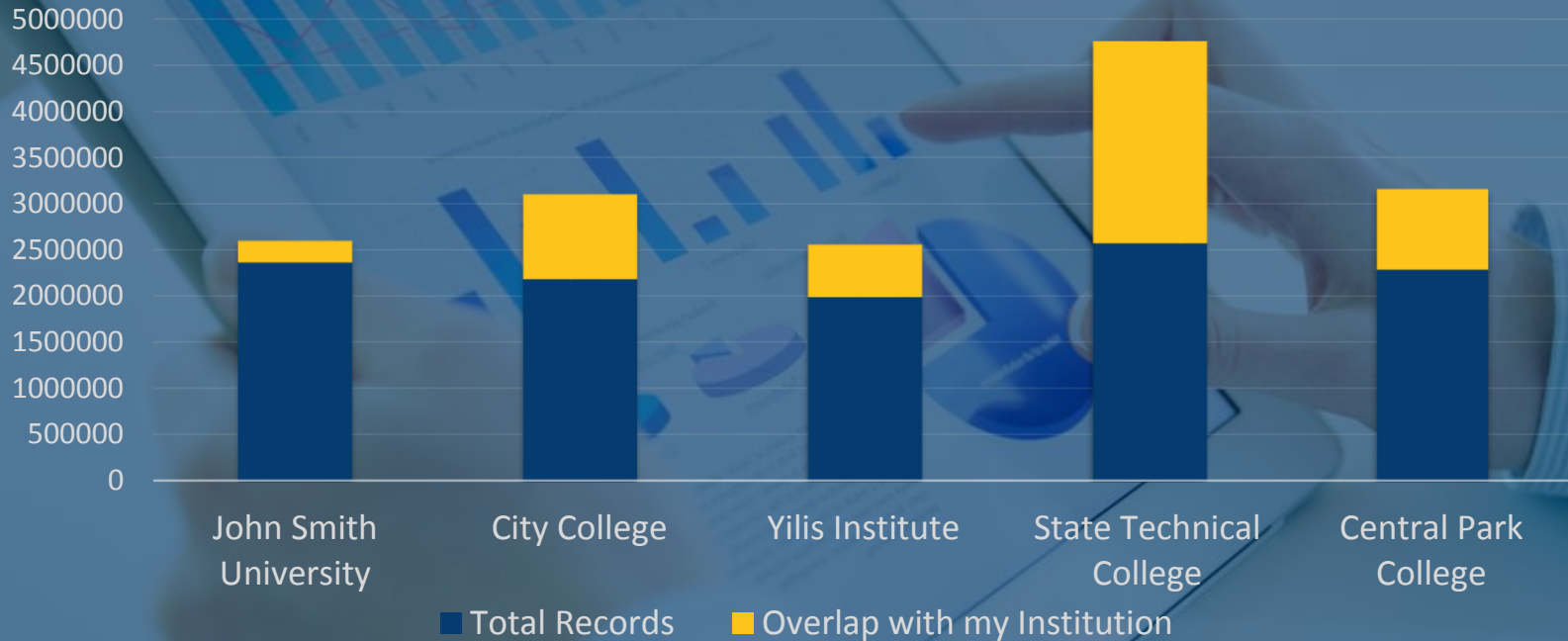
- Overlap P and E - Prompt by Dewey Number** | Last Modified 12/27/2019
Open | Edit | More
- Overlap P and E - Prompt by LC Classification Code** | Last Modified 12/27/2019
Open | Edit | More
- Overlap P and E - Prompt by title range** | Last Modified 12/27/2019
Open | Edit | More
- Overlap P and E - Prompt by word from subject** | Last Modified 12/27/2019
Open | Edit | More
- Overlap P and E - Prompt by word from title** | Last Modified 12/27/2019
Open | Edit | More

Overlap P and E - Prompt by title range

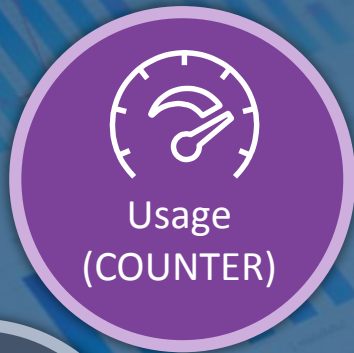
Title (Normalized)	Author	MMS Id	Electronic Inventory	Physical Inventory
		99112861970001021	0	1
		99137763680601021	1	0
		99137763680701021	1	0
	Charvet, John.	9999262130001021	0	1
	Freedman, Jane.	99105745270001021	0	2
	Hurley, Jennifer A Author	99137763680101021	1	0
	Seltzer, S. Scholz, and S. Nelavala	99137766559701021	1	0
	Walsh, Correa Moylan, 1862-	99111216910001021	0	1
and affect at the scene of argument beyond the trope of the angry feminist	Tomlinson, Barbara, 1941-	99108606150001021	0	1
	Tomlinson, Barbara, 1941-	99137784076601021	1	0
and community		9999332150001021	0	1
	Weiss, Penny.	99137785083301021	1	0
and cultural studies		99104554300001021	0	1
		99127066590001021	1	0
and motherhood in germany 1800 1914	Allen, Ann Taylor, 1944-	99100512340001021	0	1
	Allen, Ann Taylor, 1944-	99137781374001021	1	0
and nationalism in the third world	Jayawardena, Kumari.	99103263680001021	0	1
	Jayawardena, Kumari.	99119335700001021	0	1
	Jayawardena, Kumari.	99137781239201021	1	0
feminism and politics		99118982970001021	0	1
		99127066180001021	1	0
	Phillips, Anne.	99127066230001021	1	0

— “
I need to know more about
what’s going on — **Analytics**” —

Overlap & unique record comparison with peer institutions



— “
I need to know more about
what’s going on — **Analytics**” —



— “
I need to know more about
what’s going on — **Analytics**” —

Join this session!

**Analytics and Your Neighbors –
Comparative Approaches & COUNTER Report Management in the Alma Update**
Yoel Kortick, Senior Librarian, Ex Libris
Tuesday, 15:15 – 16:15

*I need better tools
to manage my
catalog/resources -
Resource Management*


★ Acquisitions Resources Fulfillment Admin Analytics

All titles Keywords Advanced

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

🏠 Institution

1 - 3 of 3

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

☒ Electronic (1)

Linked Data

Context	https://open-na.hosted.exlibrisgroup.com/alma/contexts/bib
bibo:isbn10	http://www.isbnsearch.org/isbn/1433243180
bibo:isbn10	https://open-na.hosted.exlibrisgroup.com/resolver/wikidata/isbn10/1433243180
dct:language	http://id.loc.gov/vocabulary/iso639-2/eng
JSONLD version	https://open-na.hosted.exlibrisgroup.com/alma/EXLDEV1_INST/bibs/992674110000121

Expand

All titles Keywords Advanced

< Publishing Profile Details

Profile Name aaa with linked-data Profile Id 1107149000000121

Profile Details Data Enrichment Members Enrichment

Bibliographic Normalization

Correct the data using

Linked Data enrichment ☒

Physical Holdings Enrichment

Add Holdings information ☐

Physical Items Enrichment

Add Items Information ☐

Electronic Inventory Enrichment

Add Electronic Portfolio Information ☐

Digital Inventory Enrichment

Add Digital Representation Information ☐

Add Remote Representation Information ☐

Collection Enrichment

Add Collection Information ☐

Support for representing MARC bibliographic records in BIBFRAME 2.0 format

- Publish MARC bibliographic records in BIBFRAME format
- View a MARC record as a BIBFRAME record
- Expose MARC bibliographic records as BIBFRAME via API

*I need better tools
to manage my
catalog/resources -
Resource Management*

Record View

Design issues

MMS ID	99345073600121	Suppress from publishing	No	Export to WorldCat	Don't publish
Brief level	-	Record format	marc21	Export to true	Don't publish
Originating system	NON_SFX	Originating system ID	99954925542205	Originating system version	20160407021944.8

MARC BIBFRAME

```
<rdf:RDF xmlns:rdf="http://www.w3.org/1999/02/22-rdf-syntax-ns#" xmlns:bf="http://id.loc.gov/ontologies/bibframe/"
  xmlns:rdfs="http://www.w3.org/2000/01/rdf-schema#" xmlns:bfo="http://id.loc.gov/ontologies/bfo/" xmlns:madsrdf="http://www.loc.gov/mads/rdf/v1#"
  <bf:Work rdf:about="https://open-na.hosted.exlibrisgroup.com/alma/TR_INTEGRATION_INST/99954925542205#Work">
    <bf:adminMetadata>
      <bf:AdminMetadata>
        <bf:status>
          <bf:code>=<bf:code>
          </bf:code>
          </bf:status>
        </bf:status>
        <bf:encodingLevel>
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          </bf:code>
          </bf:encodingLevel>
        </bf:encodingLevel>
        <bf:descriptionConventions>
          <bf:code>=<bf:code>
          </bf:code>
          </bf:descriptionConventions>
        </bf:descriptionConventions>
        <bf:identifiedBy>
          <bf:local>
            <rdf:value>99954925542205</rdf:value>
            </bf:local>
          </bf:identifiedBy>
          <bf:changeDate rdf:datatype="http://www.w3.org/2001/XMLSchema#dateTime">2012-10-22T18:24:05</bf:changeDate>
          <bf:creationDate rdf:datatype="http://www.w3.org/2001/XMLSchema#dateTime">2000-08-30</bf:creationDate>
        </bf:note>
        </bf:note>
        <bf:noteType metadata entry convention=</bf:noteType>
          <bf:noteType>
            <bf:noteType>
```

COMING
SOON

“

*I need better tools
to manage my
catalog/resources -
Resource Management*

”

Enhanced Browse (Alt F3)

File Edit Tools

Working on -Materials for design (992594510000121) , Created by timms (04/19/2013 12:14), Modified by System

650 0 \$Sa Architectural design.

LCSH Headings from bibliographic records

- ★ Architectural critics
 - Architectural decoration and ornament
- ★ Architectural design
 - ★ Architectural design Awards
 - ★ Architectural design Congresses
 - Architectural design contracts
 - ★ Architectural design Data processing

Reminders

List of Reminders

Back

List of Reminders

Reminder Date from 08/01/2017

to

09/05/2017

Apply Filter

1 - 1 of 1

Add Reminder



Type: All Status: All

Date	Type	Status	Title	Entity ID	Text	Created By	Modified By	
1 09/05/2017	General	New	Product Design Milton, Alex. Laurence King, London [England] : 2011 [1-85669- 751-7]	99374244000...	-	akline	akline	...

*I need better tools
to manage my
catalog/resources -
Resource Management*

**Non-preferred heading
Enrichment – Staff Search**

**CZ Contribution –
updating collections**

**COMING
SOON**

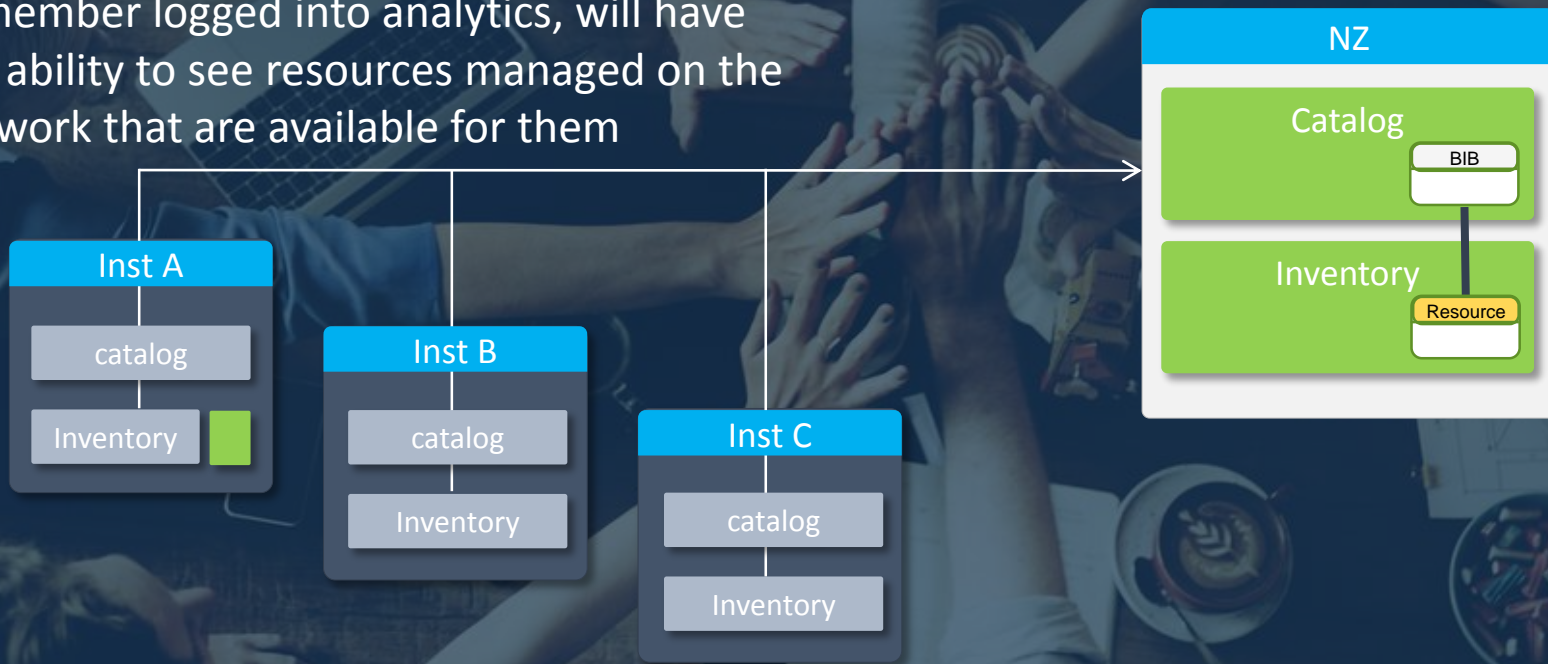
Enhanced IZ view of shared NZ resources

- E-Inventory subject area
- IZ member logged into analytics, will have the ability to see resources managed on the network that are available for them

“

*We need to work together better –
Collaborative Networks*

”



“

*We need to work together better –
Collaborative Networks*

”

Complex Deals

- Central office can today negotiate a deal with vendors in a License of type ‘Negotiation’
- If the negotiated content is different for each member it will be possible to indicate which inventory was negotiated for each member

Ex Libris Networks Alma - Tasks Analytics Currently at: None Help Ex Libris Imple...

Licenses and Amendments Cancel Save

License Web Of Knowledge Creation date 04/18/2016 Created by Ex Libris Implementor License type Negotiation

Summary License Terms Inventory PO Lines Amendments Negotiation Details History Notes Attachments

Add Member Find: in: Member Name Go

1 - 2 of 2 Records Columns Tools

Member Name	Inventory	Price	Currency	Start date	End date	Order Status	Notes	Actions
1 Open University	Science Citation Index, Journal Citation Report	1000	USD	-	-	-		Actions
2 Alma University	-	500	USD	-	-	-		Actions

Cancel Save

“

*We need to work together better –
Collaborative Networks*

”

Central management of:

- General electronic services
- Integration profiles
- Publishing profile templates
- Linked account rules
- Fulfillment units
- SFTP definitions
- Role profiles
- Mashup CSS

< List of S/FTP connections Back

1 - 4 of 4 Name Q + Add S/FTP connection ⌵ ⚙

	Shared	Name ▲	Description ▼	
1	✓	AlmaFTP	AlmaFTP	...
2		OCLC	OCLC synchronization	...
3		SIS	Student Information System	...
4		UnivACC	University Accounting	...

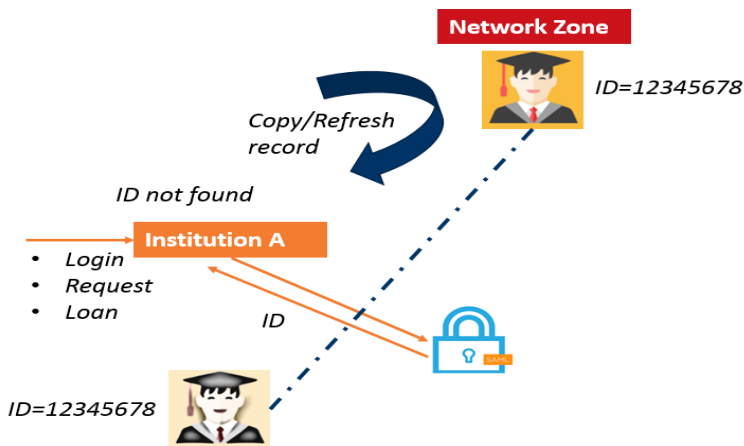
“

*We need to work together better –
Collaborative Networks*

”

Centralized user management

Consortia that can manage patrons in a centrally managed file will be able to do so based on an NZ-managed file. This will make cross consortia patron information simple to manage and always up to date



The present is *YOU!*

I need to know more about what's going on

I want a 'better' Alma

I want all of my resources to be managed together

We need to work together better

I need better tools to manage my catalog/resources

I want less manual work

I need better tools to manage my catalog/resources

I have a great suggestion

I want to provide my users with better services



Respect the past,
Improve the present,
Embrace the future

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