



# Alma Product Update

Dana Moshkovits | Alma Product Management



# Alma's Journey

2009

Boston College, Princeton University, KU Leuven and Purdue University partner with Ex Libris to create the Unified Resource Management (URM) framework

First partner release of the URM system was successfully deployed Australia and New Zealand Early Adopters program

2010

2011

URM becomes Alma  
Second, third and fourth partner release European Early Adopters program, North America Early Adopters program

2012

Alma Go Live  
Boston College  
University of East London  
Fort Hays State University  
VCU  
Boston University

2013

150 Institutions

2016

650 institutions

2017

1000 institutions

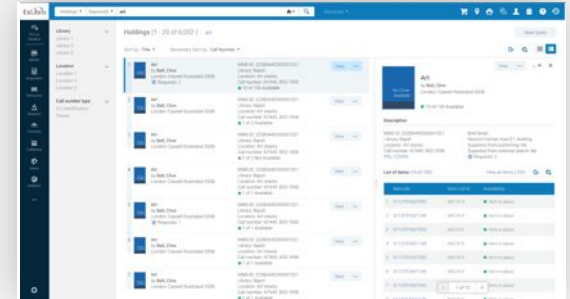
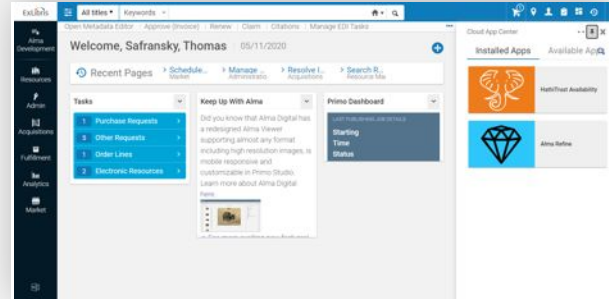
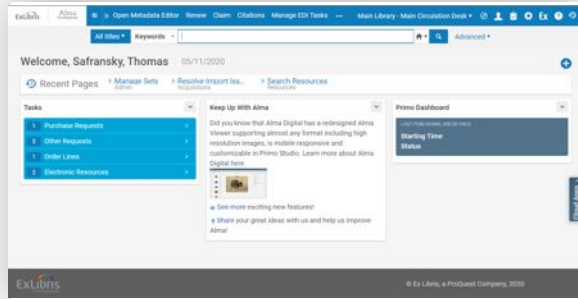
2022

1925 institutions

# It's All About Providing More Value



# User Experience – An ongoing commitment



1 New UI

2 New Concepts

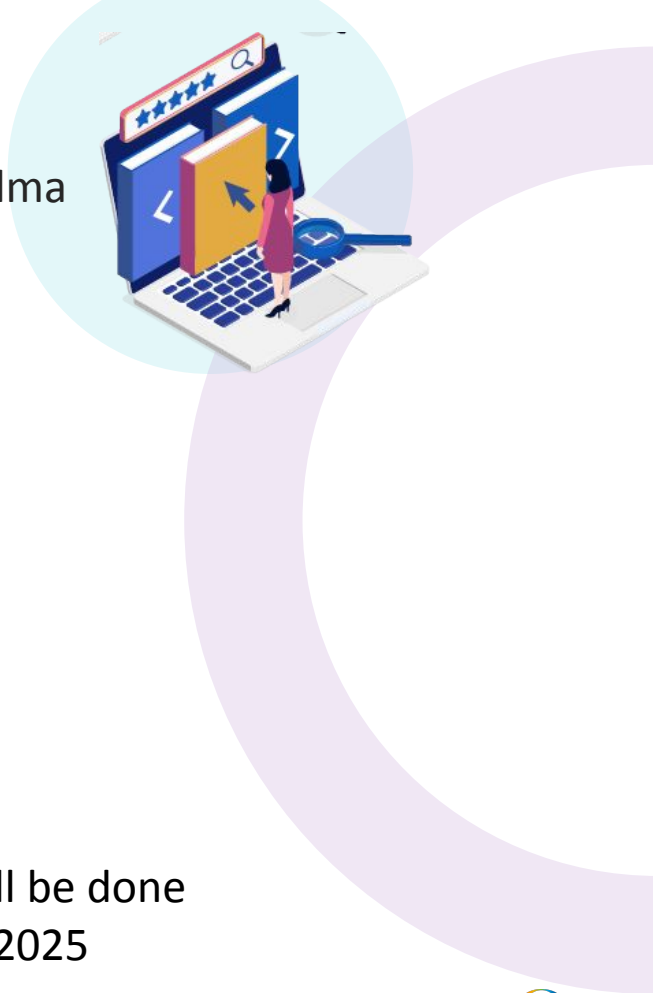
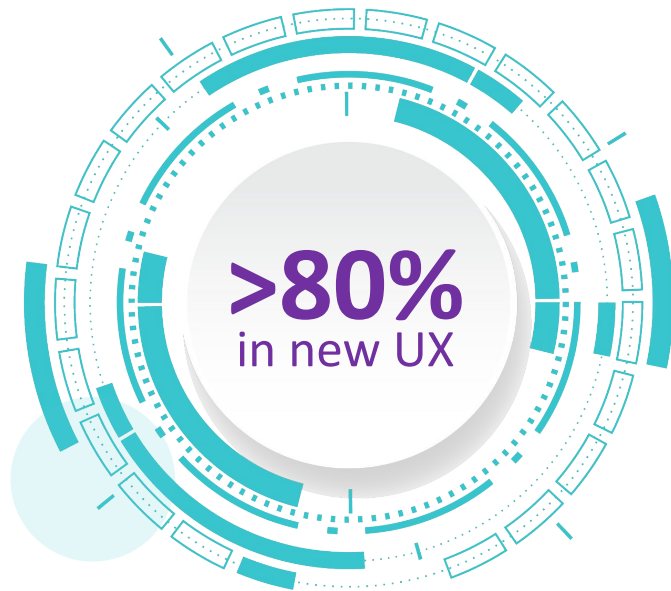
3 Apply

- New layout
- Side by side
- Slide out
- Cards

- Acquisitions
- Repository searches
- Configuration
- More...

# Workflow Simplification

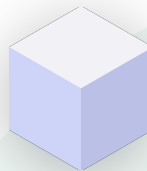
Effectively transform the user experience in Alma



Most of the day-to-day work in the system will be done through new and improved UX by the end of 2025

# Workflow Simplification

## RESOURCE SHARING TASK LISTS



### Benefits

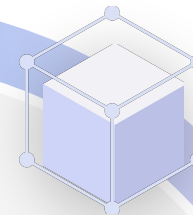
- Inline editing
- Improved faceting
- Inline handling of patron queries
- Easier search

The screenshot displays a web interface for managing borrowing requests. On the left, there is a sidebar with filters for 'Refine by', 'Activity Status' (Active), 'Clear all', 'Active Partner' (Alma ILL Partner, BLDSS Test, ILLiad), 'Activity Status' (Active), 'Status' (Cancelled By Patron, Cancelled by sta..., Created borrow...), and 'Creation Date' (4-7 days ago, 8-30 days ago, Older). The main area shows a list of borrowing requests under the heading 'Borrowing Requests (1 - 20 of 349)'. The list includes details such as title, author, ISBN, requester, creation date, and external identifier. A detailed view of a request for 'The sky is the limit?' is shown on the right, including the request form filled by the requester and request information.

Request ID	Title	Author	Requested Item	Requester	Created	Status
7	The Decline and Fall of the Roman Empire	by Gibbon	Requested: Book (Physical)	Requester: Andrew Aral	Created: 01/13/2022 15:10	Physically received by library
8	Water /	Open University	Requested: Book (Physical)	Requester: Moshe Shechter	Created: 12/14/2021 14:35	Ready to be sent
9	On the mode of laying the rails, and the adaptation of the carriages on the Baltimore and Ohio rail-road / Journal of the Franklin Institute	by Franklin Institute (Philadelphia, Pa.)	Requested: Article (Digital)	Requester: Ex Libris Staff	Created: 09/15/2021 13:19	Cancelled By Patron
10	Exposition of Foucault's Experiment / of the Franklin Institute.	by Franklin Institute (Philadelphia, Pa.)	Requested: Article (Digital)	Requester: Ex Libris Staff	Created: 11/26/2020 14:57	

# Workflow Simplification

## PO LINE TASK LIST



## Benefits

- Inline Editing
- Unified task list
- Quick navigation
- Improved faceting

**Purchase Order Lines (1 - 20 of 47)**

ID	Title	Identifier	Owner	Alerts	Amount
9	The Worthington history, DReaM Publications, 1047-241X, ISSN	1047-241X	O'Neill	Alerts (1)	0.0 USD
10	E_ReInk_CZ_0104150445, 2014, ISBN0104150445, ISBN	ISBN0104150445	O'Neill	Alerts (1)	0.0 USD
11	Canada / Julie Murray, Minneapolis, MN ; ABDO Pub Co, c2014, 978161...	9781617838064	O'Neill	Alerts (1)	0.0 USD
12	ReInkBibWithSeveralURLsToAnotherBib..._Title_15031601103, ReInkBibWithS...	ReInkBibWithSeveralURLsToAnotherBib_15031601103	O'Neill	Alerts (1)	20.0 USD
13	_Title_15031601221, _ISBN_15031601221, ISBN	_ISBN_15031601221	O'Neill	Alerts (1)	20.0 USD

**Canada / Julie Murray, Minneapolis, MN ; ABDO Pub Co, c2014, 9781617838064, ISBN**

0.0 USD

PO Line Information

PO line owner: O'Neill  
MMS ID: 9913752210001021  
Identifier: 9781617838064  
Acquisition method: Purchase  
Invoice status: No invoice

Material type: Journal  
 Manual packaging  
 Cancellation restriction

Ordered Portfolios (1)

Name	Service Type	Service Activatio...	Activation Date	Access Mod&Bib&Inal
Canada /	DATABASE	Not active		



# Workflow Simplification

## PATRON SERVICES

Loans (8 of 8) | Returns (5) | Requests (4) | Add/Renew Patron Role | Submit Request | Refresh Blocks/Notes | Done

My Institution | [Scan Item Barcode] | Sort by: Due date | Display: All | Actions

1	Water Barcode 39031031890643 Due date 16/03/2021 13:02:56 PM IST Normal	Owning Library O'Neill Item policy One week loan Loan date 16/03/2020	Notes   Renew
2	Food and war in twentieth century Europe Barcode 39031031890643 Due date 16/03/2021 13:02:56 PM IST Normal	Owning Library O'Neill Item policy One week loan Loan date 16/03/2020	Overdue   Fines (\$2.00)   Renew
3	Sport speed Barcode 39031031890643 Due date 16/03/2021 13:02:56 PM IST Normal	Owning Library O'Neill Item policy One week loan Loan date 16/03/2020	Fines (\$2.00)   Renew
4	George Stubbs Barcode 39031031890643 Due date 16/03/2021 13:02:56 PM IST Normal	Owning Library O'Neill Item policy One week loan Loan date 16/03/2020	Requests (1)   Notes   Renew
5	Water Barcode 39031031890643 Due date 16/03/2021 13:02:56 PM IST Normal	Owning Library O'Neill Item policy One week loan Loan date 16/03/2020	Fines (\$2.00)   Renew
6	Food and war in twentieth century Europe Barcode 39031031890643	Owning Library O'Neill Item policy One week loan	Requests (1)   Renew

Aulenback, Jane  
ID 65758397

User group BC Undergraduate  
Expiration date 30/08/2024  
Active balance 262.00 USD | Pay

[Quick user details](#) | [Full user details](#) | [Send report / receipt](#)

System Notes (10)

- User has 7 overdue item(s). 5 in this library.
- User has 7 overdue item(s). 5 in this library.
- User has 7 overdue item(s). 5 in this library.
- User has 7 overdue item(s). 5 in this library.
- User has 7 overdue item(s). 5 in this library.
- User has 7 overdue item(s). 5 in this library.
- User has 7 overdue item(s). 5 in this library.
- User has 7 overdue item(s). 5 in this library.

User Notes (7)

- User has 7 overdue item(s). 5 in this library.

## Benefits

- Quicker access to more information
- Visual tips
- Personalization



# Workflow Simplification

## REPOSITORY SEARCH

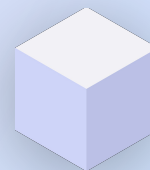
The screenshot displays a library search interface with a search bar at the top containing 'All titles', 'Keywords', and 'history'. Below the search bar, there are navigation and utility icons. The main content area shows search results for 'All Titles (1 - 20 of 80,448)'. On the left, there is a 'Refine by' sidebar with categories like 'Library', 'Item Material Type', 'Collection', and 'Process Type'. The search results list includes:

- Glamour: a history / Stephen Gundle.** By Gundle, Stephen, (Oxford ; New York : Oxford University Press, 2008.)  
Subject Beauty, Personal--France--History. Beauty, Personal--England--History. Beauty, Personal--Social aspects. and others  
MMS ID 99124910900121  
ISBN 9780199210985 and others
- History of Rome / Michael Grant.** By Grant, Michael, (New York : Scribner's, c1978.)  
Subject Rome--History.  
MMS ID 99123710800121  
ISBN 0684159864
- Teaching history.** By Historical Association (Great Britain) (London, Historical Association 1969)  
Subject History--Study and teaching--Periodicals. History--Study and teaching--Great Britain--Periodicals. History--Study and teaching. and others  
MMS ID 992297930000121  
ISBN 0040-0610

Each result has a thumbnail image and a set of social media sharing icons. The 'Glamour: a history' result is expanded to show a detailed view with a 'General information' section (Material Type Book, MMS ID 99124910900121, ISBN 9780199210985 and others, Record number 152043531) and a 'Holdings (3)' section listing three different locations with their respective call numbers and availability status.

## Benefits

1. Improve Productivity
2. Save Time
3. Streamlined workflow
4. Consistence experience for all resource types
5. Less Navigation



# Other



Analytics



Configuration



Sets

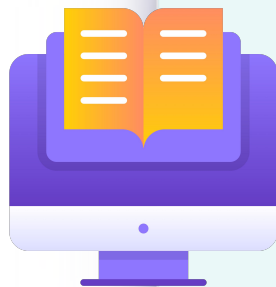
# Experience Alma New UX @IGelU

## Visit us at our booth

Meet Alma Product  
Management team

Come and talk to us- share  
your experience, thoughts,  
ideas

Try it out!



## Sessions on the topic

Experience Alma new and  
simplified Acquisitions workflow  
by Noam Fass, Ex Libris  
Tuesday September 13

A Feature is Born in Alma. A  
Collaborative Journey For the  
Perfect UX

by Ruhama Amouyal, Bar-Ilan  
University & Raphael Gabbay, Ex  
Libris  
Thursday September 15, 2022 at  
11:55 AM–12:25 PM



# Fit for Purpose



# Libraries Need Linked Data



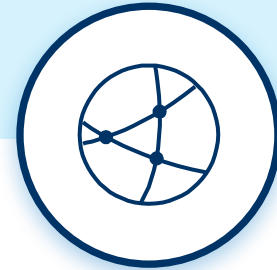
## EFFICIENT CATALOGING

Higher accuracy with less manual work. Easier to create relationships. Focus on special collections and unique materials



## BETTER DISCOVERABILITY

Display enrichment, easier navigation and accuracy. Enabling sophisticated querying making it quicker to find what you want



## IMPROVED INTEROPERABILITY

Open to the global network of data outside of libraries systems such as research

# Linked Data - What Exists Today in Alma?

## RECORDS ENRICHMENT

Automatically with URIs for language, identifiers, names, and subjects

## ALMA REFINE

supports the refine workflow within Alma. It works currently with Getty, Wikidata, and Geonames Linked open Vocabularies

## DISPLAY IN SEARCH

In result and record view (also as BIBFRAME)

## PUBLISH AND EXPORT

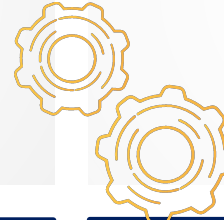
Entire catalog:  
BIBFRAME, RDA/RDF

## REST APIS

In: BIBFRAME, RDA/RDF  
and JSON-LD

## ENDPOINTS

Ability to reach either  
work, instance or  
authority





# Linked Data – Plans for 2022/2023



## CATALOGIN

**G**  
**Ability to store and have basic use for Linked Open Data records**

User will be able to upload and search for work and instance cataloged as linked open data. It will be also possible to manage inventory and perform fulfillment workflows for these instances.

**Integrate 3<sup>rd</sup> party Linked Data editor**

Cataloger will be able to create new linked data records and store them in Alma



Linked Open Data  
Wednesday, September 14, 2022 at 10:40 AM–11:10 AM  
by Itai Veltzman

# Data Excellence Looking Forward



**Capacity, Efficiency,  
Speed and  
Provision, Quality**

**Data Excellence (DX) Strategy, Ongoing Status, and Future Plans**

Thursday, 9:30 AM–9:55 AM

Rael Elstein



## Quicker Updates

Increase update frequency of Alma



## Better Quality

Improve and expand MARC metadata in Alma CZ



## Improved Discoverability

Enhance linking and rights for CDI users



## And More...

Long-term Content and Data focus

# Collaborative Collection Management

## THE CHALLENGE:

- Shelving space
- Budget constraints
- The “long tail”: hard-to-find materials, very useful to few patrons in each library



## THE ANSWER:

- Cooperation and Collaboration
- Collection Retention Agreements
  - Joint Acquisition
  - Joint Storage
  - Analytical Management

**Collaborative collections: the evolution of collective physical resources management and ownership**

Tuesday, September 13, 2022 at 2:20 PM–2:50 PM

By Lili Daie

**Collaborative collections: Round table**

Wednesday, September 14, 2022 at 4:00 PM–4:30 PM

By Lili Daie & Itai Veltzman



# The Alma User Community

# We Depend on Your Involvement and Input



Idea  
Exchange

NERS

Focus Groups and  
Working Groups

UX • Analytics • Authority

Consortia • Special Focused Group

# Your Ideas..

## Idea Exchange

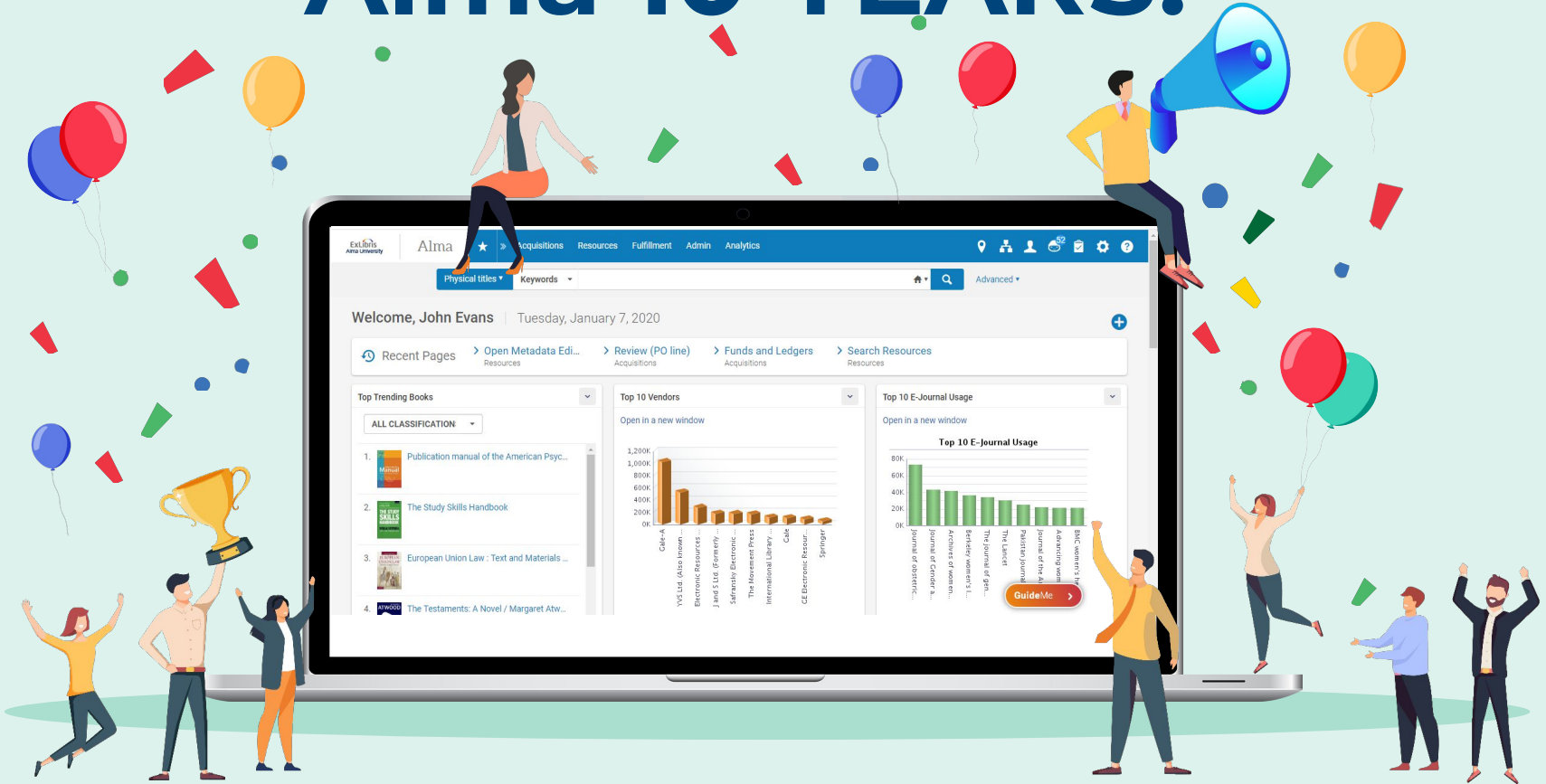
- 425 Idea Exchange items have the status completed
- 58 Ideas were completed in 2021
- 109 Ideas planned or accepted
- 81 Ideas are tentatively planned for 2022

## NERS

NERS2020 Cycle -6 enhancements  
NERS2021 cycle – 6 enhancements planned  
NERS2022 cycle – in progress



# Alma 10 YEARS!





# Thank you!

---

