

# Focus on efficiency: Time & cost savings solutions in Alma

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**TECHNION**  
Israel Institute of Technology



Wouldn't it be nice  
if Alma was capable of  
everything we need

# Agenda

1. Redundant screens transitions
  2. Only printout or manual forward
  3. No Grace
  4. Lack of needed Blocks
  5. No blocks automation
  6. Manual registration of multiple new users
- Cloud App
  - Proxy Email
  - Alma Sync Application
  - Alma Sync Application
  - Python Selenium + Alma API's
  - Alma Sync Application

# Technion - Israel Institute of Technology (1)

- ▶ Founded in 1912
- ▶ 5 Campuses
- ▶ 17 Faculties
- ▶ ~600 Faculty Members  
~15,000 Students  
60 Research Centers



## Technion - Israel Institute of Technology (2)

- ▶ 4 Nobel Prize winners
- ▶ Shanghai Ranking 2022

**“We will continue to strive for excellence using all the tools at our disposal”**

Prof. Uri Sivan



# Technion Libraries

- ▶ 15 Libraries:
  - 1 Central Library
  - 14 Faculty Libraries
- ▶ ~80 Employees



Elyachar Central Library  
Aerospace Engineering  
Architecture & Town Planning  
Biomedical Engineering  
Chemical Eng., Biotech. & Food

Chemistry & Biology  
Civil & Environmental Eng.  
Computer Science  
Education in Science & Technology  
Electrical & Computer Engineering

Industrial Eng. & Management  
Mathematics  
Mechanical Engineering  
Medical Sciences  
Physics

# Information Systems Team of Six



Guy Shahaf  
Head of Information  
Systems



Efrat

Alagem Tehar Lev

Information Systems  
Engineer



Sigal

Leibovitz

Information Systems  
Engineer



Yakir

Siegelman

Information Systems  
Engineer



Nimrod

Haller

Information Accessibility  
Coordinator



Amir

Sackran

IT Infrastructure Manager

# Alma Synchronization Application

(Alma Sync App)



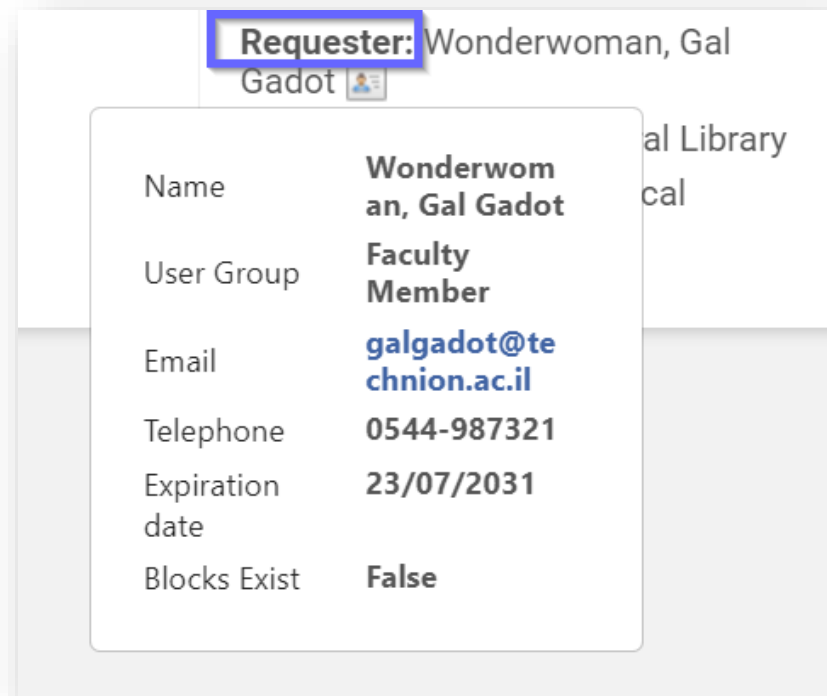


All good projects  
begin with some  
frustration & tears




# Pain point 1: Redundant screens transitions (1)

Requester's  
details  
**DO NOT**  
include  
home library



The screenshot shows a user profile form with a highlighted 'Requester:' field. Below it, a dropdown menu displays the user's details, which are redundant with the information already shown in the 'Requester:' field.

<b>Requester:</b>	Wonderwoman, Gal Gadot 
Name	Wonderwoman, Gal Gadot
User Group	Faculty Member
Email	<a href="mailto:galgadot@technion.ac.il">galgadot@technion.ac.il</a>
Telephone	0544-987321
Expiration date	23/07/2031
Blocks Exist	False

# Pain point 1: Redundant screens transitions (2)

- Requester keeps default pickup location
- Staff verifies up front the preferable pickup



# Pain point 1: Redundant screens transitions (3)

Pick From Shelf | Scan In Items | Return Items | **Manage Patron Services** | Borrowing Requests

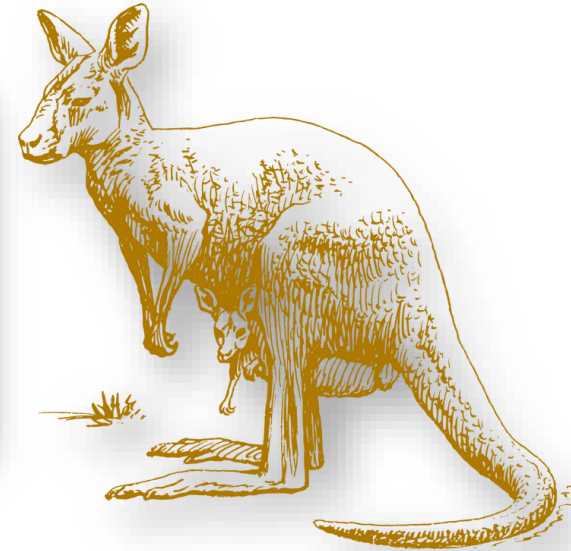
### Patron Identification

Scan patron's ID or search for patron \*

Use proxy

Go

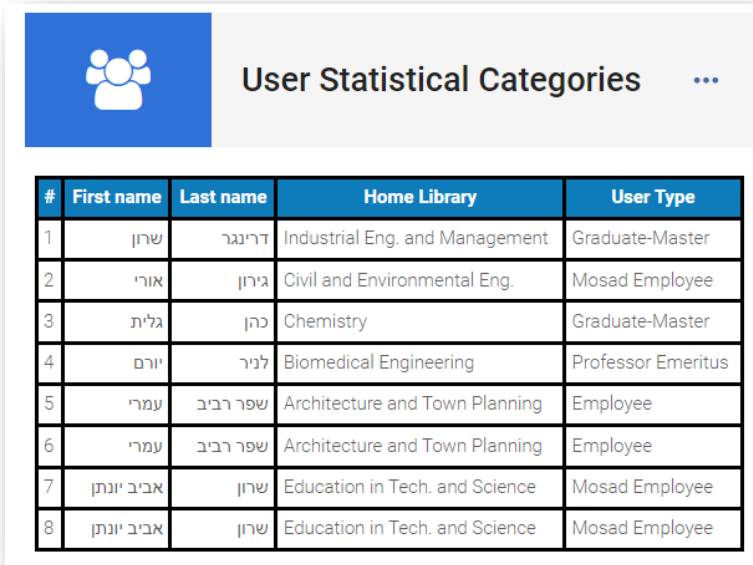
- Wonderwoman, Gal Gadot - Faculty Member - **galgadot**



Continuously skip to the user's library card

# Solution: Cloud App (1)

- Displaying statistical categories of users
- Available in Alma Screens:
  1. Borrowing Requests
  2. Find and Manage Users



#	First name	Last name	Home Library	User Type
1	שרון	דרינגר	Industrial Eng. and Management	Graduate-Master
2	אורי	גירון	Civil and Environmental Eng.	Mosad Employee
3	גלית	כהן	Chemistry	Graduate-Master
4	יורם	לניר	Biomedical Engineering	Professor Emeritus
5	עמרי	שפר רביב	Architecture and Town Planning	Employee
6	עמרי	שפר רביב	Architecture and Town Planning	Employee
7	אביב יונתן	שרון	Education in Tech. and Science	Mosad Employee
8	אביב יונתן	שרון	Education in Tech. and Science	Mosad Employee

# Solution: Cloud App (2)



user statistical

Search Results for: user statistical 



## Display user statistical category type

Technion Israel Institute of Technology  
Alma | Cloud App

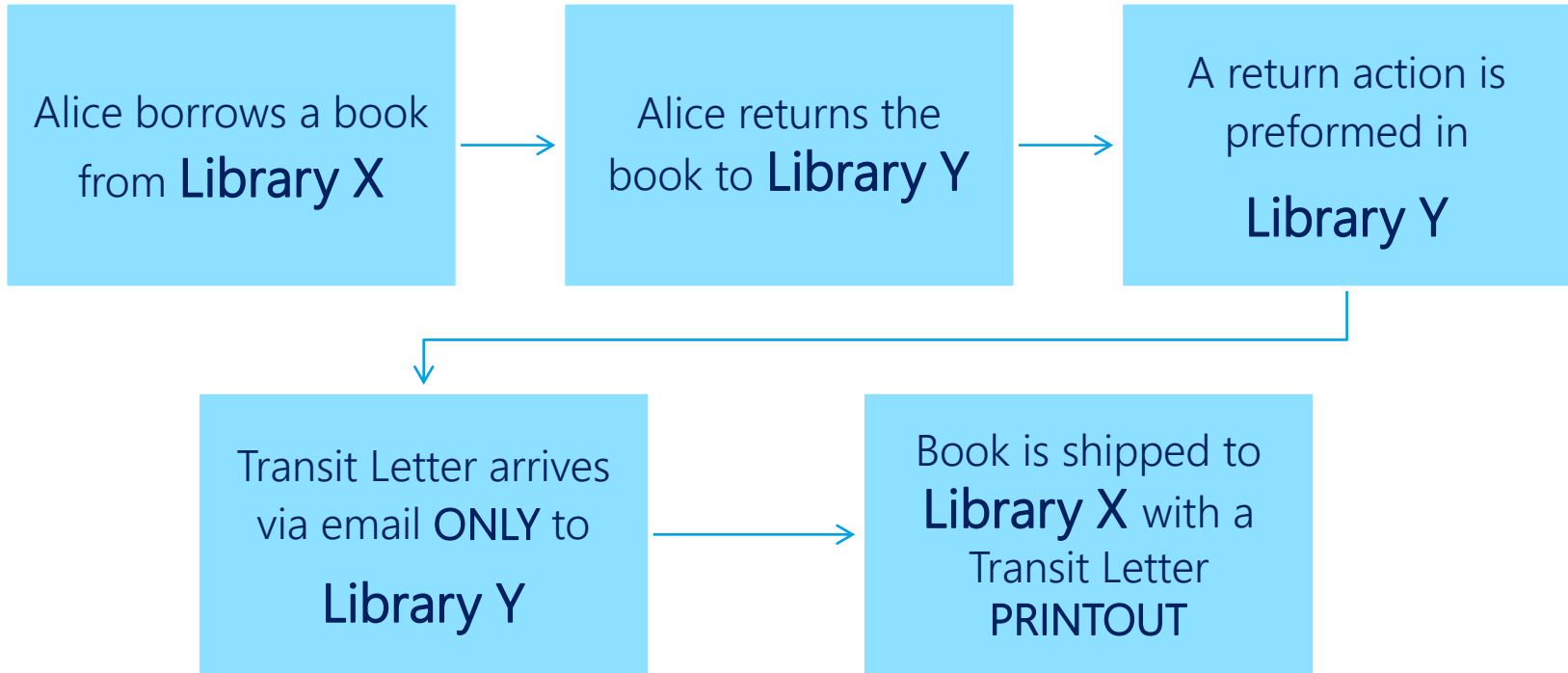
Display users' statistical category types, for users in Alma screens such as Borrowing Requests and

# Efficiency: Home Library is visible on the App

- A very convenient view
- Transitions are no longer needed



# Pain point 2: Only printout or manual forward



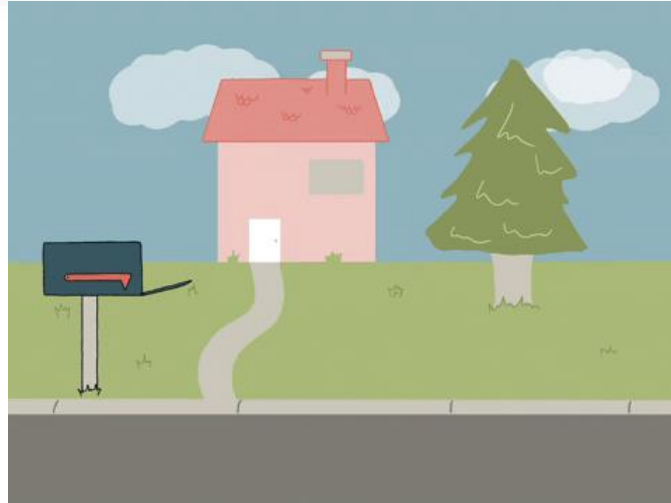


# Solution: Proxy Email (1)

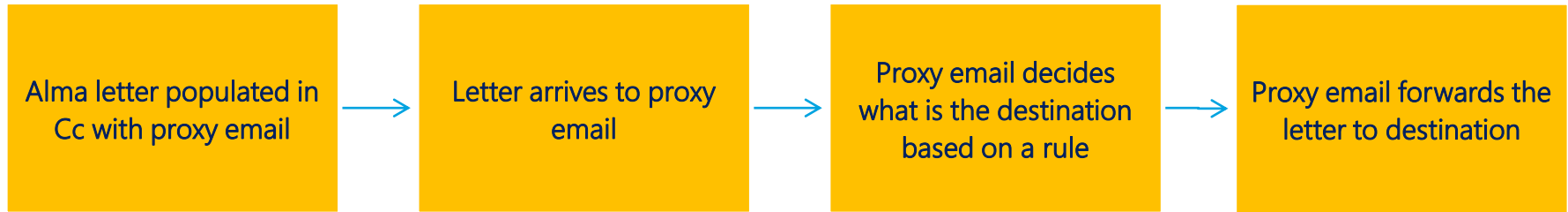
**ONLY ONE Cc Address**

Ful Transit Slip Letter Preview Letter Cancel Save

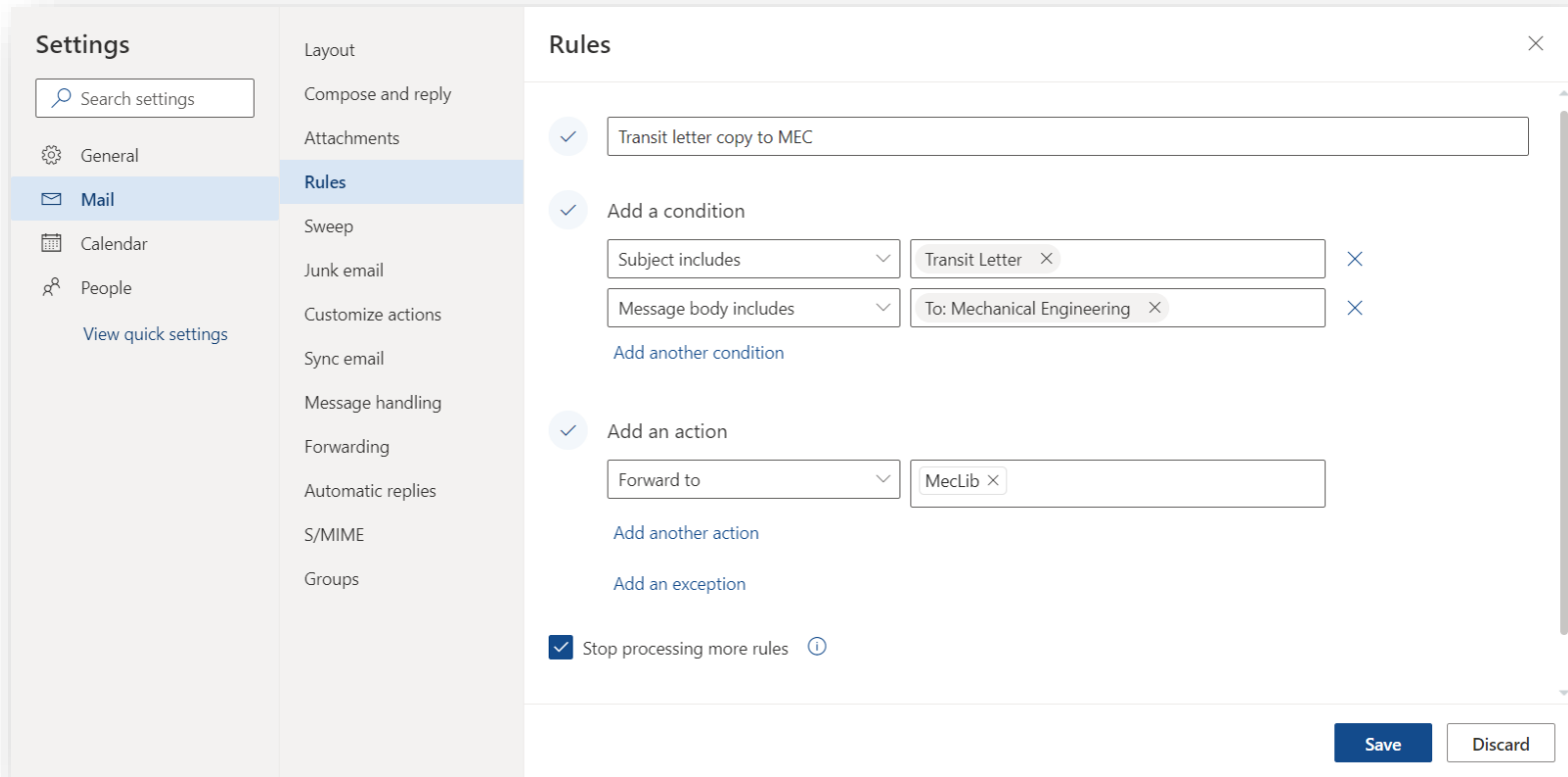
Enabled	Code	Description	Translation	Updated By	Last Updated		
7	<input checked="" type="checkbox"/>	Cc	libraryproxy@technion.ac.il	libraryproxy@technion.ac.il	galitg	17/05/2022	...



# Solution: Proxy Email (2)



# Solution: Proxy Email (3)



The screenshot shows the Outlook 'Rules' configuration window. On the left, the 'Settings' pane is open to 'Mail' > 'Rules'. The main area shows a rule named 'Transit letter copy to MEC' with the following configuration:

- Transit letter copy to MEC
- Add a condition
  - Subject includes: Transit Letter
  - Message body includes: To: Mechanical Engineering
  - [Add another condition](#)
- Add an action
  - Forward to: MecLib
  - [Add another action](#)
  - [Add an exception](#)
- Stop processing more rules

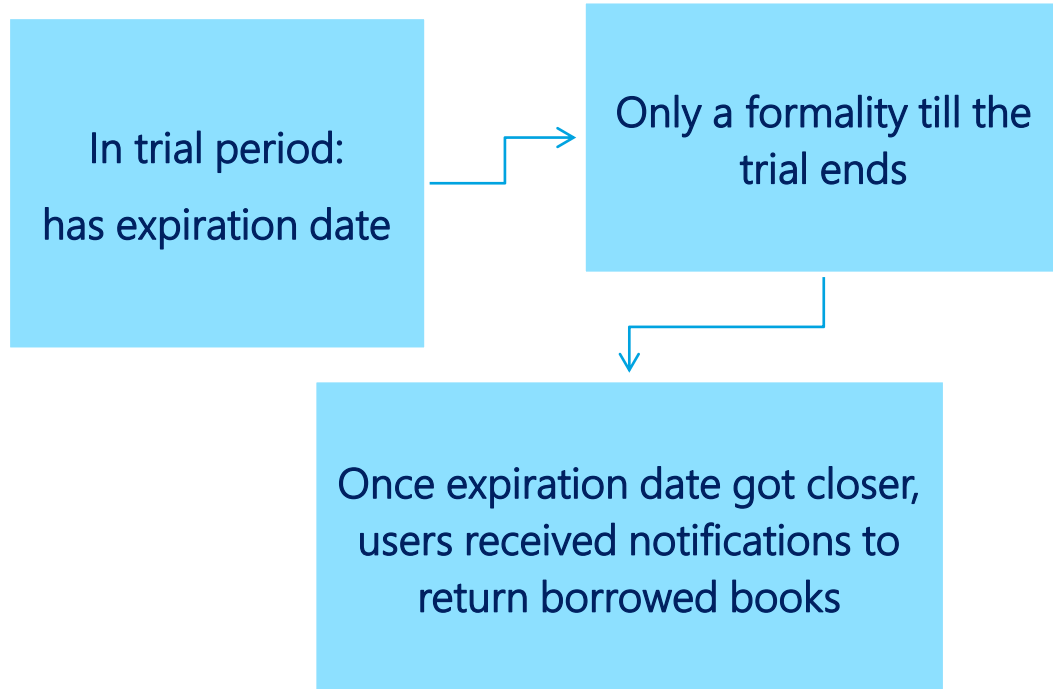
Buttons for 'Save' and 'Discard' are at the bottom right.

# Efficiency: Cc letter to destination

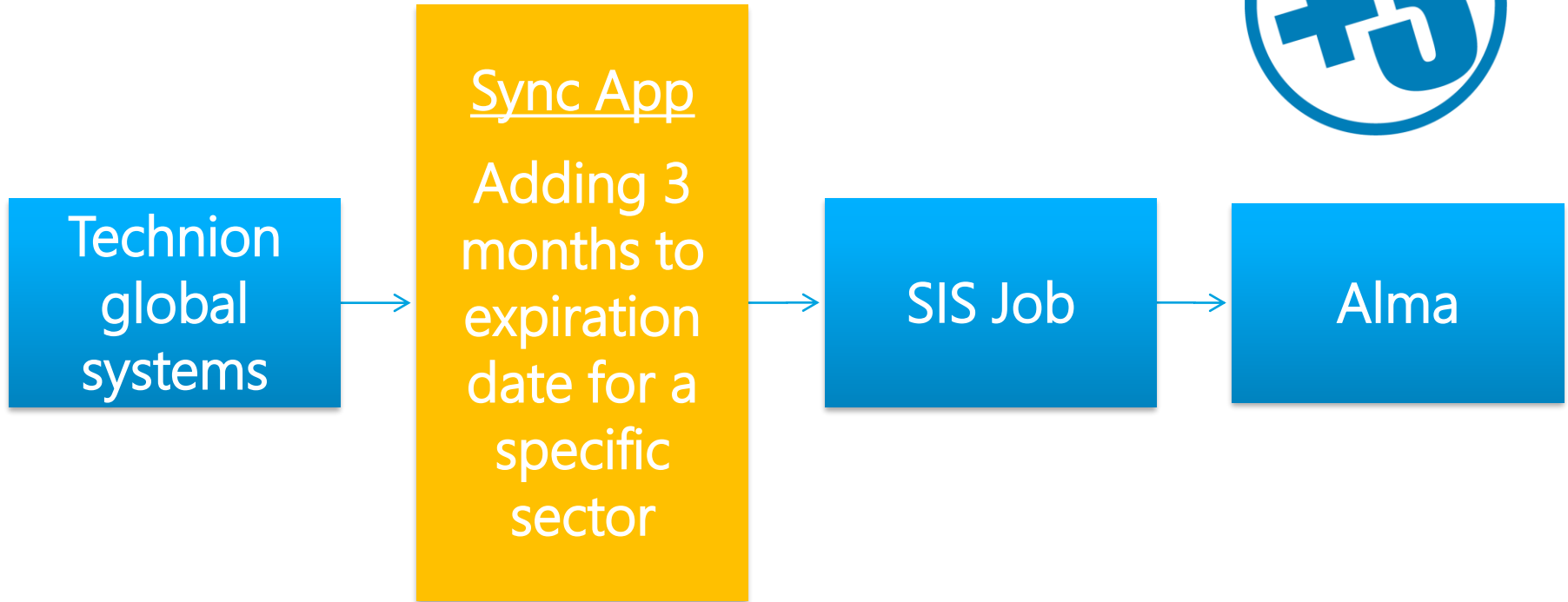
- Each letter arrives to both sender and destination
- No need to FW
- No need to print
- Follow-up is simple than ever for all libraries & departments



# Pain point 3: Grace period



# Solution: Sync App Improvement



# Efficiency: Grace period granted



Allowing readers to  
keep enjoying  
circulation services

# Pain point 4: Lack of needed Blocks

- Library cards without an expiration date
- Need indication - leave or pass away
- Library card remained active with no notification





# Solution: Alma Sync App Improvement

## Sync App

New statuses  
from Technion  
IS department

Inserting  
blocks

Populate  
expiration &  
purge dates


Send daily  
report via  
email

# Efficiency: Blocks & Daily notification



- Automatically blocked
- Daily report of blocked users via email for follow-up (in case of active loans)

Blocked Users

 Alma Technion  
To: Central Library - Circulation; Circulation & Interlibrary Loan Supervisor - Technion

[Reply](#) [Reply All](#) [Forward](#) [...](#)

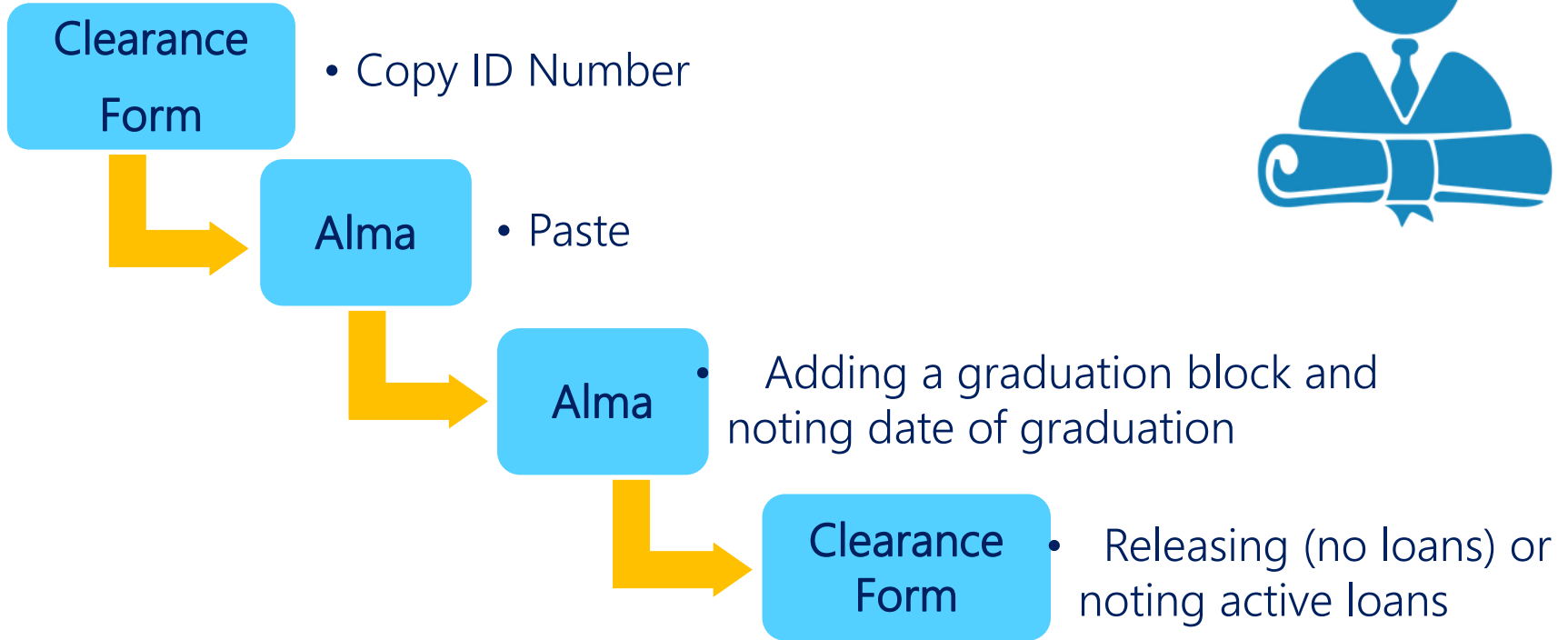
Tue 31/05/2022 3:06

Hello,

The following users are blocked and have loans:

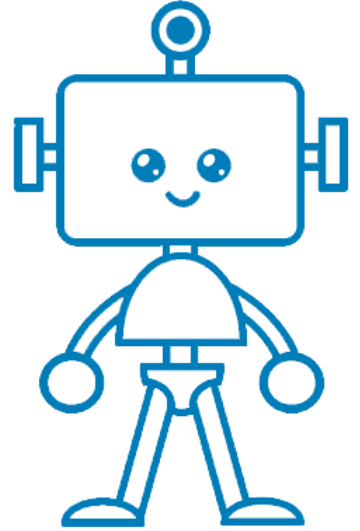
#	ID Number	Primary identifier	First name	Last name	Block date	Block reason
1	080302102	spilner	It' veor	tm'ee	2022-05-31	Patron has passed away
2	001808008	naillon	yo	g'he	2022-05-31	Employment Termination

# Pain point 5: Clearance automation



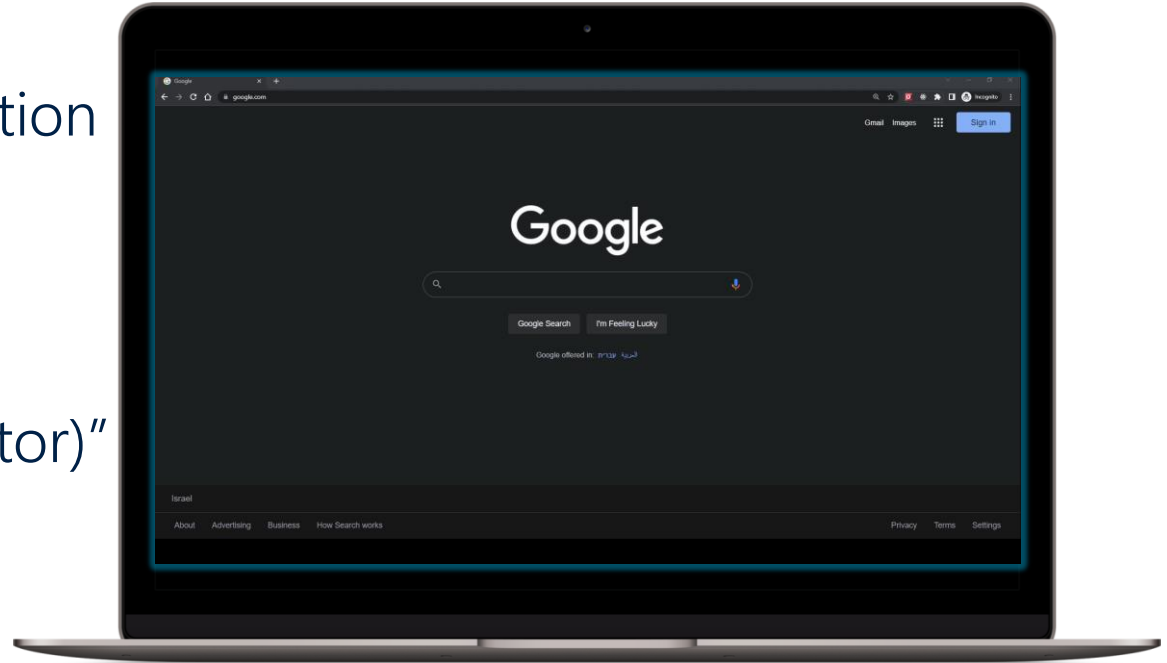
# Solution: Selenium Software (1)

- Open-source (free)
- NO need to learn a programming language
- Mimics manual actions of a user



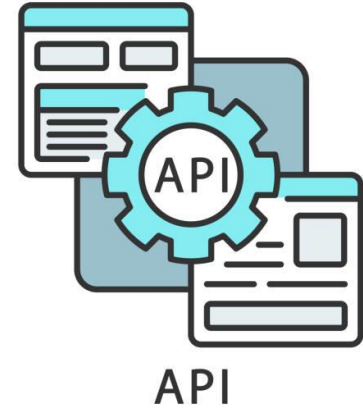
# Solution: Selenium Software (2)

- ▶ IGELU conference registration demonstration
- ▶ Using the following chrome extension: "Katalon Recorder (Selenium tests generator)"



# Solution: Selenium + Alma API's (3)

- Mimics manual actions of Circulation staff
- Perform API's calls against Alma:
  - Insert blocks
  - Retrieve active loans list
- Sends email with a list of books
- Dismiss all manual actions



# Efficiency: Automated Clearance form

- No human intervention is needed: **ONLY** the systems speak to each other
- Save a significant number of working hours
- Daily report via email for follow-up
- The automated process neutralizes errors and maintains uniformity



# Pain point 6: Manual registration of multiple new users

- Groups of users that do not sync to Alma:

Pre-University students

Practical engineers

Honor high school students

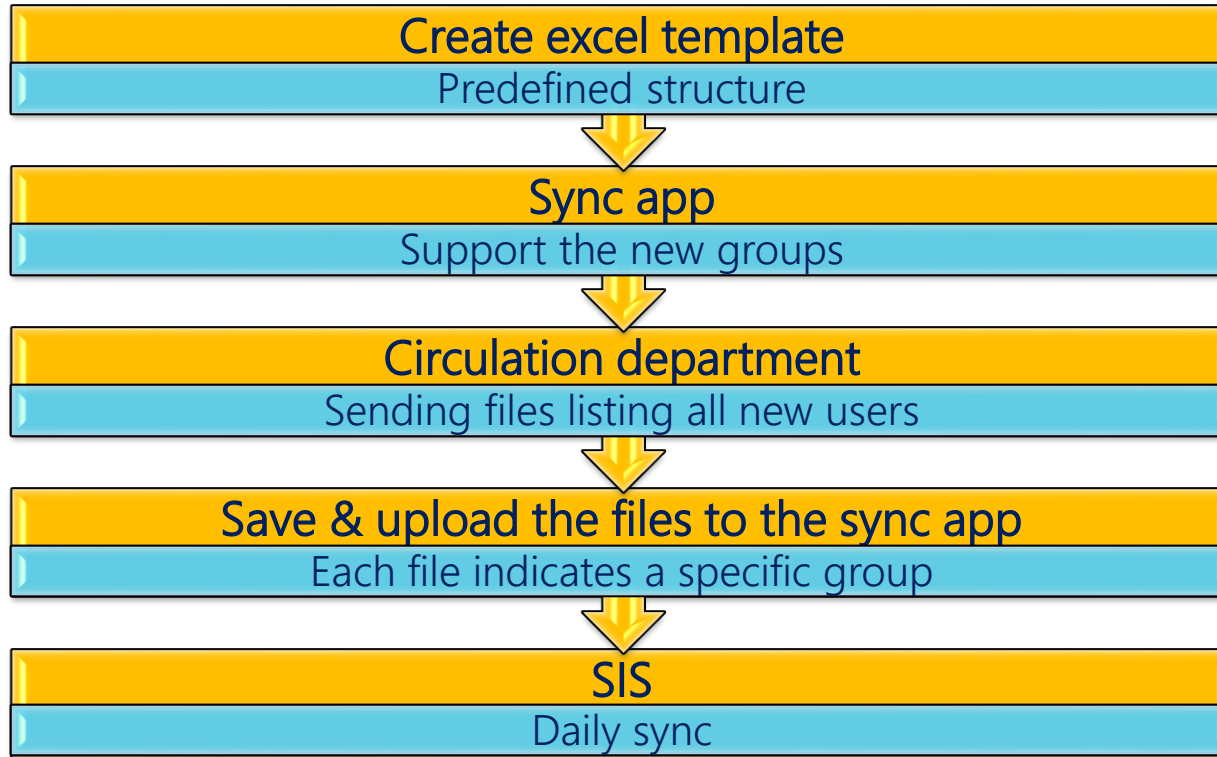
Campus partners



- Circulation staff had to register each user manually



# Solution: Alma Sync App Improvement



# Efficiency: New users are upload automatically

- Circulation department – Receives the files
- Reviewing the files & sending to Information System engineer
- Overnight sync: library cards are updated in Alma

A	B	C	D	E	F
FAMILY NAME	PRIVATE NAME	IDNO	CEL PHONE	EMAIL	EXPIRATION DATE
Cohen	David	555666888	052-44445555	kkkk@outlook.com	13/07/2022

# Summary

- Less manual work
- Solutions save huge amount of working hours
- Libraries can benefit from these solutions
- Devote time to new projects



# LIBscan





# Thank you!

# Questions?

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