

ExLibris
Part of **Clarivate**

IGOLU
International Group of Ex Libris Users

Alma Product Update

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Address Current & Emerging Needs



Optimization



Collaboration



Open Access



Linked Data

Optimization

User Experience(UX)
workflow
simplification

Easy to use, efficient,
and enjoyable for
users, leading to
higher satisfaction
and engagement



Clear



Intuitive



Consistent



Responsive



Accessible

Alma UX Projects 2023/2024



Resource Sharing Task Lists



Acquisition PO Lines



Repository Search



Patron Services

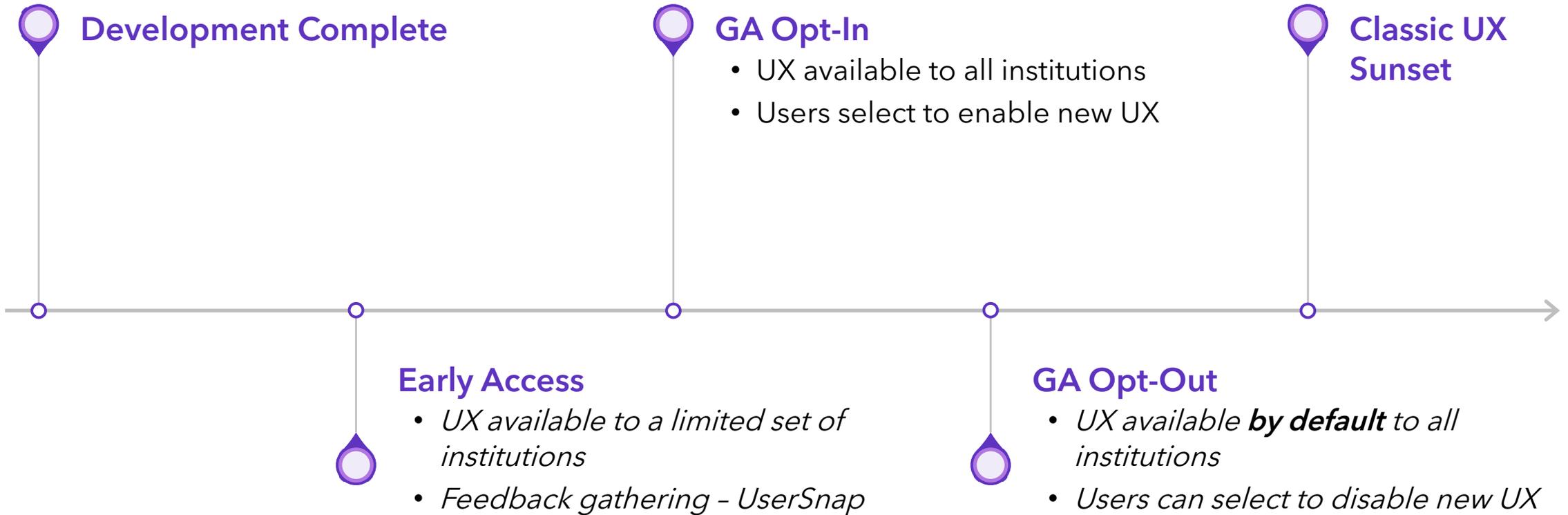


Sets



Analytics

UX Gradual Rollout Milestones



Workflow Simplification

RESOURCE SHARING TASK LISTS - NOW IN PRODUCTION

The screenshot displays the 'Borrowing Requests' interface. On the left, there is a 'Refine by' sidebar with filters for Activity Status (Active), Creation Date (Older), Labels (check), Active Partner (Alma ILL Partner, BLDSS Test, ILLiad), Activity Status (Active), Status (Cancelled by Patron, Cancelled by staff, Claimed), Creation Date (Older), Update Date (Yesterday, 4-7 days ago, 8-30 days ago), Requested Format (Digital, Physical, Physical non-retur...), and Supplied Format (Digital, Physical, Physical non-retur...). The main area shows a list of requests, with request 18 'A kindness' selected. The right panel provides a detailed view of this request, including general information (Title: A kindness, ISBN: 0531057674, External identifier: EXLDEV10002257), notes (Ex Libris Staff: Please supply by May 1st), request form details (Volume: 4, Chapter title: On kindness in culture, Chapter author: -, Chapter number: -, Publication date: 2005, Note: -), and request information (Requested format: Physical, Pickup location: The Main Campus: Main Library, Partner: Open University, Requested media: Any, Assignee: Shmuel Moss, Internal identifier: 2390471080000121, MMS ID: 99142911200121).

Benefits

- Reduction in required clicks for common actions
- Inline editing
- Improved faceting
- Inline handling of notes and patron queries
- Easier search

Workflow Simplification

PO LINE TASK LIST - NOW IN PRODUCTION

The screenshot displays the 'Purchase Order Lines' interface. On the left, a 'Refine by' sidebar allows filtering by 'Workflow Step' (set to 'In Review'), 'Assignment', 'Workflow Step', 'PO Line in Claim', 'Alert', 'Purchase Type', 'Vendor', and 'Vendor Account'. The main list shows six purchase order lines with details such as item description, PO line number, vendor/account, and status. The right pane provides a detailed view of the selected PO line (02-4194), including a summary, PO line information, ordered items, vendor information, pricing, and receiving information. A 'Save Query' button is visible in the top right of the main list area.

| Item | Description | PO Line | Vendor/Account | Status | Amount |
|------|---|--------------|---|----------------------------------|-----------|
| 1 | 00 : drawings 2000 at Barbara Gladstone Gallery / text by Klaus Kertes... | 02-4194 | YANKEE BOOK PEDDLER/YBPEDI/Account (M)/111009 | Physical - One Time In Review | 20.88 USD |
| 2 | 007. Quantum of solace, Los Angeles, CA ; Activision Publishing, c20... | 09-000037279 | AMAZON COM/AMAZON/Default Account/AMAZON | Physical - One Time In Review | 32.99 USD |
| 3 | <=, 2014, | 15-302904 | GIFTS/GIFT/Default Account/GIFT | Physical - One Time In Review | 10.00 USD |
| 4 | 0044 / [editor, Peter Murray], Cork ; Crawford Municipal Art Gallery... | 15-316785 | Electronic Book - Subscription | In Review | 0.00 USD |
| 5 | Nature [electronic resource], Nature Pub Group, Print began with v. 1... | 15-316786 | Print Journal - One Time | In Review | 0.00 USD |
| 6 | 10:04 : a novel / Ben Lerner. | | | | 0.00 USD |

Benefits

- Reduction in required clicks for common actions
- "All PO lines" menu link
- No "GO to task list" action
- "Receive" action from the PO line itself
- Multi-select facets
- Labels
- Bulk assignments
- Sliding panel to keep the user oriented
- Section customization

Workflow Simplification

PATRON SERVICES - NOW IN EARLY ACCESS

The screenshot displays a library management system interface. At the top, there are navigation links for 'Loans (8 of 8)', 'Returns (5)', and 'Requests (4)'. Below these are buttons for 'Add/Renew Patron Role', 'Submit Request', 'Refresh Blocks/Notes', and 'Done'. A search bar contains 'My Institution' and a 'Scan Item Barcode' button. The main area shows a list of loans with columns for item details, library information, and actions. The right sidebar shows a user profile for 'Aulenback, Jane' with details like 'User group BC Undergraduate', 'Expiration date 30/08/2024', and 'Active balance 262.00 USD'. Below the profile are sections for 'System Notes (10)' and 'User Notes (7)', both containing repeated messages: 'User has 7 overdue item(s). 5 in this library.'

| Item ID | Title | Barcode | Due Date | Library | Policy | Loan Date | Notes | Actions |
|---------|--|----------------|----------------------------|------------------------|---------------|------------|--------------------------|---------|
| 1 | Water | 39031031890643 | 16/03/2021 13:02:56 PM IST | Owning Library O'Neill | One week loan | 16/03/2020 | Notes | Renew |
| 2 | Food and war in twentieth century Europe | 39031031890643 | 16/03/2021 13:02:56 PM IST | Owning Library O'Neill | One week loan | 16/03/2020 | Overdue Fines (92.00) | Renew |
| 3 | Sport speed | 39031031890643 | 16/03/2021 13:02:56 PM IST | Owning Library O'Neill | One week loan | 16/03/2020 | Fines (92.00) | Renew |
| 4 | George Stubbs | 39031031890643 | 16/03/2021 13:02:56 PM IST | Owning Library O'Neill | One week loan | 16/03/2020 | Requests (1) Notes | Renew |
| 5 | Water | 39031031890643 | 16/03/2021 13:02:56 PM IST | Owning Library O'Neill | One week loan | 16/03/2020 | Fines (92.00) | Renew |
| 6 | Food and war in twentieth century Europe | 39031031890643 | | Owning Library O'Neill | One week loan | | Requests (1) Overdue | Renew |

Benefits

- Quicker access to more information
- Visual tips
- Personalization

Workflow Simplification

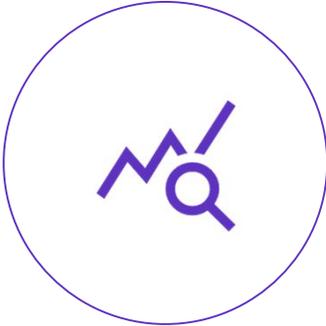
REPOSITORY SEARCH - NOW IN DEVELOPMENT

The screenshot displays a library search interface. On the left, there are filters for Material Type (Book, Computer file, Journal), Resource Type (2D non-projectable, 3D artifact), Language (Afrikaans, Akkadian, Altaic), Publication Year (0976-1768, 1769-1977, 1978-2001), and Collection (Art Collection_Picasso, Art titles, mn). The main area shows a list of titles, with the third item, 'Art & antiques' by Robert Cumming, selected. The right panel provides a detailed view of this record, including general information (Material Type: Journal, Record number: OCoLC51460137, ISSN: 0040-0610), MARC Record information, and Electronic Portfolios (EBSCOhost MasterFILE Premier, General OneFile, Gale World History in Context).

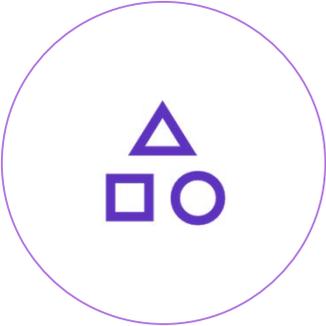
Benefits

- Reduction in required clicks for common actions
- MARC simple view upfront
- New Item section
- Actionable inventory information

Other UX Projects



Analytics



Sets



Open Access

Open Access and the Role of the Library



Budget Management

- Allocate and manage funds towards publishing models that best serve the institution



Collection Development

- Keep track of which journals are transitioning to Open Access and adjust their collections accordingly



License Negotiation

- Negotiate new types of agreements for optimal use of budget



Tracking

- Institution publication as part of Transformative agreements
- Monitoring publication outputs
- Monitoring usage of Open Access resources

Drive Research Excellence



Capture & Record

- Transformative Agreements details
- APC threshold (tokens)
- PO line type for Transformative Agreements
- PO line type for APC
- Reporting Codes



Insights

- Provide library with insights about cost per use and APC to inform transformative negotiation



Content

- Open Access rights for Community Zone Journals and CDI articles



Connect

- Integrate with research platforms and publisher platforms to better process Transformative Agreement



Collaboration



Collaborative Network - Central Administration

Optimize Consortia Services

Central Administration

Efficient and centralized management of settings, preferences and configurations across consortia members

- ✓ "One stop shop" dashboard
- ✓ Easy access to consortia member configurations
- ✓ Unified & enhanced distribution mechanism
- ✓ Configuration mode - 'Proposed' vs 'Imposed'
- ✓ Centralized discovery configuration
- ✓ Additional centralized configuration options

Support Services

Empower the Consortia Central Office by providing support services to its members using maintenance tools and problem troubleshooting utilities

The screenshot displays the 'Consortia Configuration Management' interface. The top navigation bar includes 'Authorities', 'MMS ID', and 'Resource Sharing Library - Resource Sharing Desk'. The main menu has tabs for 'Acquisition', 'Administration', 'Fulfillment', 'Resource Sharing', 'User Management', 'Discovery', and 'Services'. A red box highlights the 'Configuring: Network Zone' dropdown menu. Below the navigation, there is a search bar and a table of 'Terms Of Use'.

| Name | Type | TOU Owner | Description |
|---|----------------------------|-------------|---|
| 1 Default terms of use | Booking | Generic | Default Booking Terms |
| 2 Default terms of use | User Registration | Generic | Default User Registration Terms |
| 3 Default terms of use | Request | Generic | Non-Requestable Default |
| 4 Default terms of use | Loan | Generic | Non-Circulating Default |
| 5 Default terms of use | Lending Resource Sharing | Generic | Default No Incoming Resource Sharing Requests From Other Institutions |
| 6 4 Week Fjernlån | Loan | Institution | For bruk på innlånte eksemplarer som lånes ut til låner |
| 7 4 Weeks Fjernlån tillatt | Request | Institution | - |
| 8 4 Weeks RS Ansatte - with Personal Delivery | Borrowing Resource Sharing | Institution | This is to support employees that use Primo for requesting RS, with personal delivery. BIBSYS uses RS to support both traditional RS as well as printouts. Patrons of group 'Egne ansatte' should have this support. |
| 9 4 Weeks RS Bibliotek - with Personal Delivery | Borrowing Resource Sharing | Institution | This is to support external libraries that use Primo for requesting printouts of articles. BIBSYS uses RS to support this. Patrons of group 'libraries' should have this Personal Delivery support, not the students. |
| 10 4 week RS | Borrowing Resource Sharing | Institution | - |



Collection Analysis

What We Have Already Done

| Analytics | Alma | Resource Sharing | Rialto |
|-----------------------------|---|----------------------------|--------------------------|
| OTB "Title" overlap reports | Overlap analysis tool (e-resource and physical) | Controlled Digital Lending | Purchase Recommendations |
| OTB Consortia title reports | DARA smart recommendation infrastructure | Alma Resource Sharing | |
| | Retention Workflow | Rapido | |

Collection Analysis, Management and Development



The current tools demand personal initiative
We are moving to proactive workflows that guide users towards their goals

Coming
in Alma

- Data-driven insight visualization dashboards (configuration based)
- Collection level benchmarking
- From insight to action: powerful recommendation system triggered by data



Linked Data

How Does Link Data Help Libraries?



EFFICIENT CATALOGING

Framework that can be adapted to new technologies and use-cases as they arise



IMPROVED DISCOVERABILITY

Granular descriptions of resources promoting accurate and relevant results



IMPROVED INTEROPERABILITY

Integrating catalogs with other data sources in order to provide users with a seamless Discovery experience

What Already Exists

| Eco system | Management | Discovery |
|---|----------------|-------------------|
| APIs and endpoints | URI enrichment | Record enrichment |
| Publish and export to BIBFRAME | Alma Refine | Recommendations |
|  | Alma | Primo |

Linked Data - Plans for 2023/2024



CATALOGING

Ability to store and use Linked Open Data records

- User will be able to use APIs to create and upload LC BIBFRAME work and instance
- It will be possible to manage inventory and perform fulfillment workflows for these instances, as well as discover them in Primo

Linked Data - Plans for 2023/2024

Main Workflows

- One-by-one resource creation and management (e.g. Special Collections)
- Services: cataloging, acquisition, inventory management, discovery, and fulfillment

Data Scope

- Unique materials
- Same authorities as today, but using URI as ID base

Main Features

- Collaborative Cataloging via Sinopia (ecosystem)
- Authority linking and updates (Alma and CZ)
- Core workflows - acquisition, inventory and fulfillment (Alma)
- Discovery and info card (Primo)

SINOPIA

Collaborative Cataloging



Alma

Management



Primo

Discovery & Info Card

What it Will Look Like - from Sinopia, via Alma to Primo

The image displays three overlapping library catalog interfaces:

- SINOPIA (Left):** A 'Monograph Work (BF2) Un-Nested' record with a sidebar menu containing sections like 'Contribution (Creator/Contributor)', 'Title Information', 'Form of Work', 'Date of Work', 'Place of Origin of the Work', 'In series', '(Geographic) Coverage of the Content', '(Time) Coverage of the Content', 'Intended Audience', and 'Notes about the Work'.
- Alma (Center):** A 'BIBFRAME Record Simple View' for MMS ID 991010862919704986. It shows metadata such as 'Record Format: bibframe', 'Record Type: Video', and 'Original system ID: 34CUBA_UMA'. A 'Send to Alma' button is visible at the top.
- Primo (Right):** A record for 'Harry Potter and the Deathly Hallows, Part 1'. It includes a video icon, a 'Send to' section with various export options (EXPORT BIBTEX, EXPORT RIS, EASYLIB, ENDNOTE, REFORMATS, PRINT, CITATION, PERMALINK), and a 'Related Persons' section for J.K. Rowling, listing her birth date (31 July 1965), place of birth (Yate), and field of work (literature, fantasy literature, children's and youth literature).

MARC and Linked Data



CATALOGING

- MARC will continue to exist alongside Linked Data
MARC can be enriched with LD elements to be utilized for richer display

MARC21 Linked Open Data URI enhancements

- Catalogers will be able to add URIs in \$\$1, which will then be searchable in Alma in Real World Object indexes
- Cataloger URIs (starting with WikiData) will impact the data used for creator info cards displayed to patrons

To Summarize



Optimization



Collaboration



Open Access



Linked Data

Roadmap Highlights

Alma Roadmap for 2023-2024 published

Metadata Management

Electronic Resource Management

Digital Resource Management

Physical Resource Management

Acquisitions

Fulfillment and Resource Sharing

Analytics

Consortia

User Experience, Accessibility & Infrastructure

Home » Alma » Product Materials » Roadmap and Themes

Roadmap and Themes

Feature

Roadmap

- Alma Roadmap: (2023 - 2024)
- Alma Roadmap - Completed - 2022 H2
- Alma Roadmap - Completed - 2022 H1
- Alma Roadmap - Completed - 2021 H1
- Alma Roadmap - Completed - 2021 H2

Roadmap Webinar Series

- Alma 2022 Roadmap Webinar Series
- Alma 2023 Roadmap Webinar Series

Themes

- Library Independence
- Repository Searches - Enhanced UX
- Workflow Simplification
- Linked Open Data
- Controlled Digital Lending



Thank You!

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About Clarivate

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