

Alma Product Update

Dana Moshkovits | Alma Product Management

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

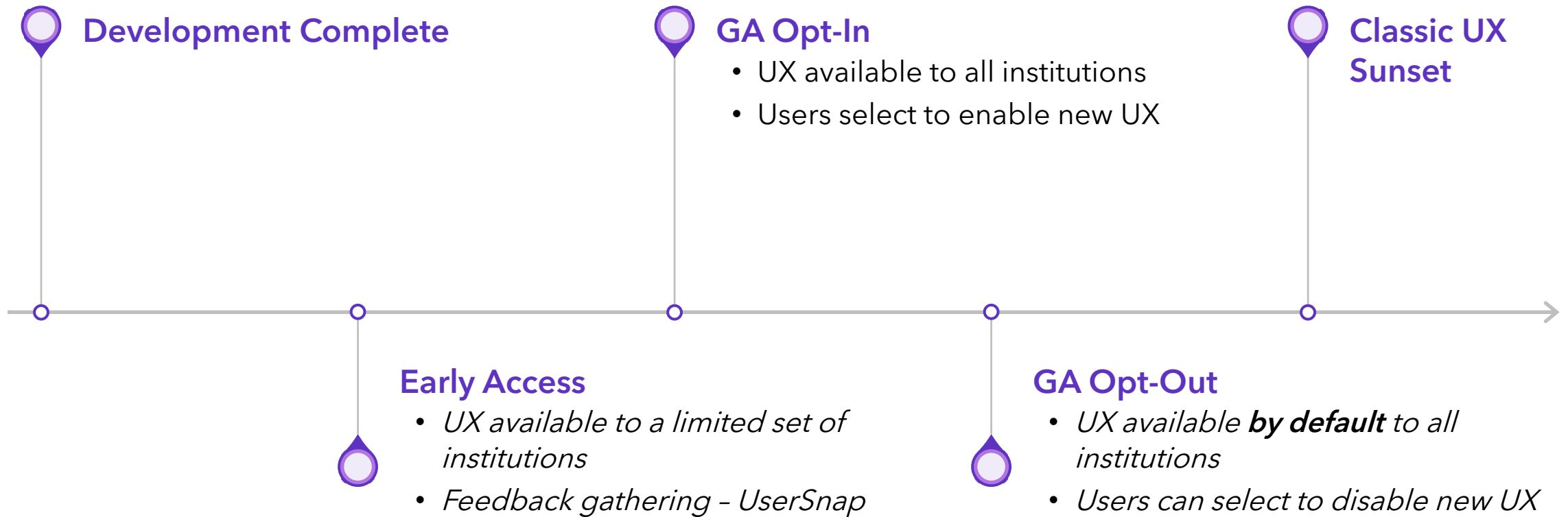


Sets



Analytics

UX Gradual Rollout Milestones



Workflow Simplification

RESOURCE SHARING TASK LISTS - NOW IN PRODUCTION

The screenshot displays the 'Borrowing Requests' interface. On the left, a sidebar allows refining requests by activity status (Active, Cancelled by staff, etc.), creation date, and update date. The main area shows a list of requests, with request 18, 'A kindness' by Cynthia Rylant, selected. The right pane provides a detailed view of this request, including general information (ISBN, external identifier), notes (e.g., 'Please supply by May 1st'), and the request form (chapter title, author, number, publication date). The interface is designed for efficient workflow management with inline editing and faceted search.

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' (In Review), 'Assignment' (Assigned to Me, Unassigned), 'Workflow Step' (In Review), 'PO Line in Claim' (No), 'Alert' (The bib record is, Mandatory information, Items already exist), 'Purchase Type' (Digital - One Time, Electronic Book - ..., Electronic Book - ...), and 'Vendor' (AMAZON COM, AMAZON FRANCE, GIFTS). The main table lists 8 purchase order lines with details such as item description, PO line number, vendor/account, and status. A detailed view of PO line 02-4194 is shown on the right, including a summary, PO line information, ordered items, vendor information, pricing and funding, receiving information, interested users, reporting codes, and associated PO lines.

Purchase Order Lines (1 - 8 of 8)

Sort by: Modification Date

Item	Description	PO Line	Vendor/Account	Status	Amount
1	00 : drawings 2000 at Barbara Gladstone Gallery / text by Klaus Kertess...	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, PO line: 15-302904	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

PO Line Summary

PO Line Information

Ordered Items (1)

Vendor Information

Pricing and Funding

Receiving Information

Interested Users

Reporting Codes

Bib Description

Invoice Lines (1)

Associated PO Lines

Communications

History (2)

Attachments

PO Line Information

MMS ID: 9999614980001021

Identifier: 0970342209

Acquisition method: Purchase

Invoice status: Fully invoiced

Material type: -

Additional PO line reference field: 42

Associated PO lines: -

Source type: Migration

Manual packaging

Cancellation restriction

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 the ExLibris Patron Services interface. At the top, there are navigation tabs 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 labeled 'My Institution' with a 'Scan Item Barcode' placeholder is visible. The main area shows a list of loans with columns for item details, library information, and actions. The right sidebar features a user profile for 'Aulenback, Jane' (ID 65758397) with details on user group, expiration date, and active balance. Below the profile are sections for 'System Notes (10)' and 'User Notes (7)', both showing repeated messages about overdue items.

Item	Barcode	Due date	Owning Library	Item policy	Loan date	Actions
1	Water	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	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	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	16/03/2021 13:02:56 PM IST	Owning Library O'Neill	One week loan	16/03/2020	Requests (1), Notes, Renew, ...
5	Water	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	16/03/2021 13:02:56 PM IST	Owning Library O'Neill	One week loan	16/03/2020	Requests (1), Overdue, Renew, ...

Benefits

- Quicker access to more information
- Visual tips
- Personalization

Workflow Simplification

REPOSITORY SEARCH - NOW IN DEVELOPMENT

The screenshot displays the 'Repository Search' interface. On the left, a sidebar contains 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', selected. The right panel provides a detailed view of this record, including its title, author (Robert Cumming), subject, and various identifiers (MMS ID, Record number, ISSN). It also lists 'Electronic Portfolios' and offers options to 'View full table' or 'Generate new search'.

Library scope: All

All Titles (1 - 20 of 80,448) | history

Sort by: Rank | Secondary Sort by: Rank

Material Type

- Book (86950)
- Computer file (47)
- Journal (2850)
- + More (4)

Resource Type

- 2D non-projectable ... (14)
- 2D non-projectable g... (9)
- 3D artifact - Physical (4)
- + More (25)

Language

- Afrikaans (2)
- Akkadian (5)
- Altaic (Other) (1)
- + More (123)

Publication Year

- 0976 - 1768 (22793)
- 1769 - 1977 (22822)
- 1978 - 2001 (22345)
- + More (2)

Collection

- Art Collection_Picasso (1)
- Art titles (5300)
- mn (20)
- + More (3)

1 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

2 History of Rome / Michael Grant.
By Grant, Michael, (New York : Scribner's, c1978.)
Subject Rome--History.
MMS ID 99123710800121
ISBN 0684159864

3 Art & antiques
By Cumming, Robert ([Place of publication not identified] DK Publishing 2005)
Subject Art--Handbooks, manuals, etc
Visual Arts Art, Architecture & Applied Arts and others
Language English
MMS ID 99229793000121
Peer Reviewed

4 Responsible history [electronic resource] / Antoon De Baets.
By Baets, Antoon de, (New York : Berghahn Books, 2009.)
Subject History--Moral and ethical aspects. Historians--Professional ethics. Electronic books.
MMS ID 99329242600121
ISBN 1-282-62741-4 and others

Art & antiques
By Cumming, Robert ([Place of publication not identified] DK Publishing 2005)
Peer Reviewed
Add Label

General information

Material Type Journal
Record number (OCoLC)51460137
ISSN 0040-0610

MMS ID 99229793000121
Creation Date 26/02/2012 04:39:55 AM IST
Modification Date 10/12/2014 08:07:43 AM IST

MARC Record information

Electronic Portfolios (3)

Collection Name EBSCOhost MasterFILE Premier Interface EBSCOhost, Full text In Deletion Process	Service Type Full Text Portfolio ID 123456789
Collection Name General OneFile (Gale Cengage General OneFile) Interface Galegroup	Service Type Full Text Portfolio ID 123456789
Collection Name Gale World History in Context Interface Galegroup	Service Type Full Text Portfolio ID 123456789

Add Local portfolio

View full table | Generate new search

Save Query

Sections | Edit Record

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



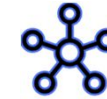
Insights

- 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 a search bar. The main menu on the left lists 'Alma', 'Acquisitions', 'Resources', 'Go VE', 'Fulfillment', 'Admin', 'Analytics', and 'Configuration'. The top right corner shows 'Resource Sharing Library - Resource Sharing Desk' and a 'Configuring: Network Zone' dropdown menu. The main content area is titled 'Terms Of Use' and shows a table with 10 rows of configuration data. The table columns are 'Name', 'Type', 'TOU Owner', and 'Description'. The table is filtered to show 'Terms Of Use Type: All'.

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
		DARA smart recommendation infrastructure	Alma Resource Sharing	
OTB Consortia title reports		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

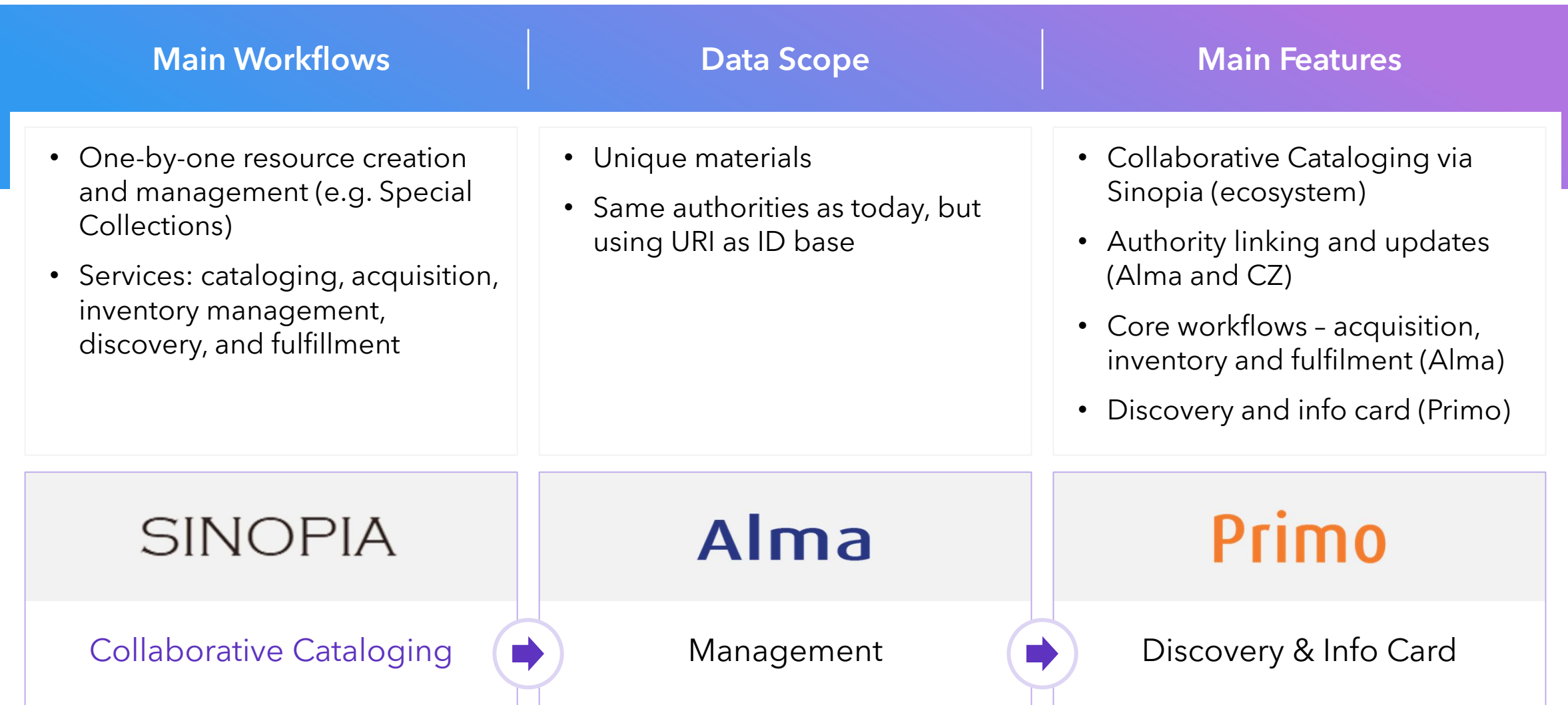


CATALOGING

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



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

SINOPIA

Dashboard Editor Resource Templates Actions Search Sinopia art

Monograph Work (BF2) Un-Nested

Send to Alma

Close Save

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

Notes about the Work

Dissemination

Class: http://id.loc.gov/ontologies/bibframe/Work

Contributor

BIBFRAME Record Simple View

Add Holdings Back

In the meantime

MMS ID 991010862919704986

Suppress from Discovery Yes

Export to WorldCat Don't publish

Brief level -

Record Format bibframe

Suppress from external search No

Originating system 34CBUA_UMA

Originating system ID

Record

<record>

<rdf:RDF xmlns:bfb="http://id.loc.gov/ontologies/bibframe/" xmlns:bfc="http://id.loc.gov/ontologies/bibframe/" xmlns:foaf="http://xmlns.com/foaf/0.1/" xmlns:dcterms="http://purl.org/dc/terms/" xmlns:foaf="http://xmlns.com/foaf/0.1/" syntax="xml" xmlns:rdfs="http://www.w3.org/2000/01/rdf-schema#" xmlns:skos="http://www.w3.org/2004/02/skos#" >

<bfc:work rdf:about="http://id.loc.gov/resources/works/5655977">

<bfc:aap:McNight, Sharon. In the meantime/bfc:aap>

<bfc:aap-normalized-mcnightsharoninthemeantime/bfc:aap-normalized>

<rdf:type rdf:resource="http://id.loc.gov/ontologies/bibframe/Audio"/>

<bfc:content rdf:resource="http://id.loc.gov/vocabulary/contentTypes/prm"/>

<bfc:language rdf:resource="http://id.loc.gov/vocabulary/languages/eng"/>

<rdfs:label-in the meantime/rdfs:label>

<bfc:title>

<bfc:title>

<rdfs:label-in the meantime/rdfs:label>

<bfc:mainTitle-in the meantime/bfc:mainTitle>

</bfc:title>

</bfc:title>

<bfc:tableOfContents>

<rdfs:label>The best things in life are free -- Meantime -- Picture in the hall -- City of New Orleans -- Blues rhapsody -- Calling you -- The man I love -- Guilty -- I

</bfc:tableOfContents>

</bfc:tableOfContents>

<bfc:subject rdf:resource="http://id.loc.gov/authorities/subjects/sh91003897">

<bfc:contribution>

<bfc:contribution>

<bfc:agent rdf:resource="http://id.loc.gov/rwo/agents/nr95040998">

<bfc:role rdf:resource="http://id.loc.gov/vocabulary/relators/prf"/>

</bfc:contribution>

</bfc:contribution>

VIDEO

Harry Potter and the Deathly Hallows. Part 1

Yates, David, 1963-; Kloves, Steven; Heyman, David, 1961-; Barron, David; Wigram, Lionel; Serra, Eduardo, 1943-; Craig, Stuart, 1942-; Day, Mark; Desplat, Alexandre; Temime, Jany; Radcliffe, Daniel, 1989-; Grint, Rupert, 1988-; Watson, Emma, 1990-; Bonham Carter, Helena, 1966-; Coltrane, Robbie; Fienies, Ralph; Gambon, Michael; Gleeson, Brendan; Griffiths, Richard, 1947-; Hurt, John, 1940-; Ifans, Rhys, 1968-; Isaacs, Jason, 1963-; Nighy, Bill, 1949-; Rickman, Alan; Shaw, Fiona, 1958-; Spall, Timothy, 1957-; Staunton, Imelda, 1953-; Thewlis, David, 1963-; Davis, Warwick; Felton, Tom, 1987-; Jones, Toby, 1967-; Legeno, Dave, 1963-; McBurney, Simon; McCrory, Helen; Moran, Nick, 1969-; Mullan, Peter; O'Hara, David, 1965-; Pooley, Clémence; Tena, Natalia, 1984-; Walters, Julie, 1950-; Williams, Mark, 1959-; Wright, Bonnie, 1993-; Rowling, J. K.; Heyday Films.; Warner Bros. Pictures (199-); Warner Home Video (Firm) c2011

Available at O'Neill Media 7 day (PR6068 .O93 P687 2011) >

Send to

EXPORT BIBEX EXPORT RIS EASTVIEW ENDNOTE REWORKS PRINT CITATION PERMALINK

LINKS

EMAIL

Get it

REQUEST: Interlibrary Loan

Please sign in to check if there are any request options. Sign in

BACK TO LOCATIONS

LOCATION ITEMS

O'Neill

Available, Media 7 day; PR6068 .O93 P687 2011

(1 copy, 1 available, 0 requests)

Item in place

Loanable

Related Persons

J K Rowling

British author and philanthropist

Born 31 July 1965

Place of birth Yate

Pseudonym: Robert Galbraith, J. K. Rowling

Field of work literature, fantasy literature, children's and youth literature

Educated at Wyndean School, University of Exeter

Notable work Harry Potter, Harry Potter and the Philosopher's Stone, Harry Potter and the Chamber of Secrets, Harry Potter and the Prisoner of Azkaban, Harry Potter and the Goblet of Fire, Harry Potter and the Order of the Phoenix, Harry Potter and the Half-Blood Prince, Harry Potter and the Deathly Hallows

Influenced by George Eliot, Edith Nesbit, Emily Brontë, Lloyd Alexander, G. K. Chesterton, Elizabeth Goudge, Stephen King, T. H. White, J. D. Salinger, Jessica Mitford, Sylvia Plath, C. S. Lewis

Wikipedia

Show less

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



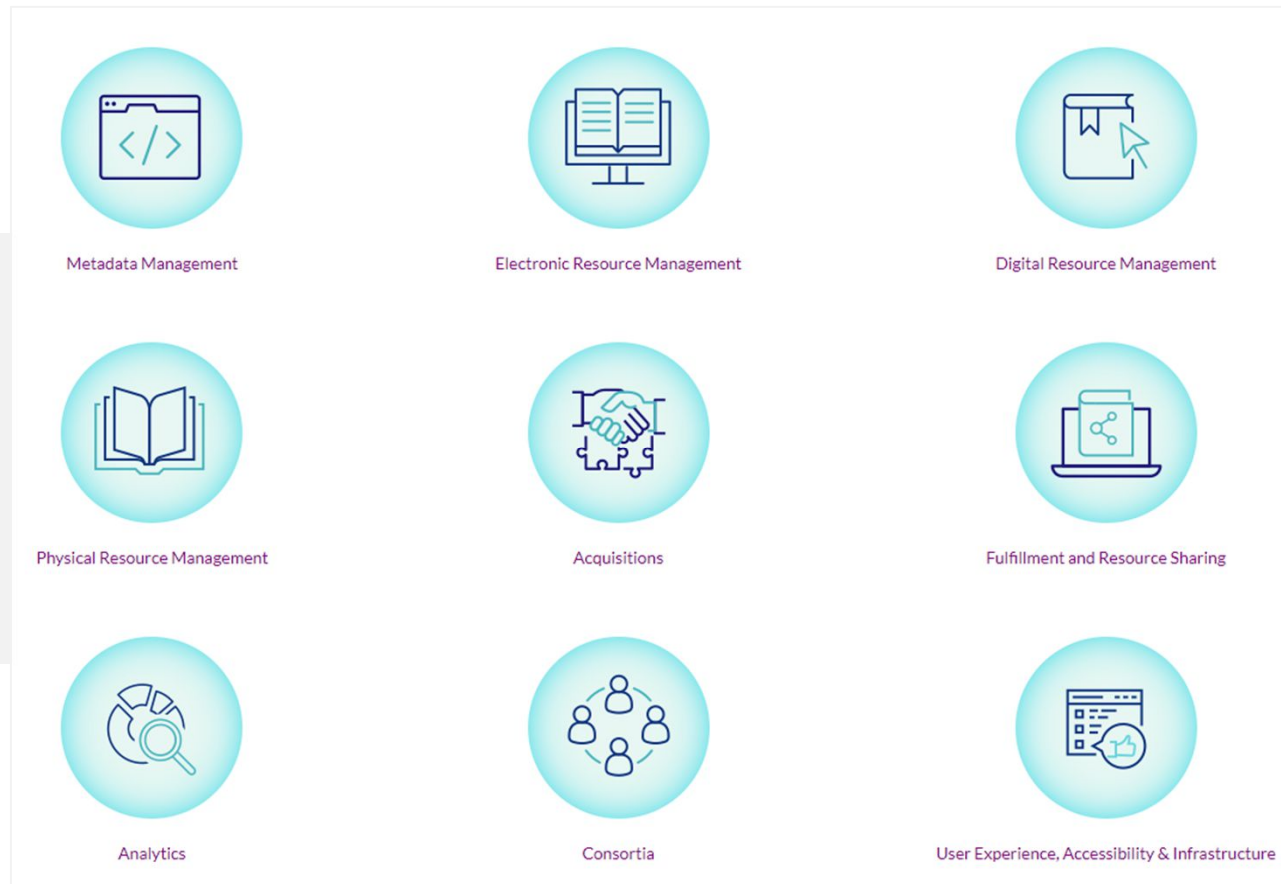
Open Access



Linked Data

Roadmap Highlights

Alma Roadmap for 2023-2024 published



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!

Dana.Moshkovits@clarivate.com

About Clarivate

Clarivate is the leading global information services provider. We connect people and organizations to intelligence they can trust to transform their perspective, their work and our world. Our subscription and technology-based solutions are coupled with deep domain expertise and cover the areas of Academia & Government, Life Sciences & Healthcare and Intellectual Property. For more information, please visit [clarivate.com](https://www.clarivate.com)

© 2023 Clarivate

Clarivate and its logo, as well as all other trademarks used herein are trademarks of their respective owners and used under license.