

# AI in the Loop

Making Librarians' Lives  
Easier with AI Tools



# Agenda



Background & Challenges

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Our Approach and Vision

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Collaborating With the Community

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The Alma AI Focus Group

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Sneak Peek: What We're Looking Into

# But first...

A little bit about me

A librarian 😊

## Working in Alma for over 10 years

- Product Manager (metadata & UX)
- Business Analyst (Fulfillment)
- Professional Services
- Technical Support

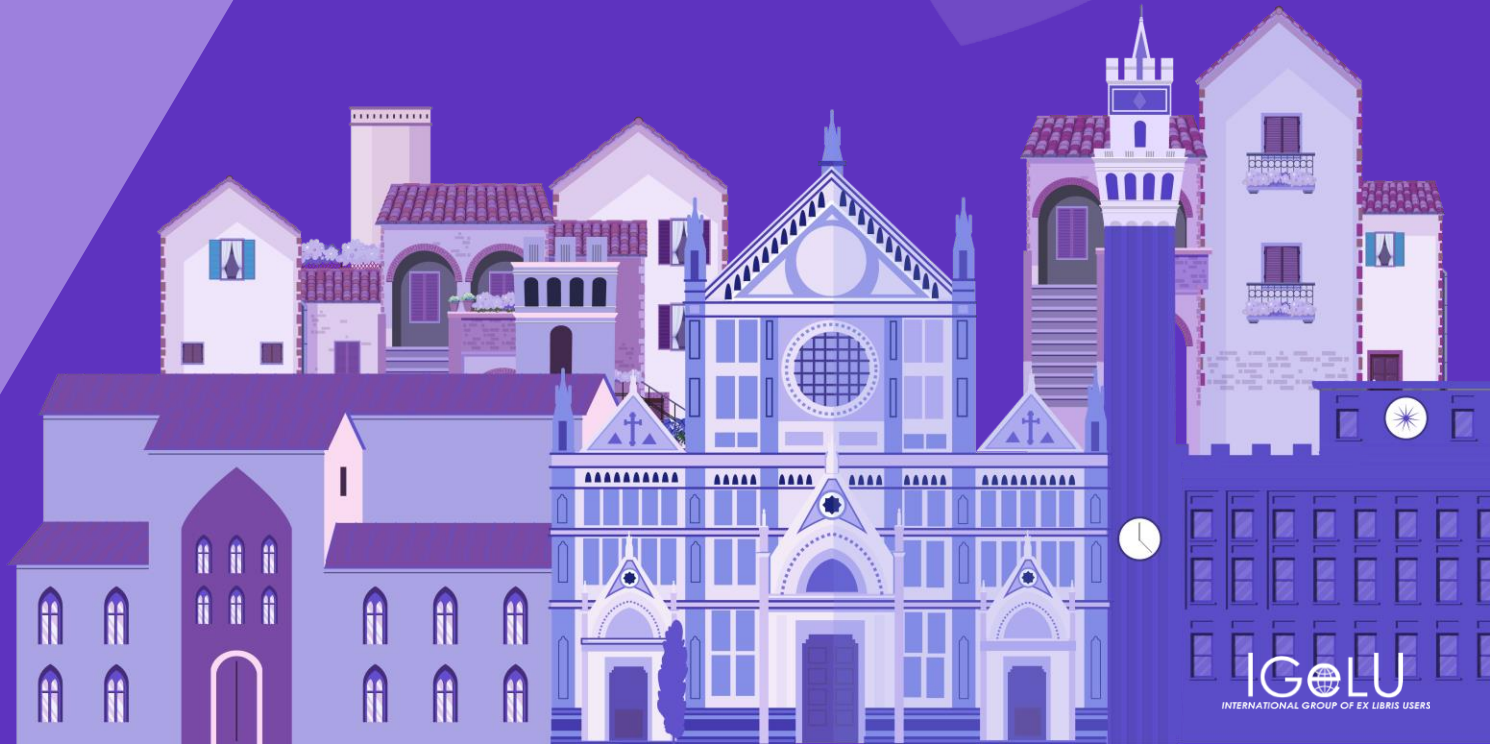
## Clarivate's liaison to

- PCC Standing Committee on Applications
- PCC Task Group on AI and Machine Learning for Cataloging and Metadata

## And personally...

- M.A in Cognitive Science, researching unconscious processes
- 2<sup>nd</sup> generation science fiction fan...

# Background & Challenges



# Libraries of the Future



## Libraries are facing immense challenges, including

- Evolving patron expectations
- Growing complexity of workflows and standards
- Expanding scope of materials
- Limited resources



## Innovative AI solutions are transforming the world

- Generative AI can create text, images, videos... (who can catalog all this???)
- Large Language Models (LLM) can process and generate metadata, queries and more
- AI Agents accomplish complex, multi-step tasks

# What is Artificial Intelligence?

(These are not the droids you're thinking of...)

- The AI we're seeing today is **not** the sci-fi AI (yet...):
  - Not a strong, generalized AI - **doesn't understand**
  - Not self-aware, no "Genuine People Personalities" (but can sound like it!)
- A complex **statistics/probabilities engine**
- Field-specific (language models, images, driving...) - but being combined more and more
- Agentic AI - an AI "manager" using various "tools"

# Generative AI

Potential, challenges and risks



## Potential

- Assisting librarians
- Improving workflows
- Increasing efficiencies
- Saving time and effort
- Data analysis
- Error detection



## Challenges

- Generated "hallucinations"
- Massive creation of data
  - E.g., Amazon guidelines following AI generated books
- Impact on trusted sources
  - Is the internet being "poisoned" with AI?

# Available in Alma Today

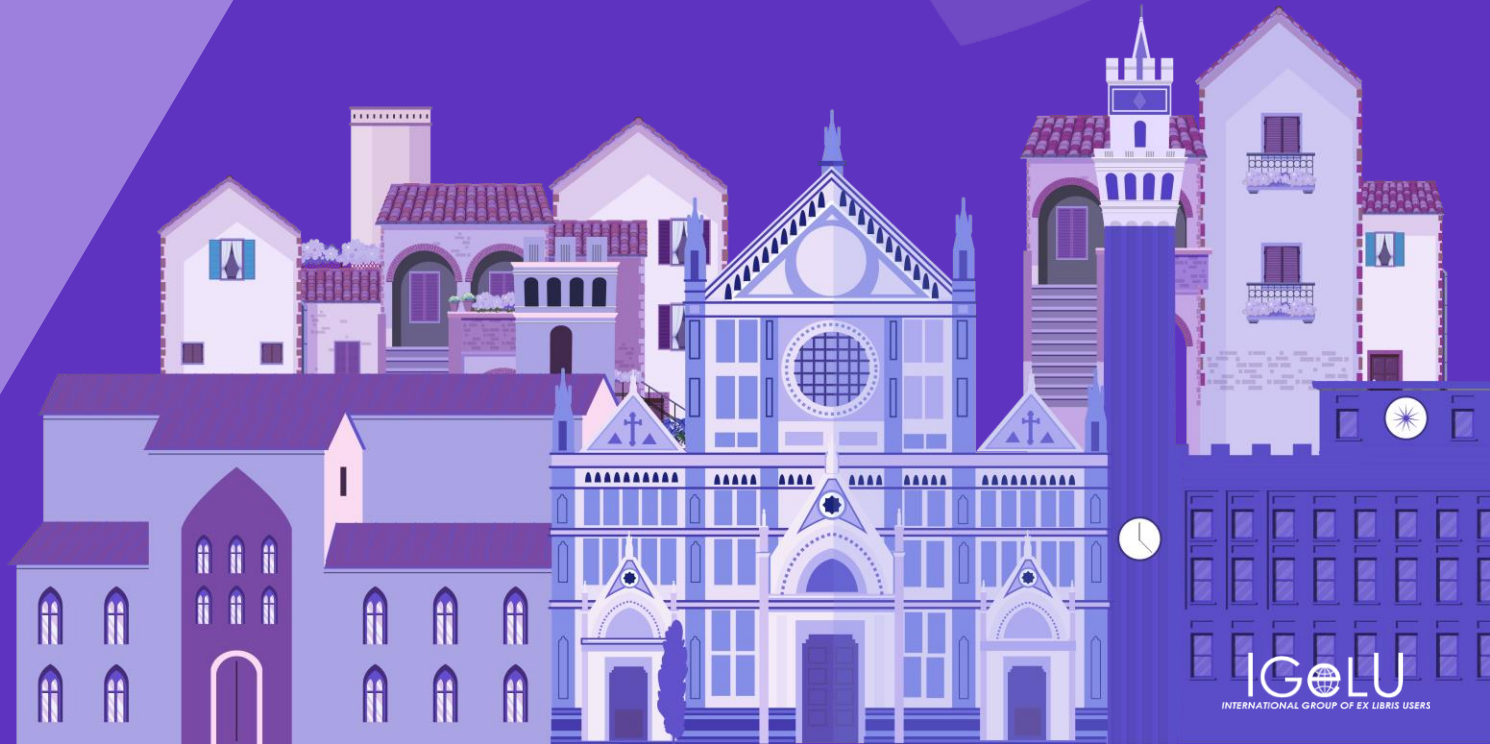
## The AI Metadata Assistant

- Generates MARC 21 metadata suggestions
- Mediated workflow
- Cataloger control
- Based on description/ images of the resource

## The Metadata Generator in the Community Zone

- Full-text based
- Available for specific resources (according to type, licenses, etc.)
- Enriching records with specific fields

# Our Approach and Vision



# AI at the Service of Libraries and Librarians

## Cut Through Challenging Workflows

- Metadata
- Acquisitions and Technical Services
- Selection
- Analytics
- Configuration
- ...and more

## Introduce new ways to Automate, Simplify and Analyze

- Data Assessment & Improvement
- Bulk Processes
- Ease of Use
- Insights and Data-Driven Recommendations

## Key Benefits

- Increased Efficiency
- Reduced Manual Work
- Optimized Budget Use

# AI in the Library: Our Strategy & Approach



## Be Beneficial

Offer helpful and ethical solutions

Identify needs and pain points

Assist librarians

Respect laws and best practices

Community Collaboration



## Transform & Increase Efficiencies

Unlock library workflow efficiencies with innovative technology

Agentic AI & Assistants

Metadata using LLM & image processing

Process Automation

Data Insights



## Responsible AI Use

AI Principles Informed by the Library Community

Human in charge

Opt-in features

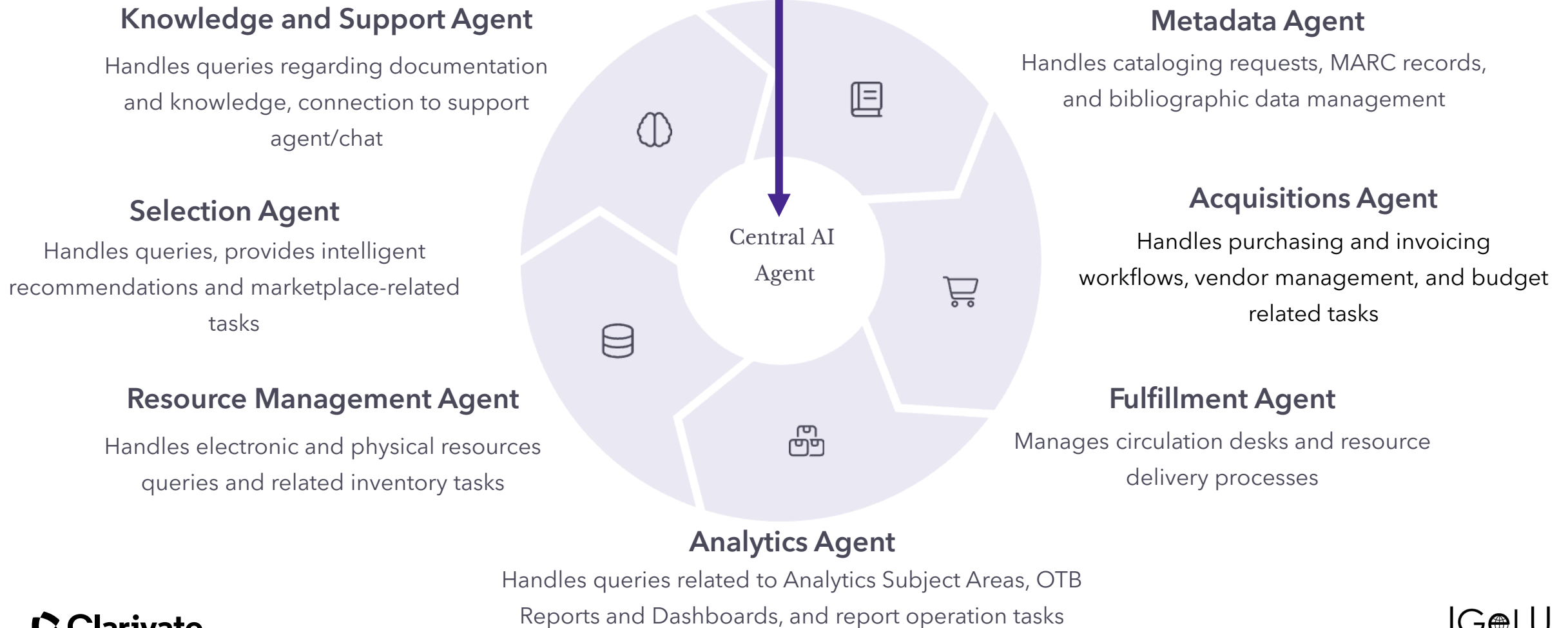
Ethical & Safe: AI not trained on uploaded data, limited web access

Academic AI Platform: Powering All Clarivate Products

# AI Assistant Orchestration in the Library Platform

Our vision: providing librarians an alternative experience - interact with the Library Platform through AI orchestration

Main conversational interface that understands user intent and coordinates specialized responses.



# Collaborating With the Community



# Collaborating With the Library Community

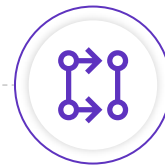
We feel the  
community's input  
is crucial to...



Identify needs and pain points



Increase efficiency



Assess the abilities of the  
new tools



Enhance quality

# AI Metadata Assistant Development Process



# The Assistant's Principles

- The AI suggests, the cataloger catalogs
- Keeping control in the hands of the library and librarians
- Utilize LLM text and vision APIs to generate metadata
- Validating and filtering results (e.g., existing subject headings)
- Provided data is processed solely for metadata generation
- No training of third-party AI models

## ✦ New Record From AI Assistant

Enter the metadata and/or images you want to use to generate the record. The new record draft will be pushed to MDE when ready.

Title\*

Enter Text Here

Summary Note

Enter Text Here

Author

Enter Text Here

Record Format

Marc21

ISBN

Enter Text Here

Expand from Template

Books

Content Note

Enter Text Here

Requested Metadata\*

Requested Metadata: All x

Attachments

Upload up to 4 images of the book (e.g. back cover, colophon)



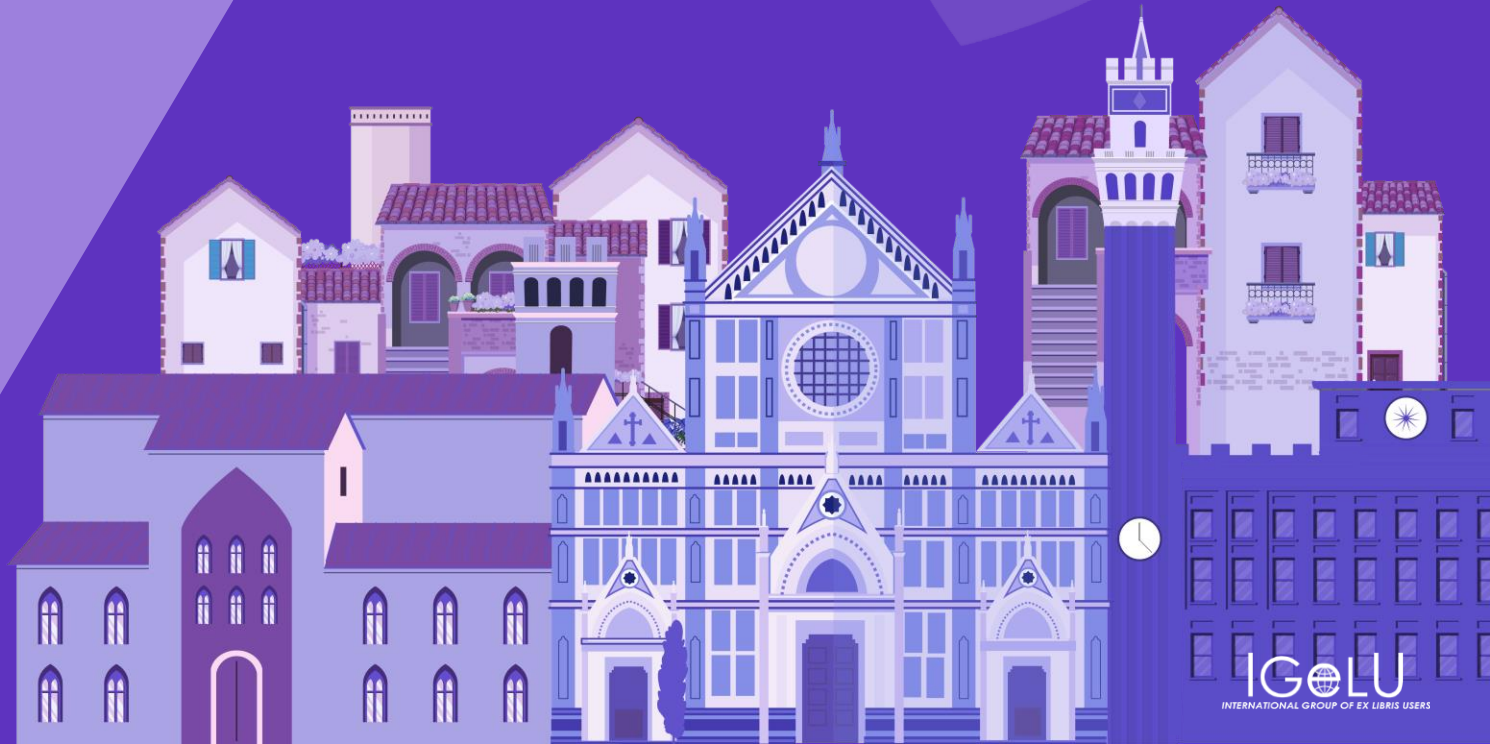
Open webcam

Drop a file or [Browse files](#)

Cancel

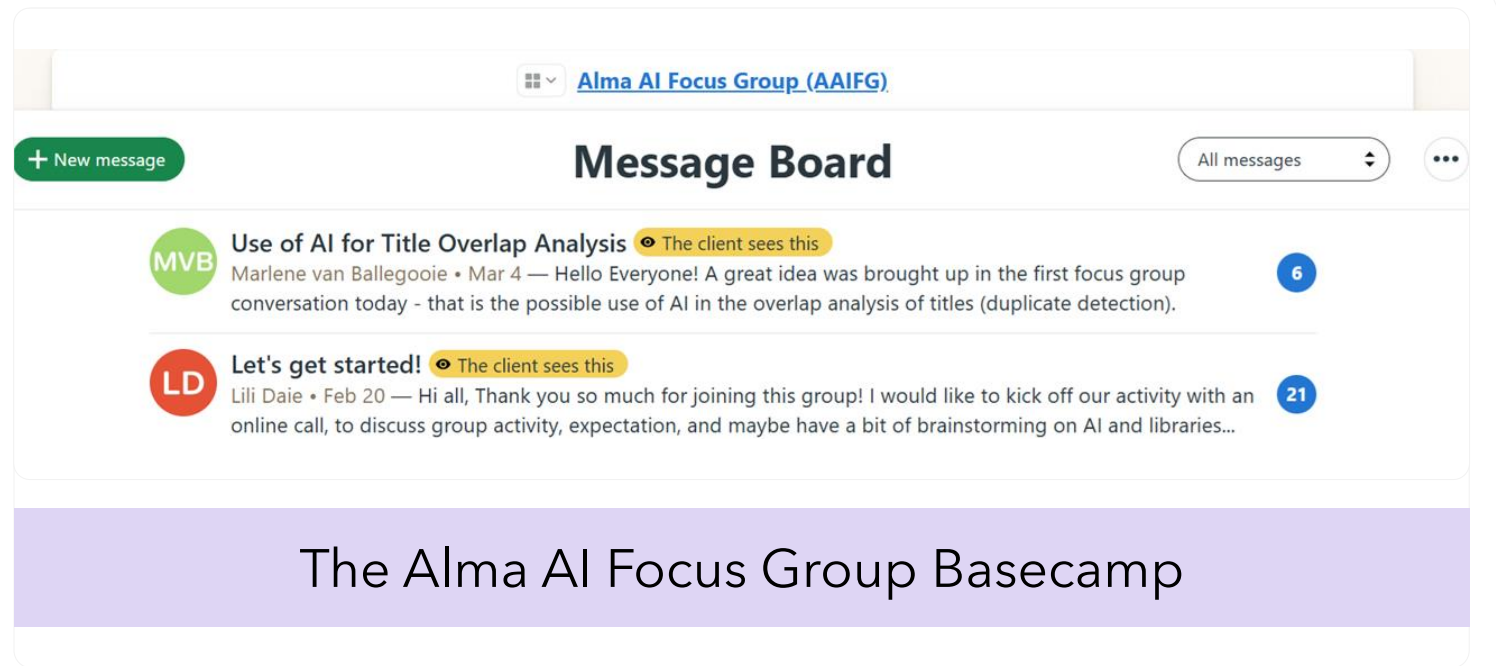
Generate Record

# The Alma AI Focus Group



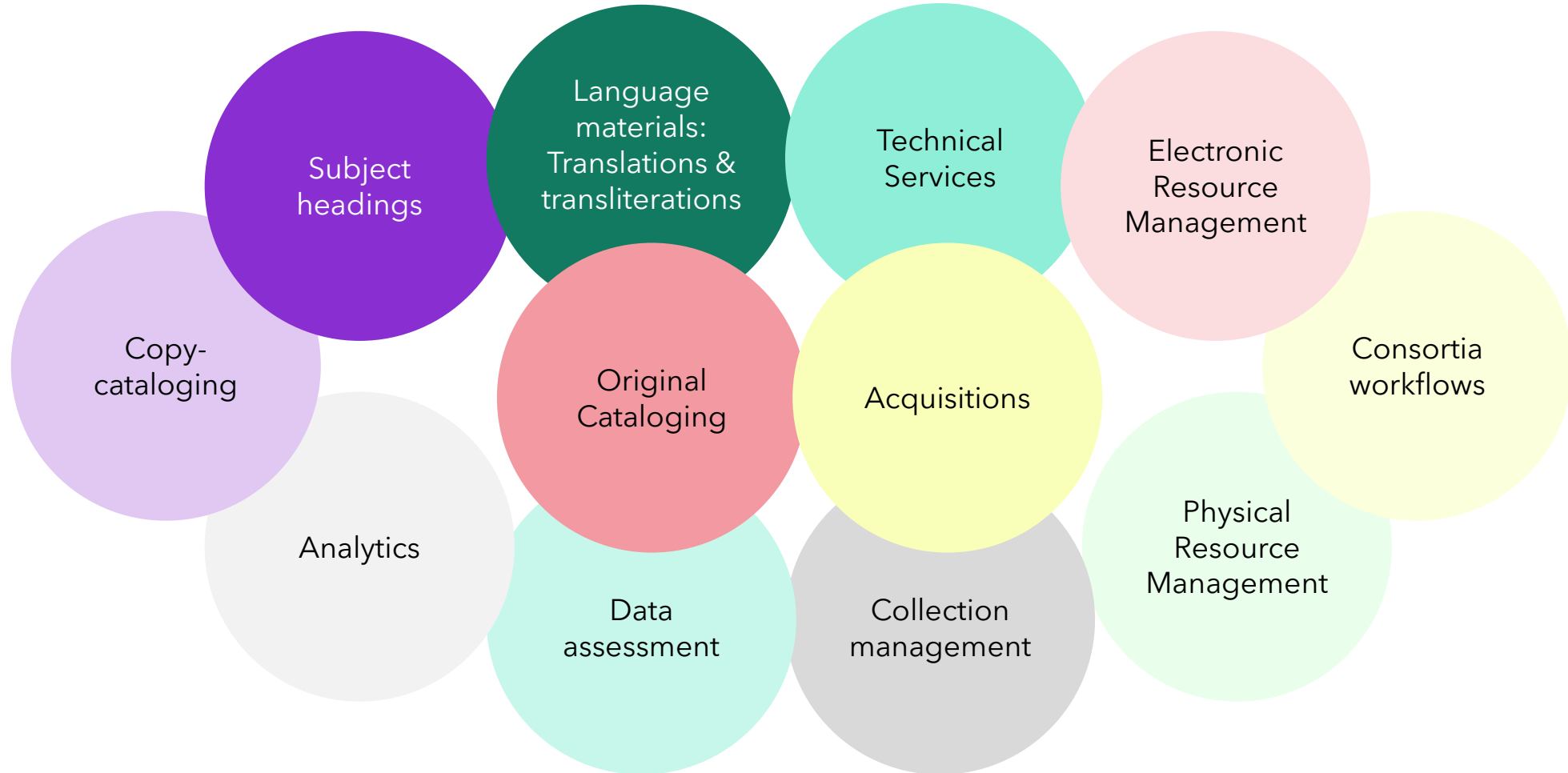
# Identifying Libraries' Needs

- Online brainstorming
- Basecamp discussions
- Diverse representation of countries, library types, and areas of interest



# Diverse Interests and Expertise

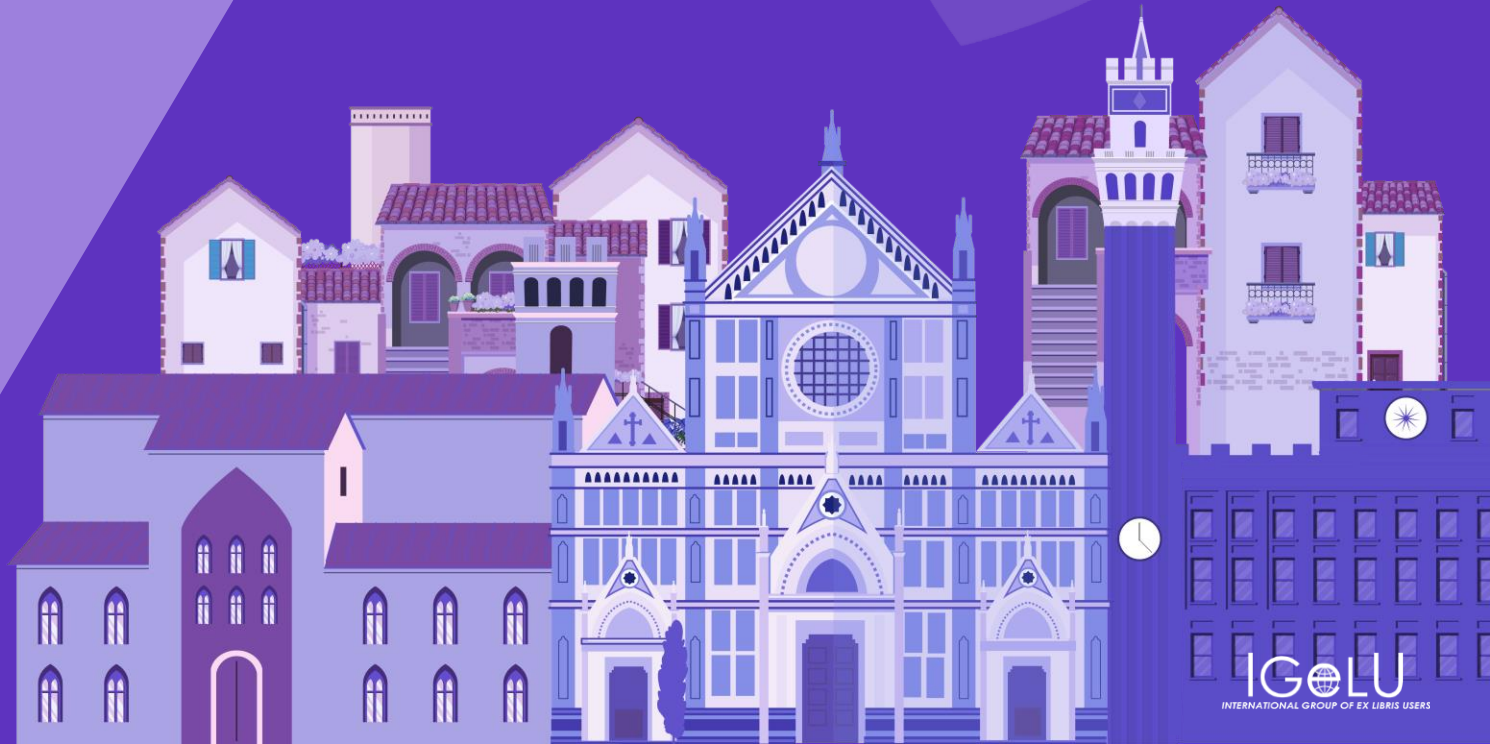
Librarians from various countries and library types



# Sneak Peek

## What We're Looking Into

Disclaimer: These are projects in the research and viability assessment stages – not all will be developed



# AI Assistants

The screenshot shows the Alma Assistant interface. At the top, it says "Alma Assistant BETA". The first message from the assistant states: "The total available balance for all active funds in the current fiscal period is 704,983,110.55 USD." A user then asks, "Can you break down the balance by fund?". The assistant responds with a bar chart titled "Show Text" showing the "Available Balance (USD)" for various "Fund Names".

Fund Name	Available Balance (USD)
Alumni Funds	~100,000
E - Humanities	~200,000
E - Sciences	~50,000
E - Social Scienc...	~100,000
Facultad de dise...	~100,000
Facultad medicin...	~100,000
GOBI Deposit Acc...	~100,000
Keyes Family End...	~100,000
Law - E-Resource...	~100,000
Law - Monographs	~100,000

Below the chart, there are three suggested questions: "Which fund has the highest balance?", "Can you show me the largest transaction for a specific fund?", and "What are the inactive funds?". At the bottom, there is a text input field with the placeholder "What is your question?" and a "Character Limit 0/400" indicator.

## Conversational AI assistance for library staff



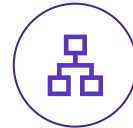
Enabling staff to ask natural language questions



Assistance performing complex actions



Provides answers based on the library's data

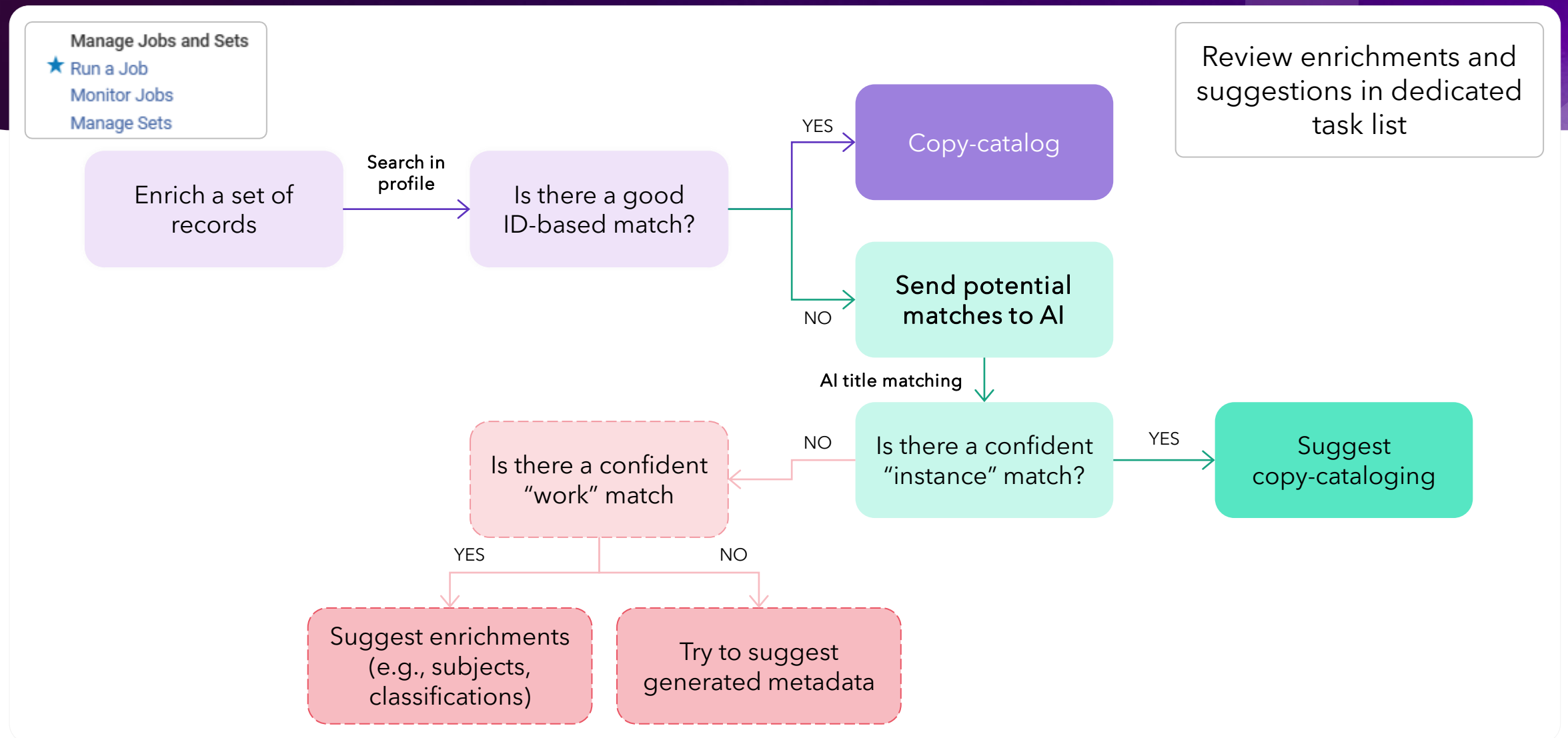


Helping streamline staff workflows



Reducing dependency on manual reporting

# Enrich Bibliographic Records in Bulk: Conceptual Flow



# Alma AI Insights - demo

Getting analytical insights directly to the relevant librarians

- Integrate Alma analytics data and AI reasoning
- Present meaningful data to each user
- Concise and easy to understand

The screenshot displays the Alma AI Insights interface within a web browser. The browser address bar shows the URL: `sq003-na03.alma.exlibrisgroup.com/ngu-%2Fmng%2Faction%2Fhome.do%3Fngl%3Dtrue`. The interface includes a navigation menu on the left with categories like Alma QA, Collection Development, Acquisitions, Resources, Discovery, Fulfillment, Admin, and Analytics. The main content area is titled "Welcome, Ex Libris Staff" and shows a "Tasks" list on the left and a "Notifications" section in the center. A prominent notification window titled "INSIGHTS Powered by AI" is displayed, showing the following text: "Purchase Requests in the Previous Year. Nearly all months show that purchase requests ended in a final decision—with 11 out of 12 months showing zero requests in review—suggesting that the requests are processed to a clear outcome." Below the text is a "Download Report" button. On the right side, there is a "Real-Time Notifications" panel with several alerts, including one about purchase requests in the previous year and another about electronic collections usage. The bottom of the browser window shows a video player interface with a progress bar at 0:16 / 2:48 and a volume icon.

# Questions?





# Thank You

# Your voice matters!

Take our 2-min  
survey now



## Help us innovate

Your feedback drives the next generation of valuable solutions

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## See real impact

The improvements you experience today are direct results of feedback from customers like you

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## Shape the future

Help us prioritize improvements that will continue to add value to your work