

# Alma Product Conversation

Maud Arnaud - Product Manager

Adina Marciano - Product Manager



# Evolving Efficiency



## Efficiency through Experience

Smarter UI & streamlined workflows



## Efficiency through Intelligence

Conversational AI & decision support



## Efficiency through Automation

Process automation & background tasks

# Efficiency Through Experience Continuing the Rollout: Smarter, Simpler Screens



## Streamlined Screens

Redesigned Title Search and fulfillment interfaces with fewer clicks, better navigation

Smart defaults that anticipate common actions



## Workflow Improvements

Reduced steps for routine processes

Enhanced batch actions for bulk processing



## Customer-Driven

Improvements based directly on usability studies

Features requested through customer feedback channels

# A New UX Across Alma

Updated experience now covers ~80% of the most commonly used Alma screens

The image displays two screenshots of the Alma library management system interface. The left screenshot, titled 'Title Search', shows a search results page for 'globalization' with various filters and facets on the left. The right screenshot, titled 'Manage Patron Services', shows a list of loans for a specific patron, with a sidebar for managing patron details and a navigation menu on the left.

## Title Search

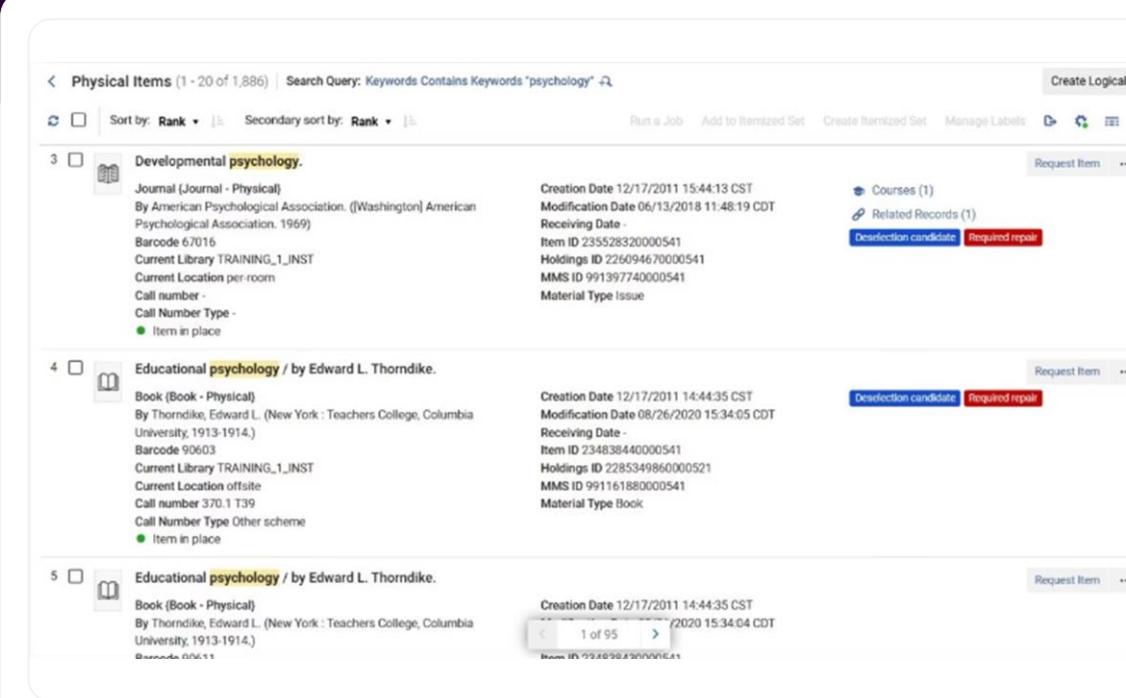
Rollout Ends August 2025

## Manage Patron Services

Rollout Complete May 2025

# A New UX Across Alma

More projects in 2026...



Physical Items (1 - 20 of 1,886) | Search Query: Keywords Contains Keywords "psychology"

Sort by: Rank

Request Item

**3**  **Developmental psychology.**  
Journal (Journal - Physical)  
By American Psychological Association. ([Washington] American Psychological Association, 1969)  
Barcode 67016  
Current Library TRAINING\_1\_INST  
Current Location per-room  
Call number -  
Call Number Type -  
● Item in place

Creation Date 12/17/2011 15:44:13 CST  
Modification Date 06/13/2018 11:48:19 CDT  
Receiving Date -  
Item ID 235528320000541  
Holdings ID 226094670000541  
MMS ID 991397740000541  
Material Type Issue

**4**  **Educational psychology / by Edward L. Thorndike.**  
Book (Book - Physical)  
By Thorndike, Edward L. (New York : Teachers College, Columbia University, 1913-1914.)  
Barcode 90603  
Current Library TRAINING\_1\_INST  
Current Location offsite  
Call number 370.1 T39  
Call Number Type Other scheme  
● Item in place

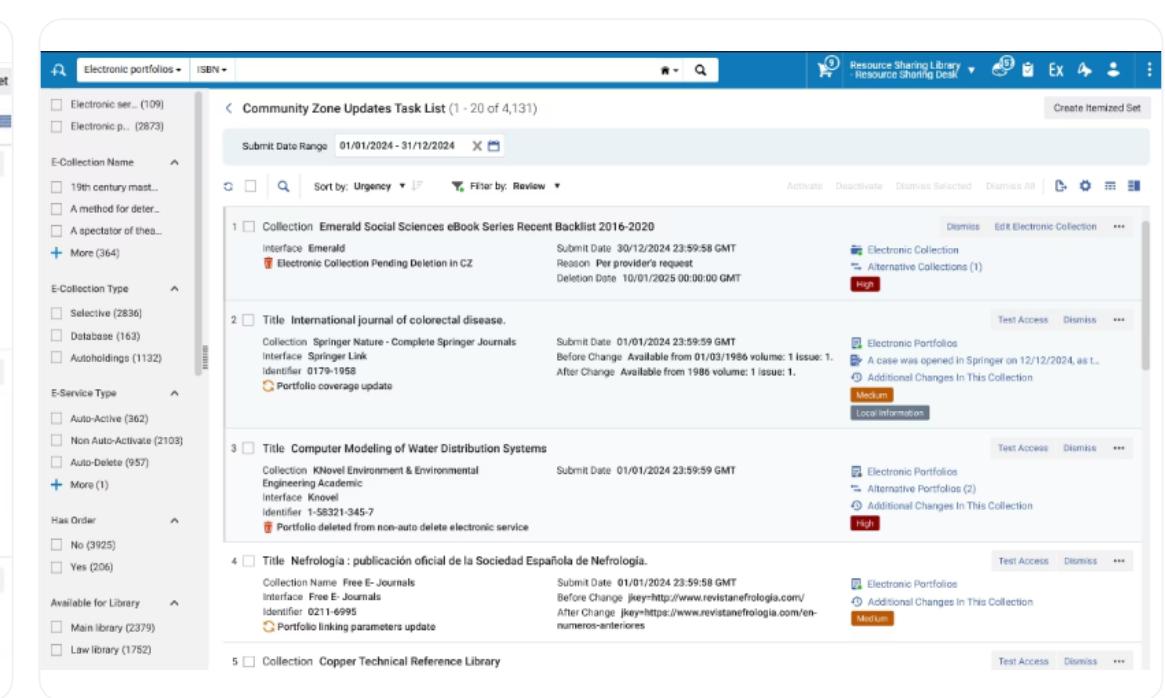
Creation Date 12/17/2011 14:44:35 CST  
Modification Date 08/26/2020 15:34:05 CDT  
Receiving Date -  
Item ID 234838440000541  
Holdings ID 2285349860000521  
MMS ID 991161880000541  
Material Type Book

**5**  **Educational psychology / by Edward L. Thorndike.**  
Book (Book - Physical)  
By Thorndike, Edward L. (New York : Teachers College, Columbia University, 1913-1914.)  
Barcode 90611

Creation Date 12/17/2011 14:44:35 CST  
Modification Date 08/26/2020 15:34:04 CDT  
Receiving Date -  
Item ID 234838440000541  
Holdings ID 2285349860000521  
MMS ID 991161880000541  
Material Type Book

## Physical Item Search

Including new features



Electronic portfolios - ISBN -

Community Zone Updates Task List (1 - 20 of 4,131)

Submit Date Range 01/01/2024 - 31/12/2024

Sort by: Urgency

**1**  Collection Emerald Social Sciences eBook Series Recent Backlist 2016-2020  
Interface Emerald  
Reason Per provider's request  
Delete Date 01/01/2025 00:00:00 GMT

**2**  Title International journal of colorectal disease.  
Collection Springer Nature - Complete Springer Journals  
Interface Springer Link  
Identifier 0179-1958  
Portfolio coverage update

**3**  Title Computer Modeling of Water Distribution Systems  
Collection KNovel Environment & Environmental Engineering Academic  
Interface KNovel  
Identifier 1-58321-345-7  
Portfolio deleted from non-auto-delete electronic service

**4**  Title Nefrología : publicación oficial de la Sociedad Española de Nefrología.  
Collection Free E-Journals  
Interface Free E-Journals  
Identifier 0211-6995  
Portfolio Linking parameters update

**5**  Collection Copper Technical Reference Library

## CZ Update Task List

Including new features

# 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

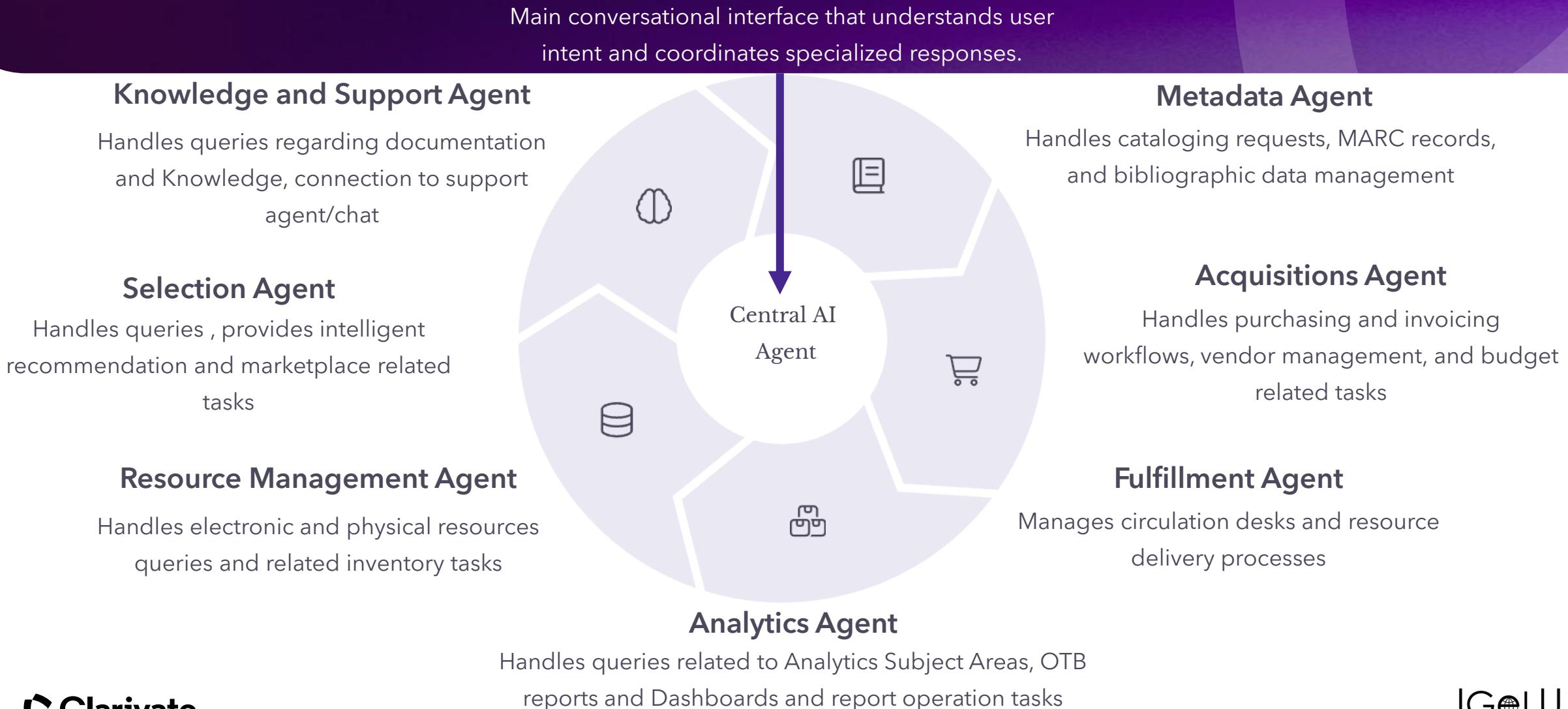
Opt-in features

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



# Efficiency Through Intelligence Conversational AI

Exploring a different way to do things - Currently in Research Mode

1

## Natural Commands

"What is the overall comparison of encumbrances versus expenditures versus allocations in the filtered data?"

2

## System Processing

AI interprets intent and context

3

## Data Retrieval

Query executed with appropriate permissions

4

## Results Delivered

Formatted response with actionable options



Conversational AI represents a significant leap in how users interact with Alma. By leveraging natural language processing, users can interact with their data conversationally.

- Drastically reduce time-to-insight
- Provide intelligent guidance, not just information
- Enable tasks to be completed in a simpler manner

*We are actively developing this capability and gathering feedback to refine its implementation.*

# AI-Powered Funds & Ledgers

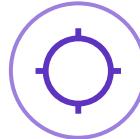


The screenshot displays the Alma library management system interface. The top navigation bar includes links for 'All titles', 'MMS ID', 'Manage Deleted Repository', 'All Mapping Tables', 'Browse Shelf Listing', 'Customer Parameters', and 'Monitor Jobs'. The top right corner shows the library name 'Theology and Ministry Library - TML Main Circ Desk' and various user icons. The main content area features several cards: 'Consortia Member Links' (with a dropdown for 'Select institution'), 'Organization Calendar' (showing a weekly view for July 16-19, 2025, with 'View Full Calendar' link), 'Primo Dashboard' (showing 'LAST PUBLISHING JOB DETAILS' with starting time 16/07/2025 09:26:54 AM, status Completed Successfully, and type Incremental), and a 'Tasks' sidebar on the right listing items like 'Borrowing Requests', 'DARA Recommendations', 'Order Lines', 'Invoices', 'Electronic Resources', 'Deposits', 'Trials', 'Reading Lists', and 'Citations' with their respective counts.

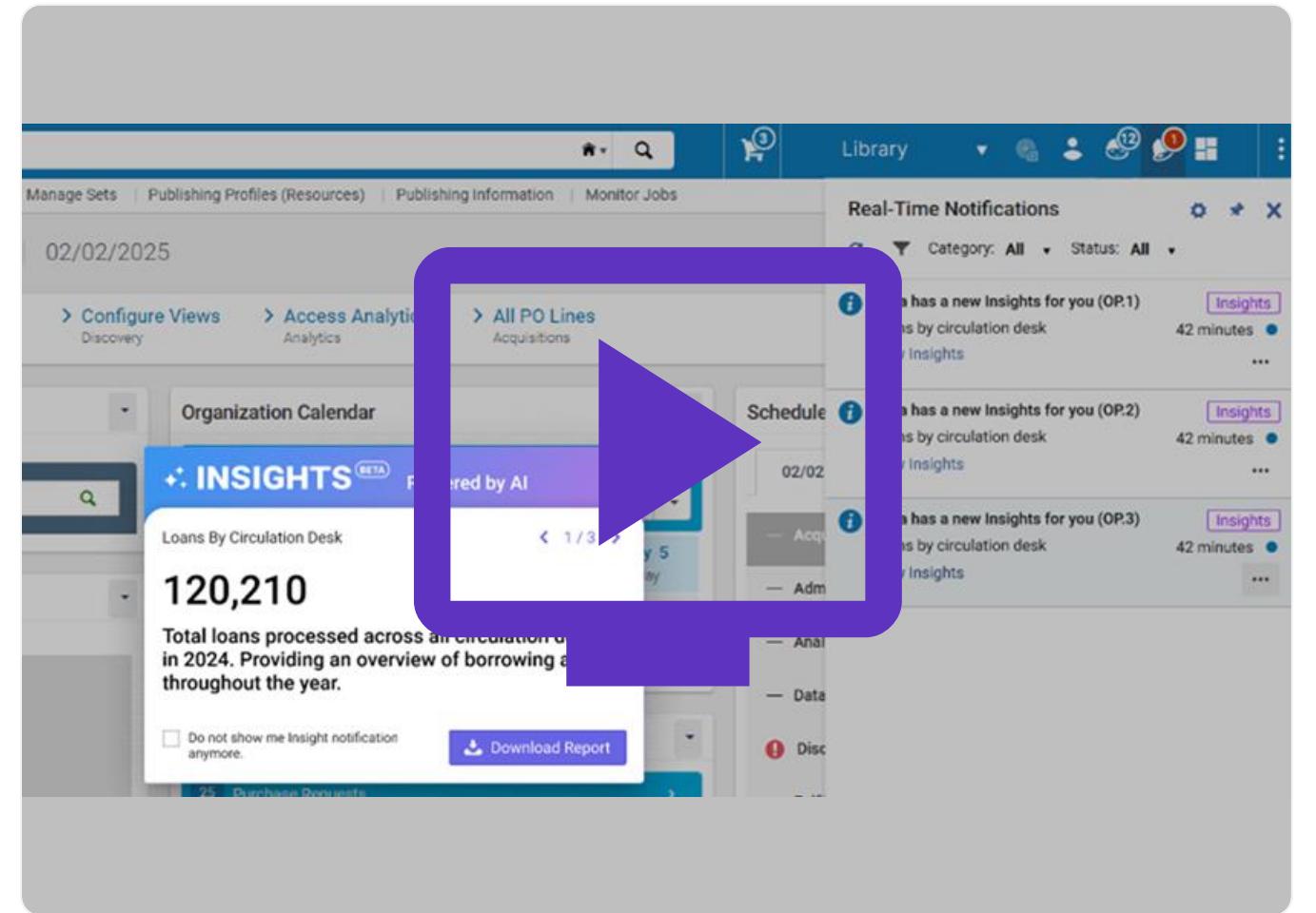
# Insights



Delivering bite-sized, actionable data directly to individual users by combining Alma Analytics with AI to surface only what matters most.



Eliminate information overload, delivering just the right information to each user.



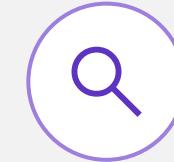
# AI at the Service of the Cataloger



## Current: AI Metadata Assistant

Generates complete MARC 21 records based on resource descriptions and images.

- Mediated workflow requiring human oversight
- Librarian reviews and corrects suggestions
- Single-record focused process



## In Research: Batch AI Processing

Enhanced capabilities for processing multiple records simultaneously.

- Automated copy-cataloging across entire sets
- Intelligent matching at instance and work levels
- Metadata generation for review



## Benefits

Dramatically increases cataloging efficiency while maintaining quality control.

- Reduced manual processing time
- Improved metadata consistency
- Scalable solution for backlog reduction

# Efficiency Through Automation - LibOW

# We are Live!

## Lower Technical Barriers

Allow libraries to create workflows in minutes, reducing IT reliance.

# Simplify Complex Tasks

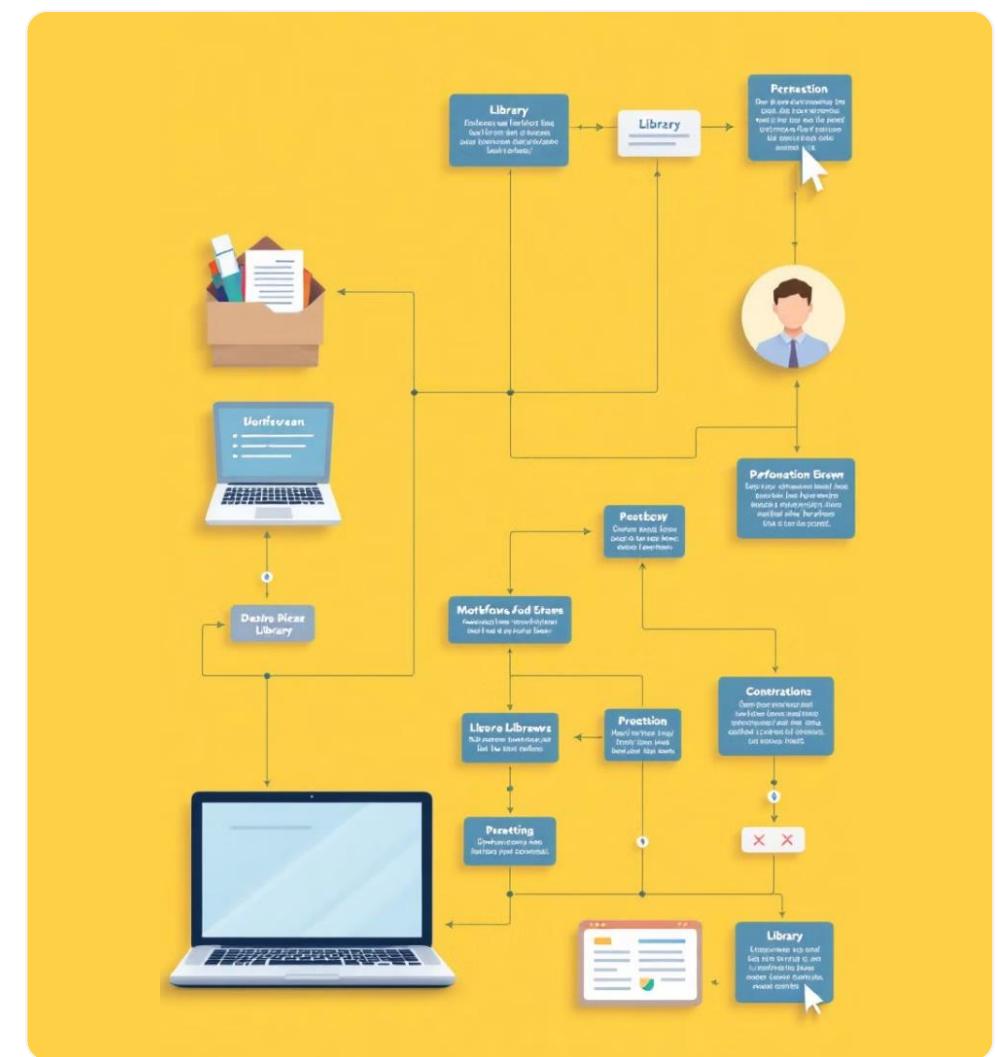
Replace legacy integrations  
and craft advanced  
workflows effortlessly.

## Centralized Management

Standardizes and consolidates all custom workflows into a single interface.

## Empowerment

Reduces dependency on IT, enabling library staff to innovate independently.

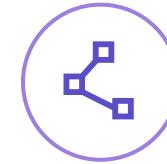


# Empowering Librarians with Linked Open Data



## Linked Open Data Editor

Linked Open Data Editor! Librarians can create BIBFRAME templates and records with efficient cataloging workflows. Early access by the end of 2025.



## RDA/RDF WEMI Support

RDA/RDF WEMI Support, enabling Create/Edit, Import, Export, Alma Core workflows, and Bulk Operations. All while keeping it practical and usable.

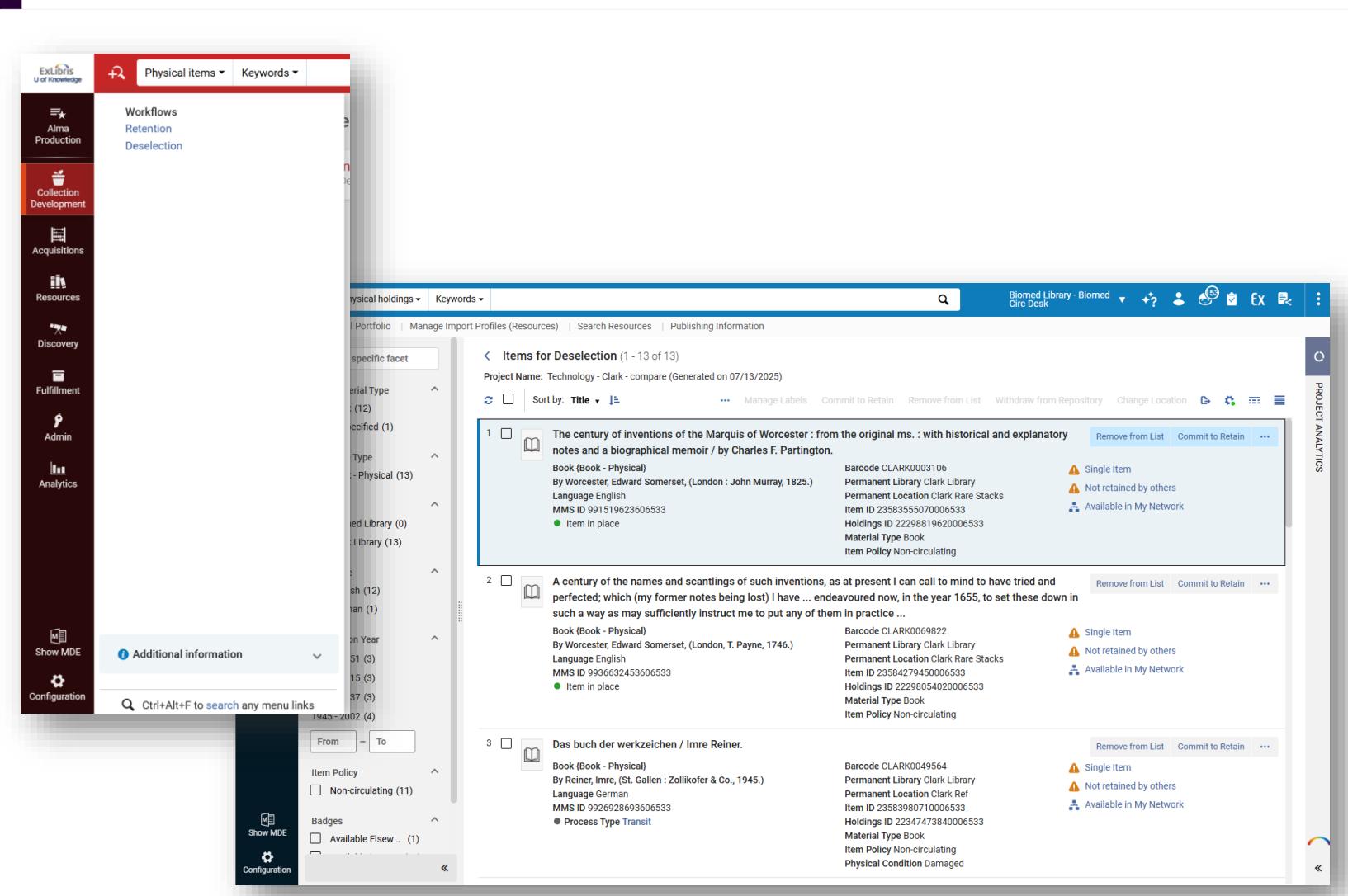
# Collection Development Workflows

- **End-to-End Tools**

for managing CD tasks for physical and electronic resources

- **Available to All Alma Users**, even without Rialto marketplace by opt-in in Data Sharing Profile
- **Streamlined Experience**

that integrates Alma actions into one workflow



The screenshot shows the Ex Libris Collection Development Workflows interface. The left sidebar has a dark theme with orange highlights for 'Alma Production' and 'Collection Development'. The 'Collection Development' section is expanded, showing 'Workflows', 'Retention', and 'Deselection'. The main area is titled 'Items for Deselection (1 - 13 of 13)' for a project named 'Technology - Clark - compare' (Generated on 07/13/2025). The results are sorted by 'Title'. Each item is listed with a checkbox, a thumbnail, and detailed information including barcode, permanent library, permanent location, item ID, holdings ID, material type, and item policy. There are also buttons for 'Remove from List' and 'Commit to Retain' for each item. The interface includes a search bar, a navigation bar with links like 'Portfolio', 'Manage Import Profiles (Resources)', 'Search Resources', and 'Publishing Information', and a 'PROJECT ANALYTICS' sidebar on the right.

# Collection Development Workflow

## Key Features of the Workflows

- Project-Based:** Create custom projects with flexible scope and criteria
- Data-Driven Decisions:** Benchmark holdings across institutions
- Integrated Actions:** Retain, deselect, or export—all within the workflow

The screenshot displays the Ex Libris Collection Development Workflow interface. The left sidebar shows navigation links for Alma, Collection Development, Acquisitions, Resources, Discovery, Fulfillment, Admin, and Analytics. The main content area is titled "Items for Deselection (1 - 11 of 11)" and shows a list of items with checkboxes and action buttons (Commit to Retain, Remove from List, Withdraw from Repository, Change Location). The right side features a "PROJECT ANALYTICS" section with a "Deselection Summary" chart and a "Title Information" and "Item Information" panel.

**Items for Deselection (1 - 11 of 11)**

Project Name: Technology - Clark - compare (Generated on 07/13/2025)

Sort by: Title

1. The century of inventions of the Marquis of Worcester : from the original ms. : with historical and explanatory notes and a biographical memoir / by Charles F. Partington.

Book (Book - Physical)  
By Worcester, Edward Somerset, (London : John Murray, 1825.)  
Language English  
MMS ID 991519623606533  
Item in place

2. A century of the names and scantlings of such inventions, as at present I can call to mind to have tried and perfected; which (my former notes being lost) I have ... endeavoured now, in the year 1655, to set these down in such a way as may sufficiently instruct me to put any of them in practice

Book (Book - Physical)  
By Worcester, Edward Somerset, (London, T. Payne, 1746.)  
Language English  
MMS ID 9936632453606533  
Item in place

3. The legacy of the Exposition : interpretation of the intellectual and moral heritage left to mankind by the world celebration at San Francisco in 1915.

Book (Book - Physical)  
By Barr, James Adam, (San Francisco : [Printed for the Panama-Pacific Exposition by J.H. Nash], ©1916.)  
Language English  
MMS ID 9919548003606533  
Item in place

4. The life, times and scientific labours of the second

**PROJECT ANALYTICS**

Total Recommendations: 13

**Deselection Summary**

| Category  | Percentage |
|-----------|------------|
| Active    | 84.62%     |
| Retained  | 0.00%      |
| Removed   | 15.38%     |
| Withdrawn | 0.00%      |
| Handled   | 0.00%      |

This chart updates only when the page is reloaded.

**Title Information**

Material Type Book  
Resource Type Book - Physical  
Record Number (CLU)151962-ucldb-Voyager;(OCoLC)07061972;(OCoLC)ocm07061972  
Language English  
Dewey Decimal Class Number 608.742  
LC Call Number T44 .W82  
Subjects Technology--history ; Métiers--Ouvrages avant 1800. ; Inventions--Ouvrages avant 1800. and others

**Item Information**

# The Road Ahead

Our commitment to continuous improvement extends across all functional areas of Alma.

1

## Customer-Driven Evolution

Partnership with libraries guiding our innovation journey

2

## Complete Roadmap

Comprehensive development plan through 2026 available in the Knowledge Center

3

## Functional Improvements

Regular enhancement releases delivering ongoing value throughout the year in all functional areas

4

## Idea Exchange & CERV Enhancements

Your suggestions actively shaping product development priorities



# Thank You

# Your voice matters!

Take our 2-min  
survey now



## Help us innovate

Your feedback drives the next generation of valuable solutions



## See real impact

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



## Shape the future

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