Alma Product Conversation

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Evolving Efficiency

Efficiency through Experience
Smarter UI & streamlined workflows

Efficiency through Intelligence
Conversational AI & decision support

Efficiency through Automation
Process automation & background tasks

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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
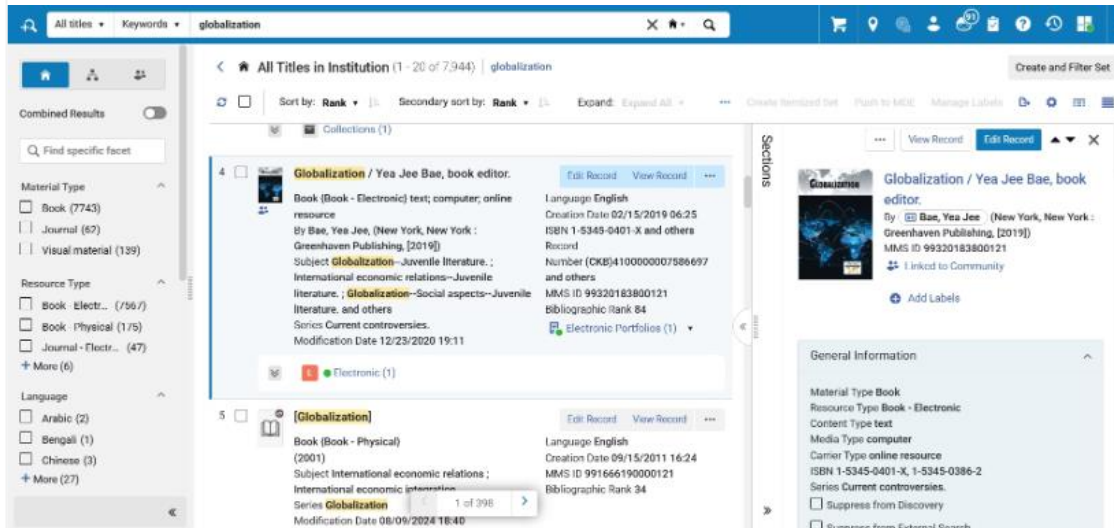
Enhanced batch actions for bulk processing

Customer-Driven

Improvements based directly on usability studies
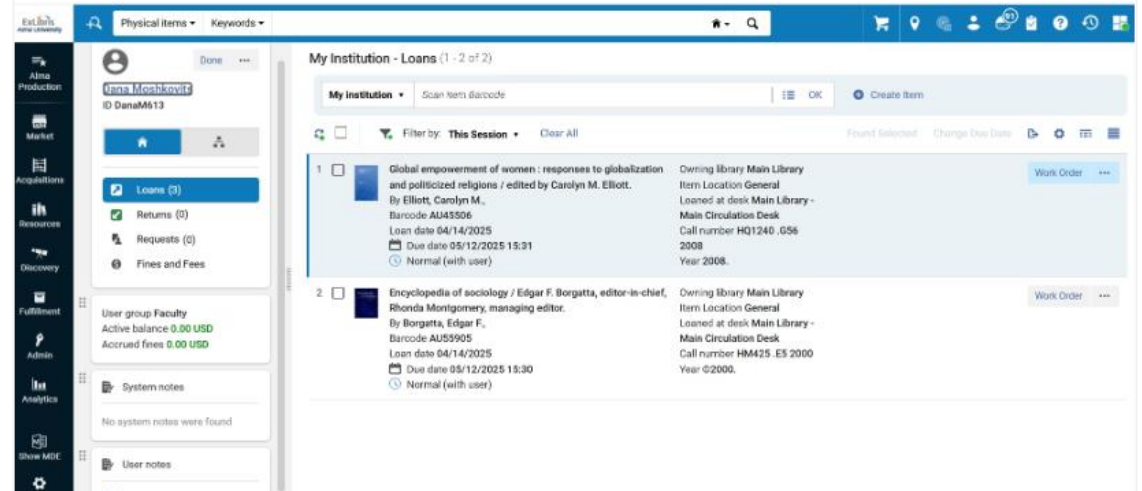
Features requested through customer feedback channels

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A New UX Across Alma

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

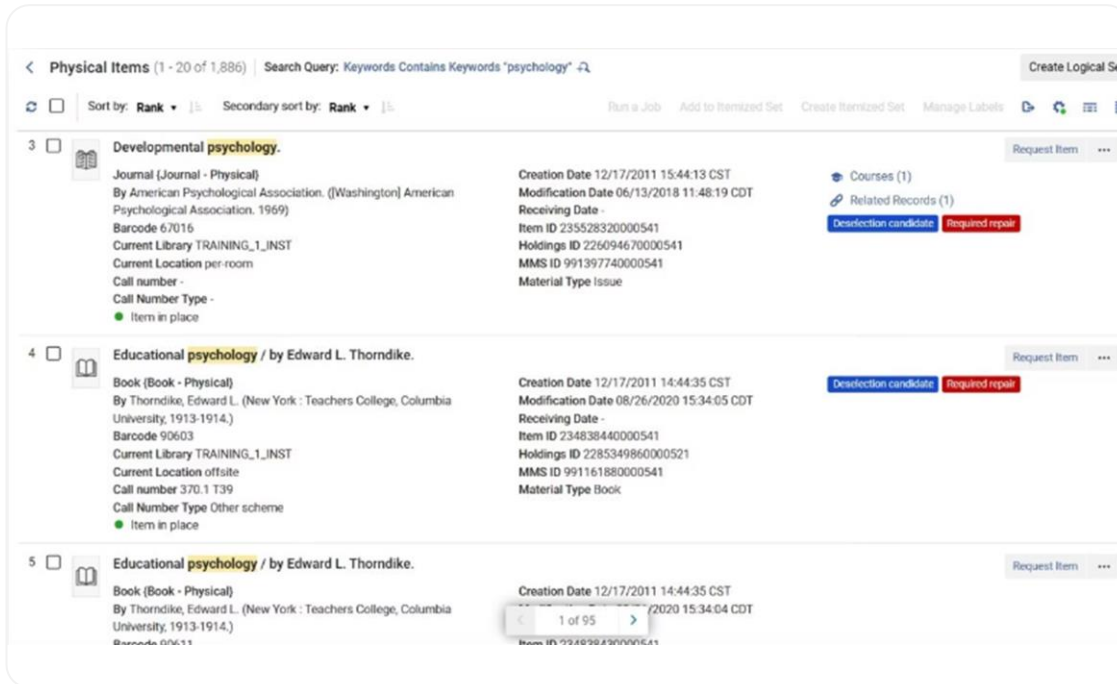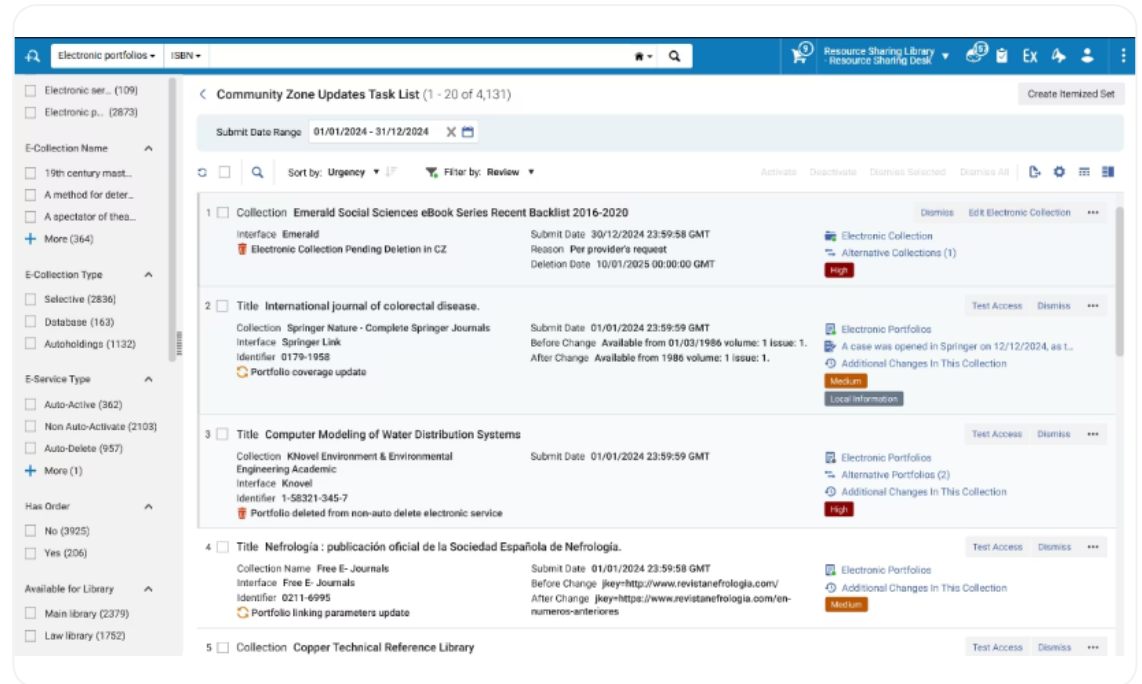| Title Search	Manage Patron Services
Rollout Ends August 2025	Rollout Complete May 2025

A New UX Across Alma

More projects in 2026…

Physical Item Search

Including new features

CZ Update Task List

Including new features

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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

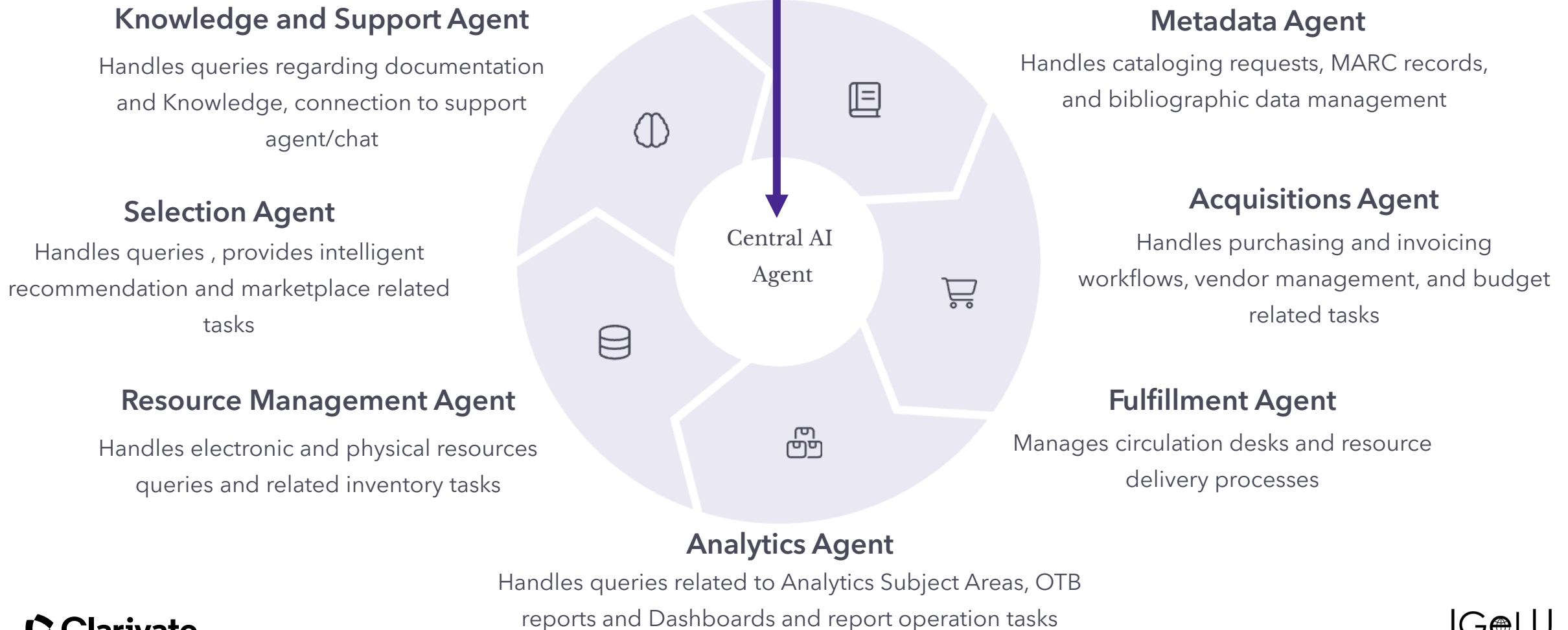|	
Human in charge	Opt-in features
Ethical & safe: AI not trained on uploaded data, limited web access	

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.

Knowledge and Support Agent

Handles queries regarding documentation and Knowledge, connection to support agent/chat

Metadata Agent

Handles cataloging requests, MARC records, and bibliographic data management

Selection Agent

Handles queries , provides intelligent recommendation and marketplace related tasks

Acquisitions Agent

Handles purchasing and invoicing workflows, vendor management, and budget related tasks

Central AI Agent

Resource Management Agent

Handles electronic and physical resources queries and related inventory tasks

Fulfillment Agent

Manages circulation desks and resource delivery processes

Analytics Agent

Handles queries related to Analytics Subject Areas, OTB reports and Dashboards and report operation tasks

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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.
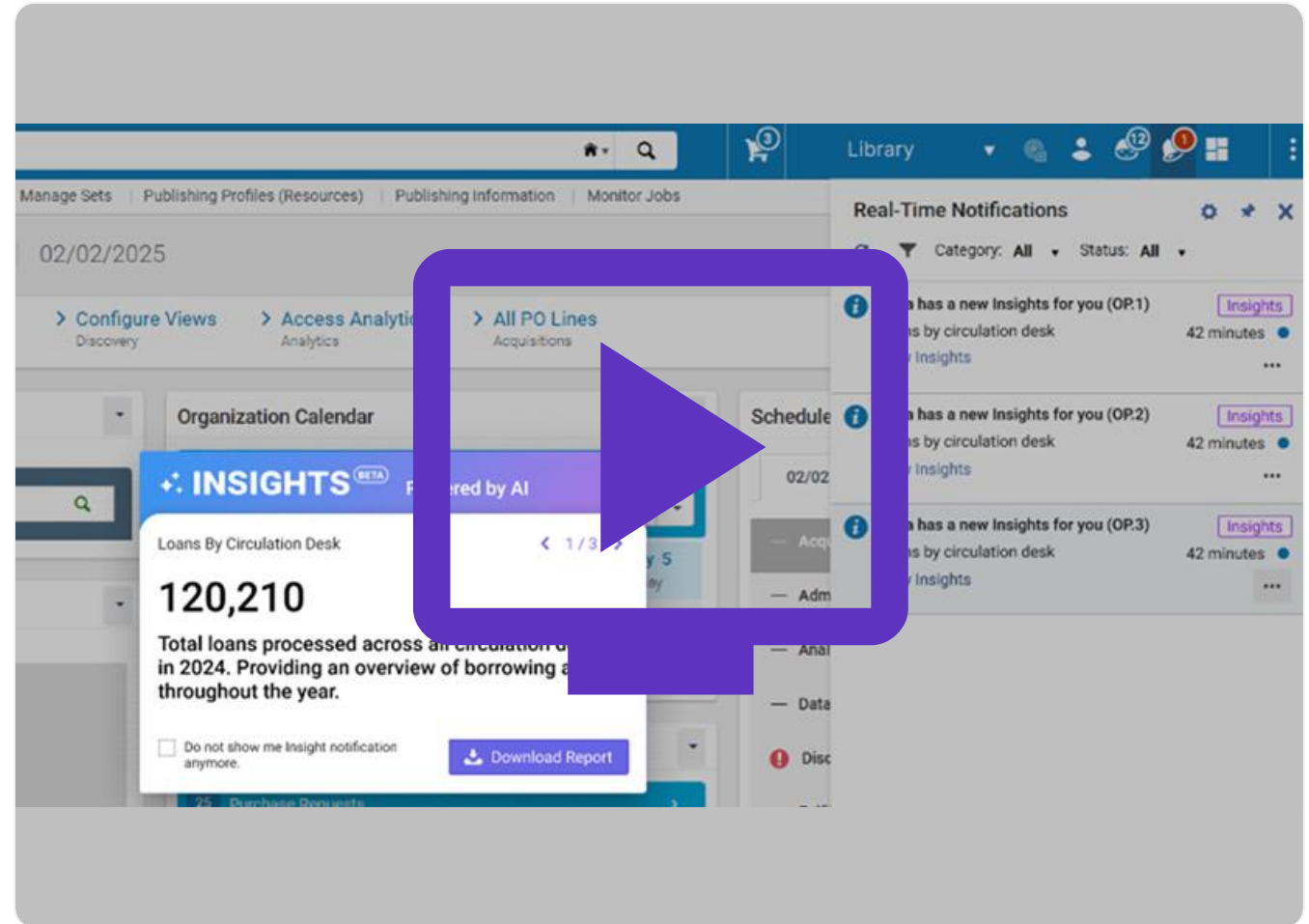
AI-Powered Funds & Ledgers

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.

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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

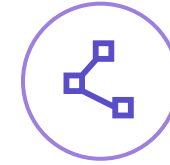Dramatically increases cataloging efficiency while maintaining quality control.

- 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

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 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

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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

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