Alma Roadmap Update

GUGM

Asaf Kline
Director, Alma Product Management
“Ch-ch-ch-ch-changes,
Turn and face the strange”
WE ARE CREATURES OF HABIT

“The more we do something - eat nuts while watching TV, ride a bike, play an instrument, study a new language - the stronger the neuronal circuit becomes that supports that habit”

GoodTherapy.org®
<table>
<thead>
<tr>
<th>The outcomes are uncertain</th>
</tr>
</thead>
<tbody>
<tr>
<td>It’s difficult at first</td>
</tr>
<tr>
<td>Fear of the unknown</td>
</tr>
<tr>
<td>Glitches and hiccups</td>
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</tbody>
</table>

Habits are hard to break – Moving to a new library software
But change can also be a very good thing

CHANGE IS LEARNING.
LEARNING IS GROWING.
GROWING IS LIVING. SO LIVE

MAKES YOU MORE
FLEXIBLE & ADAPTABLE

CHANGE IS OPPORTUNITY
A good change in moving to a new library software
How can we help?
ADKAR is a research-based, individual change model that represents the five milestones in order to change successfully.
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Alma – Current and Future
Driving ‘Forces’ of the Strategic Roadmap

- Streamlining Acquisition Workflows
- Gaining Better Insights
- Extending Collaborations
- Enhancing the User Experience
- Unifying Resource Management
UX Project Goal & Focus

- Improve Alma user experience & satisfaction
- Holistic approach and commitment to improving UX in Alma
Completely New Visual Design
Personalized and Customizable
Responsive Design – Improved Experience on Tablets
Alma Mobile

- **Review** the Pickup from Shelf list for a library location

- **Filter** the list by request date, request type, material type, location, call number, or destination

- **Scan items** to see where they need to go

- **Track** usage of items left on library tables and shelves

- **Scan barcodes** via the device’s built-in camera as well as portable wireless barcode scanners
<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benchmark and compare among other member institutions of the consortia</td>
<td></td>
</tr>
<tr>
<td>Ability to create customized reports by the consortia itself</td>
<td></td>
</tr>
<tr>
<td>Support consortia collection analysis</td>
<td></td>
</tr>
<tr>
<td>Analytical reporting a built-in and fully integrated part of system</td>
<td></td>
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</tbody>
</table>
## 14 COUNTER 4.0 Reports Templates:

<table>
<thead>
<tr>
<th>JR1</th>
<th>Journal Report: Successful Full-Text Article Requests by Month and Journal</th>
</tr>
</thead>
<tbody>
<tr>
<td>JR1 GOA</td>
<td>Journal Report: Successful Gold Open Access Full-Text Article Requests by Month and Journal</td>
</tr>
<tr>
<td>JR1a</td>
<td>Journal Report: Successful Full-Time Article Requests from an Archive by Month and Journal</td>
</tr>
<tr>
<td>JR2</td>
<td>Journal Report: Access Denied to Full-Text Articles by Month, Journal, and Category</td>
</tr>
<tr>
<td>JR5</td>
<td>Journal Report: Successful Full-Text Article Requests by Year-of-Publication (YOP) and Journal</td>
</tr>
<tr>
<td>DB1</td>
<td>Database Report: Searches, Result Clicks, and Record Views by Month and Platform</td>
</tr>
<tr>
<td>DB2</td>
<td>Database Report: Access Denied by Month, Database, and Category</td>
</tr>
<tr>
<td>PR1</td>
<td>Total searches, result clicks, and record views by Month and Platform (previously DB3)</td>
</tr>
<tr>
<td>BR1</td>
<td>Book Report: Successful Title Requests by Month and Title</td>
</tr>
<tr>
<td>BR2</td>
<td>Book Report: Successful Section Requests by Month and Title</td>
</tr>
<tr>
<td>BR3</td>
<td>Book Report: Access Denied to Content Items by Month, Title, and Category</td>
</tr>
<tr>
<td>BR4</td>
<td>Book Report: Access Denied to Content Items by Month, Platform, and Category</td>
</tr>
<tr>
<td>BR5</td>
<td>Book Report: Total searches by Month and Title</td>
</tr>
<tr>
<td>MR1</td>
<td>Multimedia Report: Successful Full Multimedia Content Unit Requests by Month and Collection</td>
</tr>
</tbody>
</table>

**23** default dashboards (“out of the box” ready to use and change if desired)

**224** default reports (“out of the box” ready to use and change if desired)
Analytics - Beyond the consortia

- **Benchmark Analytics** puts focus on the breadth of comparison
  - Data being compared is high level/KPI

- **Comparative Collection Analytics** puts focus on the depth of comparison
  - Group for comparison is smaller
Benchmark Analytics

How efficient is our acquisition process compared to other institutions?

**Analyze**

- Analyze efficiency of the acquisition workflow in your library
- Compare workflow efficiency with other institutions

**Optimize**

- Drill down to check the acquisition process per library
Comparative Collection Analytics

- Total Records
- Overlap with my Institution
- Unique Records

- John Smith University
- City College
- Yilis Institute
- State Technical College
- Central Park College

Overlap & Unique record comparison with Peer Institutions
Real-Time Ordering

- **Faster, real-time insertion of order data into Alma** at the same time the order is placed in vendor system, creating order records that allow library staff to see what is on order

- **Streamlines book workflows:** API allows order information to flow from vendor system to Alma without the need to use a (slower) FTP data transfer method

- **Saves staff time** through the automated transfer of information. Library staff does not need to perform additional steps to integrate order information into their library management system

Main added value: **increased workflow efficiency**
Auto Holdings Update

- **Objective:** Streamline the process of managing institution entitlements in Alma
- **Solution:** Automatic service that regularly updates institution entitlements with information retrieved from vendor on a scheduled basis
Deeper Integrations with Selection Platforms

Integrate **Ebook Central, Oasis, and Alma** functions for seamless workflow

- **Seamless Order Process** (Real-Time Ordering)
- **Automated Ebook Central Holdings Update**
- **Enhanced EOD & EDI Workflows with Ebook Central**
- **Query Availability and Pricing within Alma**
Curate the unique content that your campus/community produces in one place.
Hidden resources have no value, but Alma + Primo elevate the visibility of digital content

1. **BOOK CHAPTER**
   - **Conceptual Dualism**
   - Papineau, David; 2002
   - Oxford University Press
   - Thinking about Consciousness, Chapter 3
   - Online Access Available

2. **DISSERTATION**
   - **On sensible matters: a defense of conceptual dualism**
   - Elpidorou, Andreas; 2013
   - Available at Mugar Memorial Library Microforms: Microfilm (PhD 2013 epl)
   - Online Access Available
Analytics—never an afterthought

- Link Resolver Usage
  - OpenURL Context Measures
    - Number of Requests
    - Number of Clicked Requests
    - Number of Requests Without Services
    - Number of Services (total)
    - Number of Electronic Services
    - Number of Digital Services
    - Number of Clicked Services (total)
    - Number of Electronic Clicks Services
    - Number of Digital Clicks Services
- % Clicks from Requests
- % Requests Without Services from Requests
**Alma Digital Today**

<table>
<thead>
<tr>
<th>Metric</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Alma-D Libraries</td>
<td>85</td>
</tr>
<tr>
<td>Total Number of Digital Objects Added to Alma</td>
<td>931,249</td>
</tr>
<tr>
<td>One Year Increase in the Number of Representations Added to Alma</td>
<td>234%</td>
</tr>
<tr>
<td>Amazon S3 Storage Used Grew by</td>
<td>700% since last year</td>
</tr>
<tr>
<td>The Most Popular File Format</td>
<td>pdf</td>
</tr>
</tbody>
</table>
Managing Digital Resources in Alma

With a single interface and an integrated approach to all source material – electronic, print, and digital – Alma is breaking down collection silos in the library.

Boston University libraries shifted to using Alma for managing their digital collections, which increased efficiency, streamlined workflows, changed organizational structures, and allowed them to develop new services.

UEL’s libraries manage their digital assets using Ex Libris Alma, including professional materials used by specific schools, dissertations, and learning materials in alternative accessible formats.
What’s Planned for Alma-D’s Future?

**EXPOSING DIGITAL CONTENT**
- Publish to Google Scholar
- Enhanced Delivery
- Streaming Delivery

**FLEXIBLE IMPLEMENTATION**
- EAD import

**CURATING UNIQUE CONTENT**
- Dublin Core Application Profiles
- Social tagging

**DATA SAFEGUARDING**
- Audit history

**ANALYTICS**
- Deposit status notification
- New subject areas
Resource Sharing is supported today in a range of different workflows and involves a variety of different systems. Main workflow types include:

• **Broker based integrated workflow**, involving systems such as ILLiad, Relais ILL/D2D, Inn-Reach or national and regional systems

• **Peer to peer consortial borrowing**, implemented by NA consortia

• **Peer to peer resource sharing by non consortial libraries**, such BIBSYS libraries and Australian libraries relaying requests through Libraries Australia Document Delivery (LADD).

• **Direct services between libraries**, some of which utilize direct requesting options for patrons of one library that use the catalog of another library to place requests, and some of which only allow walk in services
Fulfillment Network

- Return
- Borrow
- Request
External Systems (Broker)

- Global\National interlibrary loan automation services
Peer to Peer (P2P)

- Used for direct requesting. At times also used via national or regional gateways
Bringing it Together

• What if I have partners of more than one type?
Bringing it Together

• What if I have partners of more than one type?

Broker/P2P Usage (1)

Broker/P2P Usage (2)
Bringing It Together

Fulfillment Network (Consortial)

P2P (regional)

Broker (regional)

P2P

Broker
APIs in Alma

All time record
68,486,644
API calls in March 2017
BIBFRAME and Linked Data

- **Acquisitions**
- **Resources**
- **Fulfillment**
- **Admin**
- **Analytics**

**All Titles (1 - 3 of 3)**

<table>
<thead>
<tr>
<th>Title</th>
<th>Language</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Cry, the Beloved Country</em></td>
<td>English</td>
</tr>
</tbody>
</table>

- **Physical**
- **Electronic (1)**
- **Digital**
- **Other details**

**Linked Data**

- **Context**: https://open-na.hosted.exlibrisgroup.com/alma/contexts/bib
- **bibco:isbn10**: http://www.isbnsearch.org/isbn/1433243180
- **dct:language**: http://id.loc.gov/vocabulary/iso639-2/eng
BIBFRAME and Linked Data

**SHORT TERM**

- Planned support for representing MARC bibliographic records in BIBFRAME 2.0 format
  - Publish MARC bibliographic records in BIBFRAME format
  - View a MARC record as a BIBFRAME record
  - Expose MARC bibliographic records as BIBFRAME via API

**LONG TERM**

- Support for native cataloging in BIBFRAME starting with a proof of concept version.
- Support a triple store service for linked data in Alma.
Shifting Focus to the Strategic

WORK MORE EFFICIENTLY

FOCUS ON AREAS OF VALUE

DRIVE NEW SERVICES
THANK YOU

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