Ex Libris Update:
The Higher-Ed Cloud Platform
Jane Burke, VP Strategic Initiatives
Collaboration as a Core Value

Putting libraries at the heart of teaching, learning, and research

Industries' expertise
Software expertise
ProQuest Synergies
Infrastructure
Supporting platforms

Library experience
Product extensions
Product feedback
Industry advocacy
Institutions' voice

NERs Voting
Idea Exchange
Developer Network
Product Working Groups
Community Events
Focus & Special Interest Groups
The Ex Libris Community

Consortium: 44

APIs: 120 M/Month

Signed Institutions: 1617

Recommendations implemented: 100+

Countries: 38

Live with Alma: 1106
Ex Libris Higher-Ed Cloud Platform

Alma  Primo  Summon  Esploro
Leganto  RefWorks  campusM  Pivot

App Services
UX & Mobile Framework  Workflow Engines  Collaboration Services  Analytics & Dashboards  Shared Data & Content

Infrastructure Services
Agile Releases  Multi-Tenancy  Open APIs & Integrations  Metadata & Data Schemas  Security & Authentication

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ALMA Updates
Alma 2018

Analytics
- Intense collaboration with customers
- COUNTER, Cost Per Use

Primo VE + Automated Fulfillment Network.
- Enhanced Patron Service
- Find anywhere, pickup anywhere, return anywhere

Digital
- Laying the groundwork for migrating and displacing DAMS
- Migration Tools, Product Features for displacement
Alma 2019

Continued work on UX
• MD Editor
• Acquisition Workflows
• Inventory Workflows

Bring the CZ closer
• Manage Sets, Add local extensions

Resource Sharing
• Expand use via new protocols (New ISO)
• New capabilities (E-Resource)

Advanced Collection Management
• Request <-> Res. Sharing <-> Acquisition

DARA
• initial recommendations, laying the groundwork

Digital
• Actively Migrating DAMS
• ContentDM, Dspace, DigiTool and others
Alma 2020

Continued work on UX
• Next Gen/Responsive Design, New Navigation and Menu
• MD Editor – Advanced Features

Collaborative E-Resource Acquisitions

Analytics -
• Introduce new data visualization capabilities
• New possibilities mixing data across areas
• Loading external data sources

Digital
• Data Safeguarding
• MODS
• Enhanced Delivery

DARA
• Introduce advanced approaches (statistical, machine learning)
I generated this recommendation after a periodic review of your activated electronic collections. Based on the collection's interface name, I identified the relevant certified SUSHI vendor. As your institution does not upload usage data from this vendor, I recommend you create a SUSHI account and have the usage information harvested automatically.

This recommendation was generated based on 1 collection(s), with the following interface name(s):
Radiological Society of North America

You can view the list of electronic collections that are the basis for this recommendation by choosing 'Let's see'. In order to implement the recommendation and harvest usage data, choose 'Let's do it!'.
CONFIGURATION RECOMMENDATIONS

“I recommend that you create a SUSHI account based on your activated collections”

FULFILLMENT RECOMMENDATIONS

“We see that a faculty member has requested a book. She can get it faster via resource sharing. Would you like to go ahead...?”

RESOURCE MANAGEMENT RECOMMENDATIONS

“I recommend you link the following local collection to the CZ”

ACQUISITION RECOMMENDATIONS

“There are 7 high demand titles with insufficient copies to provide access. Would you like to consider purchase options?”
MD Editor
System Wide Tools: Alt+Tab
New Analytics!
Ex Libris Discovery
Serving **3,400+** institutions means serving a large variety of needs... Discovery, your way:

<table>
<thead>
<tr>
<th><strong>Apply your brand &amp; design</strong></th>
<th><strong>Choose add-ons from the dev. community</strong></th>
<th><strong>Integrate with 3rd party services</strong></th>
<th><strong>Access the most relevant content, from any provider</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>✅</td>
<td>✅</td>
<td>✅</td>
<td>✅</td>
</tr>
</tbody>
</table>

- Highlight local & special collections
- Manage collaborative networks
- Integrate with open source layers
- (or implement a feature-rich out-of-the-box discovery...)

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Discovery Experience Principles

- **Research outputs & data**
  - E.g.: Esploro, Fedora, Dspace

- **Digital repositories**
  - E.g.: ContentDM, Rosetta

- **Researcher Profiles**
  - Esploro, ORCID

- **Discovery enrichment**
  - E.g.: Altmetrics, Syndetics, Unbound

- **Video content**
  - E.g.: Alexander Street Press, Kanopy

- **Publisher content**
  - E.g.: Gale, Wiley, ProQuest

- **Open Access content**
  - E.g.: DOAJ, hybrid collections, IRs

- **Library catalog**
  - E.g.: Alma, Sierra, WorldShare
Discovery at the heart of users workflows

Library portal
A gateway to library resources

Direct search in learning & research services, e.g.:
- Leganto
- RefWorks
- Esploro
- Rosetta
- campusM

Google, Google Scholar, 3rd party search engines
Improving visibility with Linked data & schema.org

3rd party systems via open APIs
Focus Areas

Data Relations
- bX Recommender
- Citation Trail
- Contextual relations
- Topic Exploration

Search Experience
- Collection Discovery
- Newspaper Search
- Control vocabulary
- Resource Recommender

Full Text Access
- Loading more open Access material to the central index
- Promotion of open access material
Ex Libris’ smart services for discovery

Data intelligence-based service suite

• **bX Article Recommender**
  • Provides recommendations based on what other users have used

• **Citation Trail**
  • Allows users to browse to the items that an article cited and that is citing this article

• **Topic Exploration**

• **Relationship Graphs**
Formal Data Relations: Related Items

Examples:

- Book <-> book review
- Book chapters <-> other chapters in the same book
- Journal articles <-> other articles from the same journal issue
- Other articles from the same author
Lead with Discovery

Central Discovery Index

Future-ready

Unified index for Primo & Summon

- Primo with Alma or SFX
- Primo VE
- Summon with 360 or Alma

Operational efficiency

- Faster ingest
- Faster updates
- Better quality data
- Single point of activation

Focus on data intelligence – *Smart services based on contextual relations*

- Exploration with formal and informal relationships
- Context and glanceability
Rialto leverages a library’s data in Alma to support data-driven selection decisions in a user-friendly, streamlined purchasing workflow.

Rialto includes a comprehensive marketplace offering academic content from a variety of publishers and platforms.
Common Pain Points in Selection

- Manual, duplicative and error-prone work across people and systems
- Workflows that aren’t designed for integrated P&E
- Obsolete approval plans
- Lack of analytics and data-driven decisions
- Low circulation of purchased print and uneven shift from P to E
- What about new types? Datasets, OA, Streaming Videos,...
- Multiple vendor platforms (various data sources, access models, and invoices)

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The outcome

• Inefficiencies

• Sub-optimal user experience

• Gaps between what is acquired and what is used (and needed)
Rialto’s Transformative Approach is Based on Four Concepts

1. Comprehensive Marketplace
2. Unification
3. Analytics
4. User Experience
Introducing….

Next Generation Resource Sharing

“Harvesting the Value of the Cloud”
Coming in 2020:

Next-Gen Resource Sharing

"Find What I want, Get it the Way I want it"

Intuitive, 'Amazon like’ user experience

Fully Embedded Workflows from Discovery to Delivery

Embracing Community commitment for high service standard
Ex Libris®
a ProQuest Company
Next Gen Resource Sharing Platform

Fast. Accurate. Predictable

Any Type of Media Delivered Your Way

Dramatic cost saving

Embracing Community commitment for high service standard

Fully Embedded Workflows from Discovery to Delivery

Any Type of Media Delivered Your Way

Embracing Community commitment for high service standard

Last Gen Resource Sharing Platform
Next Generation Resource Sharing

Resource Sharing Staff Dashboard Example
Next Generation Resource Sharing

Amazon Like Patron Experience
Next Generation Resource Sharing

Amazon Like Patron Experience
Ex Libris Esploro

Your path to greater research impact
Navigating the Complexity of Research Processes

**Researchers**
*Publish, publish, publish (for impact & recognition)*
- Too many systems
- Overhead of working with IRs
- Hard to maintain public profile
- Competition for funding

**Librarians**
*Support research processes*
- Inconsistent, manual workflows
- Multiple systems & data models
- Inconsistent data quality
- Far from the research process
- Discoverability of research assets

**Research/Provost Office**
*Increase effectiveness of research activities*
- Risk of non-compliance
- Compliance of OA publications
- Visibility to publication metrics
- Interdisciplinary collaborations

**Impact on:** Visibility, Efficiency, Compliance
The Library at the Heart of the Research Process

Leveraging library expertise and technology to better support research activities and enhance collaboration with research stakeholders

Enhancing library productivity
- Deposit workflows
- Metadata enhancement tools
- Repositories management
- Reporting & analytics
- Preservation of research assets

Increasing library impact
- Discoverability of research output & data
- Involvement in research processes
- Support for institutional compliance
- ROI of existing library solutions
Moving beyond the Traditional Institutional Repository

Capturing a comprehensive record of research assets in a unified, metadata rich, cloud-based repository

Unified Research Assets Management

- Unified & comprehensive
- Mediate & unmediated
- Quality metadata
- Integrated analytics
- Workflow-based
- Broad dissemination
Getting the Data – a Changed Paradigm

More streamlined author archive/deposit interwoven into work process

- Simple, embedded and integrated
- Automated metadata (when possible) and notifications
- Review/edit vs. fill-in forms

More comprehensive automatic capture from external sources

- Published content (e.g. indexed by library discovery)
- Disciplinary and specialized repositories
- National repositories
Leganto
Course resource lists made easy
Course resource lists made easy

- Easy to set up course reading lists, including all types of materials
- Online access to materials and indication of physical location, on any device
- Integrated and automated digitization, acquisition and licensing workflows
- Analytics and reports to optimize collection development
- Integration with learning management systems and reference management tools
- Leveraging the power of the Ex Libris Higher-Ed Cloud Platform
Introduction to Health & Human Services

This course explores the current status and history of the human service system, career opportunities and personal considerations, as well as an intro to ongoing research in human services. Required for all continuing on to HHS 220.

HHS 101 (2019)  Updated a day ago  19 items in 5 sections  136 Pages

Human Service System (Weeks 1-3) (Citations: 5, Pages: 17)

The Human Service System aims to meet human needs through an inter disciplinary focus on prevention as well as remediation of problems, and maintaining a commitment to improving the overall quality of life of service populations. The primary purpose of the human services professional is to assist individual and communities to function as effectively as possible in the major domains of living. This unit will define the human services system and introduce professional competencies.

Health Care: The Largest Human Service System (Due: Jan 15, 2019)
Bracht, Nell, Social Work 19(2), Sep 01, 1974, 522 - 542
Read and be prepared to discuss in class. Pay particular attention to the reasons Bracht gives for the needs... 3

Lecture Reading
Check availability

Lecture Slides
Goes with next reading
Download

Workplace Ethics: Issues for Human Service Professionals in the New Millennium (Due: Jan 17, 2019)
This chapter sets the foundation for units 2 & 3 and will be very relevant for your final paper. Pay particular...

Check availability
Instructors can add materials to reading lists from scholarly databases, publisher sites, online bookstores, and any web site, and automatically see if materials are already covered by the library.
Initiate library workflows such as purchasing, digitization, and moving inventory directly from Alma
NEW SERVICES: CUSTOMERS IN THE CENTER

It’s all about you!
<table>
<thead>
<tr>
<th># live institutions</th>
<th>% of customers meeting contractual SLA (99.5%)</th>
<th>% of customers meeting internal SLA (99.9%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>ExLibris Alma</td>
<td>1136</td>
<td>100%</td>
</tr>
<tr>
<td>ExLibris Summon</td>
<td>700</td>
<td>Yearly uptime 99.96%</td>
</tr>
<tr>
<td>ExLibris Primo</td>
<td>1413</td>
<td>100%</td>
</tr>
<tr>
<td>ExLibris Primo Central</td>
<td>2050</td>
<td>Yearly uptime 99.85%</td>
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<td>ExLibris campusM</td>
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<td>100%</td>
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<tr>
<td>ExLibris Leganto</td>
<td>87</td>
<td>100%</td>
</tr>
<tr>
<td>ExLibris RefWorks</td>
<td>1600</td>
<td>Yearly uptime 99.77%</td>
</tr>
</tbody>
</table>

100% OF CUSTOMERS MET CONTRACTUAL SLA

>99% OF CUSTOMERS MET INTERNAL SLA
### Certified with Strong Security and Privacy Standards

<table>
<thead>
<tr>
<th>Year</th>
<th>Certification</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>ISO 27001</td>
<td>Security framework For Cloud</td>
</tr>
<tr>
<td>2014</td>
<td>ISO 27001</td>
<td>Security framework for Ex Libris</td>
</tr>
<tr>
<td>2015</td>
<td>ISO 27018:2014</td>
<td>Privacy in the Cloud</td>
</tr>
<tr>
<td>2017</td>
<td>ISO 27017:2015</td>
<td>Cloud Security</td>
</tr>
<tr>
<td>2018</td>
<td>FedRAMP</td>
<td>Federal Risk Authorization Management System • Alma/Primo • Tailored</td>
</tr>
<tr>
<td>2019</td>
<td>GDPR EU Data Protection Regulation</td>
<td>GDPR EU Data Protection Regulation</td>
</tr>
</tbody>
</table>

Data centers are SSAE16 SOC Certified

Data centers are SSAE18 SOC Certified

Data Center are SSAE18 SOC Certified

GDPR EU Data Protection Regulation
In-Case Feedback

Encouraging customers to add feedback regarding open cases

Review by Ex Libris support management, and circling back to customer

Visible to Support analysts

Does not replace escalations or case surveys

One week SLA response time

EX LIBRIS COMMITMENT TO IMPROVE
BASED ON CUSTOMER FEEDBACK
In-Case Feedback

Main Takeaways

- Communication frequency
- Quality of communication
- Resolution time

By Category

- Communication: 336
- Knowledge: 118
- Professionalism: 159
- Resolution Time: 8
- Updates Frequency: 12
Opening Knowledge Center for Customer Contribution

Building a knowledge community together with our customers

Leveraging the knowledge center advantages to customer contribution

Recognizing customers contributing knowledge to the community

Elevating the customer’s knowledge to a central and visible place in the CKC

“AN INVESTMENT IN KNOWLEDGE PAYS THE BEST INTEREST” Benjamin Franklin
Introducing: Ask the expert

Alma users will be able to consult an expert from within the Alma UI

Who is an expert
• Alma user
• From any institution
• Also – Ex Libris Representatives

Becoming an expert
• Voluntary
• Define areas of expertise (e.g. Acquisitions)

List of experts
• Online Availability
• Filtered by area according to the page in Alma

Consulting an expert
• By choosing “Ask an expert”

Consultation
• Using chat
### Purchase Order Line Details


- **PO line**: POL-194542
- **PO line type**: Physical - One Time
- **PO line owner**: Main Library
- **Status**: In Review (2019-02-18)

### Ordered Items

<table>
<thead>
<tr>
<th>Library</th>
<th>Location</th>
<th>Barcode</th>
<th>Receiving Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main Library</td>
<td>Stacks</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

- **Receiving note**: 
- **Routing during receiving**: [ ]

### Vendor Information

- **Material supplier**: OASIS (Coutts)/OASIS/PROC
- **Claiming grace period (days)**: 30
- **Expected receipt after ordering (days)**: 0
- **Or expected receipt date**: 

### Pricing

- **List price**: 45.00 GBP
- **Quantity for pricing**: 1
- **Net price**: 45.00 GBP
- **Discount (%)**: 0.0

**Ask the Expert**

**John Librarian**

*shaneo.lamb@exlibrisgroup.com*

**March 7, 2019**

You

Hi, I need help with configuring my PO Line.

11:18 AM

John Librarian

Hi Rebecca, what seems to be the problem?

11:20 AM
Ex Libris AppCenter

Supercharge your Ex Libris solutions with apps developed by the community

SpineOMatic: Print Spine Labels
Benjamin Fiorin | Alma | Type: Extension

SpineOMatic v7.0 is a Windows application that works with Ex Libris' Alma to print spine labels, pocket labels, flag slips and other custom labels to a variety of desktop or networked printers, singly or in batches. Installation is easy—just download the...

Custom text and link to PCI when no search results
Sarah Johnston | Primo | Type: Add-on

Add custom text and an option to expand results to PCI when no records retrieved.
It’s all about data quality

Objective

Accurate and up-to-date content representation in the Community Zone

Introducing...
Content Visibility

Content

Enhancement Plans

Searchable

Content-Only

Release Notes

New Content-specific

Knowledge Articles

Coming soon:

Static list of collections and databases!

Live since August!

Live!
Provider Zone

Enables content Providers to access, add and update their Content Offerings directly and automatically within the Alma Community Zone to best reflect the collections and databases available to our mutual customers.

Provider 1

Provider 2

Provider 3

Provider 4

Create and update collections in the Provider Zone automatically

API

Alma Community Zone Knowledge Base
Thank you!