



Vision of Ex Libris Higher-Education Cloud Platform

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**LIBRARY
MANAGEMENT**

- Alma
- Rapido
- RapidILL
- Rialto
- Rosetta

**RESEARCH &
DISCOVERY**

- Primo
- Summon
- Esploro
- Pivot-RP
- Research Professional
- RefWorks

**STUDENTS &
LEARNING**

- campusM
- Leganto



Alma

Alma Product Focus Areas



Quality



Simplicity and Usability



Extensibility



Serviceability





Quality



Quality



Aggressive quality improvement plan:

- Focus on all bugs, not just high
- Focus on prevention vs. resolution



Increase automation coverage



Build a long-term strategic plan to improve content quality



Cultivate developers' quality mindset/culture

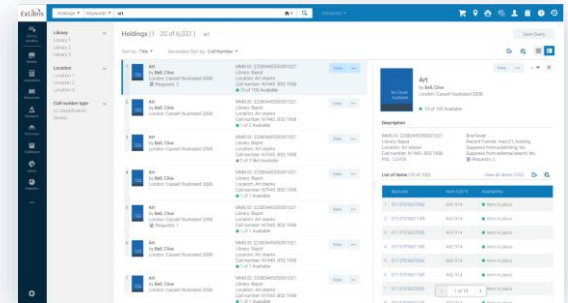
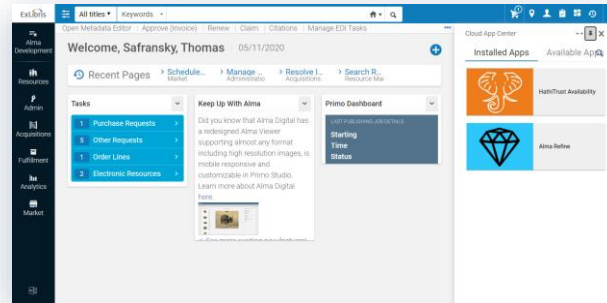
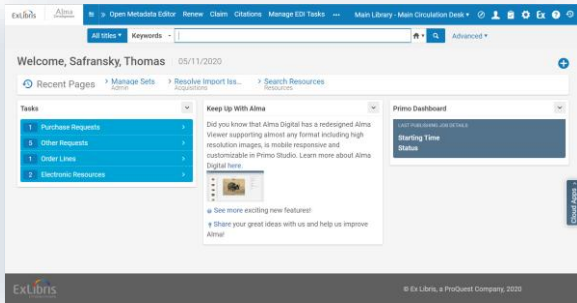




Simplicity & Usability



User Experience – An ongoing commitment



1 New UI.....→

2 New Concepts.....→

3 Apply

- New layout
- Side by side
- Slide out
- Cards

- Acquisitions
- Repository searches
- Configuration
- More...

User Experience – Themes



Initial (started in 2021)

- Enhanced Repository Search
- Acquisition Workflow

Additional (starting in 2022)

- ERM Workflows
- Fulfillment Workflows
- Res. Sharing Workflows



User Experience – Staff Search - Holdings



ExLibris Holdings Keywords **art** Advanced

Library: Library 1, Library 2, Library 3

Location: Location 1, Location 2, Location 3

Call number type: LC classification, Dewey

Physical Holdings (1 - 20 of 6,032) | art

Sort by: Title Secondary Sort by: Call Number

1 Library: Bapst Location: Art stacks Call number: N7445 .B53 1958 MMS ID: 22383445350001021 10 of 100 Items available

Title: Art by Bell, Clive London: Cassell Illustrated 2008 Requests: 2

2 Library: Bapst Location: Art stacks Call number: N7445 .R57 1934 MMS ID: 22383445350001021 1 of 2 Items available

Title: Art by Reza, Yasmina London: Faber and Faber 1996

3 Library: Bapst Location: Art stacks Call number: N7445 .B53 1934 MMS ID: 22383445350001021 2 of 2 Items not available

Title: Art. Trans. by Rodin, Auguste New York, Dodd Mead 1934

4 Library: Bapst Location: Art stacks Call number: 707 P73a MMS ID: 22383445350001021 1 of 1 Items available

Title: Art by Pluckrose, Henry London: Macmillan 1972

5 Library: Bapst Location: Art stacks Call number: N 33 C86 2005 MMS ID: 22383445350001021 1 of 1 Items available

Title: Art by Cumming, Robert London: Dorling Kindersley Ltd 2005 Requests: 1

6 Library: Bapst Location: Art stacks Call number: PS3552.U4 A7 1977aM MMS ID: 22383445350001021 1 of 1 Items available

Title: Art by Bukowski, Charles Santa Barbara: Black Sparrow Press, 1977

7 Library: Bapst Location: Art stacks Call number: N7353 .S37 1992 MMS ID: 22383445350001021

Title: Seikado art treasures by Seikado Bunko Tokyo: Seikado Foundation 1992

Title: Art by Bell, Clive London: Cassell Illustrated 2008 10 of 100 Items available

Description

Library: Bapst Location: Art stacks Call number: N7445 .B53 1958 MMS ID: 22383445350001021 PDL 123456

Brief level: - Suppress from publishing: No Suppress from external search: No Requests: 2

List of items (10 of 100) View all items (100)

Barcode	Item Call N	Availability
1 0113701637093	842.914	Item in place
2 0113701601149	842.914	Item in place
3 0113701637055	842.914	Item in place
4 0113701601166	842.914	Item in place
5 0113701637090	842.914	Item in place
6 0113701601111	842.914	Item in place
7 0113701637033	842.914	Item in place
8 0113701601149	842.914	Item in place

MAIN BENEFITS

- New Capability
- Less Clicks
- Improved Data Organization and Display

Early Access with UX FG – May 2021 Release

User Experience – PO Lines



The screenshot displays the ExLibris interface for managing purchase order lines. The top navigation bar includes 'All titles', 'Keywords', and search options. The left sidebar contains navigation icons for Alma QA, Market, Acquisitions, Resources, Discovery, Fulfillment, Admin, and Analytics. The main content area is titled 'Purchase order lines (1 - 20 of 319)' and features a list of lines with filters for Assignment, Task name, Status, PO Line in Claim, Library, and Purchase Type. A detailed view of a selected line shows the book title 'Spork Out of Orbit: Respect, The Kane Press, 2015', PO line number, vendor account, and status 'Waiting for Manual Renewal'. It also displays alerts, PO information (including vendor account, MMS ID, and ISBN), and an 'Ordered items' table.

Library	Location	Call Number	Summary	Items Received
1 Main Library	General	K1.U42	-	25 of 25

MAIN BENEFITS

- Better Navigation
- Less Clicks
- Improved Data Organization and Display

Early Access with UX FG – Q4 2021

User Experience – Looking Ahead



ERESOURCES

Activation Task List
Search Results
Overlap Analysis



DIGITAL

Collection Management
Search Results



RESOURCE SHARING

Lending
Borrowing



ACQUISITIONS

Receiving Workbench

And more.....

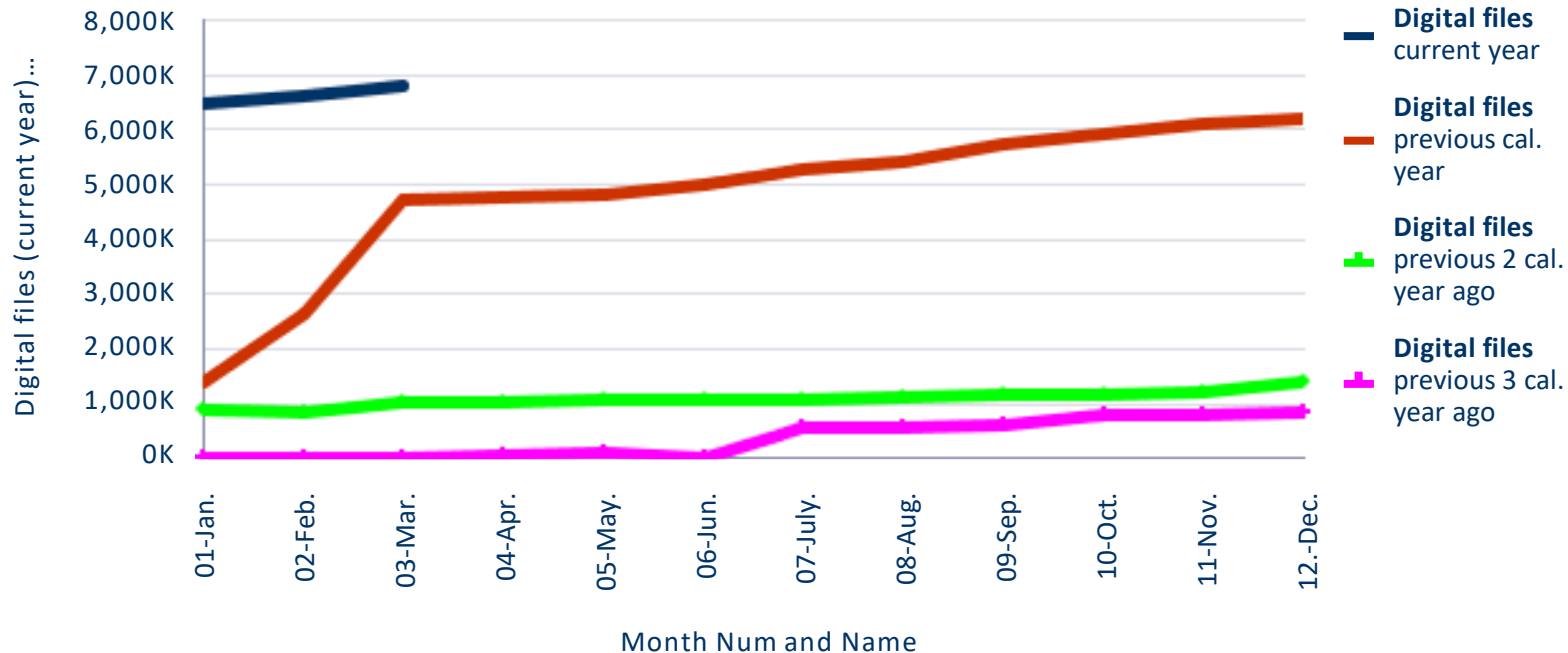


Digital



An increasing need for Digital

Digital files: Current year; Previous cal. year; 2 cal. years ago; 3 cal. years ago



Controlled Digital Lending

2020 Access Control Improvements

- Concurrent Usage and session limitations
- Strict Download control

2021 Controlled Digital Lending,
Ensuring a consistent “owned-to-loaned”
ratio, according to number of originating
hard-copies



Controlled Digital Lending



Queue registry

The number of concurrent users has reached the limit.

You can access the resource by registering to the queue and will receive a notification by email once the resource becomes available

[JOIN QUEUE \(3 USERS IN QUEUE\)](#)

[CANCEL](#)

This screenshot shows the 'Queue registry' page in the Alma interface. The page title is 'Queue registry'. Below the title, it states 'The number of concurrent users has reached the limit.' There is a circular icon containing four stylized human figures and a padlock. Below the icon, it says 'You can access the resource by registering to the queue and will receive a notification by email once the resource becomes available'. At the bottom, there are two buttons: 'JOIN QUEUE (3 USERS IN QUEUE)' and 'CANCEL'.

You have been added to the queue

A notification will be sent to usermail@gmail.com once the resource becomes available

You are number 4 in the queue, estimated availability time: 40:52
you will have 15 minutes to start viewing, before it will be passed on to the next in queue

[CLOSE](#)

This screenshot shows the 'You have been added to the queue' page in the Alma interface. The page title is 'You have been added to the queue'. Below the title, it says 'A notification will be sent to usermail@gmail.com once the resource becomes available'. There is a circular icon containing four stylized human figures and a padlock. Below the icon, it says 'You are number 4 in the queue, estimated availability time: 40:52' and 'you will have 15 minutes to start viewing, before it will be passed on to the next in queue'. At the bottom, there is a 'CLOSE' button.



Metadata

What exist today in Alma and Primo?



Discovery



Interoperability



Cataloging

RECORDS ENRICHMENT

Automatically with URIs for language, identifiers, names, and subjects

ALMA REFINE

supports the refine workflow within Alma. It works currently with Getty, Wikidata, and Geonames Linked open Vocabularies

DISPLAY IN SEARCH

In result and record view (also as BIBFRAME)

PUBLISH

Entire catalog:
BIBFRAME, RDA/RDF

API ENDPOINTS

In: BIBFRAME, RDA/RDF
and JSON-LD

DISCOVERY

Improved discoverability of the catalogue by search engine

Linked Data – Plans for 2021



CATALOGING

Ability to store and have basic use for Linked Data records

User will be able to upload and search for records cataloged as linked data

Integrate 3rd party Linked Data editor

Cataloger will be able to create new linked data records and store them in Alma for used with basic functionality (e.g. Sinopia)





Serviceability



Training and Documentation



IMPROVE STRUCTURE

Improve topic breakdown,
better differentiation
between functional areas



IMPROVE SEARCH

Additional tagging for
terms and alternatives



HOW TOS

Additional content on
how to do things:
workflows, setup, etc..



WORKFLOW DIAGRAMS

Show how the system works
visually, better 'big picture' view



IN-APP HELP

Embed the help and training
directly from Alma. Side-by-Side



Extensibility

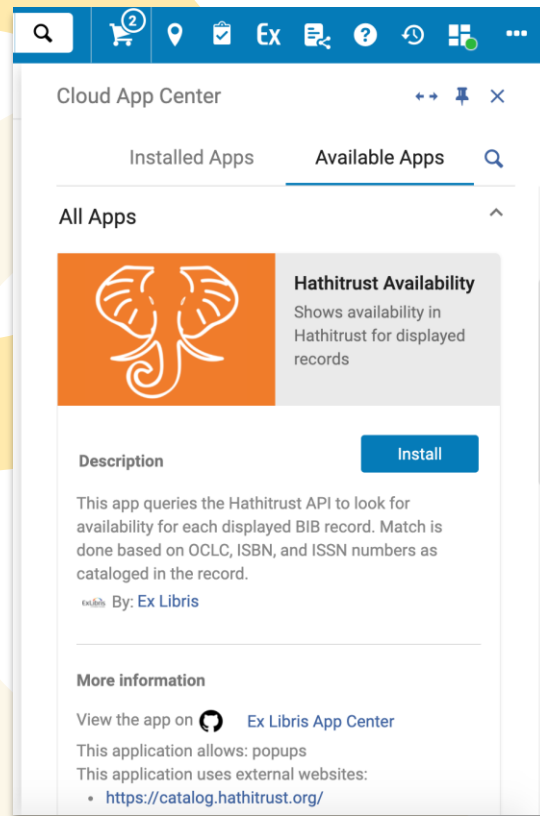


Cloud Apps

- Cloud Apps are applications which are written by the community (or Ex Libris) and run *inside* of the Ex Libris platform.
- Cloud Apps are easily searched, installed, and launched within Alma by the end user

Main Use Cases

- **New Functionality**
- **Productivity Shortcuts and Enhancements**
- **Integration with 3rd Party Systems**



Q&A





Thank you!
