Before we start...
1000 signed institutions!

LOAN TRANSACTIONS IN 2017:
21,560,798

COUNTRIES:
33

#BIBS:
688,307,959
Respect the past

"Those who do not learn from history are doomed to repeat it."

George Santayana
philosopher, essayist, poet, and novelist
Yesterday's libraries were standalone
Today, libraries are all about collaboration
Libraries are all about collaboration

Joint Collection Development
Joint Acquisition
Metadata
Analytics
Open Testing Framework
Open testing framework

SOLUTION:
- Shared testing platform
- Reduced test effort via collaboration
Open testing framework

PILOT STARTED  FEEDBACK GATHERING  PILOT SUMMARY  OFFICIAL LAUNCH
August 2017  Nov 2017  Dec 2017  2018

Thank You Pilot Users!

Alma Customers
Overview  Todo  Milestones  Test Runs & Results  Test Suites & Cases  Reports

PILOT STARTED
August 2017

OFFICIAL LAUNCH
2018
Yesterday's libraries were limited by routines.
Today, libraries are focused on **efficiency & innovation**

**Automation:**
- Holdings update
- Cataloging

**Real time Ordering**

**Publishing & Importing**

**Efficient user experience**
ALMA’S NEW USER INTERFACE

Completely new visual design

Personalized & Customizable

Responsive - works on any device

Intelligent – adapts to your behavior

Intuitive & user friendly

~70% of early adopters are using the new UI daily

311 users switched to the new UI in the first 48 hours

Just the beginning:

• Integral part of development cycle

• Committed to continue working with the community
In the past, libraries had limited ways to connect to the institutional ecosystem.
Today libraries are equipped with multiple means to become connected

- Open platform
- Industry standards
  - Linked data
  - BIBFRAME
- APIs
Ex Libris Live API Dashboard

THE POWER OF CONNECTIVITY

472,458,961

API Calls

January 2017 - To Date

Use the power of open APIs to connect your library to the academic ecosystem to improve user experience, enhance efficiencies, and provide greater value to the academic institution. This live dashboard presents how the Ex Libris community uses Ex Libris APIs in real time.
<table>
<thead>
<tr>
<th>DATE DUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>MAR 14 1965</td>
</tr>
<tr>
<td>NOV 4</td>
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<tr>
<td>FEB 3</td>
</tr>
<tr>
<td>APR 6</td>
</tr>
<tr>
<td>OCT 20</td>
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<tr>
<td>NOV 5</td>
</tr>
</tbody>
</table>

Yesterday libraries were about **MY library**
Today, libraries are about comparing and improving benchmark and comparative analytics.
Alma’s benchmark analytics – How am I doing?

34% Of all Alma institutions have agreed to share their data anonymously.
Great adoption of benchmark analytics

Institutions have been running benchmark reports in the last 2 months (at least 10 reports)

Benchmark reports were run in the last 4 months
IMPROVE THE PRESENT

The present moment, if you think about it, is the only time there is. No matter what time it is, it is always now.

Marianne Deborah Williamson
teacher, author and lecturer
The present is YOU!
What do we hear from you?

COLLABORATIVE NETWORKS
We need to work together better

ANALYTICS
I need to know more about what’s going on

RESOURCE MANAGEMENT
I need better tools to manage my catalog/resources

NEW UI
I want a ‘better’ Alma

IDEA EXCHANGE & NERS
I have a great suggestion

DIGITAL RESOURCES
I want all of my resources to be managed together

ACQUISITION WORKFLOWS
I want less manual work

STREAMLINING WORKFLOWS

GAINING BETTER INSIGHTS

EXTENDING COLLABORATION

OPERATIONAL EFFICIENCIES

RES. SHARING AND FULFILLMENT
I want to provide my users with better services

Simple, Impact, Experience
"I want a better Alma – New “UI”"

- Finish full deployment
- Handle open issues

EOY 2017

- Work with FG on next phases
- Identify workflows and system-wide elements

Q1 2018

- Incremental improvements
- New/Enhanced workflows

2018 (and beyond)
I have a great suggestion

Idea Exchange

**Ideas (Alma)**

- **824** Open ideas
- **36** Created in last 30 days
- **20** Already supported
- **58** Completed
- **40** Planned

**Users (Alma)**

- **2915** Total users
- **2167** active this year
I have a great suggestion

**Idea Exchange**

**Completed**

- Add the option to display call number in all tabs (loans, returns, requests) of the patron account.
- Batch job for deleting holding records
- Allow reactivation of withdrawn items
- RESTful API for the Alma Link Resolver

**Planned**

- Add Functionality to the Scan In Function in the Alma App
- Physical item recall: option to recall more than one copy
- Add "Previous User" in Manage Patron Services
- Alternative process for resource-sharing borrowing requests rejected by last partner on rota
I have a great suggestion

**I have a great suggestion**

**NERS**

<table>
<thead>
<tr>
<th>2016</th>
<th>ADMINISTRATION: Excel exports from Alma for titles and items - adding MMS ID</th>
<th>3512 VOTES</th>
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<tbody>
<tr>
<td></td>
<td>ADMINISTRATION Expand Repository advanced search options</td>
<td>2231 VOTES</td>
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<tr>
<td></td>
<td>ANALYTICS: Add ability to report on past events</td>
<td>1584 VOTES</td>
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<tr>
<td></td>
<td>FULFILLMENT: Alert / message for non-renewed patron loans</td>
<td>1426 VOTES</td>
</tr>
<tr>
<td></td>
<td>RESOURCE MANAGEMENT: Improve bound width architecture</td>
<td>1328 VOTES</td>
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</table>
### I have a great suggestion

**NERS**

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Votes</th>
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<tbody>
<tr>
<td><strong>E-RESOURCE MANAGEMENT</strong></td>
<td>Simplify process to remove, relink, and delete portfolios in electronic collections</td>
<td>3469</td>
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<tr>
<td><strong>ACQUISITIONS</strong></td>
<td>More flexibility to update order records</td>
<td>2615</td>
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<tr>
<td><strong>RESOURCE SHARING</strong></td>
<td>DOI and PMID in a resource-sharing request</td>
<td>2462</td>
</tr>
<tr>
<td><strong>RESOURCE SHARING</strong></td>
<td>Alternative process for resource-sharing borrowing requests rejected by last partner on rota</td>
<td>2348</td>
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<tr>
<td><strong>FULFILLMENT</strong></td>
<td>Loan embargo parameters needed</td>
<td>1856</td>
</tr>
<tr>
<td><strong>FULFILLMENT</strong></td>
<td>Show the number of holds on an item in Primo's Get It tab, status</td>
<td>1745</td>
</tr>
<tr>
<td><strong>RESOURCE SHARING</strong></td>
<td>When placing a resource sharing request item requestability as well as loans availability must display in Primo</td>
<td>1327</td>
</tr>
<tr>
<td><strong>FULFILLMENT</strong></td>
<td>Ability to send hourly overdue notices</td>
<td>1294</td>
</tr>
<tr>
<td><strong>FULFILLMENT</strong></td>
<td>Display request history in Item Fulfillment history</td>
<td>1132</td>
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<tr>
<td><strong>E-RESOURCE MANAGEMENT</strong></td>
<td>Perpetual access indication and coverage needed at portfolio level</td>
<td>1112</td>
</tr>
</tbody>
</table>
"I want all of my resources to be managed together - Digital"

The *Only* Solution For Managing Electronic, Print & Digital Assets

<table>
<thead>
<tr>
<th>Record</th>
<th>Physical</th>
<th>Electronic</th>
<th>Digital</th>
<th>Collections</th>
<th>Other details</th>
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<tr>
<td>1</td>
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<td>Digital</td>
<td>1</td>
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<tr>
<td>2</td>
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<td>Physical</td>
<td>1</td>
<td></td>
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<tr>
<td>3</td>
<td></td>
<td></td>
<td>Electronic</td>
<td>1</td>
<td></td>
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</tbody>
</table>
I want all of my resources to be managed together - Digital

Alma Digital Viewer

IIIF Viewer

Custom Viewer
### Curating Unique Content
- Dublin Core application profiles
- Normalization rules
- Support for Dublin Core
- Persistent identifier generation and integration

### Exposing Digital Content
- Publish to Google Scholar
- Enhanced delivery
- Streaming delivery
- Social tagging

### Data Safeguarding
- Extended audit history
- Grace period for content reverting

### Flexible Implementation
- Migration Tools

### Analytics
- Deposit status notification
- New digital subject areas
- Send periodical deposit reports

---

I want all of my resources to be managed together - **Digital**
I want all of my resources to be managed together - Digital

Join this session!

Moving your digital collections to Alma
Adi Alter, Director of Product Management, Digital Resources
Tuesday, 12:30 – 13:00
User searches vendor system and builds list of books to order or picks from an approval list.

Order is placed in vendor System which causes order data to be sent via API to Alma. An order line and a bibliographic record is created in Alma.

Optional: Overnight a more complete MARC record is sent to Alma via FTP which overlays the bib record created by the API.

Invoice data and MARC records flow to Alma ILS system via EDI/FTP when book is shipped.
"I want less manual work - Acquisition Workflows"
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

Coming Soon: Ebook Central
I want less manual work - Acquisition Workflows

Join this session!

Just What You Ordered:
Real-Time Ordering with Alma and ProQuest Book Platforms

Yoel Kortick, Senior Librarian, Ex Libris
Aine Rice, Director Book Sales EMEA, ProQuest
Tuesday, 13:45 – 14:30
I want to provide my users with better services – Resource Sharing and Fulfillment

<table>
<thead>
<tr>
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<th>2016</th>
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<tr>
<td>Borrowing</td>
<td></td>
<td></td>
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<tr>
<td>Requests</td>
<td>332,425</td>
<td>386,579</td>
</tr>
<tr>
<td></td>
<td>70,839</td>
<td>189,732</td>
</tr>
<tr>
<td></td>
<td>12,793</td>
<td>24,028</td>
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<tr>
<td></td>
<td>416,057</td>
<td>600,339</td>
</tr>
<tr>
<td>Lending</td>
<td>288,546</td>
<td>380,414</td>
</tr>
<tr>
<td>Requests</td>
<td>6,982</td>
<td>110,064</td>
</tr>
<tr>
<td></td>
<td>10,088</td>
<td>21,941</td>
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<tr>
<td></td>
<td>305,616</td>
<td>512,419</td>
</tr>
</tbody>
</table>

North America | Europe | Asia Pacific / Australia | Sum
--- | --- | --- | ---
Borrowing Requests | 332,425 | 70,839 | 12,793 | 416,057
Lending Requests | 288,546 | 6,982 | 10,088 | 305,616

Borrowing Requests | 386,579 | 189,732 | 24,028 | 600,339
Lending Requests | 380,414 | 110,064 | 21,941 | 512,419
I want to provide my users with better services – Resource Sharing and Fulfillment
I want to provide my users with better services – Resource Sharing and Fulfillment

Functional Highlights:

- Walk-In loans
- Return anywhere
- Direct requesting
- Pick up anywhere
- Consortial patron card in Primo
"I want to provide my users with better services – Resource Sharing and Fulfillment

Fulfillment Network (Consortial)

P2P (regional)

Broker (regional)

P2P

Broker"
I want to provide my users with better services – Resource Sharing and Fulfillment

Join this session!

Resource Sharing: Local, Regional, National, and Global

Moshe Shechter, Product Manager, Resource Management, Ex Libris

Tuesday, 15:00 – 15:45
I need to know more about what’s going on – Analytics

Already supported

- DB1 Release 3
- DB1 Release 4
- BR1 Release 4
- BR2 Release 4
- BR3 Release 4
- PR4 Release 4
- JR1 Release 3
- JR1 Release 4
- JR1 GOA Release 4
- JR1a Release 4
- JR1a Release 3
- JR5 Release 4
- MR1 Release 4
- PR1 Release 4

Planned to be added

- BR4 (SUSHI)
- BR5 (SUSHI)
- CR1
- DB2
- JR2
- MR1 (SUSHI)
I need to know more about what’s going on – Analytics

### Overlap P and E - Prompt by title range

<table>
<thead>
<tr>
<th>Title (Normalized)</th>
<th>Author</th>
<th>MMS Id</th>
<th>Electronic Inventory</th>
<th>Physical Inventory</th>
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</tr>
</tbody>
</table>

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I need to know more about what's going on — **Analytics**

**Overlap & unique record comparison with peer institutions**

- **John Smith University**
  - Total Records: 2500000
  - Overlap with my Institution: 500000

- **City College**
  - Total Records: 3000000
  - Overlap with my Institution: 100000

- **Yilis Institute**
  - Total Records: 2000000
  - Overlap with my Institution: 50000

- **State Technical College**
  - Total Records: 3500000
  - Overlap with my Institution: 200000

- **Central Park College**
  - Total Records: 3000000
  - Overlap with my Institution: 100000
"I need to know more about what's going on – Analytics"
Join this session!

Analytics and Your Neighbors – Comparative Approaches & COUNTER Report Management in the Alma Update

Yoel Kortick, Senior Librarian, Ex Libris
Tuesday, 15:15 – 16:15
I need better tools to manage my catalog/resources - Resource Management
I need better tools to manage my catalog/resources - Resource Management

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
I need better tools to manage my catalog/resources - Resource Management

Enhanced Browse (Alt F3)

Reminders

―

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I need better tools to manage my catalog/resources - Resource Management

Non-preferred heading
Enrichment – Staff Search

CZ Contribution –
updating collections
Enhanced IZ view of shared NZ resources

- E-Inventory subject area
- IZ member logged into analytics, will have the ability to see resources managed on the network that are available for them

“We need to work together better – Collaborative Networks”
Complex Deals

- Central office can today negotiate a deal with vendors in a License of type ‘Negotiation’
- If the negotiated content is different for each member it will be possible to indicate which inventory was negotiated for each member
Central management of:

- General electronic services
- Integration profiles
- Publishing profile templates
- Linked account rules
- Fulfillment units
- SFTP definitions
- Role profiles
- Mashup CSS

“We need to work together better — Collaborative Networks”
Centralized user management

Consortia that can manage patrons in a centrally managed file will be able to do so based on an NZ-managed file. This will make cross consortia patron information simple to manage and always up to date.

“We need to work together better – Collaborative Networks”
I need to know more about what’s going on.

I want a ‘better’ Alma.

I need all of my resources to be managed together.

We need to work together better.

I want better tools to manage my catalog/resources.

I have a great suggestion.

I want less manual work.

I want to provide my users with better services.

I have a great suggestion.

I need better tools to manage my catalog/resources.
Respect the past, Improve the present, Embrace the future

Dvir - Dvir.Hoffman@exlibrisgroup.com
Asaf - Asaf.Kline@exlibrisgroup.com