Streamlining with the Higher Ed Cloud Platform: Workflows that Work

Miryam Brand, Portfolio Marketing Manager
LIBRARY MANAGEMENT

Alma
Rosetta

RESEARCH & DISCOVERY

Primo
Summon
Esplo-ro
RefWorks
Pivot

STUDENTS & LEARNING

campusM
Leganto
Institutional Challenges

Break down **silos across systems** (in and across departments)

Meet student **expectations**

Measure & reach **insights** across users and departments

- Improve **collaboration** across various academic stakeholders
- **Budget constraints**
- Efficiently **manage data**
学术SEO
（Exposure to Google: Primo, Alma Digital, Esploro）

UX
（Continuous improvement across solutions, Accessibility: WCAG AA）

APIs & Customizations
（App Center: Alma, Primo, Rosetta, campusM）

安全与隐私
（GDPR Compliance, Standards Compliance, Continuous improvement）
Community Development & Sharing: the App Center

- Ex Libris & Community
- Alma, Primo, Rosetta, campusM
- Single location to discover and publish apps, customizations, and extensions
Easier & Quicker: planned UX improvements across solutions

Feedback messages (complete)

“My Activity Center”
Expanding Workflows
Library & Archive: Alma, Rosetta
Digitization: Streamlined productivity & accuracy

Two-way metadata sync between Alma record and deposit file in Rosetta
Metadata automatically updated between Alma record and deposit file

Digitization flow from Alma to Rosetta
Link in Alma will point to viewer in Rosetta
Library Management & Discovery: Alma, Primo, Summon
Define in Alma, Publish in Discovery: simpler workflows

- Alma and CDI: Single activation of content in Alma, Primo, and Summon!
- Alma Collection Management – presented in Primo Collection Discovery
- Database category defined in Alma, displayed in Primo Database Search
- Update BIB record in Alma, see change immediately (Primo VE)
Streamlined research, management, and preservation

Shared Digital Platform: Alma Digital & Esploro

Two-way metadata sync between Esploro & Rosetta:

Esploro can preserve research data in Rosetta
Library, Teaching & Learning: Alma, Primo, Leganto
Serving students: Integrated course list management & library search

**Integrated Management:** Alma/Leganto
- Joint digitization & availability workflows

**Integrated Search:** Primo/Leganto
- See course reserves in Primo
- Link to Leganto reading list in Primo main menu and record's full display
- Shared Favorites (Primo VE)
- Planned:
  - Primo - Shows more items from the same courses in Full Display
  - Primo - Adds reading list indication on brief search
Teaching, Learning, Research: Primo/Summon, Leganto, RefWorks, Esploro
Tying library search, research, & course lists together

Primo
Summon
RefWorks
Leganto
Esploro
Integrated with the Academic Ecosystem

The Ex Libris Higher-Ed Cloud Platform

**3rd-party academic systems** via open APIs

Including:
- IR, CRIS, specialized repositories,
- public profiles, discovery, HR systems

Ex Libris Esploro

- ProQuest Dissertation & Thesis
- Funding Opportunities
- Reading Lists Management
- Reference Management
- Digital Preservation
- Discovery & Indexes
- Library Services
- ProQuest
- Pivot
- Leganto
- RefWorks
- Rosetta
- Primo
- Summon
- Alma
Prof. Susan Ridley: Teaching

PERSONA: PROF. SUSAN RIDLEY | TASK: CREATE AN ENGAGING RESOURCE LIST

Susan creates a resource list for a new class she teaches

She searches Primo directly from within Leganto

Susan drags a few citations from her RefWorks folder and adds them to the list

Leganto

The library is notified via the Alma task list. The library fulfills the needed resources and clears copyrights. Automatic notification is sent to Susan when list is ready

Primo

Students can access the resource list directly from campusM app and from their learning management system/virtual learning environment

RefWorks

Susan adds the new course resource list to her institutional researcher profile, via Esploro

Alma

campusM

Esploro

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Prof. Susan Ridley: Research

**PERSONA:** PROF. SUSAN RIDLEY  | **TASK:** PUBLISH AN IMPACTFUL RESEARCH WORK

Susan searches for relevant materials

She finds an interesting source and adds the citation to the article she is working on

Susan invites her peers on this project for systematic review

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**Summon**

When the work is completed, Susan deposits the article to the institutional research repository, directly from RefWorks

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**RefWorks**

Susan compiles the data of the project and deposits it to the repository. The library adds relevant metadata and ensures that the assets are marked as open access

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**RefWorks**

The research office is notified of the new publication, and is able to promote it. Automatic reports are generated for the Compliance and Communication managers.

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**Esploro**

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Student Life, Library, Teaching & Learning: campusM, Alma, Leganto
The library as part of student life

Alma & Primo in campusM

3 Loans
2 Overdue
$80.00 Charges
1 To pick up

On-the-go access to Teaching & Learning

Leganto in campusM
Jason receives a notification alert to his mobile about a fast approaching assignment in “Middle East Economics”.

Clicking the link embedded in the alert, he opens the reading list and downloads to his device two required reading items.

Jason’s mobile device recommends on additional readings relevant to his search topic, including a book chapter. Using his device, he places a loan request for a book.

Two days later he receives a push-notification letting him know that the book is available for pick up at the nearby library.

5 days later, Jason’s mobile prompts him that the borrowed book must be returned in 2 days, offering him a 1-week loan extension. One click solves the problem.

Jason finished writing his assignment. From his mobile, he uploads his paper to the institutional reference manager to overrule any unintentional plagiarism. He is now ready to submit! All good!
Workflows that Work: The Higher-Ed Cloud Platform

Ex Libris Higher-Ed Cloud Platform

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
THANK YOU!

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