TRANSFORMATION
Resource Management

Dvir Hoffman, Corp VP Resource Management Solutions
Transformation is all around us

What’s happening in the technology world

- 100% Connected
- VR / AR
- Artificial Intelligence
- DATA Explosion

What’s happening in the library

- The library is more than just a “library”
- Users expectations soars
- Doing more with less

What’s happening with Alma

- Reaching thousands of customers
- Big data
- SaaS experience
Transformation starts with YOU

Community Collaboration

Getting the most out of Alma

Transparency

CX4U
TRANSPARENCY
Let me be as transparent as possible....

Consortium: 44
APIs: 120 M/Month
Signed Institutions: 1617
Recommendations implemented: 100+
Countries: 38
Live with Alma: 1106
This creates challenges

- Personalized experience
- Knowing what’s going to happen
- Bugs and known issues
- Every customer matters
Peek under the hood of Alma R&D

- Marathons
- Focus area fixes
- Improved methodologies
Providing even better visibility
Fix schedule, available to all customers

<table>
<thead>
<tr>
<th>Issue ID</th>
<th>Summary</th>
<th>Description</th>
<th>Case Numbers</th>
<th>Component</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 102031</td>
<td>External resource DNB SRU New does not work</td>
<td>The external search resource DNB SRU is not working properly.</td>
<td>08402003, 00026988, 00030071</td>
<td>Staff Search</td>
<td>Pending Release</td>
</tr>
<tr>
<td>2 101848</td>
<td>When creating reports with databases (e-collections with no portfolios) and dimensions other than E-collection, the databases do not appear in the report.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 101845</td>
<td>Unexpected cancellations of requests by the “Request - Recalculate after Inventory update” job</td>
<td>The Requests - Recalculate After Inventory Update job incorrectly canceled some requests.</td>
<td>00014089</td>
<td>Fulfillment</td>
<td>Pending Release 2019 Q3</td>
</tr>
<tr>
<td>4 101799</td>
<td>Renewal response not sent for itemless lending RS requests</td>
<td>The borrowing library sent a renewal request and the renewal message was received by the itemless resource sharing lending library, but the status of the lending request did not get updated and it was not possible for the lending library to process the renewal.</td>
<td>00029080</td>
<td>Fulfillment</td>
<td>Pending Release 2019 Q2</td>
</tr>
<tr>
<td>5 101746</td>
<td>Too Many Rows in Item Fulfillment History</td>
<td>A large number of in-house loans recorded in the item’s fulfillment History tab caused the page to load very slowly and led to navigation and search issues on the page while it was loading.</td>
<td>00032074</td>
<td>Fulfillment</td>
<td>Pending Release 2019 Q3</td>
</tr>
<tr>
<td>6 101490</td>
<td>Saving a note in an Electronic Collection results in long page loads and intermittent errors</td>
<td>Saving a note in electronic collections resulted in long page loads and errors.</td>
<td>00530319</td>
<td>Inventory</td>
<td>Pending Release 2019 Q2</td>
</tr>
<tr>
<td>7 101245</td>
<td>Schedule of Analytics report completes with errors but was successful when run manually</td>
<td>Scheduled Alma Analytics reports did not run properly.</td>
<td>00624067, 00631322</td>
<td>Analytics</td>
<td>Pending Release 2019 Q1</td>
</tr>
</tbody>
</table>
Transparency is also about sharing what’s happened and about to happen
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

Res. 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 possibility mixing data across areas
- Loading external data sources

Digital
- Data Safeguarding
- MODS
- Enhanced Delivery

DARA
- Introduce advanced approaches (statistical, machine learning)

Next big thing....

Join Asaf Kline’s session - Alma Product Update
Thu May 2 2019, 9:00am–9:45am, Salon
Community Collaboration
How many of you....?
Alma – current collaboration highlights

• Community Zone (+contribution)
• Analytics
• Resource Sharing
• Consortia collaboration and central administration
• Developments on top of Alma

A big thank you to the best community in the industry
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


<table>
<thead>
<tr>
<th>PO line</th>
<th>P0 line type</th>
<th>PO line owner</th>
<th>Status</th>
<th>Sent date</th>
<th>Invoice date</th>
</tr>
</thead>
<tbody>
<tr>
<td>PCL-194542</td>
<td>Physical - One Time</td>
<td>Main Library</td>
<td>In Review</td>
<td>2019-02-18</td>
<td>-</td>
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</tbody>
</table>

## Ordered Items

<table>
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<tr>
<th>Library</th>
<th>Location</th>
<th>Barcode</th>
<th>Receiving Date</th>
<th>Item Policy</th>
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<tbody>
<tr>
<td>Main Library</td>
<td>Stacks</td>
<td>-</td>
<td>-</td>
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### Receiving note

- Routing during receiving

### Vendor information

- Material supplier: OASIS (Counts)/OASIS/PROC
- Expected receipt after ordering: 0 days
- Claiming grace period: 30 days

### Pricing

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

### Funding
# Purchase Order Line Details


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- Receiving note
- Routing during receiving [ ]

### Vendor Information

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

### Pricing

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

### Notes

- Ask the Expert: John Librarian
  - March 7, 2019
  - Hi Rebecca, what seems to be the problem?
  - John Librarian: Hi, I need help with configuring my PO Line.
Ex Libris AppCenter

Supercharge your Ex Libris solutions with apps developed by the community

**SpineOMatic: Print Spine Labels**

*Benjamin Florin* | 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**

*Sara Johnston* | Primo | Type: Add-on

Add custom text and an option to expand results to PCI when no records retrieved.
Getting the most out of Alma
DARA - Data Analysis Recommendation Assistant
DARA – Already creating an impact

First 2 weeks of March:

600 Institutions

100+ Recommendations Implemented
DARA - Data Analysis Recommendation Assistant

LEVEL

RESOURCE MANAGEMENT RECOMMENDATIONS

FULFILLMENT RECOMMENDATIONS

ACQUISITION RECOMMENDATIONS

CONFIGURATION RECOMMENDATIONS

TYPE

Behavior

Configuration

Usage

Statistics

User

Institution

Consortia

Community
DARA @ ULiège Library

Stéphanie Simon
ULiège Library - Task Force Alma Acquisitions

Myriam Bastin
ULiège Library - Task Force Alma e-Resources

“DARA is a very interesting functionality and is easy to use.”

“DARA can save us time and improve efficiency”

“I think that future recommendation by DARA will be very helpful”

Suggestions for improvements:

- Make the process even smoother (automating it even further)
- Add additional recommendations on new SUSHI vendors
- Add additional recommendations about local portfolios added to the community zone
DARA @ Sonoma State University
Laura Krier
Systems and Metadata Librarian
Sonoma State University Library

“I appreciate DARA’s recommendation for our SUSHI configuration”

“I found it easy to follow and implement”

“We are actively working on improving our usage stats gathering processes, so this recommendation was very helpful”

Suggestions for improvements:

Additional recommendations
Roadmap

Available today
SUSHI recommendations

High demand item recommendations

Cataloging related recommendations

E-Collection Portfolio recommendations
New order API options

Also in 2019
Request cannot be fulfilled → create resource sharing request

1 Create a Resource Sharing request for a pending patron request on "Harry Potter and the philosopher's stone"

Type: Resource Sharing for pending patron request

There is a patron physical request waiting in the queue. It cannot be fulfilled now.
I see that one of your resource sharing partners has this title available.

I recommend creating a Resource Sharing request for this patron, to allow sooner availability of the requested item.

Created on: 2019-02-14
Updated on: 2019-02-14
Updated by: System
Notes: 0
Attachments: 0

There is a patron physical request waiting in the queue. It cannot be fulfilled now.
I see that one of your resource sharing partners has this title available.

I recommend creating a Resource Sharing request for this patron, to allow sooner availability of the requested item.
Enriching a record based on community insights
**LDR** 01775nam##2200397#i#4500

020 $Sa 1-4875-9542-5

050 4 $Sa DK274

245

- **Insights from the community**

Class Number: DK274
- # institutions: 522 (89%)

Class Number: JN6511
- # institutions: 53 (11%)
1 Our man in Moscow
By Ford, R. A. D. (Book Toronto, [Ontario]; University of Toronto Press, 1989.)
Cataloging institution: preferred institution 1
Subjects: History, Russian World, World history...
Other System Number: (OCoLC)387805, (OCoLC)989939884, (OCoLC)989934300

2 Our man in Moscow
By Ford, R. A. D. (Book Toronto, [Ontario]; University of Toronto Press, 1989.)
Cataloging institution: preferred institution 2
Subjects: History, World War, 1939-1945--United States
Other System Number: (OCoLC)10388802, (OCoLC)1023003859, (OCoLC)731109518

3 Our man in Moscow
By Ford, R. A. D. (Book Toronto, [Ontario]; University of Toronto Press, 1989.)
Cataloging institution: preferred institution 3
Subjects: History, Russian World, World history...
Other System Number: (OCoLC)31658051, (OCoLC)891308142, (OCoLC)829225696
It’s all about data quality

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

Introducing...
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.

Create and update collections in the Provider Zone automatically.
## Provider Zone

Join Dana Moshkovits’ session - The Alma Provider Zone: Content Made EasyPZ

Wed May 1 2019, 1:30pm–2:15pm, Room 212/213

### IEEE Xplore All Journals

- **Type**: Selective package
- **Services**: Full Text
- **Interface name**: IEEE Xplore
- **Linking Level**: Article DOI
- **Creation Date**: 2016-05-10 14:38:06
- **Modification Date**: 2016-05-31 17:16:40

### IEEE Xplore STEM 25 PLUS Journals Collection

- **Type**: Selective package
- **Services**: Full Text
- **Interface name**: IEEE Xplore
- **Linking Level**: Article DOI
- **Creation Date**: 2015-12-20 18:49:32
- **Modification Date**: 2015-12-24 18:20:18

### CCC Get it Now IEEE

- **Type**: Selective package
- **Services**: Full Text
- **Interface name**: CCC Get it Now
- **Linking Level**: Article DOI
- **Creation Date**: 2014-02-11 12:53:37

Managed by IEEE Xplore
What we hear from you:

“Collaboration with other institutions to provide faculty and patrons with resources in a timely manner”

“We need to revamp our resource sharing capabilities, to make it efficient, transparent and a true 21st century solution…”

“Joint collection development”

“Better utilize resources”

“Learning affordability is a major thing”
Introducing....
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
Next Gen RS

Resource Sharing Staff Dashboard Example
Next Gen RS

Patron Experience

Global Request Center
My loans. My Way
Next Gen RS

Amazon Like Experience
Next Gen RS

Amazon Like Experience
It’s all about you!

THANK YOU!