Ex Libris & Alma Update

Solution Overview for Boston Library Consortium

Wednesday, July 24th
The Ex Libris Team

• Katy Aranoff, Director of Solution Architecture

• Jessica Clemons, Account Manager

• Tom Hall, Strategic Account Manager

• Yuval Kiselstein, Director of Product Management

• Tate Nunley, Regional Vice President of Sales
Ex Libris Today

- **7,500+** Institutions in the Ex Libris cloud
- **85+** of world’s top 100 universities
- **105+** ARL institutions
- **45** National libraries
- **92%** customer satisfaction
- **950+** Employees globally
- **2,200+** Customer ideas on the Ex Libris Idea Exchange
- **>65 M** API calls per month
- **90** countries
- **5** Data centers

Cloud % of new sales:
- 2009: 16%
- 2010: 29%
- 2011: 61%
- 2012: 69%
- 2013: 81%
- 2014: 81%
- 2015: 92%
- 2016: 93%
- 2017: 96%
- 2018: 98%
Institutional Challenges

Break down silos across systems (in and across departments)

Student expectations

Measure & reach insights across users and departments

Improve collaboration across various academic stakeholders

Budget constraints

Efficiently manage data
Ex Libris Higher-Ed Cloud Platform

LIBRARY MANAGEMENT

RESEARCH & DISCOVERY

STUDENTS & LEARNING
The leading cloud-based library services platform in the industry, managing print, electronic and digital materials in a single platform. Providing libraries with the most cost-effective library management solution in the industry.

1,700+ Institutions

43,000 Active Users

62 ARL Members

51 Consortia

“Key collaborative aspects of the platform will help us achieve even greater efficiencies as a consortium and expand upon our members’ nearly 40-year history of consortial resource sharing.”

Kris Hammerstrand, CARLI
Improving the Customer Experience
Transparency – Alma Known Issues
Focus Area – Resolving Complex Issues

• Focus area plan – dedicated bug fix releases during 2019 for areas that have high impact on users’ daily operation and has a high number of high severity defects and long MTTR.

• Completed YTD:

<table>
<thead>
<tr>
<th>Area</th>
<th>Release</th>
<th># Of Complex Issues resolved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acquisition</td>
<td>Feb 2019</td>
<td>40</td>
</tr>
<tr>
<td>Fulfillment</td>
<td>April 2019</td>
<td>32</td>
</tr>
<tr>
<td>Resource Sharing</td>
<td>July 2019</td>
<td>20</td>
</tr>
</tbody>
</table>

• Plan for H2 2019:
  • Next iteration on: Acquisition, Fulfillment, Resource Sharing
  • ERM
Quick Wins Marathon

• Release Quick Wins Marathon
  • Pre define day(s) each release where all team members working on list of “Quick Wins” bugs.
  • No meetings or any other activities on this day
• Summary of 2019 Marathons YTD:

<table>
<thead>
<tr>
<th>Release</th>
<th># Resolved Defects</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 2019</td>
<td>95</td>
</tr>
<tr>
<td>April 2019</td>
<td>120</td>
</tr>
<tr>
<td>June 2019</td>
<td>79</td>
</tr>
<tr>
<td>July 2019</td>
<td>116</td>
</tr>
</tbody>
</table>
Alma User Experience

~28,000

# of staff users that logged into Alma in June 2019

MD Editor
Key part of workflows, redesigned visually/usability/ productivity

System Productivity Tools
Activity Center, System Feedback and Messages

Workflows
Investing in high use areas: Item Management, Receiving, Activation

# of Pages | Page Name
---|---
7,703,644 | loan.fulfillment_patron_workspace_loan_new_ui.xml
7,220,920 | loan.fulfillment_discharge_item.xml
5,828,965 | loan.fulfillment_checkout.xml
5,177,471 | search.mms_results.xml
3,847,849 | resource_editor.physical.items_list.xml
3,458,464 | resource_editor.physical.item_general.xml
3,146,704 | home
3,062,297 | request.scan_in_interface.xml
2,227,745 | mdeditor.md_editor.xml
2,115,654 | search.physical_item_results.xml
1,804,232 | mms.marc_record_simple_view.xml
1,434,754 | search.physical_ie_results.xml
1,133,094 | po.poline_summary.xml
1,028,369 | resource_editor.physical.holdings_list.xml
987,494 | po.poline_list.xml
630,406 | po.poline_receiving_list.xml
616,644 | po.poline_receiving_items_list.xml

Top Pages – Last 30 Days
System Productivity Tools

Feedback messages

My Activity Center - Recent documents
Metadata Editor – Redesign
Workflow Improvements in High Use Areas

Physical Resource Management
Physical Item Edit

Electronic Resource Management
Activation Task List

Acquisition
Purchas order lines management, Invoice management

Fulfillment
Information on user
Analytics

2,561,004
Number of Reports run during 2018

Community Collaboration
Use Cases, Early Access Testing

New E-Inventory Subject Area
Restructured and enhanced to combine: E-Inventory, Usage and Costs, new CPU approach.

Next Gen Analytics
Working on new Data Warehouse technologies and Data Visualization Tools
Next-Gen Analytics
Metadata Management

1,213,254,122

# of BIB Records at the end of Q1 2019

Authority FG Collaboration
Use Cases, Early Access Testing

Authority Control
Linking, Preferred Term Correction, Browsing

Linked Data
Updated Vision and Plans

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Linked Data – Where we are?

Records enrichment
automatically with URIs for language, identifiers, names, and subjects

Publish
entire catalog: BIBFRAME, RDA/RDF

Discovery
of the underlying metadata and access to it via URIs

Display in search
in result and record view
(also as BIBFRAME)

API endpoints
in: BIBFRAME, RDA/RDF
and JSON-LD

Ex Libris: Journey to Linked Open Data Support – An Update
Linked Data - principals and vision

Prime
Cataloging of new record by using linked data formats

Side by side
Existing records in various formats will continue to be managed side by side with Linked Data records

Eco system
Provide ability to managed URI for all records across institutions in Ex Libris platform as part of global eco system

Navigation
Leveraging the relationship between linked records. For example: Display, navigation, and data processing
Resource Sharing and Fulfillment

93,647,852

# of loan transactions during 2018

Fulfillment
Idea Exchange, Ongoing and Evolutionary Improvements

Collaborative
Consortial Borrowing, Automated Fulfilment Networks and Primo

Integrations
Tipasa, RAPID and more

Resource Sharing Requests in NA, 2018

<table>
<thead>
<tr>
<th>Type</th>
<th>Total # of Request</th>
</tr>
</thead>
<tbody>
<tr>
<td>ART_EMAIL</td>
<td>3</td>
</tr>
<tr>
<td>BLDSS</td>
<td>4</td>
</tr>
<tr>
<td>EMAIL</td>
<td>6192</td>
</tr>
<tr>
<td>EXTERNAL_SYSTEM</td>
<td>458</td>
</tr>
<tr>
<td>FULFILLMENT_NETWORK</td>
<td>274032</td>
</tr>
<tr>
<td>ISO</td>
<td>407450</td>
</tr>
<tr>
<td>NCIP</td>
<td>309107</td>
</tr>
<tr>
<td>NCIP_P2P</td>
<td>41</td>
</tr>
<tr>
<td>Grand Total</td>
<td>997287</td>
</tr>
</tbody>
</table>
Integrations

**Alma-Tipasa Integration**

**Q1 2019 - DONE**
At Leiden University Libraries we were sort of a development partner in cooperation with both Ex Libris and OCLC for the integration between Alma and OCLC Tipasa. We are using the integration in our Alma/Primo production environment since January 2019.

**ISO 18626**

**June 2019 – DONE**
Libraries will have new options for integrating with resource sharing systems based on the new version of the ISO ILL protocol ISO 18626.

**Push Borrowing requests to Rapid**

**H2 2019**
Library staff will be able to seamlessly use Alma in a peer to peer (P2P) mode in conjunction with other resource sharing systems that are used in the library.

**Push requests to ILLiad -using HTTP API**

**H2 2019**
Library staff will be able to seamlessly use Alma in a peer to peer (P2P) mode in conjunction with other resource sharing systems that are used in the library.

**Support for InnReach APIs**

**2020**
Integration with InnReach will be seamless and real time, without having to rely on an ongoing publishing process and without having to install the DCB client to mediate NCIP communication between Alma and InnReach.
DARA Recommendations

>600

# of Institutions Receiving Recommendations

**Different Types and Areas**
- SUSHI, High request load, Local
- Portfolio linking to CZ

**Big Data**
- Based on the Alma community

**Advanced Approaches**
- Machine Learning, Statistical analysis

Recommendations per type

- Automate Manual (27.66%)
- Load SUSHI (72.34%)
Different Types and Areas

**Analytics based**
Leverage Analytics reports to generate candidates for recommendations. E.g.: high request load, inactive portfolios

**Local collections and portfolios**
Identify cases where local collections, or local portfolios in a collection, can potentially be linked to the KB collection, for more automated updates

**Configuration**
Identify cases where missing or inefficiently configured elements can be changed to improve automation or enhance efficiency. E.g.: circ desk and dept, description rules
<table>
<thead>
<tr>
<th>Tag</th>
<th>Value</th>
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<tbody>
<tr>
<td>LDR</td>
<td>01775nam##2200397#i#4500</td>
</tr>
<tr>
<td>020</td>
<td>$$a 1-4875-9542-5</td>
</tr>
<tr>
<td>050</td>
<td>$$a DK274</td>
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<tr>
<td>245</td>
<td></td>
</tr>
</tbody>
</table>

**Insights from the community**

- **Class Number**: DK274
  - # institutions: 522 (89%)
- **Class Number**: JN6511
  - # institutions: 53 (11%)
Our man in Moscow (994340000000204482)

LDR 01775nam#220039781#4600
020 $a 1-4875-9542-5
050 $a DK274
245 $a Our man in Moscow / $b a diplomat's reflections on the Soviet Union / $c Robert A.D. Ford.
<table>
<thead>
<tr>
<th>1</th>
<th>Our man in Moscow</th>
</tr>
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<tbody>
<tr>
<td>By Ford, R. A. D. (Book Toronto, [Ontario]; University of Toronto Press, 1989.)</td>
<td></td>
</tr>
<tr>
<td>Cataloging Institution: preferred institution 1</td>
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<tr>
<td>Subjects: History., Russian World., World history...</td>
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<tr>
<td>Other System Number: (OCoLC)387805, (OCoLC)989939884, (OCoLC)989934300</td>
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<table>
<thead>
<tr>
<th>2</th>
<th>Our man in Moscow</th>
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<tr>
<td>By Ford, R. A. D. (Book Toronto, [Ontario]; University of Toronto Press, 1989.)</td>
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<tr>
<td>Cataloging Institution: preferred institution 2</td>
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<tr>
<td>Subjects: History., World War, 1939-1945--United States</td>
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<tr>
<td>Other System Number: (OCoLC)10338802, (OCoLC)1023003859, (OCoLC)731169518</td>
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<table>
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<tr>
<th>3</th>
<th>Our man in Moscow</th>
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<tr>
<td>By Ford, R. A. D. (Book Toronto, [Ontario]; University of Toronto Press, 1989.)</td>
<td></td>
</tr>
<tr>
<td>Cataloging Institution: preferred institution 3</td>
<td></td>
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<tr>
<td>Subjects: History., Russian World., World history...</td>
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<tr>
<td>Other System Number: (OCoLC)31658051, (OCoLC)891308142, (OCoLC)829225696</td>
<td></td>
</tr>
</tbody>
</table>
Managing Digital Collections in Alma

1,038,393

# of files managed & stored Amazon

- **All types of files**
  Images, text, audio, video

- **Expanded Metadata Schemas**
  Describe things using the right metadata format

- **Showcasing your collections**
  Collection Management and Discovery, Tools to move from existing systems

![Pie chart showing file types](chart.png)

- **jpg**
  534,778, 52%
- **pdf**
  398,084, 39%
- **tif**
  84,406, 8%
- **mp4**
  526,772, 49%
- **tiff**
  422,245, 40%
- **docx**
  312,217, 29%
- **gif**
  238,776, 22%
- **mp3**
  210,084, 20%
- **doc**
  190,217, 18%
- **png**
  160,084, 15%
All Types of Files

Support Streaming Video and Audio for Alma Viewer

January 2019
The Alma Viewer now supports streaming video and audio. You can convert existing digital representations to streaming format using the new Media Conversion Job.

IIIF advancements

Coming Soon
We are closely monitoring the official releases of the IIIF community, to incorporate delivery of PDF and other non-audiovisual files on the IIIF framework (IxIF).

Enhanced Delivery

Coming Soon
Support will be added for rendering of 3D images.
Expanded Metadata Schemas

**Publishing Bibliographic Records in MODS Format**

March 2019
You can now publish bibliographic records in MODS format. To support this feature, the option

**End-to-end MODS**

Coming in August
Support will be added for the entire lifecycle of MODS records, from importing and depositing to editing, publishing and delivering

**ETD Support**

Coming Soon
Adding support for ETDs, allowing customers to import, catalog and deliver content described by ETD schema
Moving your collections

• We can help you move your collections to Alma. Please let us know if you are interested

• Currently collaborating with customers to move their collections from existing systems to Alma

**Completed**
- DigiTool

**In Process**
- Equella
- Digital Commons
- Islandora

**Planned**
- Dspace
- ContentDM
Maximizing the exposure of library collections, providing students and researchers with fast access to scholarly materials and strengthening the library’s role in the research process

3,400+ Institutions

~15M Users

3.5B+ Records

6.5M+ Searches per Day
Our environment rapidly evolves

- Steep increase of the amount of material available
- Increased influence of social media and consumer platforms on user perception
- Increased focus on data mining, data science
- Open access and OER
- More diverse material types
- Better technologies - more processing power
Meeting the challenge – key strategies

- Putting Data Science at the core of discovery
- Leveraging intelligence from our big data repositories
- Offering contextual services in addition to the one search box approach
- Consolidating of our data repositories to allow for new innovative services to be created
New in 2019: Ex Libris Central Discovery Index (CDI)

Central Discovery Index

*Future-ready*

- Unified index for Primo & Summon
- Comprehensive, scalable & flexible

- Faster ingest & updates, better quality data
- Smart services based on contextual relations
- Data intelligence as a core part of our discovery systems
Graph database - Formal and informal relationships

Cocoa and chocolate flavonoids: Implications for cardiovascular health
Steinberg, Francene M; Bearden, Monica M; Keen...
Discovery beyond the single search box with data relations

- Understand context by exploring relations
- Find more material by following suggestions and relations
- Positive impact on learning and research output
- Learning about the topic
- Enhanced information literacy
- Supports the use of more diverse material
- Enhanced user experience
Context in discovery with **formal relationships**

Example:
Book → Book reviews
Book → Book chapters
Central Discovery Index – Rollout Plans

Phase 0
Primo/Alma
Working Group
Aug 2019 - Nov 2019

Phase 1
Summon
All customers
Primo/Alma
Early Access
Nov 2019 – Feb 2020

Phase 2
Primo Alma / VE
All customers
Primo/SFX
Early Access
Feb 2020 – May 2020

Phase 3
Primo/SFX
All customers
May 2020 – Oct 2020

Finalize move
Dec 2020
Enhanced glanceability: Helping users to distinguish and choose
Enhanced glanceability: Helping users to distinguish and choose

And in the future:

• Research and Review articles
• Primary sources
• Items included in course resource lists
• Educational material / OER
Use the power of open APIs to connect your library to the academic ecosystem, enhance efficiencies, and provide greater value to the academic institution. The Ex Libris community uses Ex Libris APIs in real time.

http://developers.exlibrisgroup.com/live
The App Center

Extend. Ex Libris.
Build your solutions with APIs, system integrations, and standards support.
<table>
<thead>
<tr>
<th>A few examples</th>
<th><a href="https://developers.exlibrisgroup.com/appcenter/">https://developers.exlibrisgroup.com/appcenter/</a></th>
</tr>
</thead>
</table>
| **Bookmarklet generator to print Alma loans receipts** | Nazzareno Bedini  
Alma | Extension  
Create and customize a bookmarklet (bookmark with JavaScript code) to drag and |
| **RSS2OAI** | Deborah Fitchett  
Primo | Extension  
RSS2OAI is a PHP script that converts a WordPress RSS feed to a minimal OAI feed for harvest |
| **AlmEZ: Authenticate and authorise “external” patrons with EZProxy using Alma** | Deborah Fitchett  
Alma | Extension  
A way to authenticate and authorise “external” patrons with EZproxy using Alma. Currently it |
| **Self-hosted Interloan Form** | Deborah Fitchett  
Alma | Primo | Extension  
Code and instructions for prepopulating a self-hosted interloan form from Alma/Primo. |
| **Automated system alerts on Primo** | Deborah Fitchett  
Primo | Extension  
Displays a status alert on Primo NUI based on data from the Ex Libris status API When we |
| **grima – Whispering into Alma’s Ear with APIs** | Kathryn Lybarger  
Alma | Extension  
Whisper into Alma’s ear using APIs to speed up workflows. With grima, you can use small web- |
App Center - Future plans

- Work has already begun on a framework to enable developers to write apps which will run **inside** of Alma. This will include apps which will
  1. interact with an open page in Alma
  2. use REST APIs to update data.
- Examples of what this could include are:
  - Adding a role to a list of users
  - Updating a list of bibliographic records or items
  - Formatting and printing the entire tree of a bibliographic record, holdings, and items
  - Performing an action on a list of items
North America Customer Support
Technical Support Alignment

Streamline and Unify Experience for Customers
- Align ProQuest & Ex Libris customers’ experience
- Easy to interact and work with Support

Boost Efficiency
- Between ProQuest and Ex Libris teams
- For Development and Content Operations cases

Improve Collaboration and Communication
- Holistic view of the customers
- Removal of barriers between the teams
- Working together, joint task forces
North America Alma/Primo Support Satisfaction

Main Takeaways
- 93% satisfaction rate
- 1206 surveys year to date
- Need more completed surveys
CX Maturity Level

- Benchmark for Ex Libris CX Organization
- Overall rated well and within the industry benchmark
- Areas above Benchmark:
  - Customer focused culture
  - Customers feedback channels
  - Cooperation and communication with customers
  - Strategy building with customer focus
- Areas below benchmark:
  - Insights: Customers trends
  - Technology: Tools for gathering, analyzing and reporting customers trends and insights
  - Predictive analytics and leveraging throughout the internal systems
Introducing Support Academy for Analysts

- Support Learning Center for new and existing analysts
- Structured program for new analysts
- Multiple paths based on product and tier
- Global professional standard
- Internal certification
- Progress tracking

PRACTICAL HANDS-ON WEEK IN LIBRARY WITH CUSTOMERS
UNDERSTANDING USAGE CONTEXT AND TERMINOLOGY
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

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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
Provider Zone

Enabling providers to access, add and update content directly and automatically within the Community Zone

- Quicker turnaround for new collections
- Increased currency and accuracy
- Growing collaboration with providers

- Working with Development Partners
- In production by end of 2019

https://developers.exlibrisgroup.com/blog/provider/
Questions!