



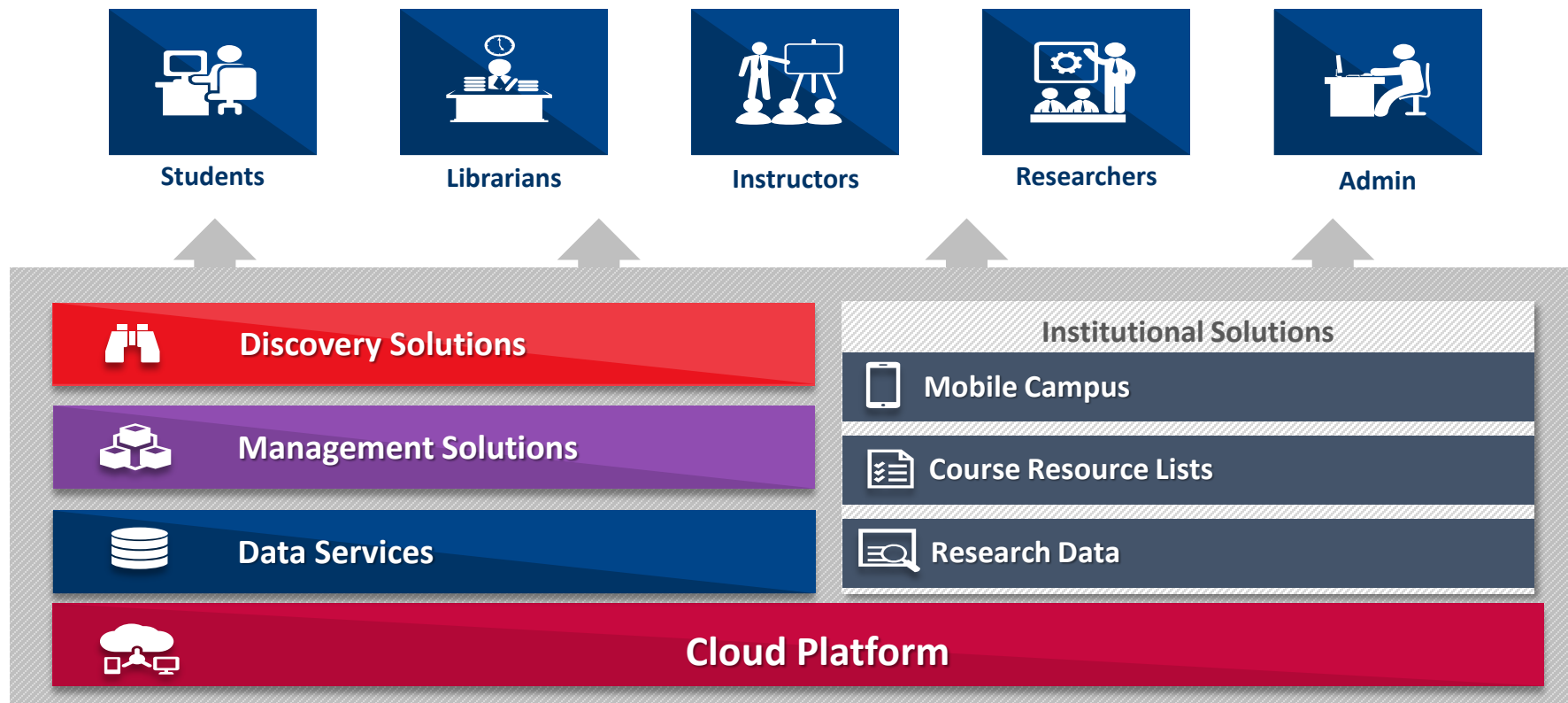
The Future is Now: Discover Your Opportunities with Alma

Knjižnični podaci: interoperabilnost, povezivanje i razmjena
Nacionalna i sveučilišna knjižnica u Zagrebu, 28.-29. studenoga 2017

Christian Motovsky | Senior Account Manager

ExLibris
a ProQuest Company

A Market-Leading Product Offering



Serving National, Academic, and Research Libraries

Alma		Rosetta		Primo	Summon		Leganto	campusM
Aleph	Voyager	Intota	360 Link	SFX	Ulrich's	360 MARC	360 Resource Manager	

BIBSYS

**BOSTON
UNIVERSITY**



**HARVARD
UNIVERSITY**



**EMORY
UNIVERSITY**

LSE

**Imperial College
London**

**ORBIS
CASCADE
ALLIANCE**

**BRITISH
LIBRARY**



**Massachusetts
Institute of
Technology**

KU LEUVEN



**UNSW
AUSTRALIA**



**PRINCETON
UNIVERSITY**



**STATE LIBRARY®
NEW SOUTH WALES**



Ex Libris At-a-Glance



>7,000
Institutions using Ex
Libris Cloud



>850
Employees Globally



>90
Countries



>45
National
Libraries

ExLibris
Primo
ExLibris
Summon

>3,400
Institution using Summon
and Primo

ExLibris
Alma

>1,000
Alma Institutions
worldwide





Provided as a SaaS solution, Alma supports the entire suite of library operations for print, electronic, and digital resources, helping institutions to save costs and increase efficiency

>1,000
INSTITUTIONS

>26,000
STAFF USERS

>55%
COMPETITIVE
DISPLACEMENTS



Back in 2007

What
wasn't
working

Siloed Environment

Lack of Insight

Cumbersome Workflows

Duplicate Data

Duplicate Efforts

Painful Upgrades

Aging Hardware

No integrated Discovery

Today's Environment

Integrated Library System

Link Resolver

Knowledgebase & Record
Services

E-Resource Management System

Digital Repository(s)

Next-Gen Environment

Primo

**Ex Libris
Alma**

Print, Electronic & Digital Resource Management

Unified for students and library staff

Primo

Discovery, delivery and fulfillment of all library resources

Smart fulfillment for all resource types

ScholarRank™ technology for personalized ranking

Article recommendations for serendipitous discovery

Title grouping to streamline results

Library-configurable for your community

Alma

Management of print, electronic and digital resources

Alma is unified by design.



Unified
Data



Unified Workflows



Unified Management

 **ExLibris Alma**

Selection & Acquisitions

Metadata Management

Fulfillment

Analytics

What Does Next-Gen Mean?

1

UNIFIED MANAGEMENT

Print, electronic & digital resources

2

EXCEPTION BASED WORKFLOWS

Automated by library policies

3

ADVANCED ANALYTICS

Know how your library operates

4

OPEN PLATFORM

Extend, build and integrate

5

SMART COLLABORATIONS

In different areas of operations

6

COMMUNITY KNOWLEDGEBASE

Including Automatic authority updates

7

ROLE-BASED MANAGEMENT

Access to permitted areas only


8

AGILE DEVELOPMENT PROCESS

New functionality quickly and more frequent




1. Unified Management














Print, Electronic and Digital Resources

ExLibris **Alma** 

Welcome Jim Benson

Tasks
Electronic resources - activation -
Electronic resources - activation -
Invoices - approval - without assi
Invoices - review - assigned to yo
Invoices - review - without assign
Order Lines - review - assigned t
Order Lines - review - unassigne
Order Lines in evaluation - analysis (8)

-  All titles
-  Physical items
-  Electronic portfolios
-  Funds
-  Collection
-  Electronic collection
-  Digital files
-  Order lines
-  Invoices
-  Requests
-  Vendors
-  Users
-  Authorities

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-  Users
-  Authorities

Use the Metadata Schema That Fits Best.

The screenshot displays the Alma MD Editor interface. At the top, the 'Alma' logo is on the left, a search bar is in the center, and a 'Tasks' button is on the right. Below this is the 'MD Editor' header. A menu bar contains 'File', 'Edit', 'Additional Services', and 'Help'. A status message reads: 'You have 6 warning(s) on your record - Draft saved at 11:38:22.' The main area shows a MARC record for 'The Austr (99427447)'. The record is displayed in a table-like format with fields and their values. A yellow highlight is on the 008 field. Below the MARC record, a Dublin Core record is shown for 'The Austr (99483167)'. The Dublin Core record is displayed in a table-like format with fields and their values. The fields include title, creator, publisher, abstract, dateCopyrighted, description, extent, format, medium, subject, and contributor.

Alma

MD Editor

File Edit Additional Services Help

You have 6 warning(s) on your record - Draft saved at 11:38:22.

Working on -The Austr (99427447)

LDR	00000nkm#a22#####a#4500
001	000050112
005	20050307130846.0
007	kh#bc####
008	041209m18711873ctunnn#####f000#kneng#d
090	\$\$a nla.pic-an9517826

Draft auto-saved at 11:49:37.

Working on -The Austr (99483167)

title	The Australian clipper ship, Arabian	En
creator	Williams, C. P.	English
publisher	John R. Isaac	English
abstract	Abstract	English
dateCopyrighted	[184-?]	English
description	Sailing along trail	English
extent	31.2 X 46.5	English
format	image	English
medium	print : lithograph, hand col.	English
subject	Arabian (Ship)	English
subject	Sailing ships -- Australia	English
contributor	Williams, C.P.	English

Designed with flexibility for today's collections

MARC with RDA

Dublin Core

Auto-save & record versioning

Record templates & normalization rules

2. Exception Based Workflows

Automated by Library Policies

Tasks
Order Lines - packaging (5)
Order Lines - review - assigned to you (5)
Order Lines - review - unassigned (2)
Order Lines in evaluation - analysis (3)
Order Lines in evaluation - draft (4)
Order Lines with claims (15)
Orders - approval (15)
Requests - pickup from shelf (4)
<u>New Lending Requests - assigned to you (1)</u>
New Borrowing Requests with partner (1)
Electronic resources - activation - assigned to you (2)
Electronic resources - activation - unassigned (2)

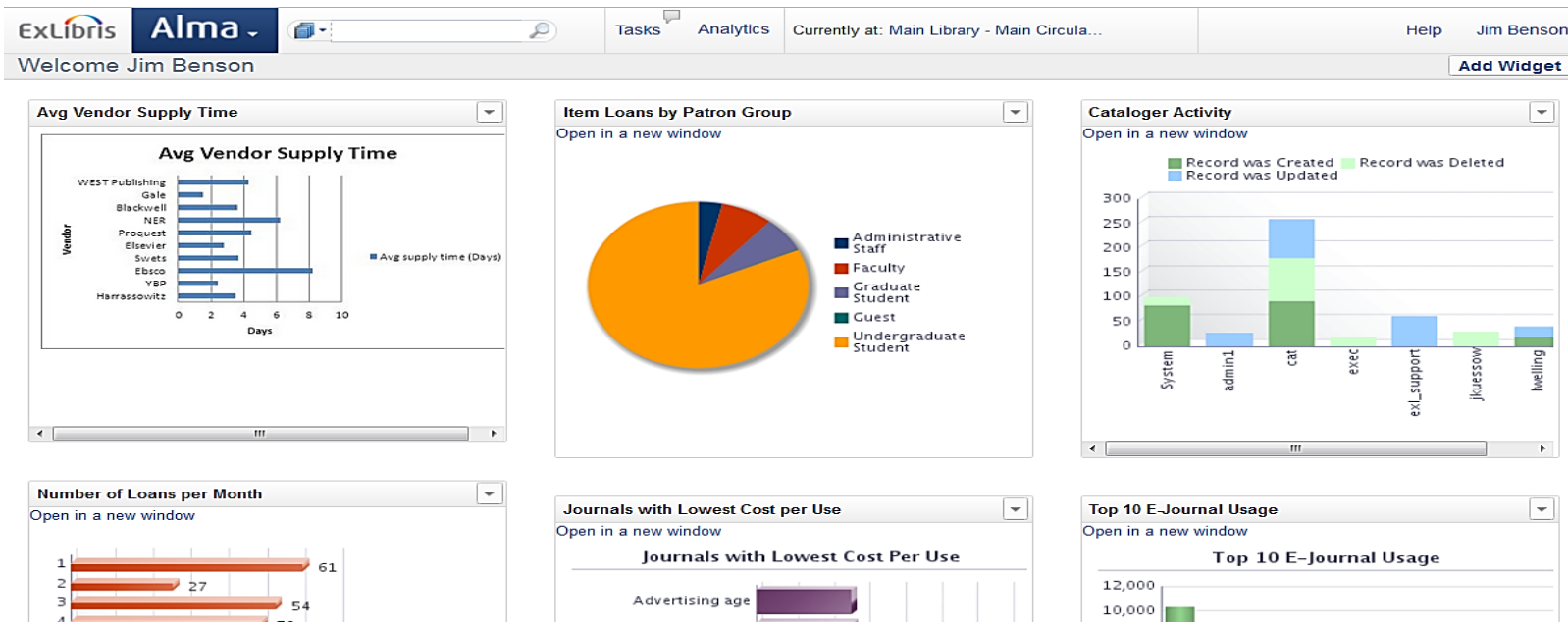
Common tasks fully automated
based upon library-defined
profiles

From record import, to
acquisitions and more

Role-based, intelligent

3. Advanced Analytics

Know How Your Library Operates



Make better day-to-day decisions using real-time data.

Sophisticated analysis, informed decision making

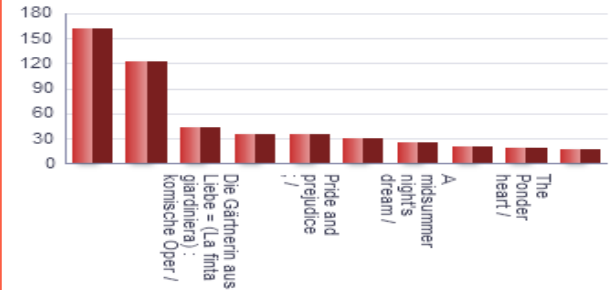
Role-based widgets, dashboards, on-demand, scheduled, multi-format – reporting and analysis your way.

Analytics data and visualization as part of daily workflows

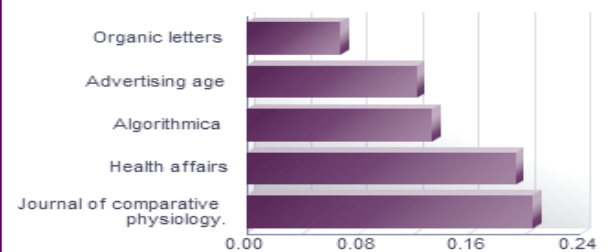
Suite of industry-relevant report templates

Diverse customization options designed for both non-technical and advanced users

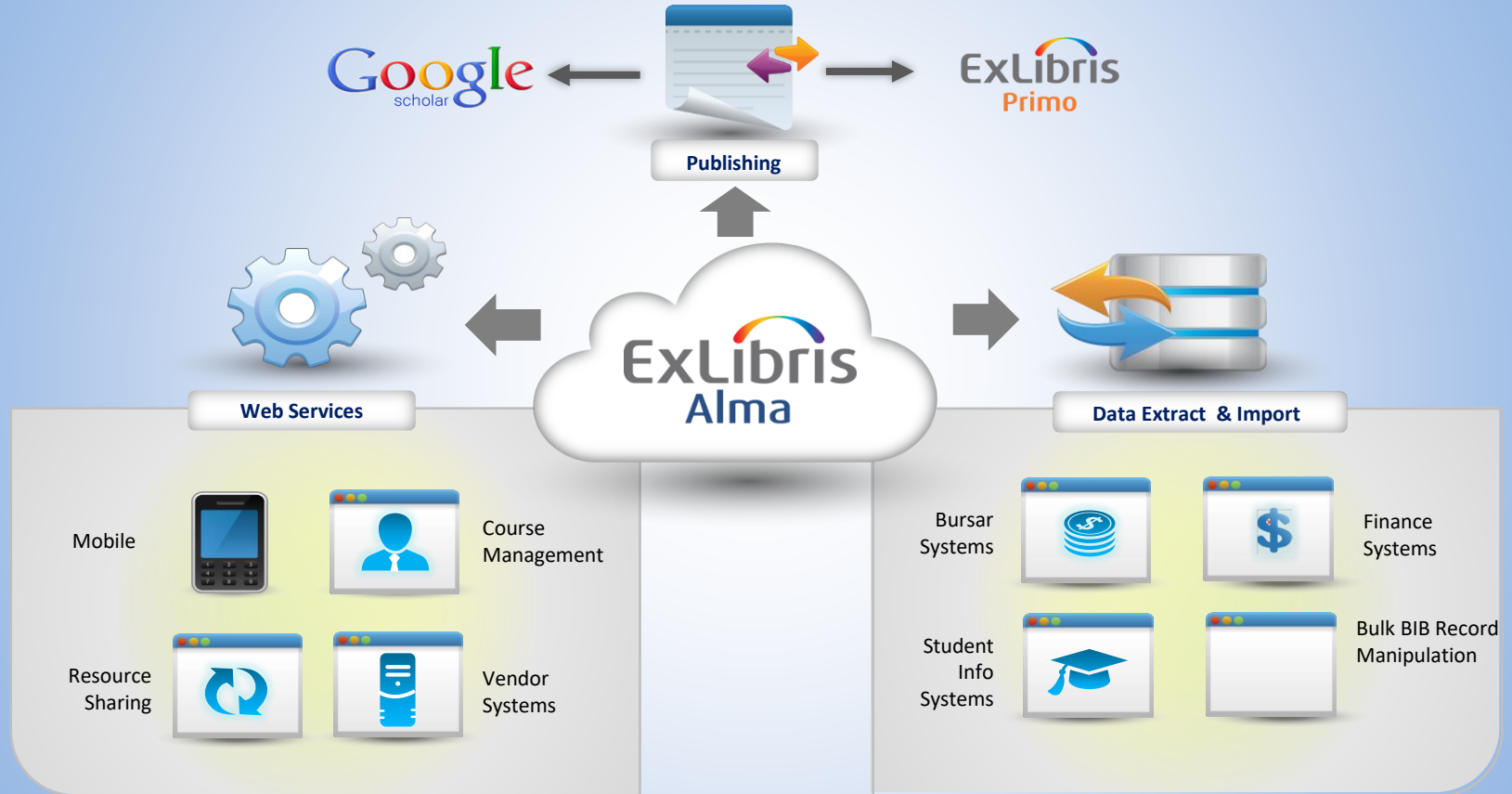
Top Ten Circulated Titles



Journals with Lowest Cost Per Use



4. Open Platform



Open Platform

Extend, Build and Integrate

[Login](#) | [Signup](#)[Developer Network](#)[Docs](#)[Tech Blog](#)[Code & Apps](#)[API Dashboard](#)[Forum](#)

Ready to Learn? ExLibris products all provide open APIs

Resources:

[Primo](#)[Alma](#)[Rosetta](#)[bX](#)[MetaLib](#)[Voyager](#)[SFX](#)[Aleph](#)

APIs



Users

[get user details](#)[get user details](#)[get user details](#)**Create user loan**[Retrieve user requests](#)[Create user request](#)[Delete user request](#)[Create user request for resource sharing](#)

Integrations

[Home](#) / [Alma](#) / [APIs](#) / [Users](#)

This Web service loans an item to a user. The loan will be created according to the library's policy. In order to use this service, authentication should be done by a user that have the 'API Fulfillment Write' role.

Resource URL.

POST /almaws/{user_id}/loans

[Try it now!](#)

API URL : <https://api-na.hosted.exlibrisgroup.com>

Authentication (None)

Parameters

Parameter	Value	Description
user_id	0	A unique identifier for the user
item_pid	0	The Item ID. This parameter or the

5. Smart Collaborations

In Different Areas of Operations

Maximize **cooperation, integration and sharing** between institutions in a network

Support each institution's particular **workflows** and **standards**

Maintain local **privacy** and **ownership** of data

Standardize and **streamline** the connection points to make them **seamless** and **reliable**

Facilitate Collaboration in Smarter Ways.

Shared Catalog



Cataloging

Joint acquisitions and negotiations



Acquisitions

ILL via broker, directly between partners



Resource Sharing

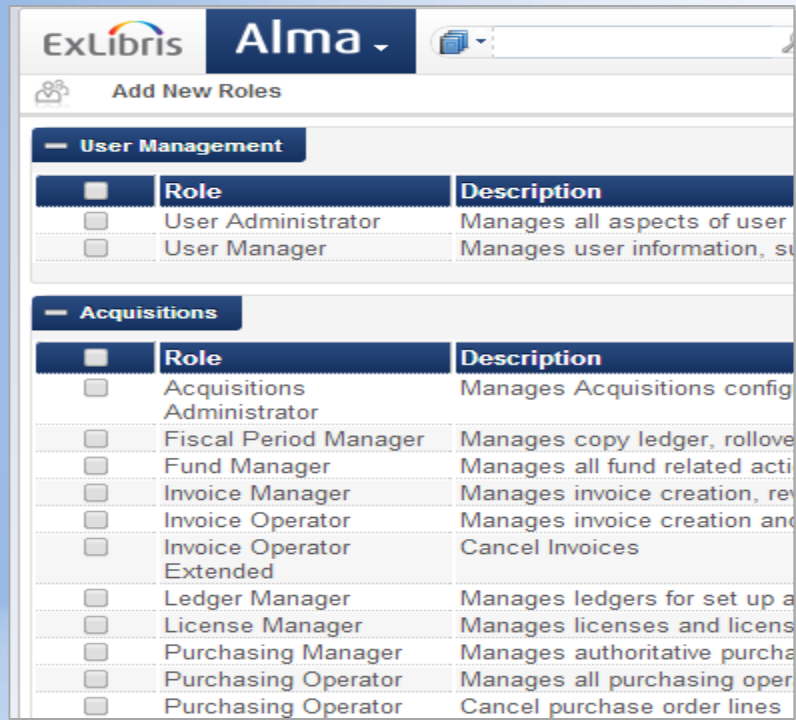
Direct patron interaction



Fulfillment

7. Role-based Management

Access to Permitted Areas Only



The screenshot displays the ExLibris Alma interface for role management. At the top, the ExLibris logo and 'Alma' are visible. Below the header, there is a section titled 'Add New Roles' with a plus icon. The main content area is divided into two tabs: 'User Management' and 'Acquisitions'. The 'User Management' tab is active, showing a table with columns for 'Role' and 'Description'. The table lists two roles: 'User Administrator' and 'User Manager'. The 'Acquisitions' tab is also visible, showing a similar table with columns for 'Role' and 'Description', listing various roles such as 'Acquisitions Administrator', 'Fiscal Period Manager', 'Fund Manager', 'Invoice Manager', 'Invoice Operator', 'Invoice Operator Extended', 'Ledger Manager', 'License Manager', 'Purchasing Manager', 'Purchasing Operator', and 'Purchasing Operator Extended'.

	Role	Description
<input type="checkbox"/>	User Administrator	Manages all aspects of user
<input type="checkbox"/>	User Manager	Manages user information, su

	Role	Description
<input type="checkbox"/>	Acquisitions Administrator	Manages Acquisitions config
<input type="checkbox"/>	Fiscal Period Manager	Manages copy ledger, rollove
<input type="checkbox"/>	Fund Manager	Manages all fund related acti
<input type="checkbox"/>	Invoice Manager	Manages invoice creation, rev
<input type="checkbox"/>	Invoice Operator	Manages invoice creation and
<input type="checkbox"/>	Invoice Operator Extended	Cancel Invoices
<input type="checkbox"/>	Ledger Manager	Manages ledgers for set up a
<input type="checkbox"/>	License Manager	Manages licenses and licens
<input type="checkbox"/>	Purchasing Manager	Manages authoritative purcha
<input type="checkbox"/>	Purchasing Operator	Manages all purchasing oper
<input type="checkbox"/>	Purchasing Operator	Cancel purchase order lines

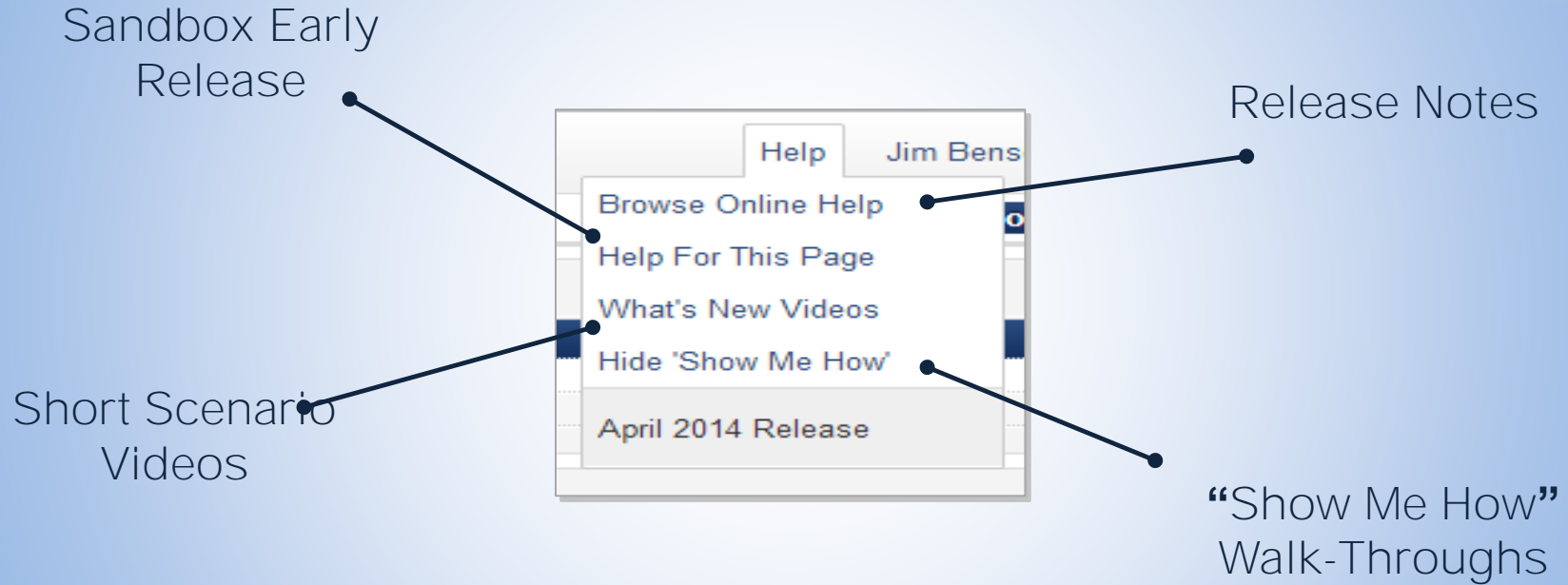
Everyone is a user

Integrate with the student information system

Create role templates for various positions

Different levels of access to areas of functionality

8. With Every Release.





Alma Cloud

ExLibris[®]
a ProQuest Company



Certified with Most Rigid Security Standards



ISO/IEC 27001:2013
The most rigorous global security standard



**Our data centers are SSAE-16
certified (formerly SAS-70)**



**We comply with the US-
EU Safe Harbor
Framework**



Cloud in Numbers



+7,000

SaaS/Hosted
Institutions

Alma, Primo, Summon, Intota, Aleph, 360, SFX, Voyager, MetaLib, MetaLib+, Verde, PC, bX, Ulrich's

+4 M

Daily Primo Searches

+2.5 M

Daily Summon Searches

+3.5 M

Daily Alma Transactions

+80

Racks in 10 Private DCs and 3 AWS Locations

+1,600

Physical Servers

+2,400

Terabytes of Storage

How is Alma a Unique Solution? Let's Recap.

Streamlined Workflows

Single unified solution for Print,
Electronic and Digital

Enhanced Patron Experience

Sophisticated discovery integration

Improved Productivity

Workflow Automation (Exception-based
tasks list)

Optimized Collection Usage

Comprehensive Analytics (Data-Driven
Decisions)

Unique and Shared Data

Hybrid model – institution & community
zone

Interoperability & Extended Services

Open Platform, APIs & Integrations

Decreased Complexity & Silos

Unified Resource Management (multi-format
metadata)

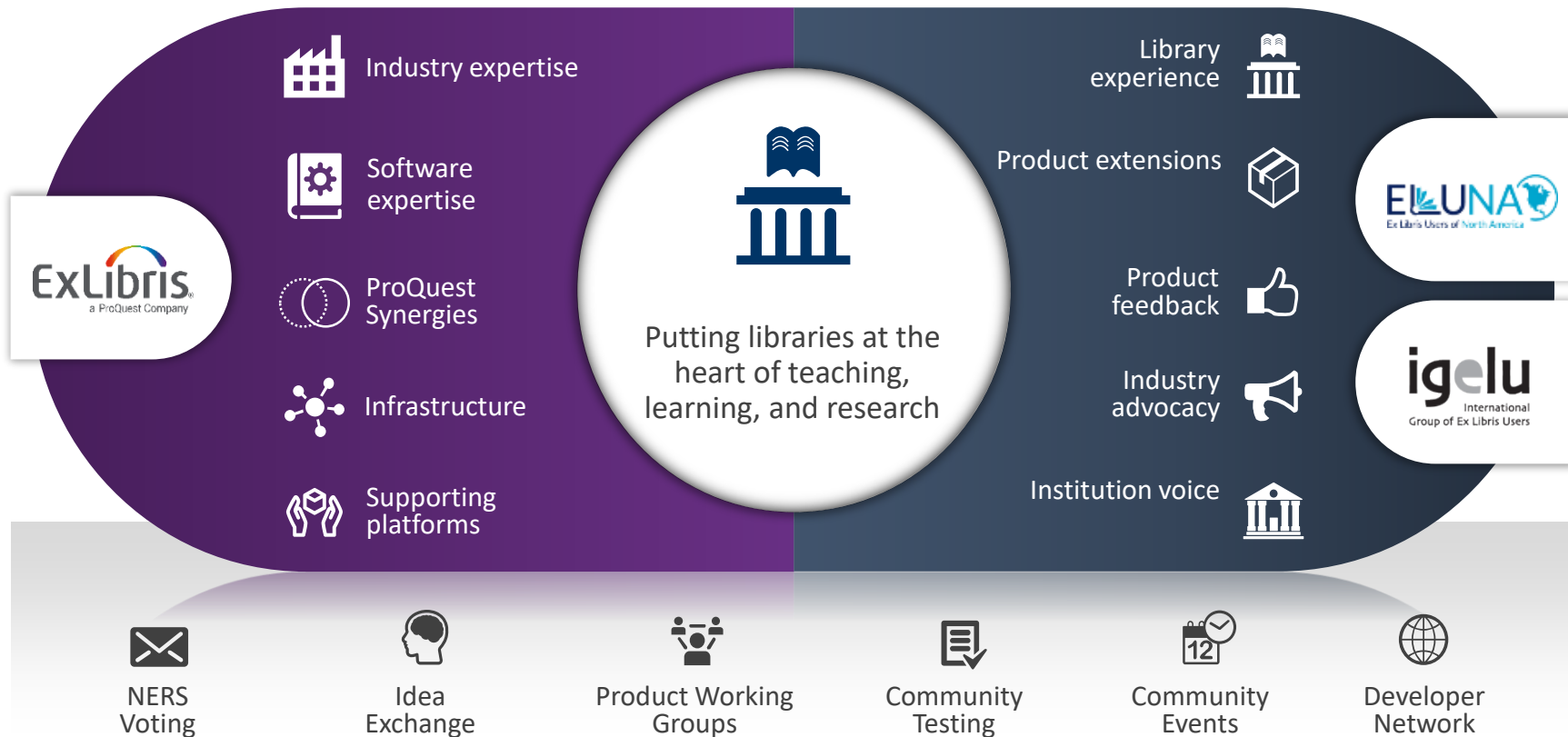
Maximized Flexibility

Depth of functionality & High degree of
configurability

Unprecedented Collaboration

Collaborative Networks

Customer Community: The Power of Collaboration





HVALA!

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