Clarivate™
Think Forward
Kaitlyn O'Malley
October 2024

# We Leverage the Power of our Communities

## LARGEST COMMUNITIES

**94** Countries

**6,503** Institutions

**85** National Libraries

## CONNECTED COMMUNITIES

**1,810** Resource Sharing institutions

**2,655** Alma institutions

**3,709** Discovery institutions

## LOCAL USER-GROUPS

**8,020** User groups members

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# Peeking into 2024 and the Future

Enhancing Existing Services

Building New Solutions

AI in Action

# From Concept to Reality

**CONNECT**
Expand reach and connect communities & institutions

**ANALYZE**
Generate insights through a global data network

**OPTIMIZE**
Continue to optimize Products & operations

**PERSONALIZE**
Innovate library experiences

**ENGAGE**
Introduce new standards for engagement

# Last Year for Alma was Busy…

**Library Independence**

New Consortia Central Configuration Dashboard

**New DV Dashboards**

**Physical Item Templates**

Premium Sandbox Infrastructure

**297** New Features

**Idea Exchange 46 Completed**

**New PO Line UI**

Configure funds/ledgers

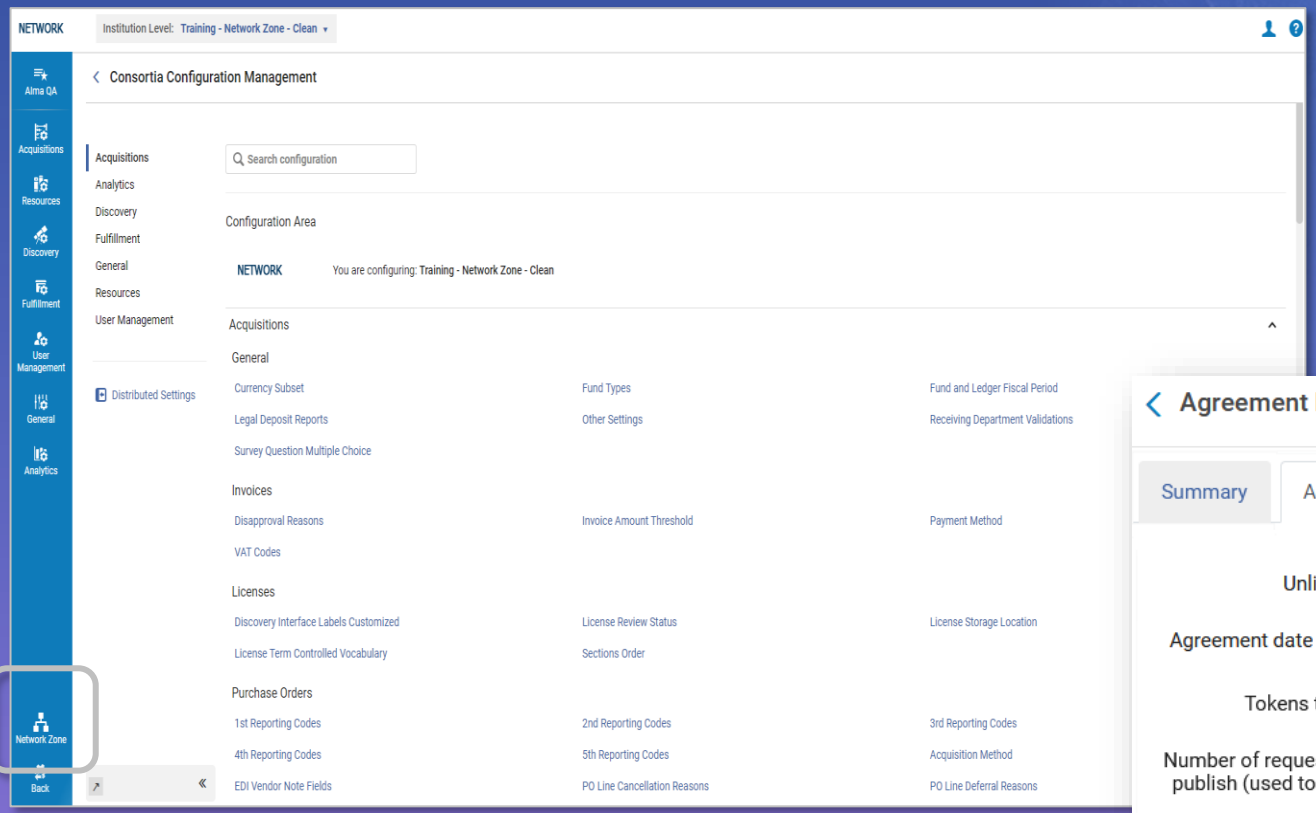
**NERS**

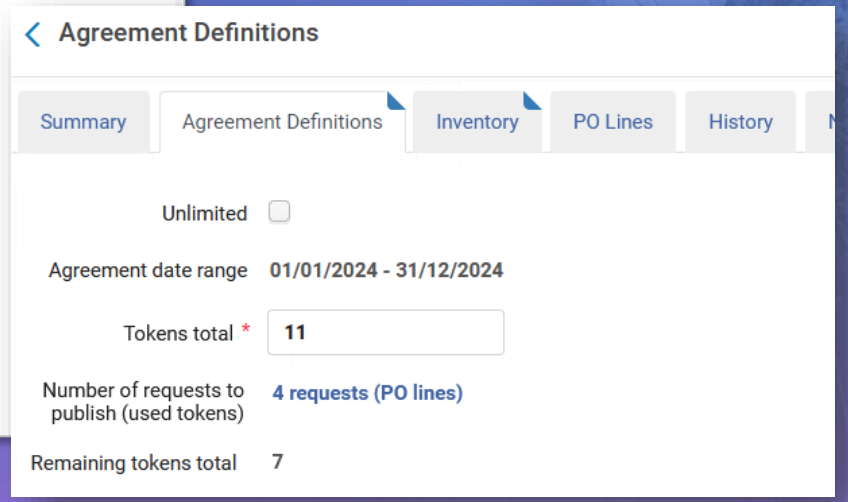
**Automatic Upload of Electronic Holdings**

Open Platform: Unlimited Webhooks

**12** Monthly Releases **4** Quarterly Feature Releases

# Working with the Alma Community



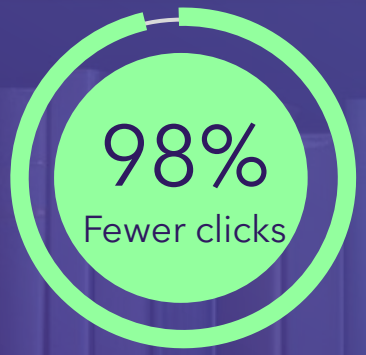

## Consortia Central Configuration Dashboard UI

## Streamlining Open Access Publishing

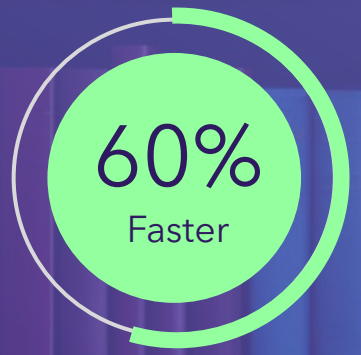
Transformative Agreement License

New PO Line Type: Article Processing Charge (APC)

# New UX: Title Search and Patron Services

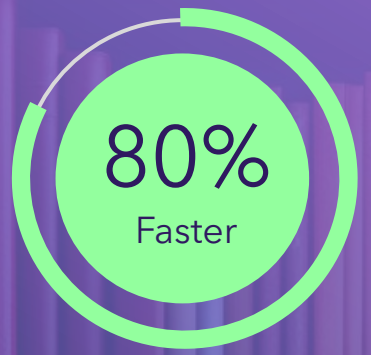



View Loan Note

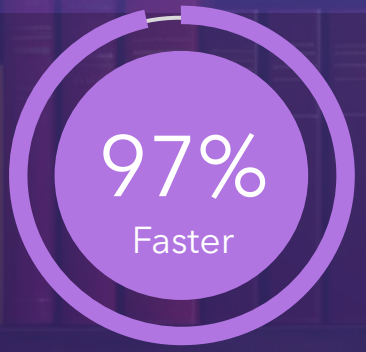



Create Loan Note

View Loans/Request

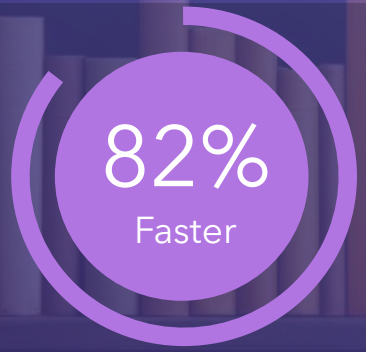



View Historical Requests

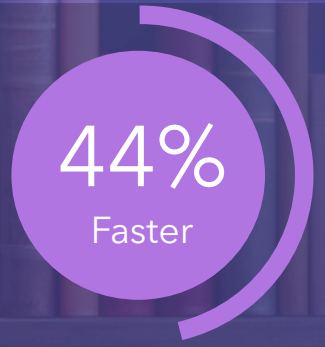



Run Job on
Selected Records

Suppress from
Discovery




Search for Records with
Same Subject/Contributor




Activate Portfolio

# The Next 12-18 Months Will Be Even Busier

**New UX: Staff Search**

**Form Based Editing**

Analytics: Out of the Box Dashboards

nsortia Configuration and Administration

**New UX:  Patron Services**

Authority Control

Automatic Upload of Electronic Holdings

**Open Access Suppo**

**RequestIt!**

# What is Specto Special Collections?

A digital asset management solution that:

**Extracts**
metadata and entities with AI

**Links**
materials to provide context

**Exposes**
collections to a broad audience

**Tells a Story**
through a discovery journey

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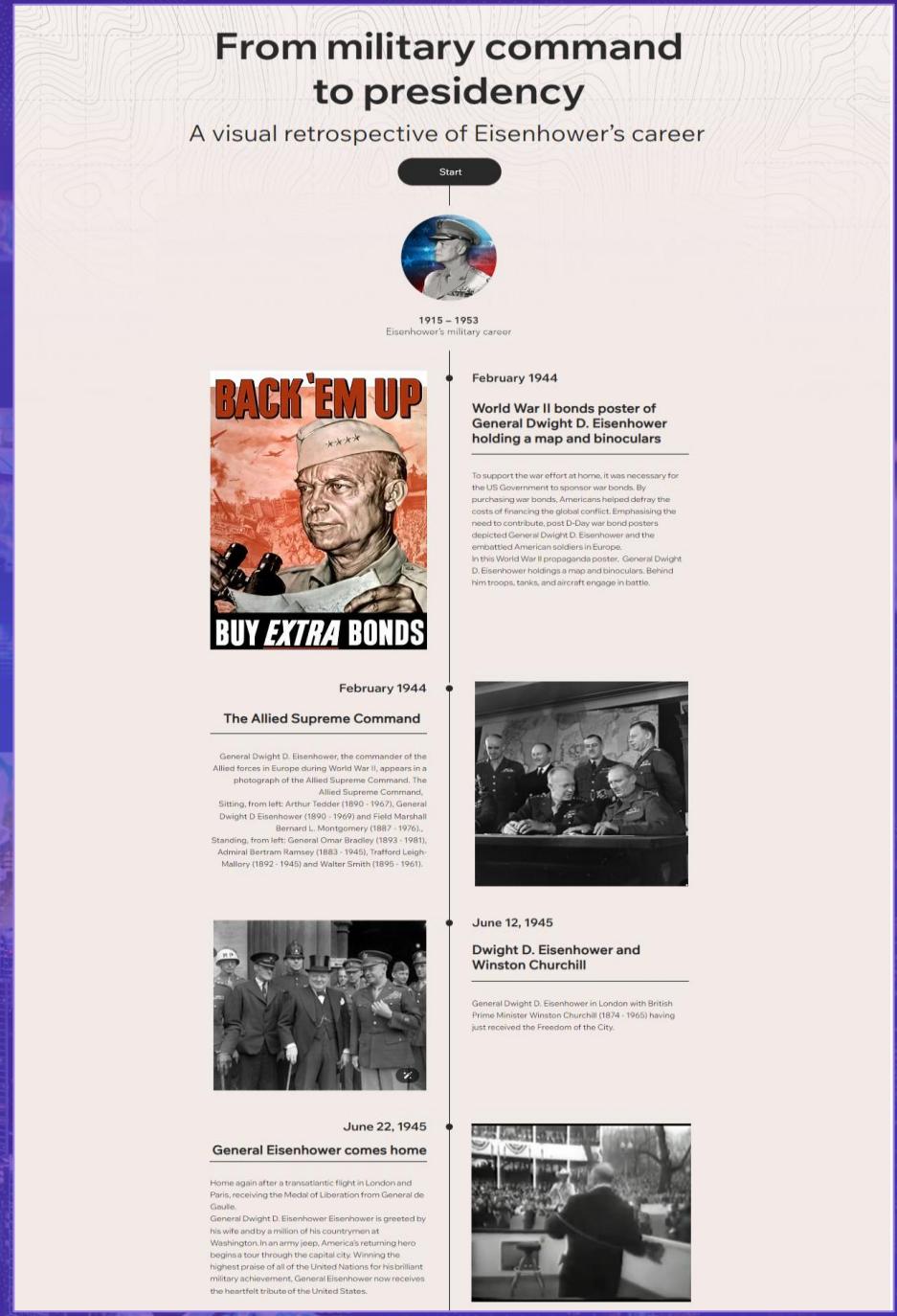
**Based on existing Alma and Alma D**

# Specto’s Front Door

## New Discovery, Exhibition, SEO



# Metadata extraction

**Title**: Lunch atop a Skyscraper

**Subjects**:
- Construction workers
- Skyscrapers--New York (State)--New York
- Iron and steel workers
- Rockefeller Center (New York, N.Y.)

**Description**: The photograph shows eleven men sitting on a steel beam, eating lunch, reading newspapers, and chatting, with no safety harnesses, high above the streets of New York City. This photograph is often studied for its composition and historical context, symbolizing both the perils and the progress of urban development.

**Format**: image/jpeg, Black and white

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## NER

**Person:** Joe Curtis, Joseph Eckner

**Building:** Rockefeller Center

**Location:** New York City

## Metadata Update

**Person**: Joe Curtis
**Building**: Rockefeller Center
**Location**: New York City (NY)
**Geolocation Coordinates**: 40°45′31″N 73°58′45″W

## Linking

LIBRARY LIBRARY OF CONGRESS WIKIPEDIA

# Specto Offerings

## Special Collections

- AI Metadata Assistant
- Online Exhibition

+

## Preservation

- Long-term access guarantee
- Risk management

+

## Essential DAM

- Improved workflows
- Improved discovery
- Improved SEO

# Current Analytics Situation

## Operational Analytics

- All libraries use Analytics provided in Platform
  - Dashboards and Widgets
  - Scheduled
  - Ad hoc
- Over 17 million reports run in 2023
- YOY increase of 28%

## Collection Development

- Launched a Focus Group last year with 33 Members
- Delivered initial Dashboards Feb 2024
- Now progressing with POC on Cross Institution Analytics

# Ex Libris Collecto

A unified environment to manage all collection development workflows

**All-in-one data**
Multiple data sources for optimized data-driven decisions

**Cross-institution analytics**
Benchmark against other institutions

**Smart end-to-end workflows**
AI-based and personalized to institution preferences

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# Ex Libris Collecto

## Workflows and Use Cases

**Retention**

Keep or remove

**Expand & diversify**

Purchase opportunities

**Cost saving**

Unnecessary expenses

**Space optimization**

Candidates for weeding

Alma Rapido Leganto Rialto Bowker ProQuest Ebook Central Primo **Cross Institution** Analytics

# Timeline

**Development Partner Program**

- Collecto Analytics
- Retention Workflow-
- Deselection Workflow –
- Shared Print
- Discipline Expansion
- Curriculum Expansion
- Resource Sharing/ Acquisition



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# What are we also hearing?

*There is a learning curve for writing Cloud Apps*

*Cloud Apps are great! For UI integration…*

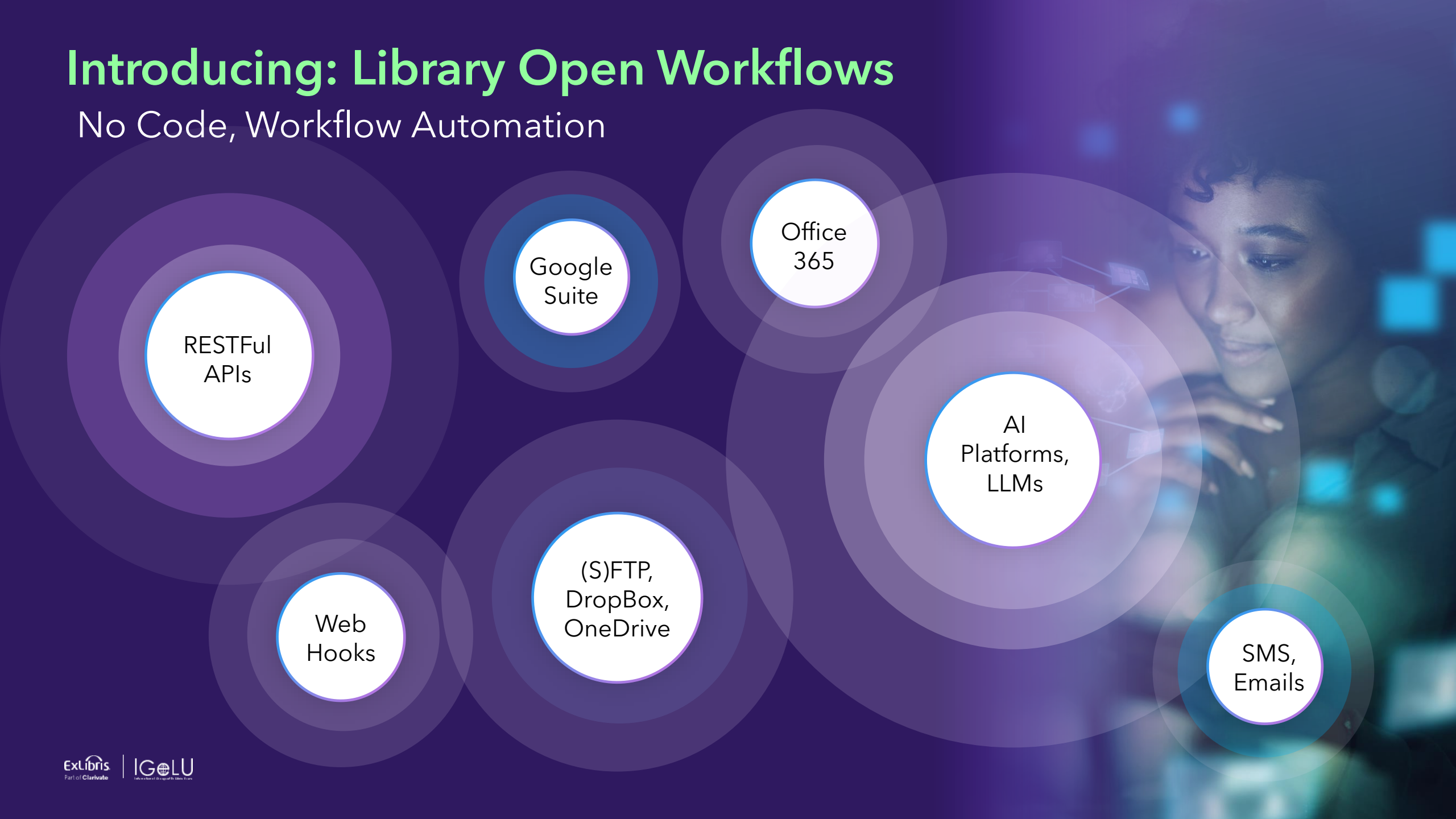
*We need an easy way to send SMS's*

*Give us tools to schedule scripts*

*What about AI for developers?*

# Introducing: Library Open Workflows

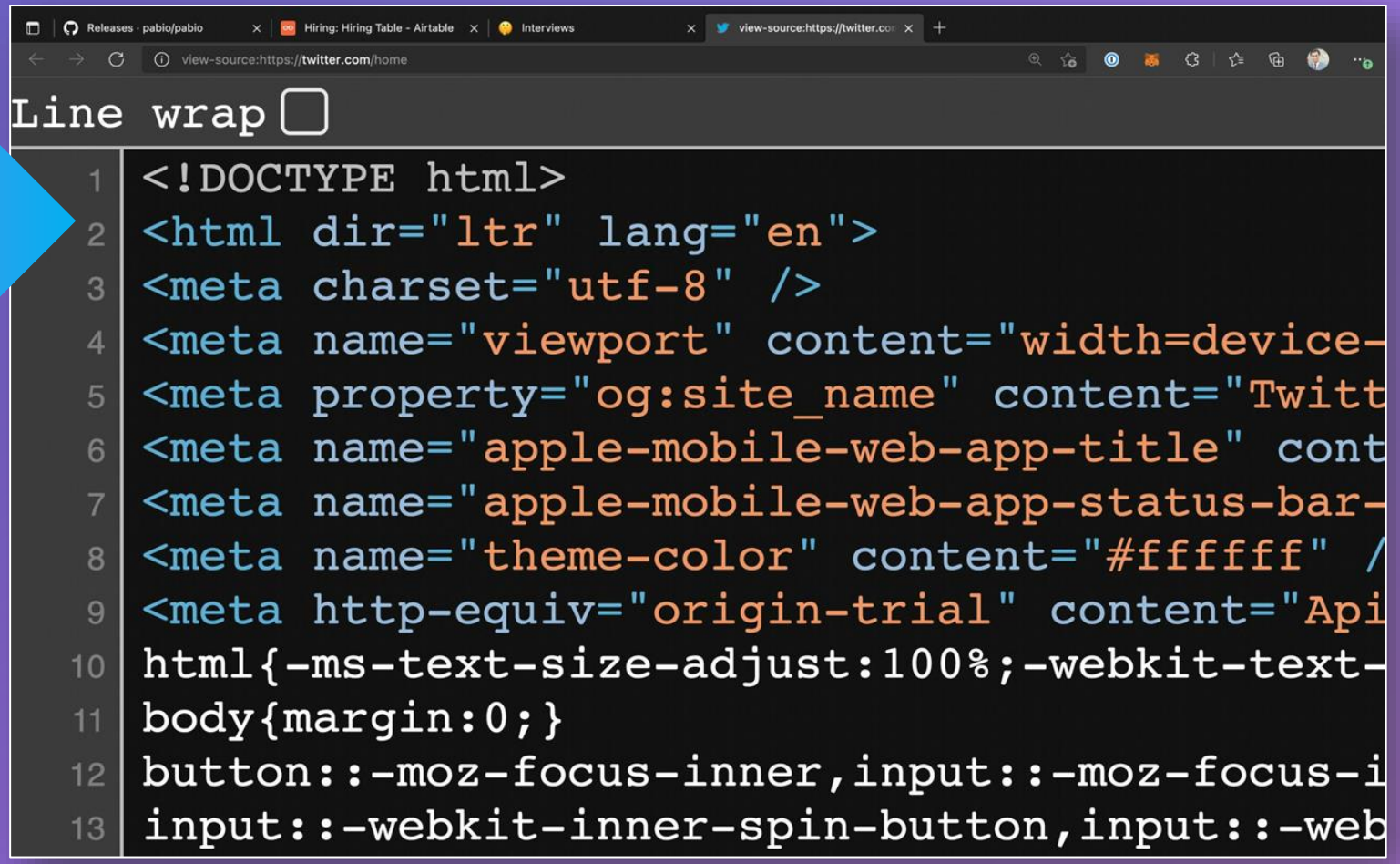
## No Code, Workflow Automation



# Introducing Library Open Workflows

## No Code, Workflow Automation

FROM THIS ...

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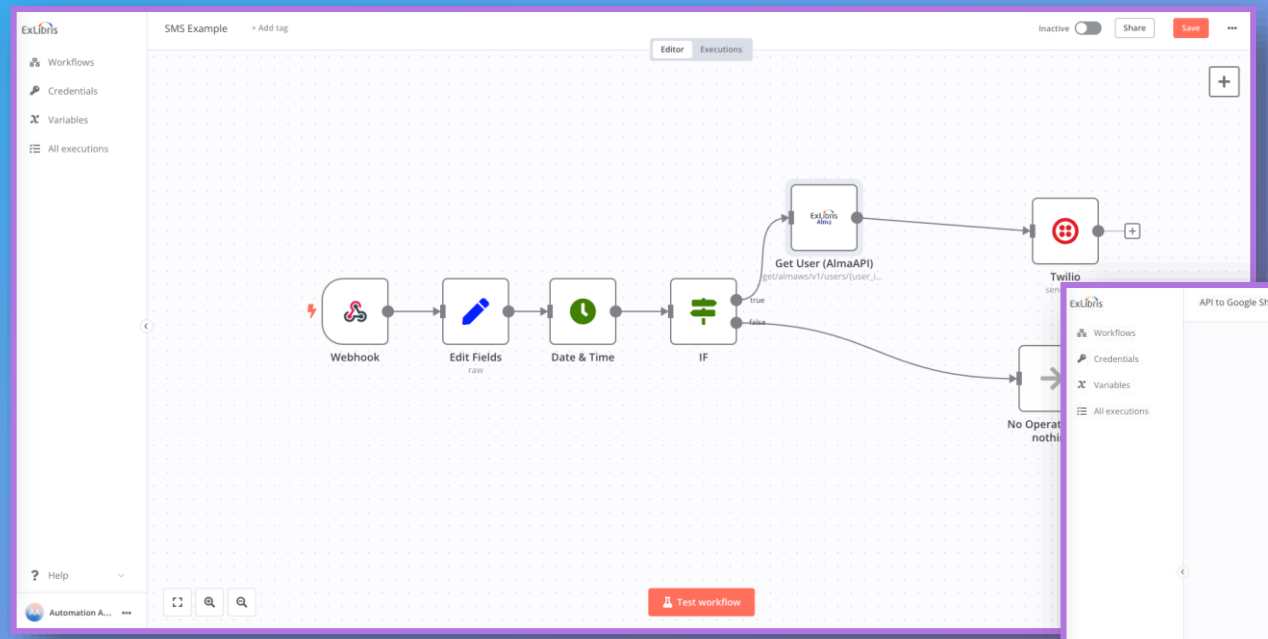
# Introducing Open Library Workflows 2.0

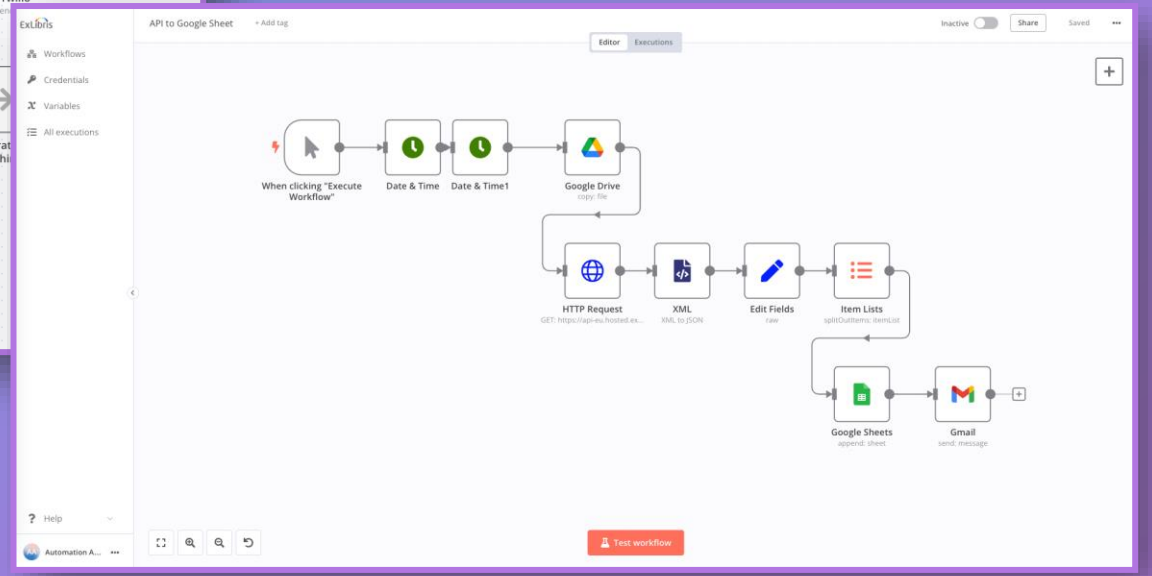
## No Code, Workflow Automation

### Send SMS on checkout




**TO THIS ...**

### Automated report to Google Sheet

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# Library Open Workflows – Timeline

**2023**

Listen to the community

**2024 H1**

Embed new low-code/no-code automation infrastructure

**2024 H2**

Recruiting Development Partners

Harvard University

**2025 H1**

**General Availability**

**2025 and beyond**

Extend capabilities based on community feedback

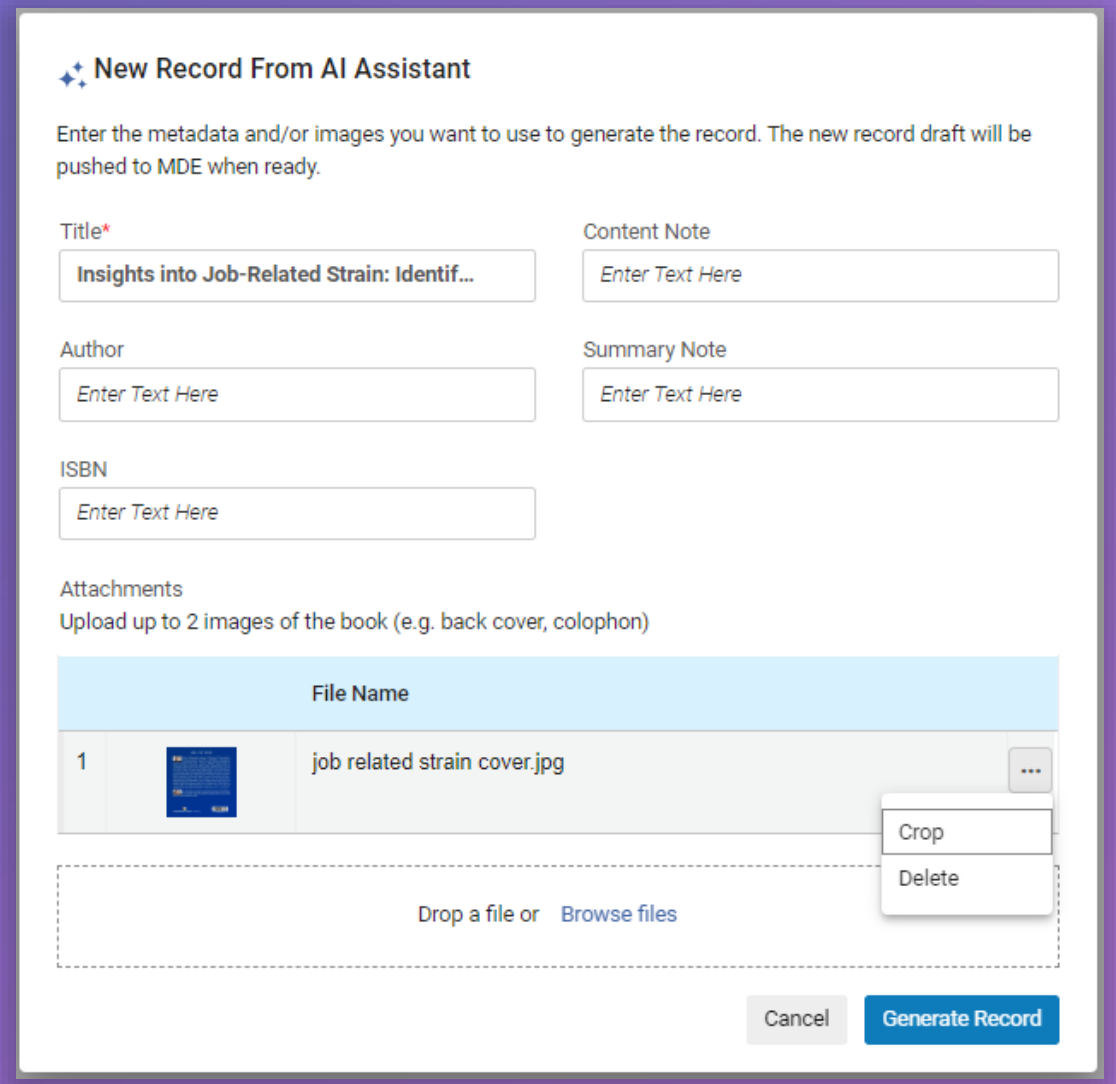
# AI Metadata Generator

## For Alma Community Zone

# AI Metadata Assistant

Leveraging AI to help catalogers work more efficiently

Suggest metadata based on information provided by the cataloger – such as title, uploaded image (e.g. book cover)

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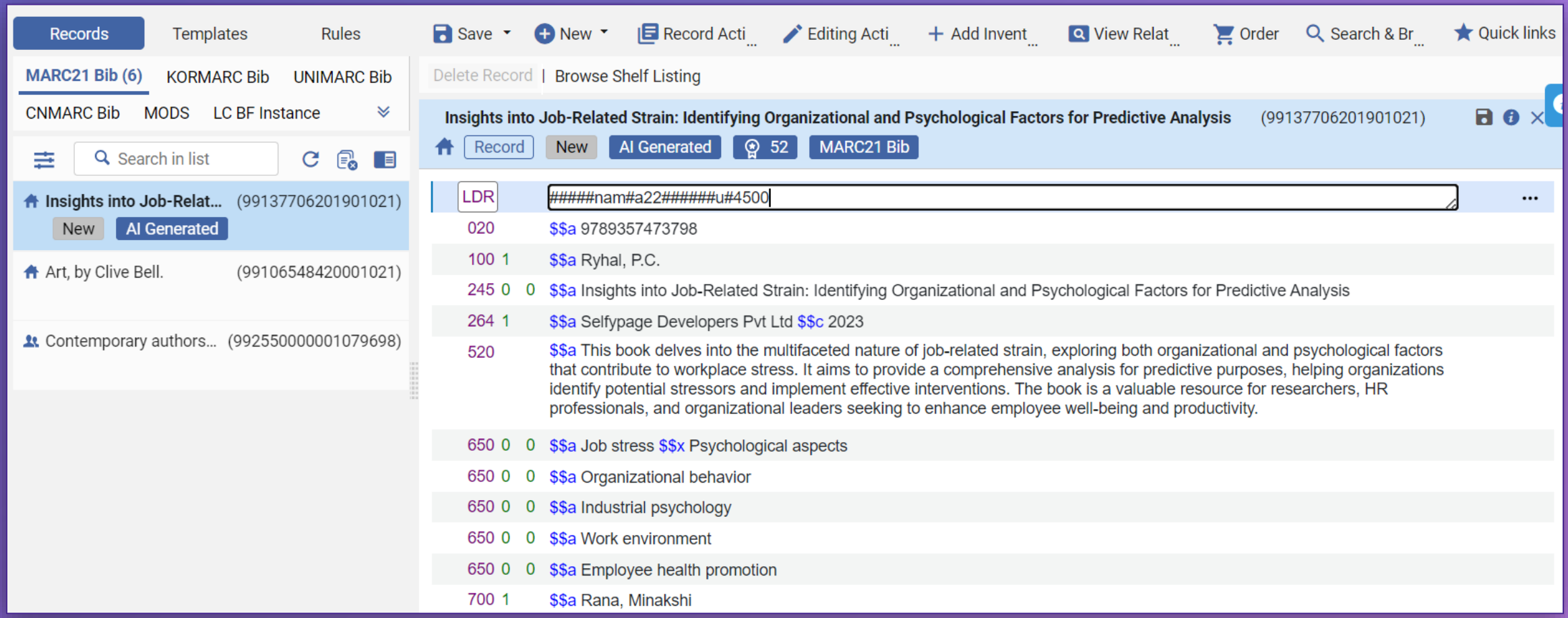
# AI Metadata Assistant

## Cataloger-mediated to maintain quality and accuracy of catalog

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# AI Metadata Assistant – Next Phases

## 1. Automate

- Use Cases
  - Ongoing Record Loads
  - Retrospective Updates
- With full control over level of automation/mediation

## 2. Expand

- Additional Formats
- Additional Languages
- Additional Subject Headings

# Linked Open Data
## Sinopia and Alma

### Alma now production-ready

- BIBFRAME work and instance
- Sinopia integration

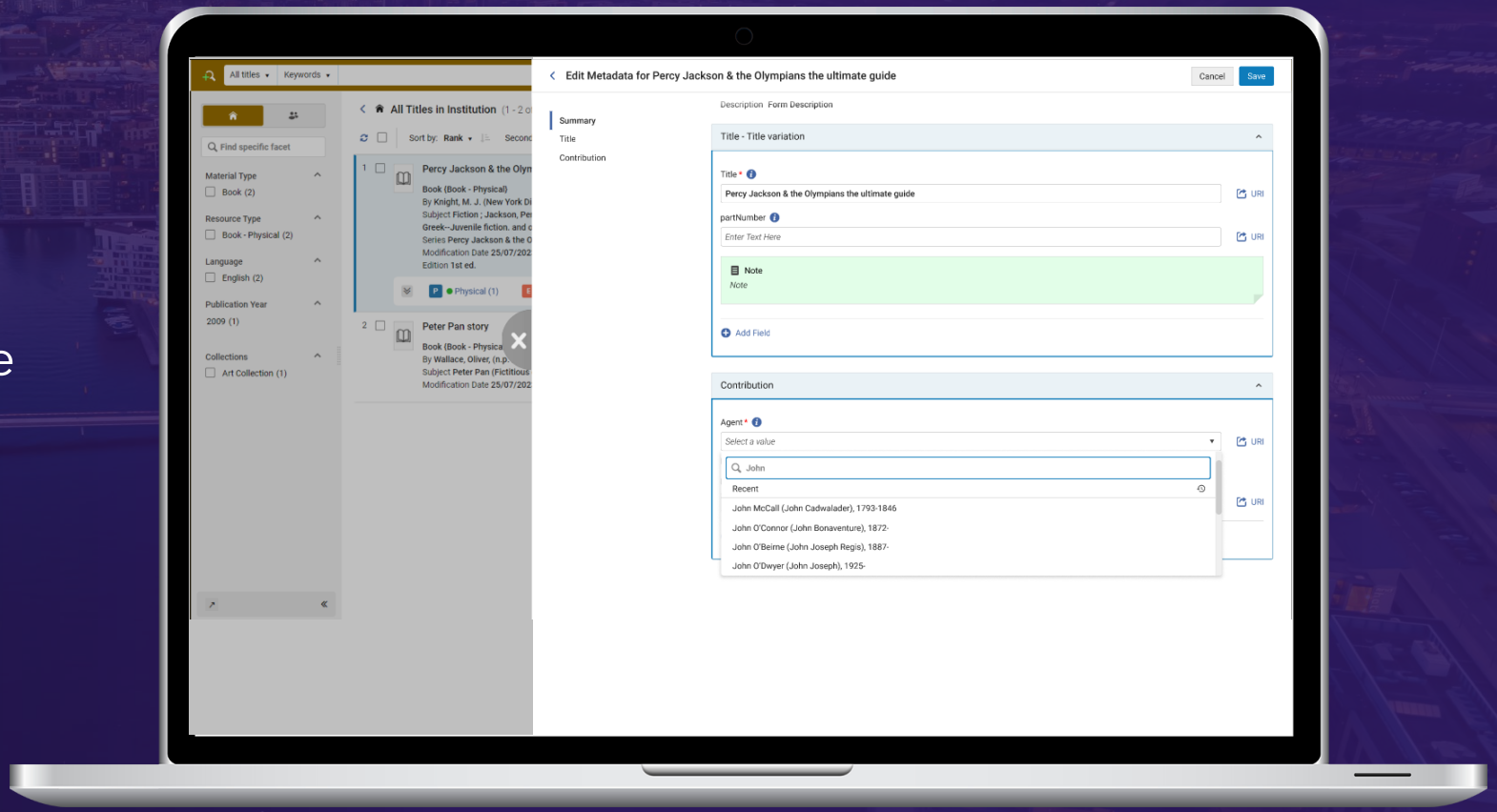
### Working with the Linked Data Focus Group

- Discuss and define the development of new features and functionalities

# Linked Open Data: Editing in Alma

## What's Next?

- Integrated form editor with resource management workflows
- Easy and flexible user interface
- Based on external ontology
- Display focus on labels
- Additional ontology metadata one click away




*Note: The image is for illustrative purposes only*

# Rapido and RapidILL

## A Growing Community

**408,718**

Physical borrowing requests in 2023

**650**

Digital partners including RapidILL community

**57**

Pods

**1,278,455**

Digital borrowing requests in 2023

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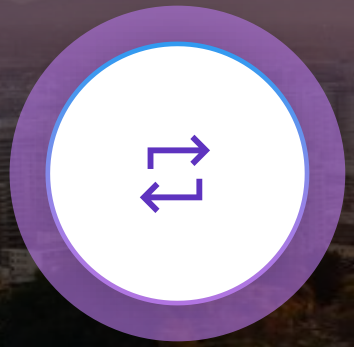
# Open ILL Network



## Interoperability

Advocate for standards based, open and extensible approaches to ILL interoperability

Example:
ILL system to ILL system

## Integration

- Combining systems to function as a unified whole
- Support integration approaches

Example:
ILL system with ILS

## Flexibility

- Do no harm
- Adapt to changing circumstances
- Be responsive and resilient
- Provide reasonable notice

# Building the Next Discovery Experience

## For tomorrow's end users

Primo & Summon Research Assistant

New UI

Linked Open Data

User Engagement Platform

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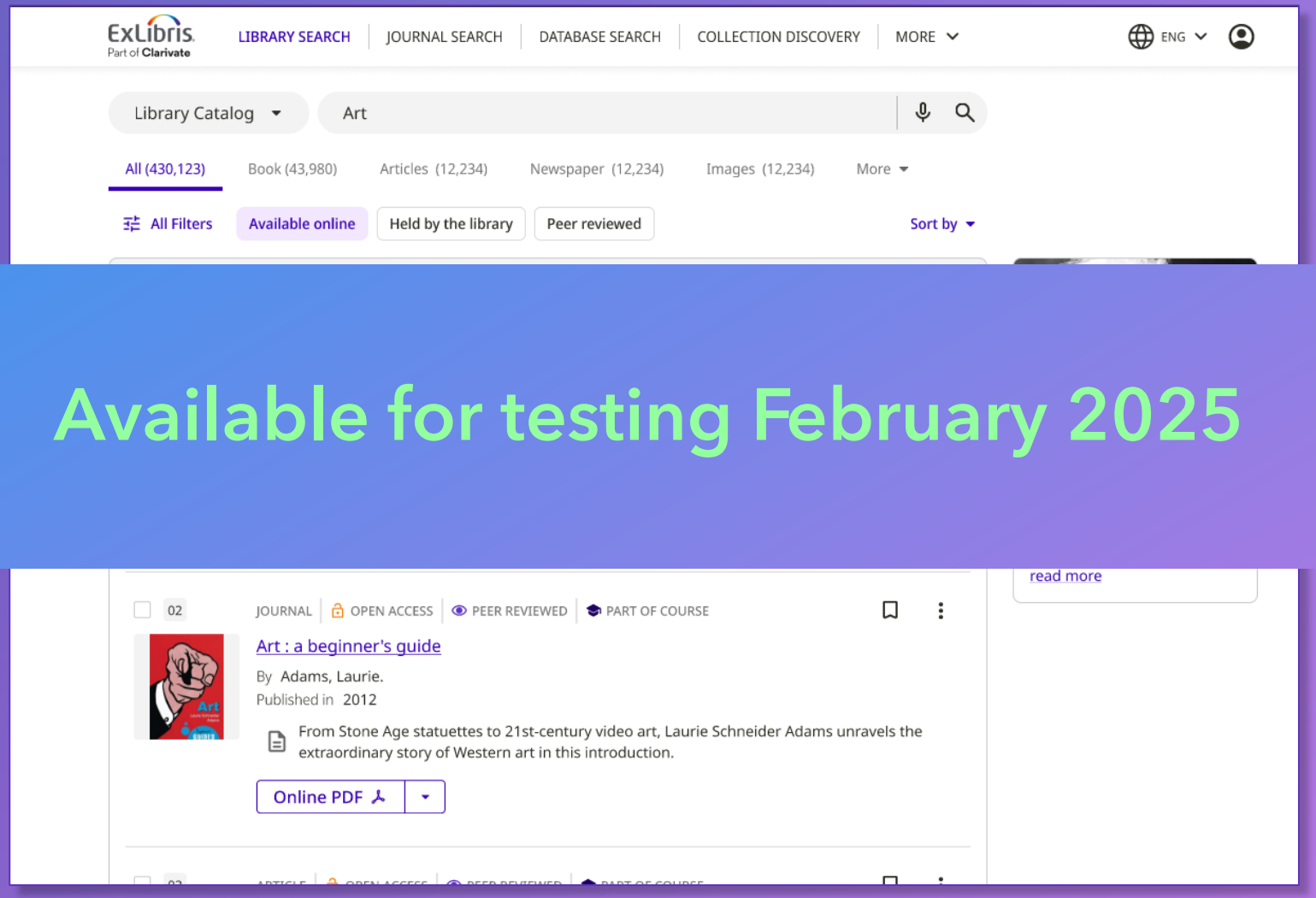
# Primo Research Assistant – A New Search Paradigm

- Research with Natural Language
- Contextual Results
- Trusted Content
- Revolutionizing Information Interaction

# NDE New UI




## Available for testing February 2025

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# NDE Linked Open Data

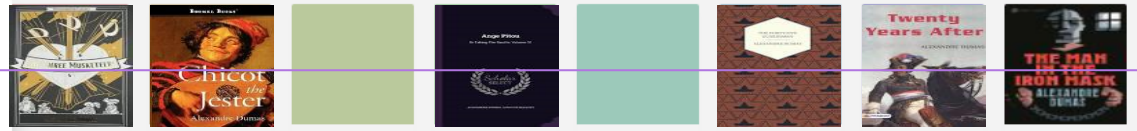
**Dumas, Alexandre, 1802-1870**

French writer and dramatist (1802–1870)

Alexandre Dumas (UK: , US: ; French: [alɛksɑ̃dʁ dymɑ]; born Dumas Davy de la Pailleterie ([dymɑ davi də la pajət(ə)ʁi]), 24 July 1802 – 5 December 1870), also known as Alexandre Dumas père, was a French novelist and playwright. His works have been translated into many languages and he is one of the most widely read French authors. Many of his historical novels of adventure were originally published as serials, including The Count of Monte Cristo, The Three Musketeers, Twenty Years After and The Vicomte of Bragelonne: Ten Years Later. Since the early 20th century, his novels have been adapted into nearly 200 films. Prolific in several genres, Dumas began his career by writing plays, which were successfully produced from the first.
See more in Wikipedia

| | |
|---|---|
| **Born** | 1802-07-24, Villers-Cotterêts (France) |
| **Died** | 1870-12-05, Dieppe (France) |
| **Field Of Work** | French literature |
| **Occupation** | Author, Dramatist, Novelist, Authors, Dramatists |
| **Source** | Library of Congress Name Authority and Wikidata |

Titles in the Library By Dumas, Alexandre, 1802-1870




The three musketeers ... | Chicot the jester ... | The Vicomte de Bragelonne ... | Ange Pitou | Le collier de la Reine. ... | The forty-five | Twenty years after ... | The man in the iron mask ...

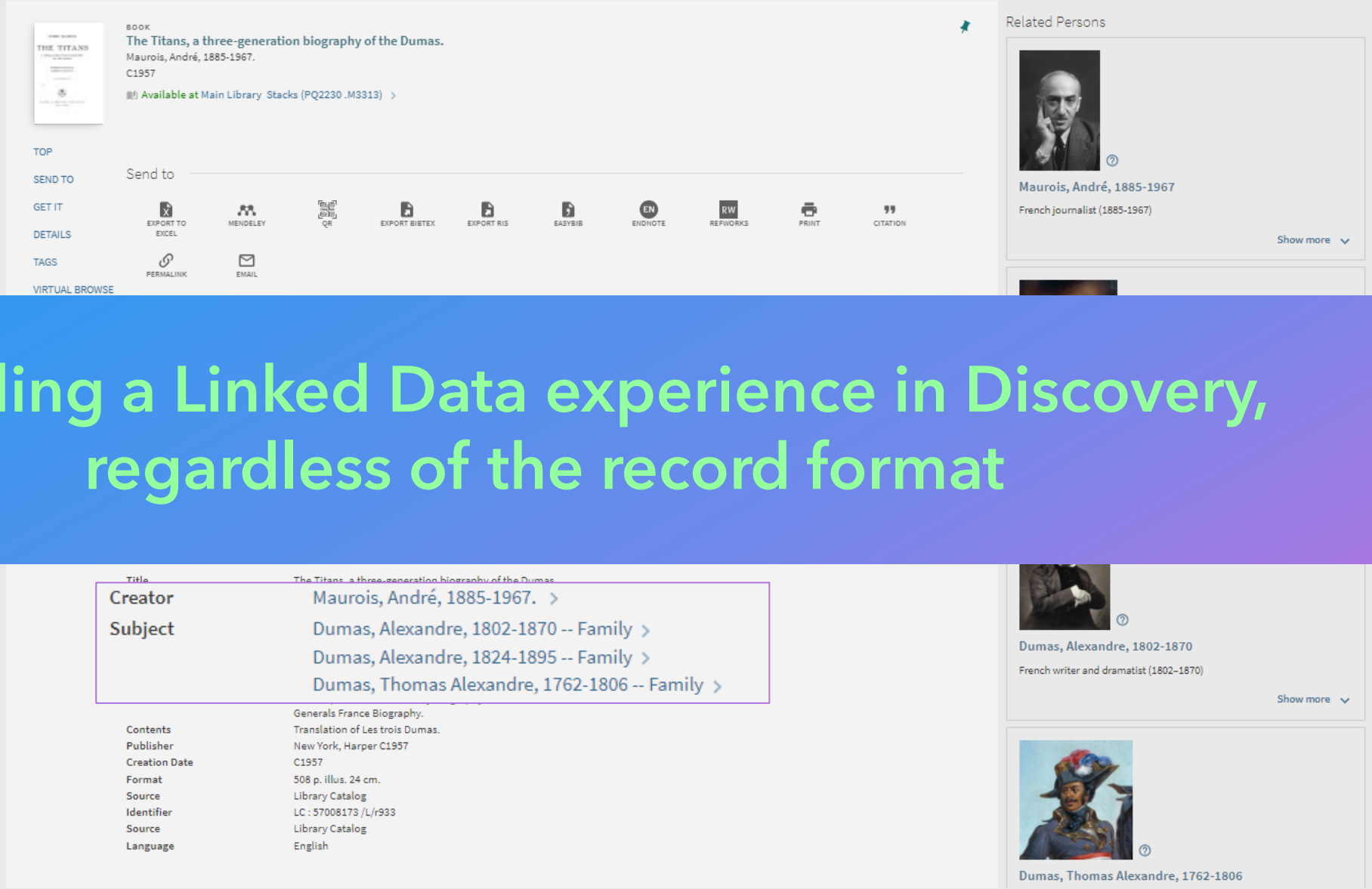
See All Titles

Titles in the Library Written About Dumas, Alexandre, 1802-1870

The incredible marquis, Alexander ... | The Titans, a three-generation biography ...

See All Titles

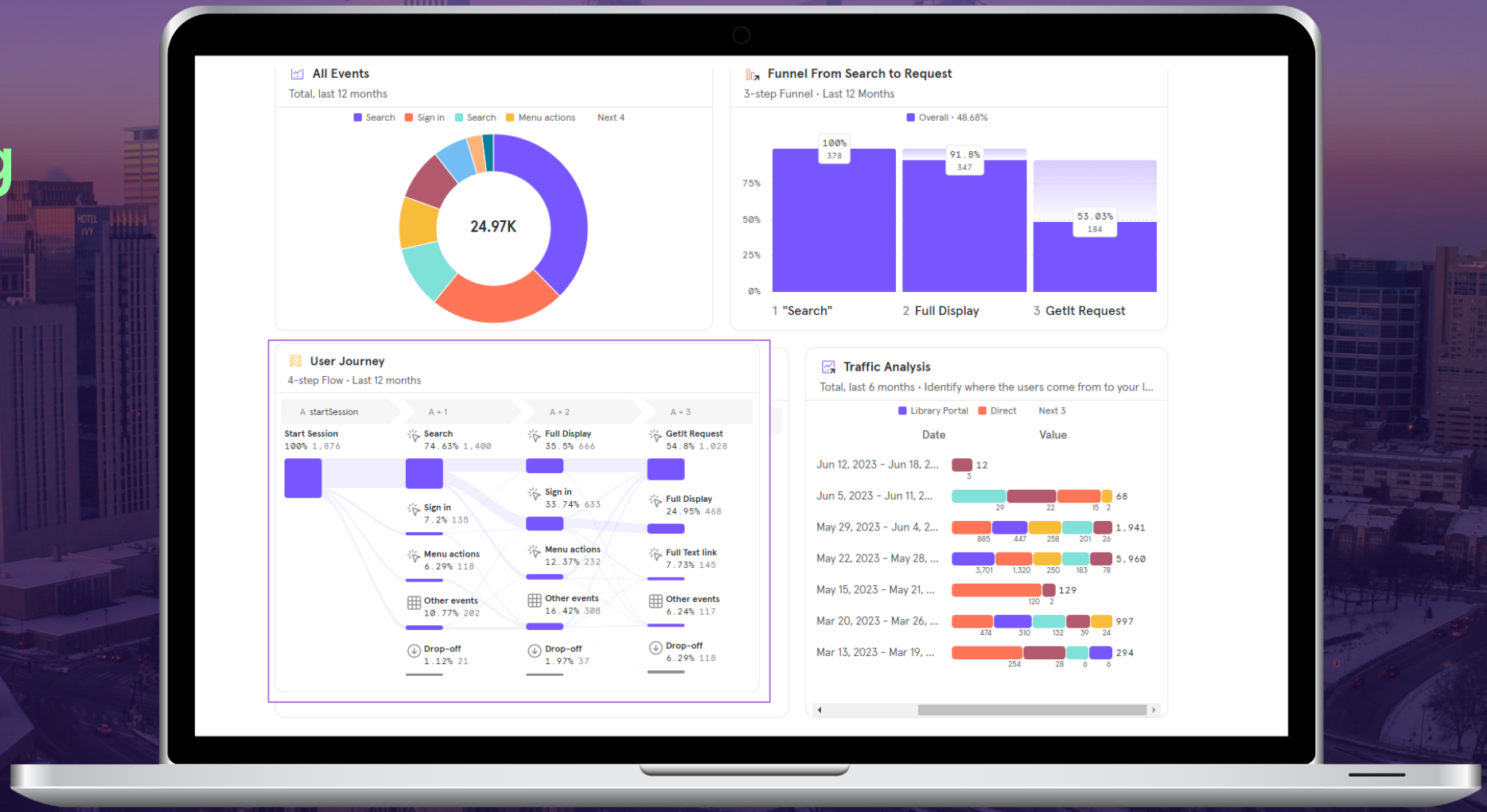
# NDE Linked Open Data




## Providing a Linked Data experience in Discovery, regardless of the record format

# NDE User Engagement Analytics: understanding the journey

Powered by mixpanel



# And the journey into the future continues…

## With you, every step of the way!

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