

ANZREG Best Practice Day EXL Q&A

2017-05

Alma-vendor acquisitions API workflows

Real-Time Ordering

- **Faster, real-time insertion of order data into Alma** at the same time the order is placed in vendor system, creating order records that allow library staff to see what is on order
- **Streamlines book workflows:** API allows order information to flow from vendor system to Alma without the need to use a (slower) FTP data transfer method
- **Saves staff time** through the automated transfer of information. Library staff does not need to perform additional steps to integrate order information into their library management system

Main added value: **increased workflow efficiency**

Example – OASIS Real Time Ordering

The screenshot displays the OASIS LIVE web application interface for Kansas State University. The browser address bar shows the URL <http://www.courtsoasis.com/authorize>. The page title is "General *** Acquisitions - Kansas State University".

On the left side, there is a navigation menu with the following items:

- Search All Titles
- Lists & Groups
- Shopping Cart (0)
- eMails (0)
- Authorize Orders (35)
- Inbox (0)
- Search Orders
- New Titles
- Profiles
- Standing Orders
- Management Reports
- Administration
- OASIS Help Portal
- What's New
- OASIS Collections
- Current Canadian Books
- Contacts
- Feedback
- MyLibrary
- OASIS Change Log

The main content area features a search bar with the text "Ending Aug 14, 2015 (33)" and a "Sort By" dropdown menu. Below the search bar, there are buttons for "Mark All", "Process List", and "Empty Current List". A table of titles is displayed, with a total of 33 records and a value of 1,761.02. A callout box points to the table with the text: "Titles are selected in OASIS and ordered."

Below the table, there are several dropdown menus and input fields for order information:

- Quantity: 1
- Library Code: ARCH
- Location Code: archmedia
- Allocating Fund Code: archdis
- Reporting Code: archdis

Two callout boxes highlight these fields:

- "Selection of Location from OASIS dropdown menu" points to the Location Code dropdown.
- "Selection of Fund (taken from Alma)" points to the Allocating Fund Code dropdown.

At the bottom of the page, there is a "ProQuest" logo and a "Save Order Info for:" dropdown menu. The Windows taskbar at the bottom shows various application icons and a system tray with the date and time: 12:10 PM, 10/22/2015.

Example – OASIS Real Time Ordering

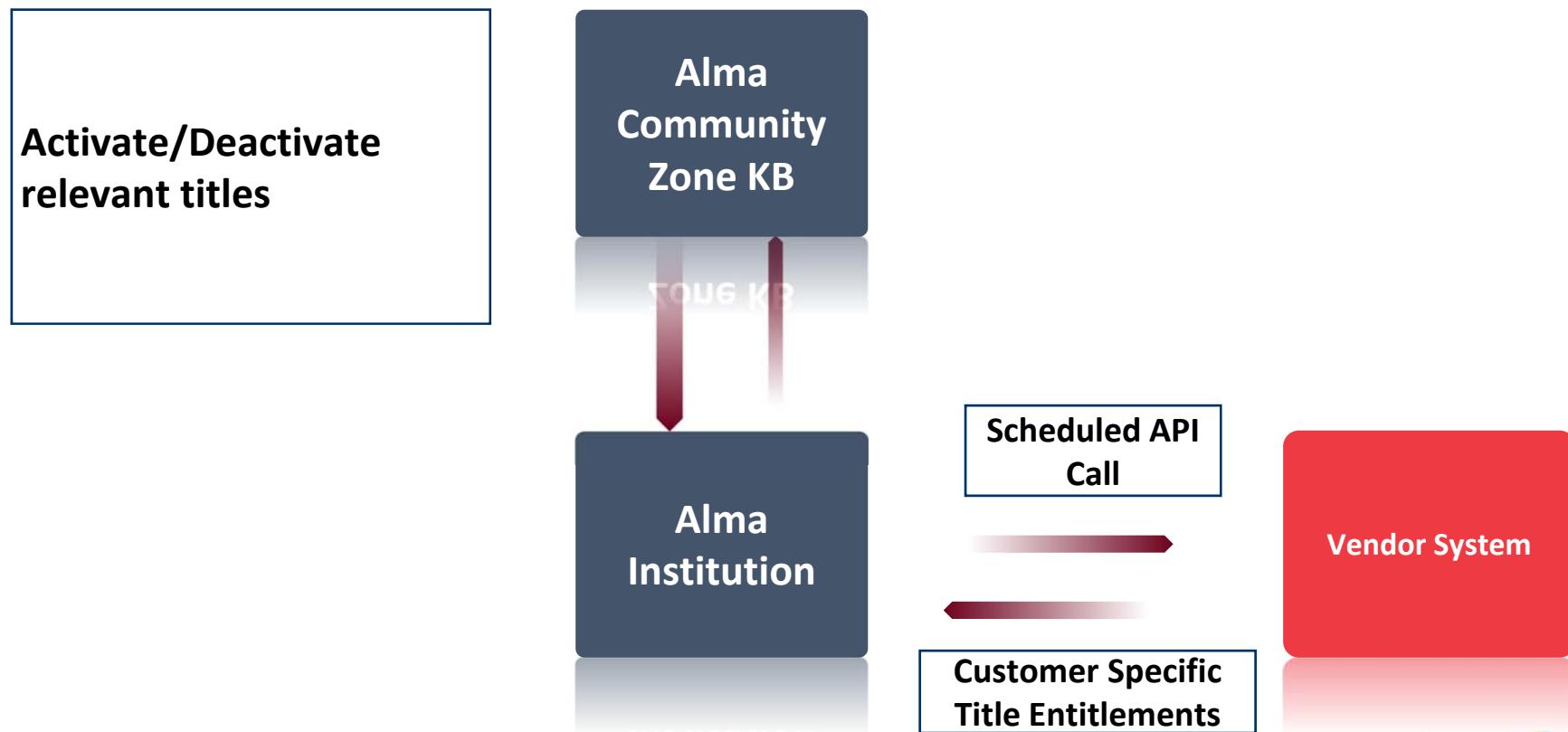
The screenshot shows the Alma library system interface. The browser address bar displays the URL: <https://na02.alma.exlibrisgroup.com/mng/action/home.do?mor>. The page title is "Search for PO Line". The user is logged in as "Crawford, Marie". The search results show 1 record:

1 [Religion and inequality in America : research and theory on religion's role in stratification / \[edited by\] Lisa A. Keister, Duke University, Darren E. Sherkat, Southern Illinois University, New York. ; Cambridge University Press, 2014., 1107657113, ISBN, 26254732](#)
Order/Line status: - / [In Review](#)
MMS ID: 9942429503202401
Assigned to: -
Type: Print Book - One Time Standard number: 1107657113 Order/Line: - / [POL-744](#)
Copies: - Total price: 32.99 USD Funds: -
Vendor/Account: COUTTS Vendor reference ID: 1098LMA4 Expected delivery: -
Receiving note: -
The bib record is brief, Mandatory information is missing or erroneous
[View](#) | [Go to task list](#) | [Change Bib Reference](#) | [Cancel](#)

A text box highlights the order line details, stating: "Order line is created in Alma based on the details from OASIS".

Auto Holdings Update – General Flow

- **Objective:** Streamline the process of managing institution entitlements in Alma
- **Solution:** Automatic service that regularly updates institution entitlements with information retrieved from vendor on a scheduled basis



Pricing and Availability



**STREAMLINED
PROCESS**



IMMEDIATE



**SAVE TIME AND
MONEY**



Pricing & Availability - Example

Purchase Requests
Create Purchase Request
Manage Purchase Requests
Check Availability and Pricing

Vendor Details

Vendor name Amazon-USA ← Vendor code Amazon-USA

Summary | Contact Information | Contact People | EDI Information | Usage Data | System Integration

Attachments | Notes

System Integration Attributes

Availability and Pricing

System Type * Amazon-US

URL

- Amazon-US
- Amazon-Canada
- Amazon-UK
- Amazon-Germany
- Amazon-Japan


Pricing & Availability - Example

	Source	Description	RS Availability	Comment	
1	Amazon-USA	Total results: 54		-	Review results
2	Harrassowitz	Total results: 70		-	Review results
3	OASIS	Total results: 72		-	Review results



Item Lookup

1



[View in Amazon](#)

Title: Marketing Project Management Body of Knowledge
ISBN: 146819660X
Lowest New Price: \$30.94 **Lowest Used Price:** \$32.69
Total New: 19 **Total Used:** 4
Language: English

[Create Order](#)

Alma and Tableau

- **Resources**

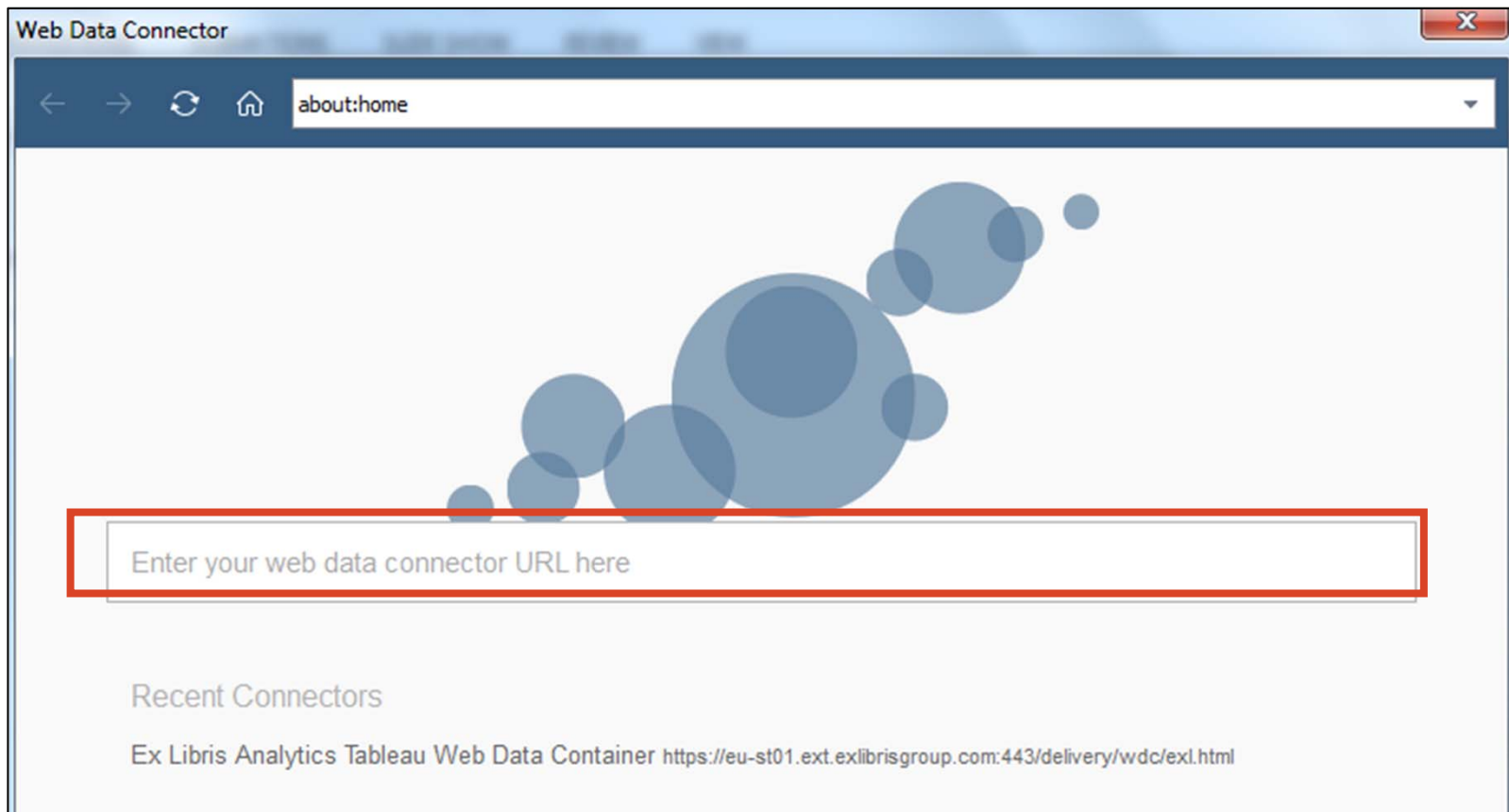
- <https://developers.exlibrisgroup.com/blog/Tableau-Web-Data-Connector-for-Ex-Libris-Analytics>
- https://knowledge.exlibrisgroup.com/@api/deki/files/53301/Analytics_-_Using_Alma_Analytics_with_the_Tableau_Web_Data_Connector.pptx

Alma and Tableau

- The Tableau Web Data Connector allows the user to build connections to data from different sources.
- In this manner an Alma institution can use the Tableau Web Data Connector to combine data from Alma Analytics and one or more additional sources.
- In order to facilitate creating the connection from Tableau to Alma Analytics, Ex Libris has built a Web Page which can be “plugged in” to the Tableau Web Data Connector.
- After pointing to this web page from the Tableau Web Data Connector it’s as simple as merely entering your API Key and the relevant path of your report into the designated fields.

Alma and Tableau

- E.g. <https://eu-st01.ext.exlibrisgroup.com/delivery/wdc/exl.html>



Alma and Tableau

- Fill in the API Key and path, choose your region, and click “Get data”

Ex Libris Analytics Tableau Web Data Container

https://eu-st01.ext.exlibrisgroup.com/delivery/wdc/exl.html

Ex Libris Tableau Web Data Connector

API Key

Remember key

Report Path

The path of the Analytics report. See this [blog post](#) for more information on how to retrieve the path.

Region

Max number of rows

Get data

Alma and Tableau

- You now have the Alma Analytics report in Tableau

The screenshot shows the Tableau interface for a connection named 'ExLibris'. The connection type is 'Web Data' and is set to 'Extract' mode. The data source is 'JR1 usage by month for previous calendar year'. The interface includes a menu bar (File, Data, Server, Window, Help), a toolbar with navigation icons, and a sidebar with 'Connections' and 'Table' sections. The main view displays a table with the following columns:

#	#	#
JR1 usage ...	JR1 usage by month for previo...	JR1 usage by month for previo...
0	Year Key * 100 + ...	JR1 - Journal Usa...

Below the table, there are buttons for 'Update Now' and 'Automatically Update'. A 'Go to Worksheet' tooltip is visible over the 'Sheet 1' tab at the bottom.

Alma Analytics Roadmap

Alma Roadmap Highlights

APIs and Open Platform

- Set Management APIs
- Electronic Inventory APIs
- Call Out Notification Channel
- Export in BIBFRAME Format
- Enhanced BIB APIs
- RDF Published Data
- Linked Data Triplet Store
- Import in BIBFRAME Format
- New Acquisitions Related APIs
- Discovery APIs

Analytics

- Digital Usage Subject Area and Link Resolver Support
- Subject Area for Titles
- Benchmark Analytics - Library KPIs and Dashboard
- Reporting on Past Events
- Licenses Subject Area
- Digital Inventory Subject area
- Additional Local Field Reporting
- Embedded Analytics Reports in Alma
- Comparative Collection Development Analysis
- Creation of Alma Set from Analytics and Reports from Alma
- "Alma Analytics" Subject Area

H1 2017

H2 2017

2018

Alma Mobile App

Alma Mobile App

- Currently in production use with multiple institutions
- Plans focus on both incremental improvements as well as new workflows, such as:
 - Enhancements to Pick From Shelf and Scan-in Items
 - Work order processing
 - Evaluating improved scanner plug-in

Alma UX Project

Alma UX project

- Our current focus is on the Phase 1 Rollout to all institutions
- Addition further phases are planned on a continuous basis going forward
- Scope will be determined in collaboration with user group
- Part of our ongoing development methodology
 - Requirements
 - Design
 - Development
 - Extc...

Rollout Plan

	June Release	July Release	August/September	End of Q4
Early access	New UX can be turned on/off per user	New UX will be turned on per institution Option for each user to turn on/off		
Entire Alma Community Sandbox		Option to turn on new UX on institution level option for each user to turn on/off		
Entire Alma Community Production			New UX can be turned on by institution on institution level. User can turn on/off (once institution turns on)	New UX will be turned on for all institutions on institution level. User will not be able to turn on/off Stop support for old UI



asaf.kline@exlibrisgroup.com