



# Alma Working Group Report

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**ANZREG 2018**

## Alma Working Group guidelines finalised at IGeLU 2018

The Alma Product Working Group (PWG) represents Alma users, under the auspices of both the ELUNA and IGeLU Steering Committees.

Primary activities of the Alma Product Working Group are:

- Enhancements
- 2017/18 WG projects
- Advocacy Groups
- Discussion

## Alma Working Group election results

New Alma Working Group members were elected to the committee in March 2018

- Betsy Friesen, University of Minnesota, USA / Coordinator
- Joe Ferguson, University of Tennessee, Knoxville / Deputy Coordinator
- Dave Allen, SLQ, Australia
- Ann Miller, University of Oregon, USA
- Karen Stone, SLQ, Australia
- Amelia Rowe, RMIT, Australia
- Geir Nordanger, University of Oslo
- Marina Kalach, University of Haifa
- Megan Lee, Monash University Library, Australia
- Bettina Kann, OBVSG, Austria
- Laurence Richelle, Universite de Liege, Belgium
- Leon Krauthausen, FUB, Germany

## 2017/18 Projects

- UX Project
- Elections and Enhancements
- Primo/Alma Back Office Project (Primo VE)
- Community Zone Management Group
- Open Testing framework
- Smart Recommendations
- Authentication Focus Group

## Alma New User Interface: Stage 1 & Stage 2

- Alma UX project stage 1 completed
- Alma UX project stage 2 now underway, with Kick off in Feb 2018
- Project led by Itai Veltzman. Dana Sharvit has left Ex Libris

## Alma New User Interface: Stage 1 & Stage 2

- Contributing institutions continuing from stage 1 of the Alma UX project
  - Mannheim University (Germany)
  - KU Leuven (Belgium)
  - University of Wisconsin System (US)
  - Getty Research Institute (US)
  - Monash University (Australia)
  - State Library of Queensland (Australia)
  - University of Tennessee, Knoxville (US)
  - University of Oslo (Norway)
  - Northwestern University (US)

## Alma New User Interface: Stage 1 & Stage 2

- First area of Alma to be reviewed is the Alma metadata editor
- Itai collected pain point issue from all instructions until end of April
- Now scheduling user feedback sessions to look at the redesigned the Merge/Overlay/Combine functionality

## Alma New User Interface Stage 2 timeline





## 2018 Alma Enhancement Cycle

Jan. 28 - Feb. 10, 2018	New Enhancements to NERS (2 weeks)
Feb. 11 – Mar. 17, 2018	Enhancement Team reviews, dedups, scopes, verifies and sets up vote in NERS (5 weeks)
April 1 – Apr. 14, 2018	First round of voting (3 weeks)
Apr. 15 - 18, 2018	Enhancement Team reviews results, prepares to send to Ex Libris for pointing
April 18, 2018	Enhancements to point to Ex Libris
April 19 – June 15, 2018	Ex Libris pointing work (6 weeks, includes ELUNA meeting)
June 17 – June 30, 2018	Second round of voting on pointed enhancements

## Proposal for strategic enhancement voting

Alma WG looking for more successful NERS outcome  
Should we develop strategic recommendations for core voting options, based on:

- Regional/consortial issues
- Greater good issues

The Alma WG could present a select number of issues (5-10) for consideration by Alma community

- Institutional/Consortial Leadership -- join forces
- Propose strategically -- focus on your biggest issues
- Vote strategically -- campaign/make your case

## Community Zone Management Group

Steven C. Shadle, University of Washington

Stacie Traill, University of Minnesota

Jane Daniels, Cardiff Metropolitan University

Ebe Kartus, University of New England (Australia) - Coordinator

Galen Jones, The Open University (UK)

Ellen Jones, University of Iowa

Ann Fath, Getty Research Institute

Marina Kolach, University of Haifa

John Butera, Swinburne University

Lachlan Young, University of South Australia

Mary Greci, University of Oregon

Unni Knutsen, University of Oslo

Allison Powers, Harvard University

## Open Testing Framework

- Ten institutions entered into an Open Testing Framework pilot with Ex Libris in September – October 2017.
- The project involved using a shared system to support transparency in Alma release testing.
- This framework was created in response to Alma Community concerns about quality of testing.
- Volunteers for this particular initiative were sought from institutions already rigorously testing releases or, at least, rigorously reporting problems with releases.

## Authentication focus group

In September 2016, Ex Libris announced plans to move toward the use of external-only password management in Alma.

This shift would affect customers' ability to create patron and staff accounts where the password is stored within Alma.

Following the establishment of a joint ELUNA/IGeLU External Authentication Focus Group (AFG) to work with Ex Libris, community surveys and interviews were conducted to determine the impact of this change on institutions.

## Authentication focus group

- As a result of that collaboration, Alma now supports a number of authentication options:
- LDAP,
- SAML2 based authentication such as Shibboleth,
- OAuth based authentication with Facebook or Google, and CAS
- Ex Libris also plans to introduce an Ex Libris identity service

# Identity & Access Management (IAM) Requirement Services to Support Alma Authentication

## **INSTITUTIONAL REQUIREMENTS**

- Meets institutional ID security/privacy
- Least amount of staffing impact
- Levels of institutional responsibility for ID product/system
- Institutional workflow

## **SOLUTION FEATURES**

- Free and fee-based Service
- Cloud hosting vs. Local hosting
- User limits
- 2-factor authentication compatible
- Integrates with Ex Libris products

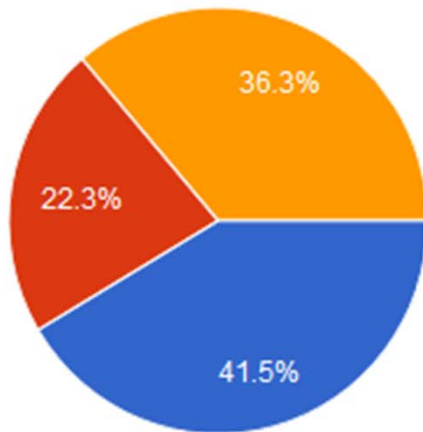
## **ADDITIONAL CONSIDERATIONS**

- Applications to Sync Alma to the ID system
- Consortia : Potential multiple auth systems
- Cost
- Patron ease of use
- ExL ability to support the institutional auth systems

# Institutional Authentication Methods Review

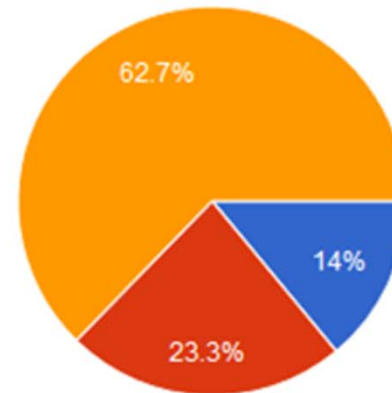
What type of password management is enabled for Staff Operator accounts?

(193 responses)



What type of password management is enabled for Patron accounts?

(193 responses)



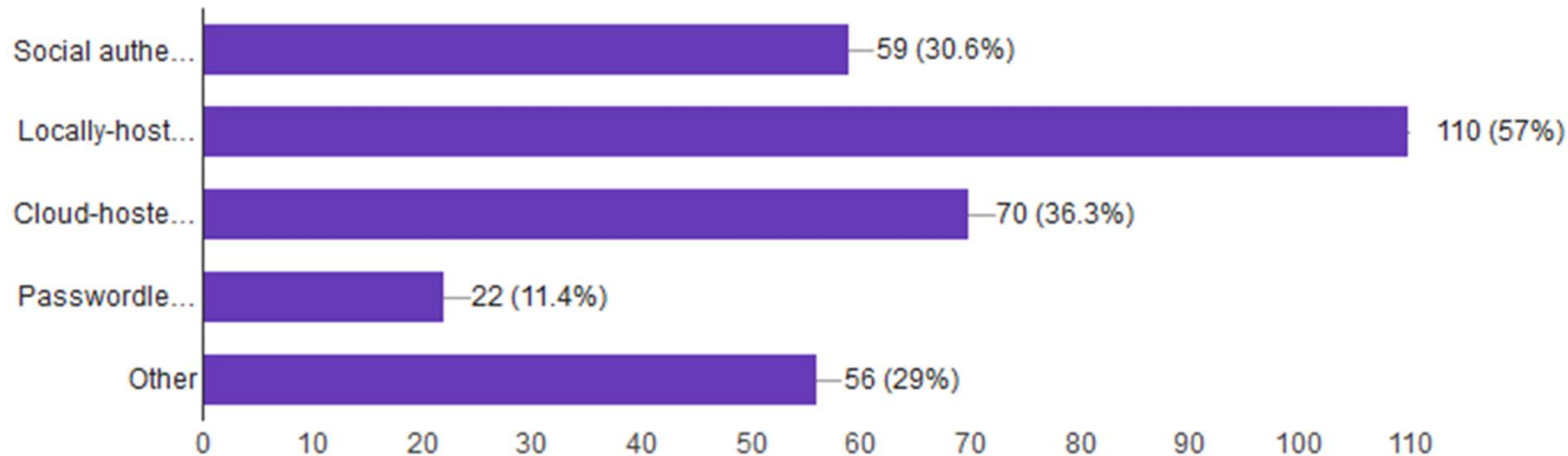
- Internal (inside Alma)
- External authentication system
- Mix of Internal and External



# Institutional Authentication Methods Review

When internal authentication inside Alma is no longer available, which possible future solution(s) are you likely and allowed to implement? (Please verify with your IT Department about these possible future options)

(193 responses)



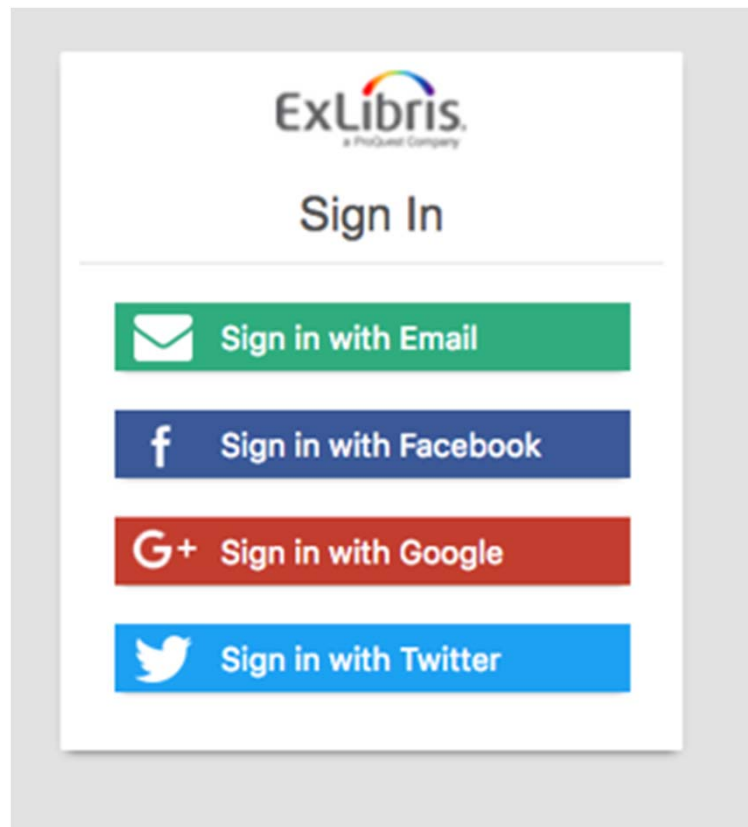
# Authentication Options

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# Social Login


- Use case: Community borrowers who are not registered in the institutional identity provider
  - Avoids the need for the user to remember an additional username and password
  - No information shared between Alma and the social provider
  - Self registration available
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# Social Login





ExLibris  
a ProQuest Company

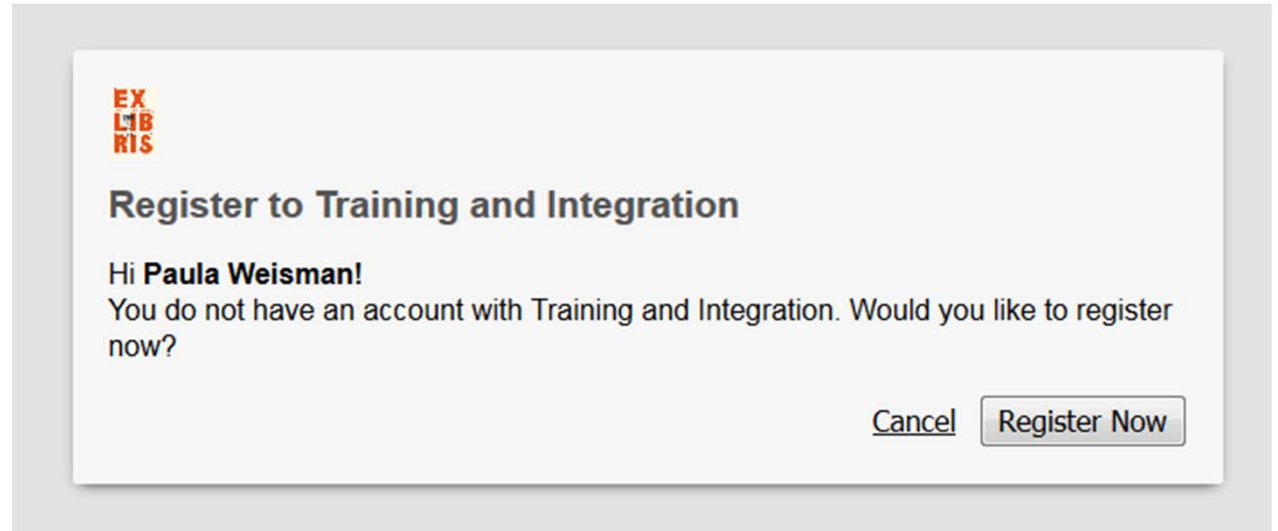
Sign In

 Sign in with Email

 Sign in with Facebook

 Sign in with Google

 Sign in with Twitter



EX  
LIB  
RIS

**Register to Training and Integration**

Hi **Paula Weisman!**  
You do not have an account with Training and Integration. Would you like to register now?

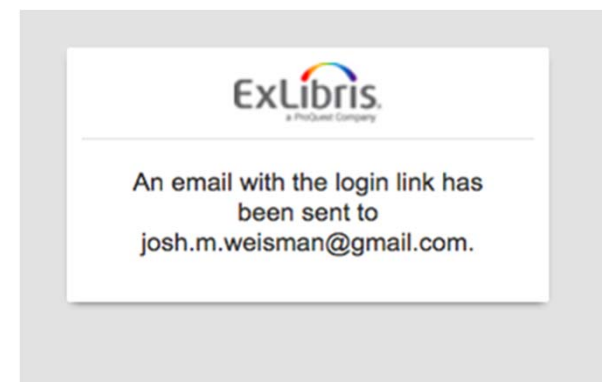
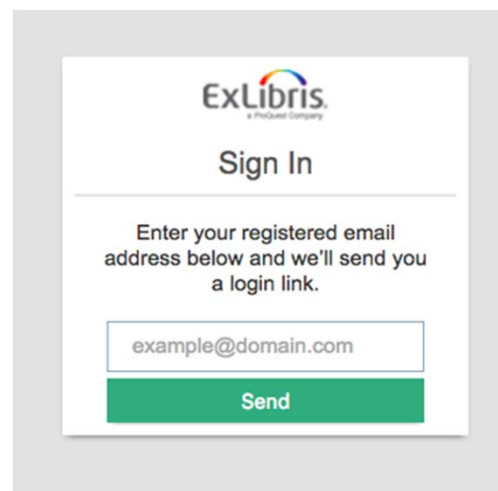
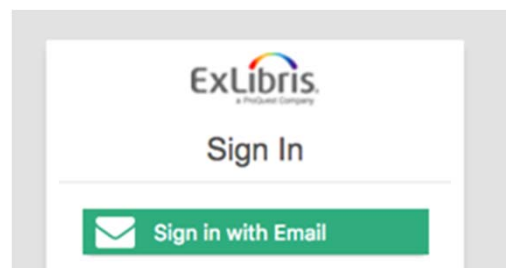
[Cancel](#)

# Sign-in via email

- Alternative to social login
  - Available for Primo (patrons) from June 2017
  - Available for Alma (staff) from Available from January 2018
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# Sign-in via email

- Users are registered in Alma with an email address by the circulation desk (or by the REST APIs)
- When users wish to login to Primo, they select the “login via email” option and provide their registered email address



# Sign-in via email

- An email with a “magic link” is sent to the user. The user can click the link within 30 minutes and is automatically logged in to Primo. No password required.
- The link is cryptographically signed to prevent spoofing

Your.Department@organization.com   
To: Josh Weisman  
Login using your email address

  
ExLibris  
A HEBRON COMPANY

Dear...

To log in, [click here](#) and follow the instructions provided.  
This link will expire in one hour.

Sincerely,  
Training and Integration  
Jerusalem

**Training and Integration**

# Ex Libris Identity Service

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# Ex Libris Identity Service

- As a result of the work with the Authentication Focus Group, Ex Libris has decided to introduce an Ex Libris Identity Service that will be based on a dedicated identity management solution
- Will replace the internal authentication / passwords method used today by live Alma customers and all existing customers will be migrated to this service.

FAQ: <https://bit.ly/2HsW85n>

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# Ex Libris Identity Service

- “Internal users” are users who are created and managed in Alma, rather than an external system such as a Student Information System. Alma will continue to support internal users.
  - Internal users’ passwords will be stored in the “Ex Libris Identity Service,” a commercial, best-of-breed identity provider application hosted by Ex Libris in its data centers.
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# Ex Libris Identity Service- Flavors

- Standard Service – this service will be included in the standard Alma annual subscription fee (no additional charge) and will allow the institution to authenticate up to 5,000 internal users.
- Premium Service – this service will be an optional cost offering and will allow the institution to authenticate unlimited number of internal users. This option is designed to provide an effective solution to institutions without any identity management service that prefer not to use the other authentication methods.

*Existing Alma customers and customers that will sign their contract before June 30, 2018 will receive the premium service at no additional fee as part of the transition process to the new service.*

# Ex Libris Identity Service- Migration

- The first time a user logs into Discovery or Alma after the service is launched, the user's password will be automatically migrated out of Alma and into the service.
- Users whose passwords do not meet the unified password strength policy will be asked to update their password as a part of their first login to Alma or Discovery.
- Users who do not login during the migration period will be able to create a new password in one of two ways:
  - Using a "Forgot my password" link from Alma or Discovery; Alma will send an email with password reset instructions to the email address associated with the user
  - A user's password can be reset by a librarian using Alma

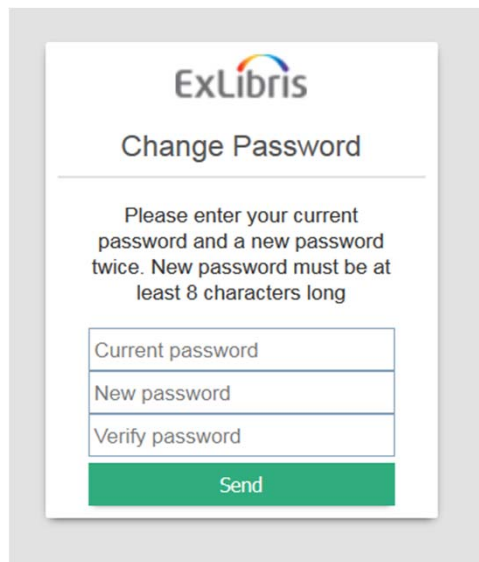
# Ex Libris Identity Service

## Migration of existing user to the Identity Service

- If password meets requirements, transparent for the user
- If password doesn't meet requirements, will be required to enter a new password

## Reset from Alma

- From Alma, a staff user can reset the password manually or send an email for the user to reset their password

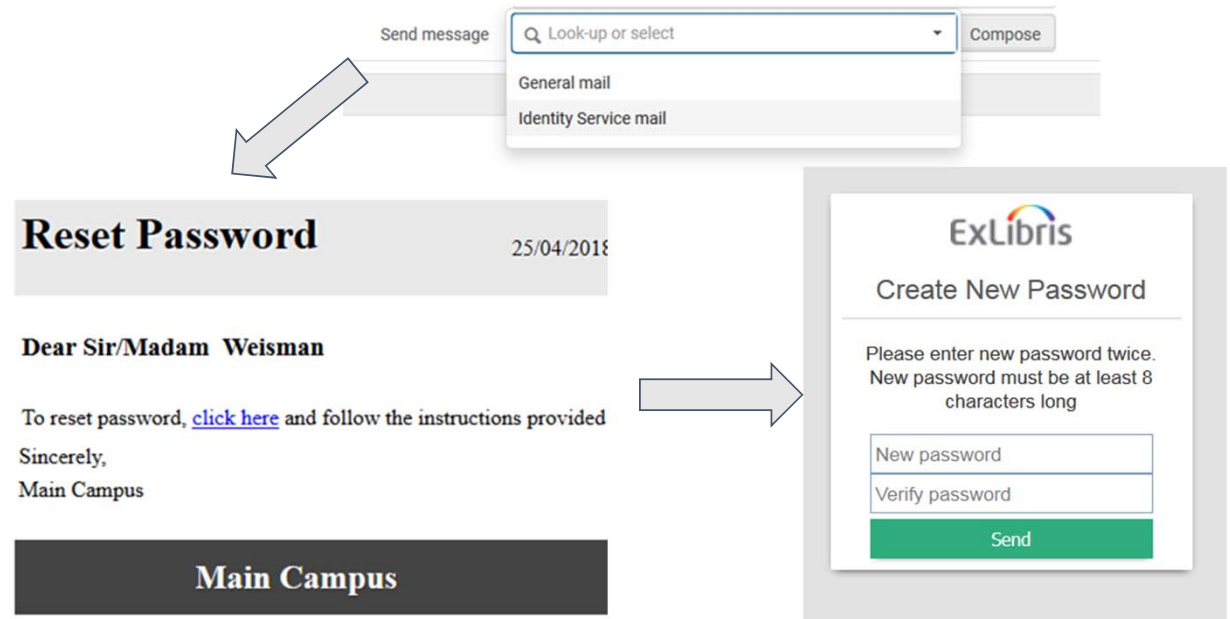


ExLibris

### Change Password

Please enter your current password and a new password twice. New password must be at least 8 characters long

Current password
New password
Verify password



Send message

General mail  
Identity Service mail

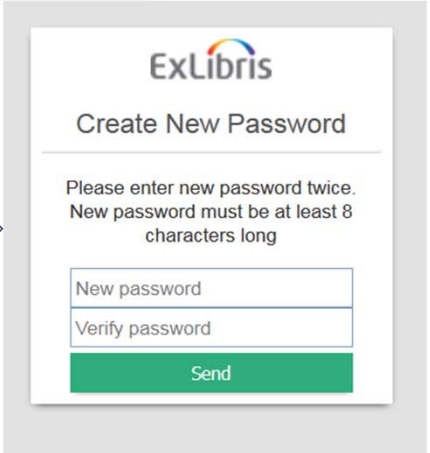
**Reset Password** 25/04/2018

Dear Sir/Madam Weisman

To reset password, [click here](#) and follow the instructions provided

Sincerely,  
Main Campus

**Main Campus**



ExLibris

### Create New Password

Please enter new password twice. New password must be at least 8 characters long

New password
Verify password

# Ex Libris Identity Service

## Reset password

- If a user has no password in Alma (new customers, for example), the user can receive a reset password via email

## Forgot password

- It is possible to add a Forgot Password link to Primo to allow patrons to change their passwords

