

# SUNY 5 Year Celebration

Updates on Alma, Primo and more

Asaf Kline, VP Product Management

Yisrael Kuchar, Sr Director Product Management

June 2024

# Last Year Was Busy...

**Library Independence**

Configure funds/ledgers

**New DV Dashboards**

**Physical Item Templates**

Premium Sandbox Infrastructure

287 New Features

**Idea Exchange 46 Completed**

**NERs**

**New PO Line UI**

New Analytics UI

**Automatic Upload of Electronic Holdings**

12 Monthly Releases 4 Quarterly Feature Releases

**Open Platform: Unlimited Webhooks**

# The Next 12-18 Months Will Be Even Busier

**New UX: Staff Search**

**Form Based Editing**

Analytics: Out of the Box Dashboards

Consortia Configuration and Administration

**New UX: Patron Services**

Authority Control

Automatic Upload of Electronic Holdings

**RequestIt!**

**Open Access Support**



# Laying the Foundations... For The Library of Tomorrow



Collection  
Development



Open  
Platform 2.0



New Approaches  
on Metadata



Building Bridges:  
Resource Sharing



# Collection Development

# Current 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%

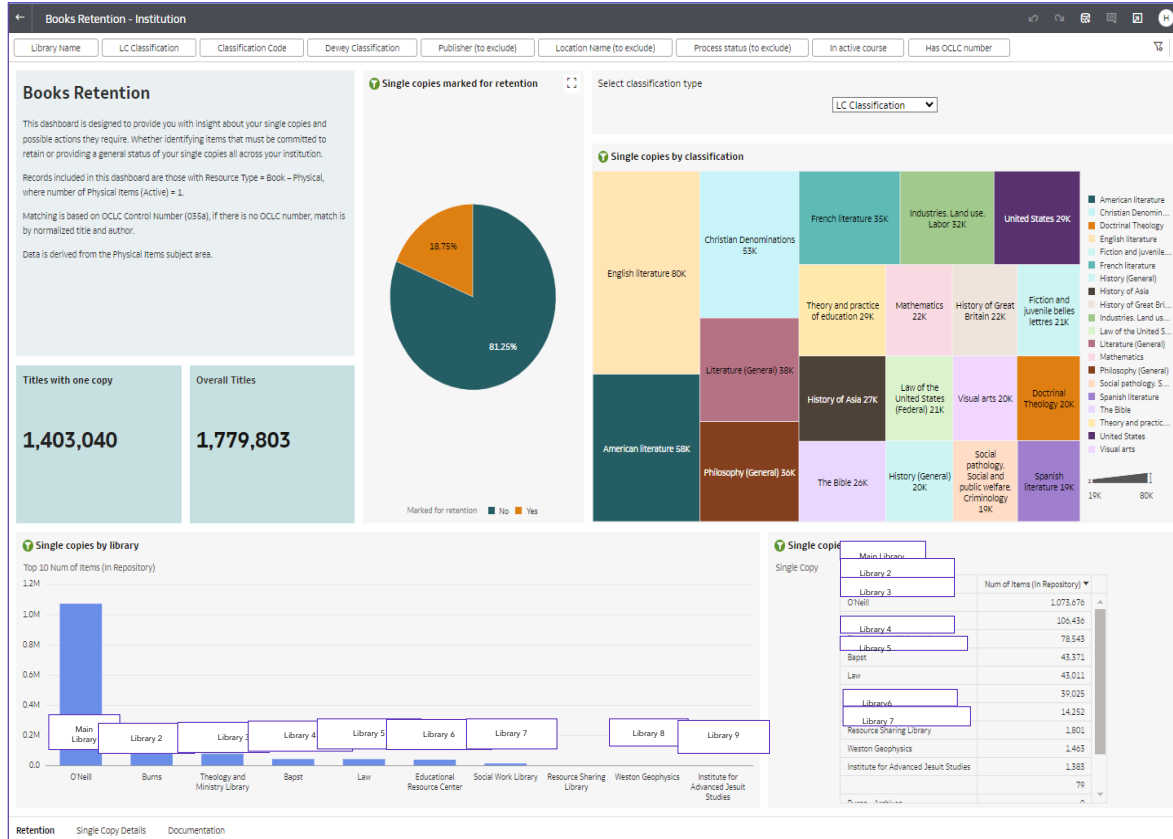


## Collection Development

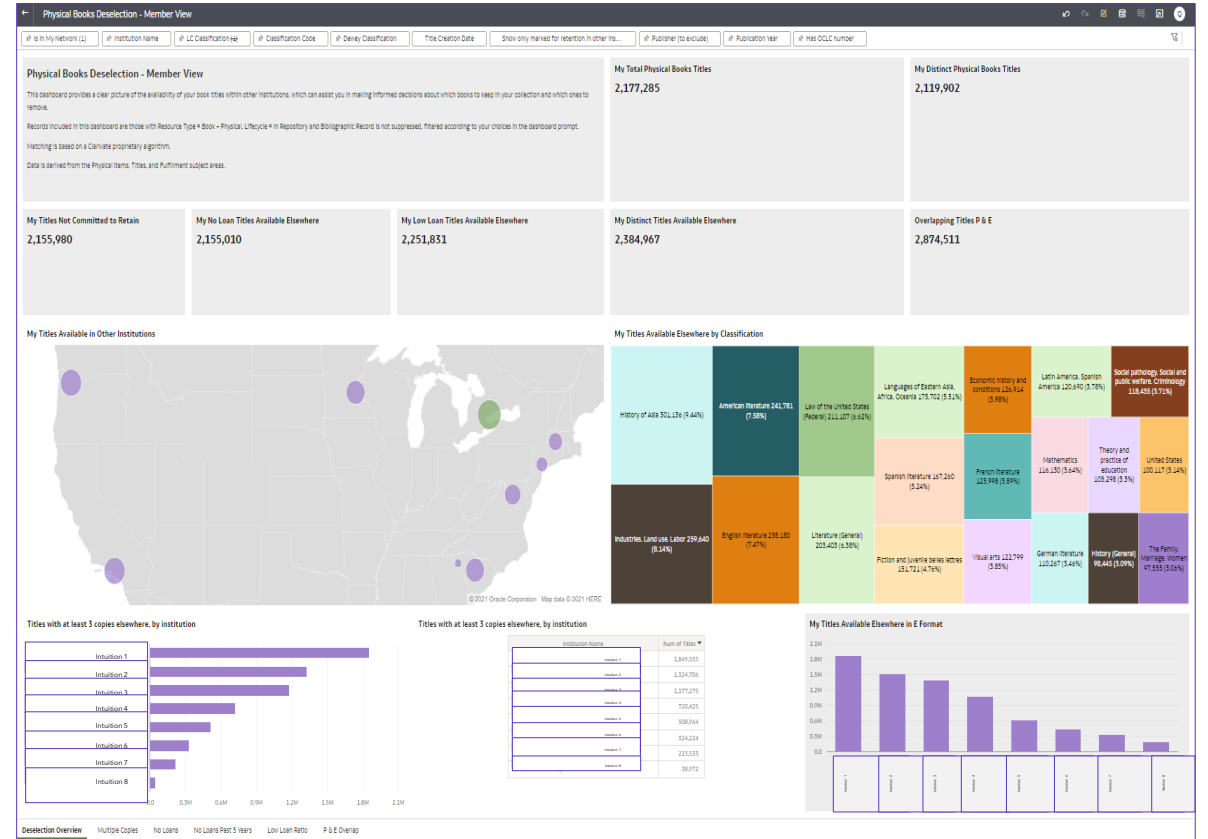
- Launched a Focus Group last year with 33 Members
- Delivered initial Dashboards Feb 2024
- Now progressing with POC on Cross Institution Analytics



# Current Situation: Collection Development



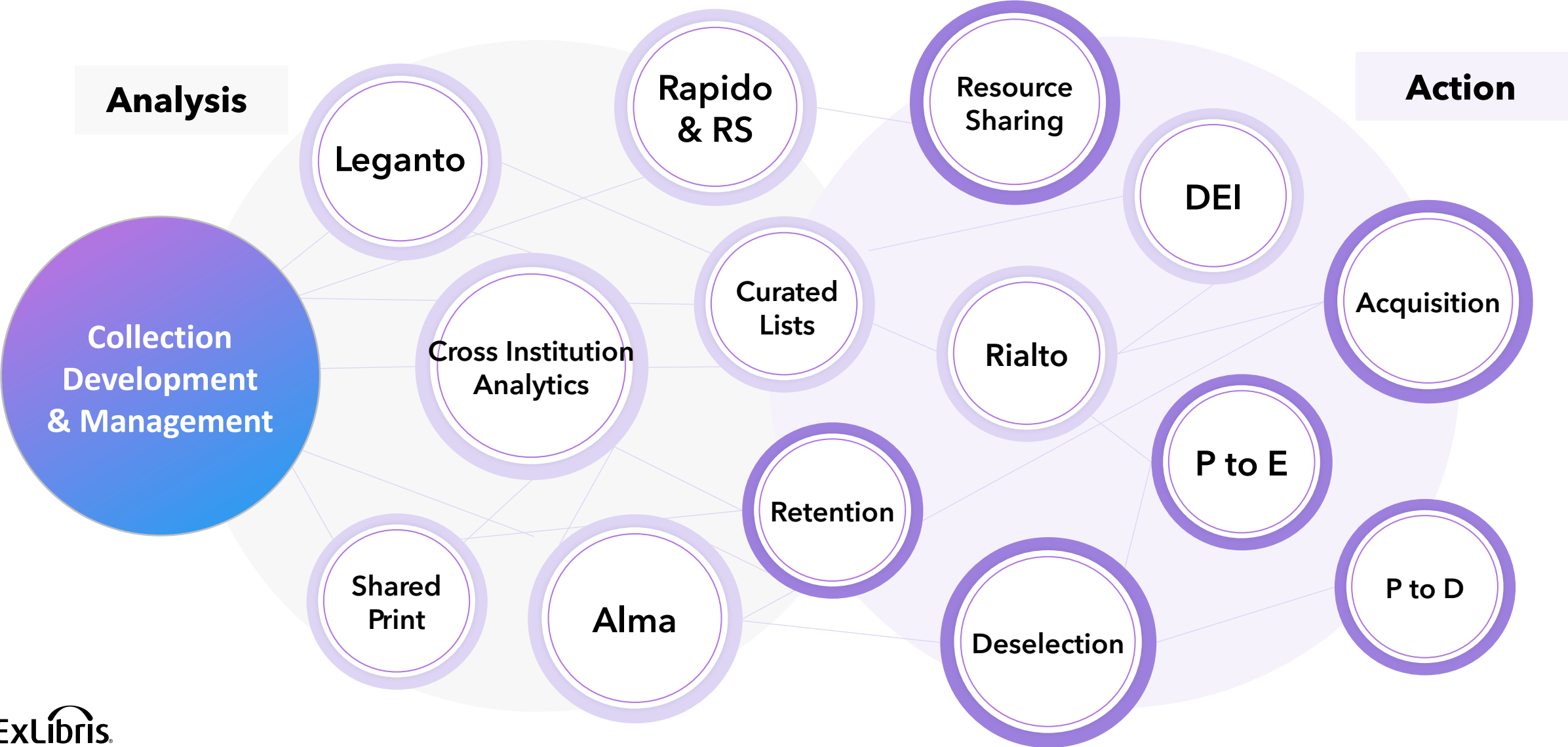
Retention and Deselection Data visualizations. **Available**



Cross Institution Dashboards. **With Focus Group**

# Collection Development today:

Siloed, multi platform, labor intensive process





# Introducing: Ex Libris Collecto

## Centralized Environment

For all collection management workflows



Data: All in One



Cross-Institution Analytics



Unified Experience



Smart Recommendations &  
End-to-End workflows

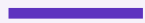
# Ex Libris Collecto

## Workflows and Use Cases



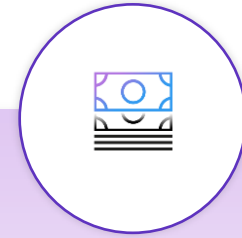
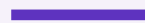
### Retention

Keep or  
remove



### Expand & Diversify

Purchase  
opportunities



### Costs Saving

Unnecessary  
expenses



### Space Optimization

Candidates for  
weeding



Alma

Rapido

Leganto

Rialto



Bowker



ProQuest  
Ebook Central

Primo

Cross Institution  
Analytics



# Ex Libris Collecto

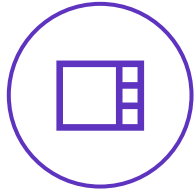
## A Centralized Solution

All main Collection development tasks offered with dedicated smart workflows

The screenshot displays the Ex Libris Collecto interface. On the left is a dark sidebar menu with icons and labels for various functions: Alma QA, Acquisitions, Resources, Research, Fulfillment, Admin, Analytics, and Collecto. The Collecto item is highlighted with a green box. The main content area on the right shows a search bar at the top with 'All titles' and 'Keywords' dropdowns. Below the search bar is a list of menu items: Preferences, My Profile, My Recommendations, Expand (highlighted), Gap Analysis, Curriculum Development, Discipline Development, Preserve (highlighted), Retention Analysis, Collaborated Shared Print, Faculty Work Analysis, Return on Investment (highlighted), Open Access Overlap Analysis, Resource Sharing Vs. Purchase Analysis, Storage Optimization Analysis, Optimize Space (highlighted), Convert P to E, Usage Analysis, Central Storage, and Shared Print. At the top right of the main content area, there is a header with 'Libris | 08/01/2024' and a navigation bar with links for 'Monitoring Tables', 'Monitor Jobs Administration', 'Design Analytics Analytics', and 'Deposit Research'.

# Open Platform 2.0

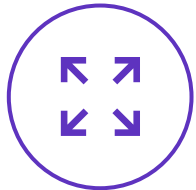
# Current Situation



RESTful APIs



WebHooks



Open Standards



CloudApps

**4B** API calls in last 12 months

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**48%** Growth in last 2 Years

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**>200 M** Webhooks in 2023

The screenshot shows the Ex Libris Developer Network homepage. At the top, there is a navigation bar with links for 'New Here?', 'Cloud Apps', 'API Console', 'Standards', 'Search', 'Go to exlibrisgroup.com', 'Login', and 'Signup'. Below this is the Ex Libris logo (Part of Clarivate) and the 'DEVELOPER NETWORK' title. A main navigation menu includes 'Learn' (Documentation), 'Build' (My APIs), 'Share' (Blog), 'Ask' (Forum), and 'Discover' (App Center). The main content area features the headline 'Extend. Ex Libris.' and the sub-headline 'Build your solutions with APIs, system integrations, and standards support.' A 'Cloud Apps' call-to-action box is on the right. Below the main content is a row of buttons for various platforms: ALMA, PRIMO, SUMMON, ESPLORO, CAMPUSM, LEGANTO, and ROSETTA. At the bottom, a section titled 'Collaborate and build solutions with the developer community' features four icons: 'LEARN' (apple with code), 'BUILD' (screen with gear), 'SHARE' (group of people), and 'ASK' (two people with a question mark).



# What are we 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



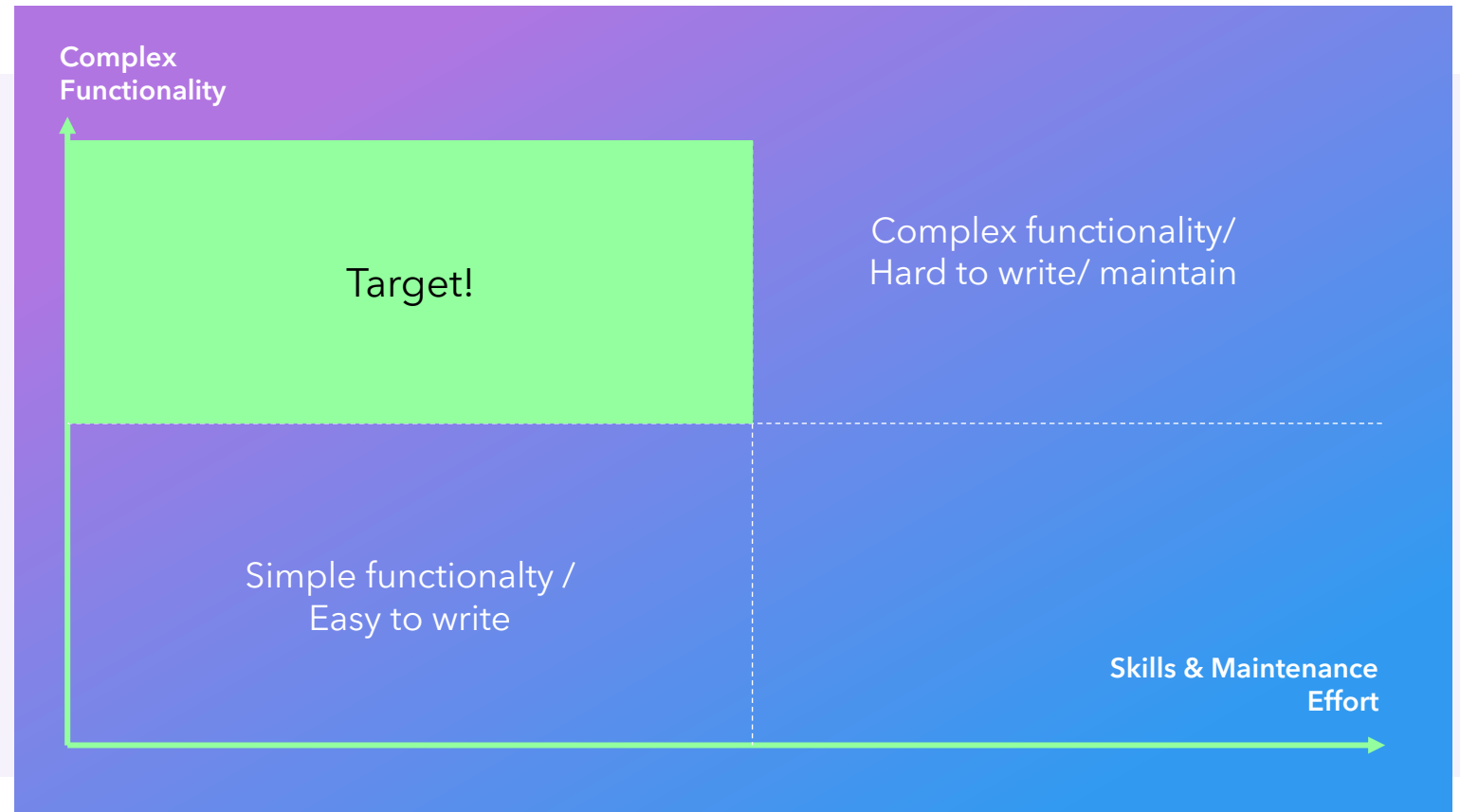
Give us tools to **schedule scripts**



What about **AI** for developers?

# What do we want to change?

- Lower the technical barrier
- Enable new capabilities (e.g. custom batch jobs)
- Enable better integrations in the Enterprise ecosystem





# Introducing: Open Library Workflows

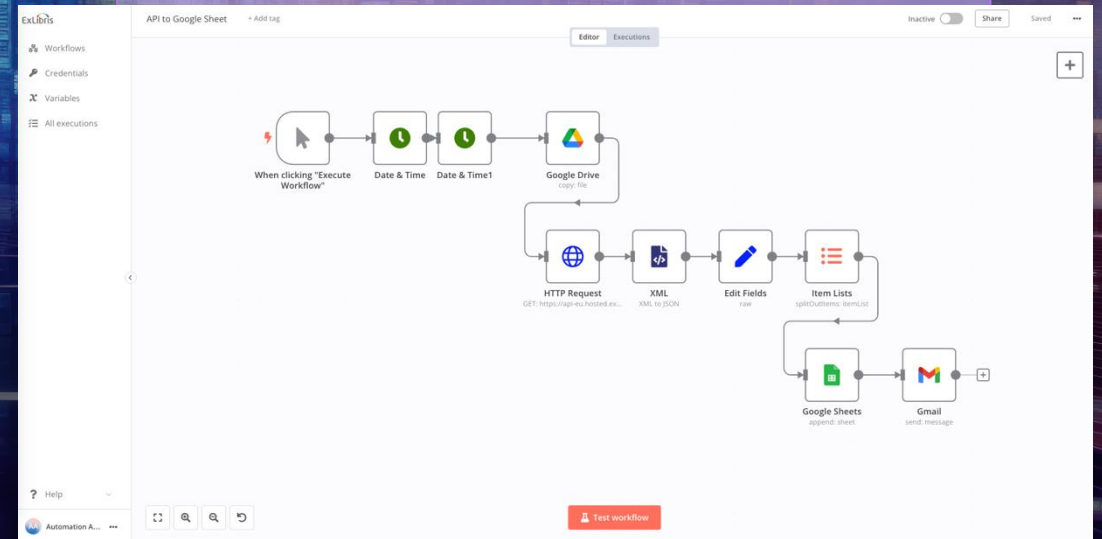
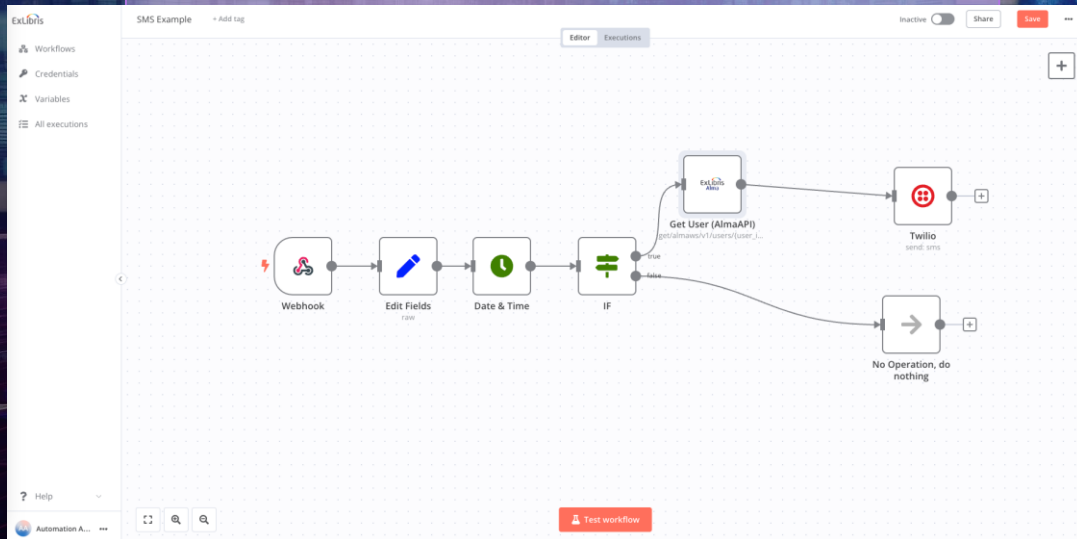
## No Code, Workflow Automation



Send SMS on checkout

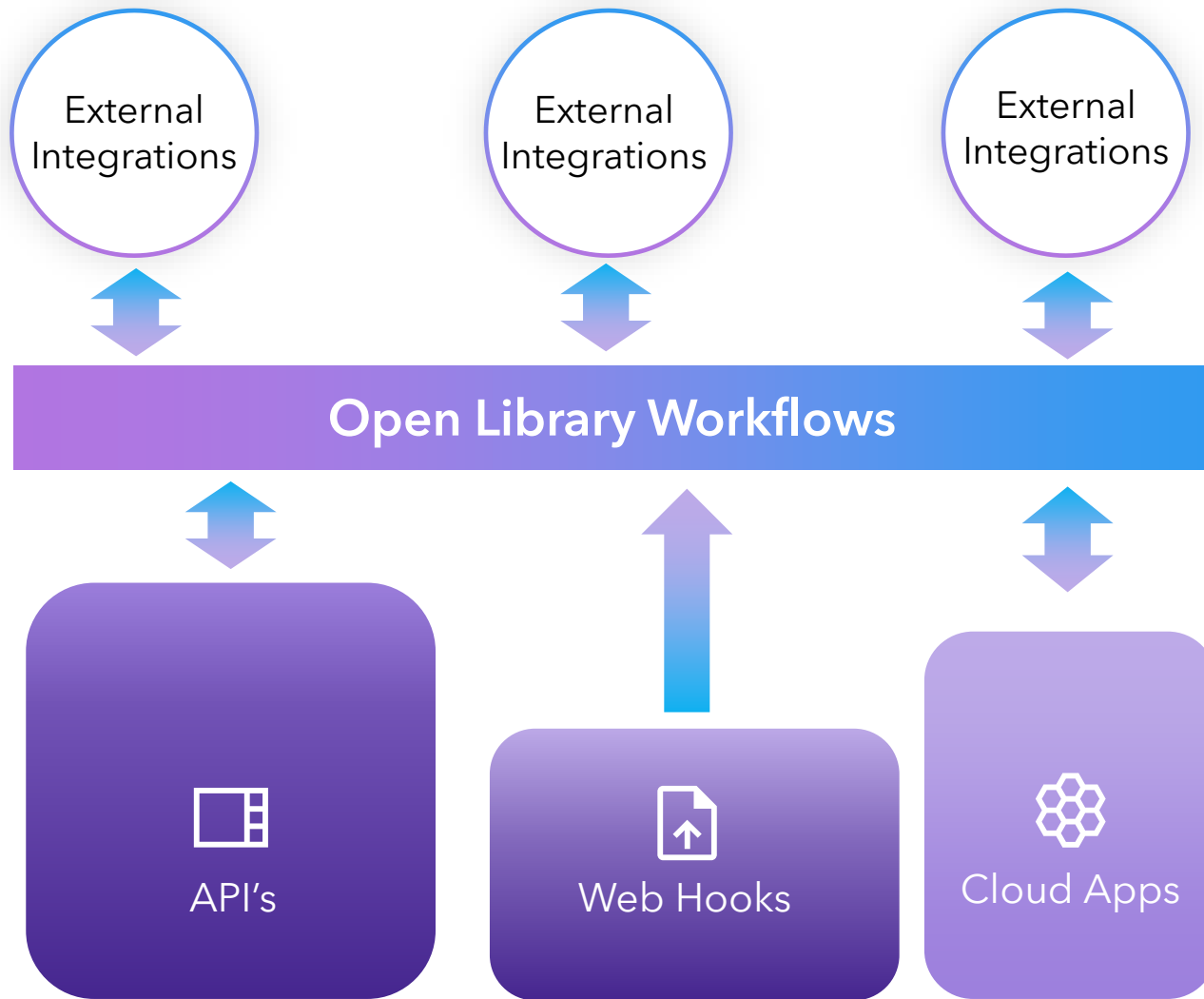


Automatic report to Google Sheet





# Open Library Workflows



# New Approaches on Metadata

# Current Situation

## 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?

- Part of Alma
- Better workflow
- Flexible
- Editable
- With the community
  - Ontology
  - Validation
  - Mockups and more...

The screenshot shows the 'Quick edit' interface for a record titled 'Electrochemical data [by] Louis Meltes, Petr Zuman and [others]'. The interface is divided into several sections:

- Descriptive Information:** Includes fields for Resource type (Book - Electronic), Language (English), Edition (Enter Text Here), Main title (Electrochemical data), and Author (Meltes, Louis).
- Identifiers:** A list of identifiers with their types and values:
  - ISBN (print): 0471592005
  - LCCN: 74014958
  - OCLC number: ocm01009468
- Publication Information:** Includes Place of Publication (New York), Publisher (J. Wiley), and Date of Publication ([1974]).
- Additional Titles:** A section for adding titles.

*Note: The image is for illustrative purposes only*

# Cataloger 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)

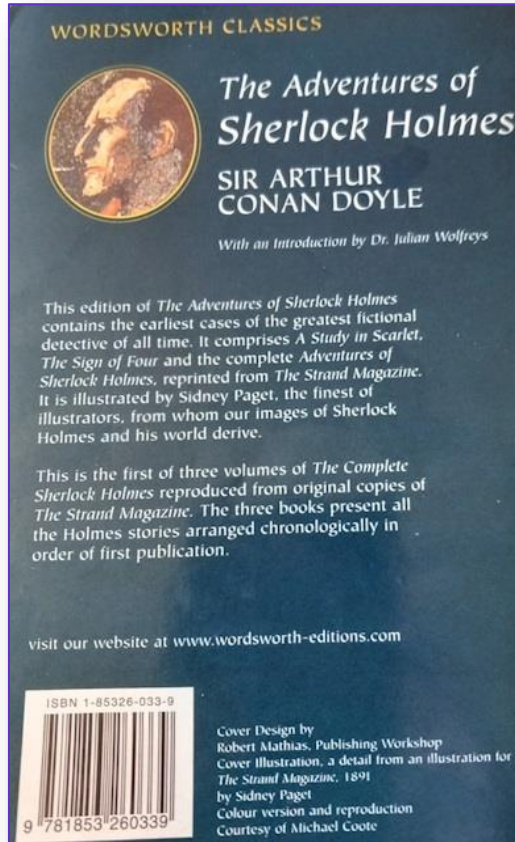
The screenshot displays the ExLibris Cataloger Assistant interface. The main window shows a record for "The Adventures of Sherlock Holmes" (99137706101401021). The record details include:


LDR	00188nam#a2200073#u#4500
001	99137706101401021
005	20240407164721.0
008	240407s2014#####xx#####r#####000#0#eng#d
245 1 1	\$Sa The Adventures of Sherlock Holmes

The interface also features a sidebar with the "Cataloger Assistant" title and a menu icon. Below the title, there are radio buttons for "Displayed Records" (selected) and "Select Records". The "Upload image of book" section includes a text prompt: "Please select or drag an image file of the book such as the back cover blurb" and a dashed box containing the text "Choose or drag image file". A green notification bar at the bottom indicates "Record saved at 4:47:21 PM."

# Cataloger Assistant

Cataloger-mediated, to maintain quality and accuracy of catalog





## Cataloger Assistant

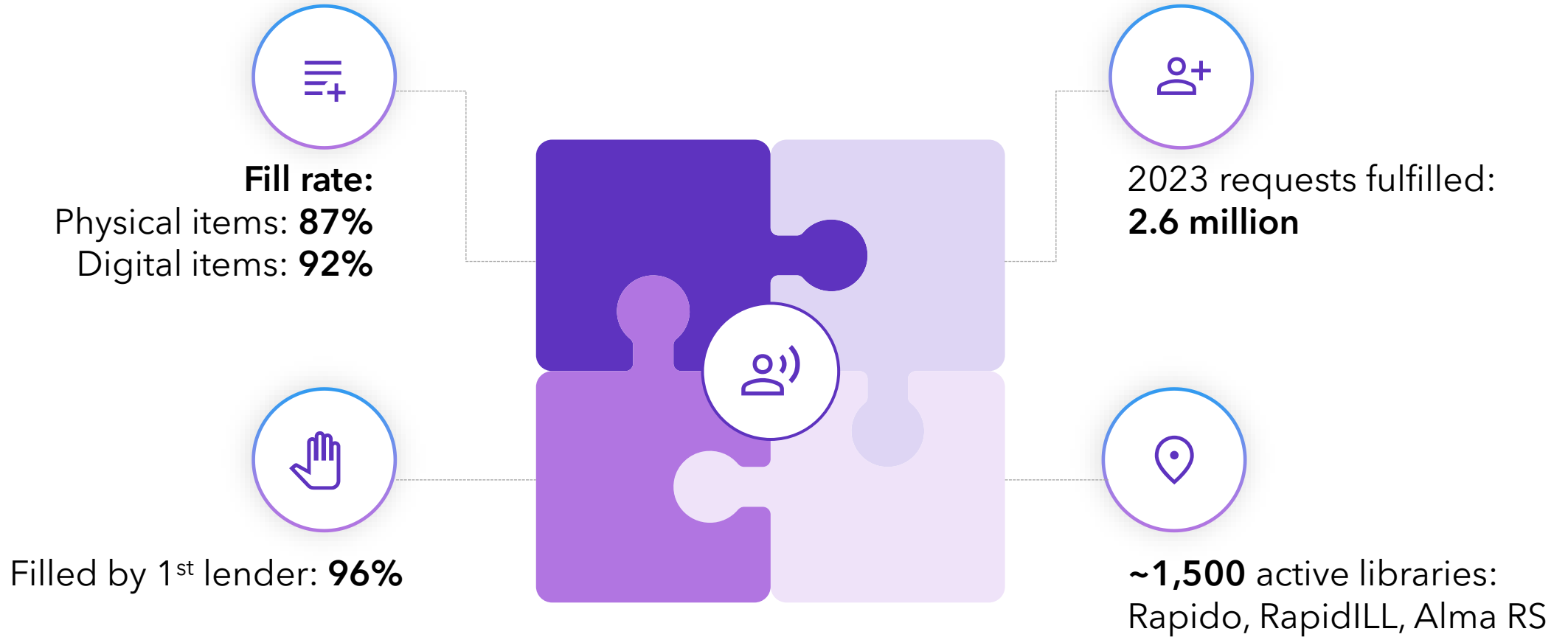
- 020 ##\$a 1853260339
- 100 1#\$a Doyle, Arthur Conan,\$d 1859-1930,\$e author.
- 245 14\$a The Adventures of Sherlock Holmes /\$c Sir Arthur Conan Doyle ; with an introduction by Dr. Julian Wolfreys.
- 250 ##\$a Wordsworth Classics edition.
- 830 1#\$a Wordsworth Classics
- 500 ##\$a "Comprises A Study in Scarlet, The Sign of Four, and the complete Adventures of Sherlock Holmes, reprinted from The Strand Magazine."
- 500 ##\$a Illustrations by Sidney Paget.
- 500 ##\$a "This is the first of three volumes of The Complete Sherlock Holmes reproduced from original copies of The Strand Magazine."
- 500 ##\$a Cover design by Robert Mathias, Publishing Workshop. Colour version and reproduction courtesy of Michael Coote.
- 520 ##\$a "This edition of The Adventures of Sherlock Holmes contains the earliest cases of the greatest fictional detective of all time, including his first appearance and many of his most famous investigations. The cases are illustrated by Sidney Paget, providing iconic images that have shaped the Holmes legacy."
- 650 #0\$a Detective and mystery stories, English.
- 650 #0\$a Private investigators \$z England \$v Fiction.
- 650 #0\$a Holmes, Sherlock \$v Fiction.
- 650 #0\$a Watson, John H. (Fictitious character) \$v Fiction.
- 650 #0\$a Crime \$v Fiction.





# Building Bridges: Resource Sharing

# The Resource Sharing Community



# Rapido: Integration with Any ILS



Inventory



Real time  
availability



Circulation



Discovery  
Layer

## How?

OAI-PMH for physical  
holdings load

KBART for e-resources

Utilize ILS API

NISO Circulation  
Interchange Protocol  
(NCIP)

APIs

OpenURL

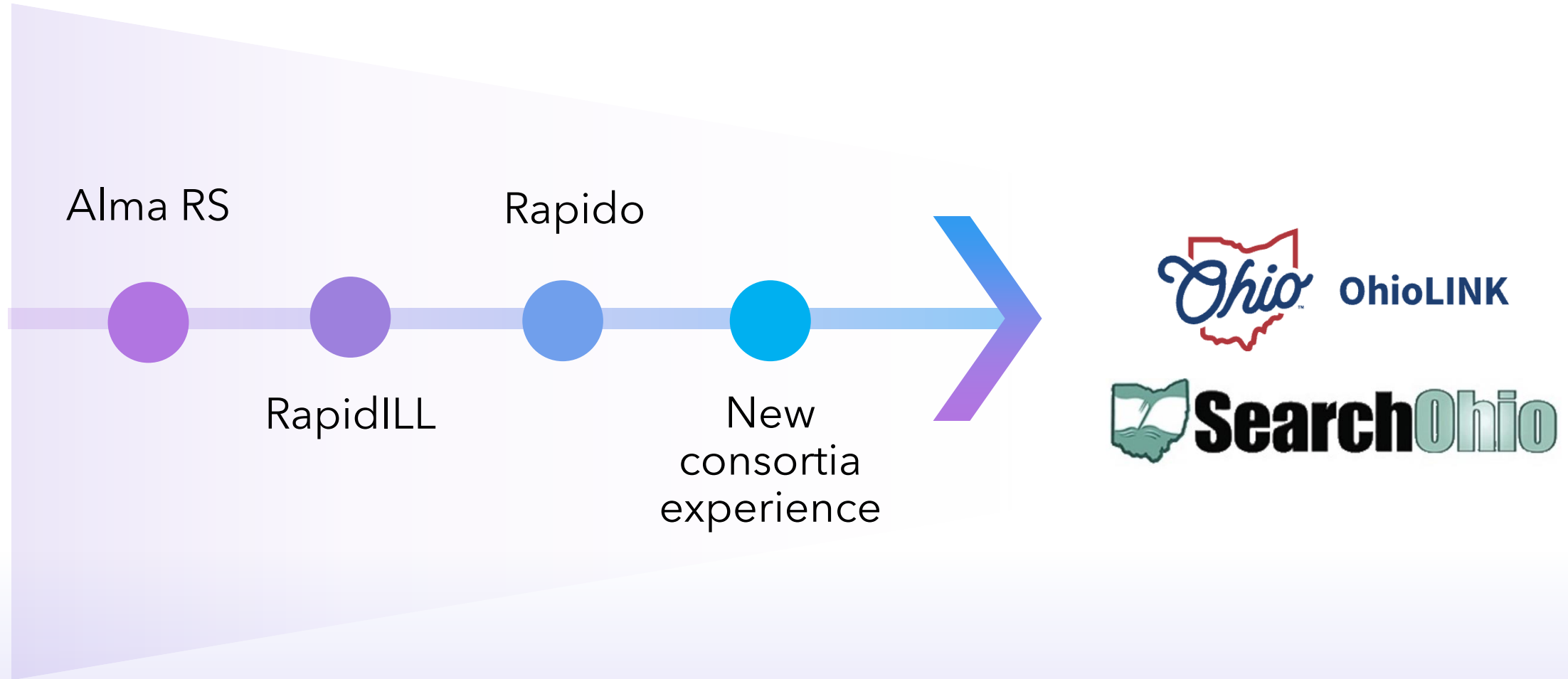
# Rapido

## Integration with Any ILS - Roadmap

ILS	Inventory	Real time availability	Circulation	Patron look up	General Availability
Alma	✓	✓	✓	✓	✓
Sierra	✓	✓	✓	✓	✓
FOLIO - EBSCO	✓	✓	✓	✓	Summer 2024



# Expanding the Network





# The Library of Tomorrow



Ex Libris Collecto:  
Collection  
Development



Open Library  
Workflows



Linked Data and AI  
Catalog Assistant



Building Bridges through  
Resource Sharing

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# Creating the Discovery Walkway: The Next Discovery Experience

**Yisrael Kuchar, Senior Director of Product Management  
Discovery Solutions**



# Our Lanes Towards the Next Discovery Experience

How does the new Primo UI meet **new user expectations**?

How can users use **Linked Open Data** in Discovery today?

How can you start understanding **what your users are doing**?

When can you start using **Generative AI** in Primo and Summon?



# Our Lanes Towards the Next Discovery Experience

**New UI:** How does the new UI meet new user expectations?

**Linked Open Data Experience:** How can users use Linked Data in Discovery today?

**User Engagement Analytics:** How can you start understanding what your users are doing?

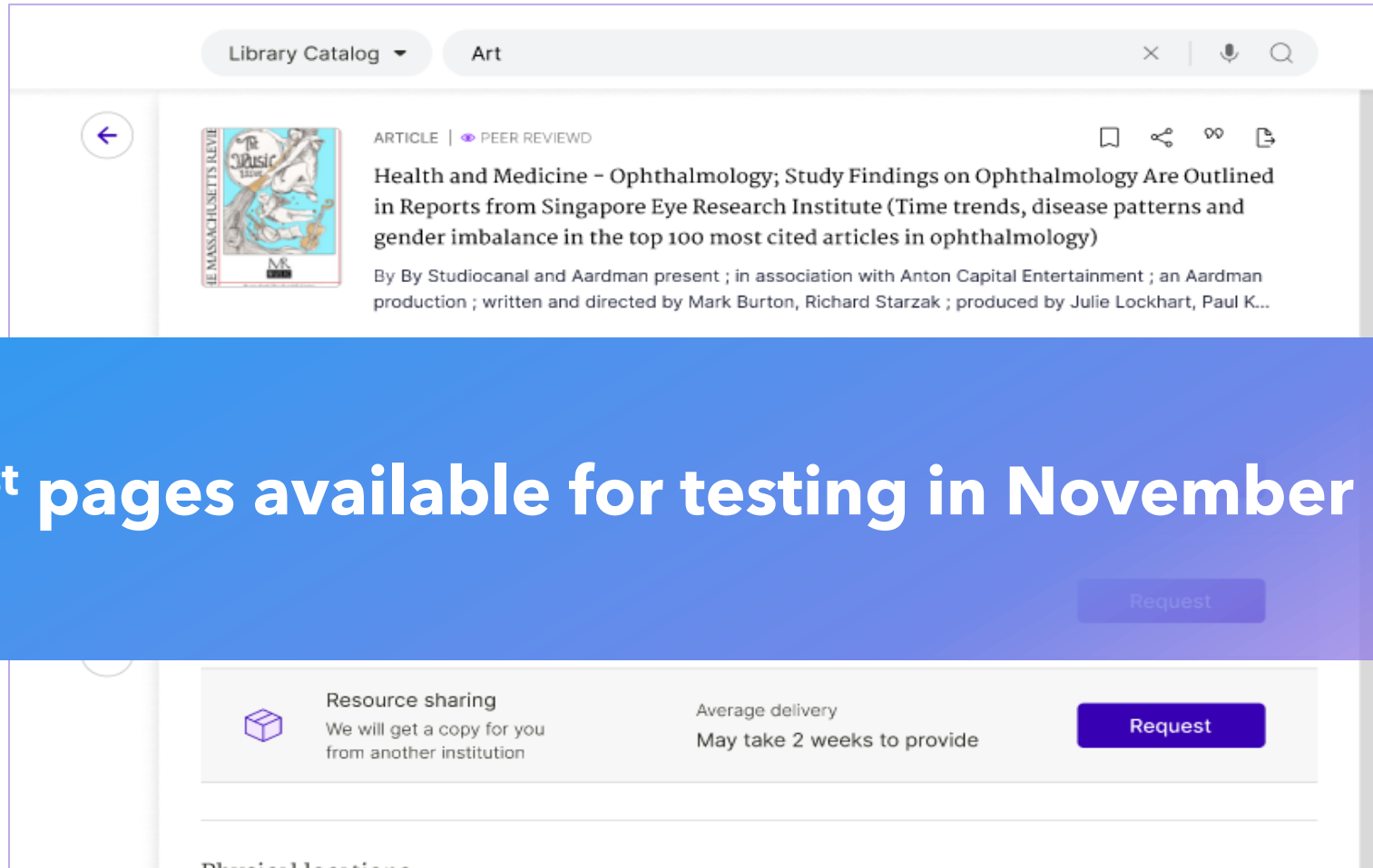
**Discovery Research Assistant:** When can you start using Generative AI in Primo and Summon?

# NDE New UI

The screenshot displays the ExLibris library search interface. At the top, the ExLibris logo (Part of Clarivate) is on the left, and navigation links for LIBRARY SEARCH, JOURNAL SEARCH, DATABASE SEARCH, COLLECTION DISCOVERY, and MORE are in the center. On the right, there are language and user icons. Below the navigation is a search bar with 'Library Catalog' and 'Art' entered. A dropdown menu shows search results: All (430,123), Book (43,980), Articles (12,234), Newspaper (12,234), Images (12,234), and More. Filter buttons include 'All Filters', 'Available online', 'Held by the library', and 'Peer reviewed'. A 'Sort by' dropdown is also present. The main results area shows '1-10 from 430,123 results' and '10 results'. Two results are visible: 01 'American art / National Museum of American Art, Smithsonian Institution' (11 Web of Sciences, Am score 62) and 02 'Art : a beginner's guide' (Open Access, Peer Reviewed, Part of Course). A right-hand sidebar features a portrait of Albert Einstein (1879-1955) with a bio: 'German-born theoretical physicist; developer of the theory of relativity' and a 'read more' link.



# NDE New UI



1<sup>st</sup> pages available for testing in November 2024

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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 pajɛt(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](#)

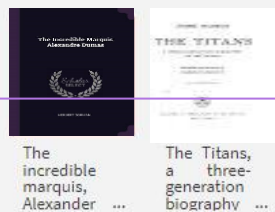
<b>Born</b>	1802-07-24, Villers-Cotterêts (France)
<b>Died</b>	1870-12-05, Dieppe (France)
<b>Field Of Work</b>	French literature
<b>Occupation</b>	Author, Dramatist, Novelist, Authors, Dramatists
<b>Source</b>	Library of Congress Name Authority and Wikidata

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



[See All Titles](#)

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



[See All Titles](#)



# NDE Linked Open Data



BOOK  
The Titans, a three-generation biography of the Dumas.  
Maurois, André, 1885-1967.  
C1957  
Available at Main Library Stacks (PQ2230 .M3313) >

TOP

SEND TO

GET IT

Send to



EXPORT TO



MENDELEY



OPEN



EXPORT BIBTEX



EXPORT RIS



EASYBIB



ENDNOTE



REFWORKS



PRINT



CITATION

Related Persons



Maurois, André, 1885-1967  
French journalist (1885-1967)

Show more >



Dumas, Alexandre, 1824-1895  
French writer and dramatist (1824-1895)

Show more >



Dumas, Alexandre, 1802-1870  
French writer and dramatist (1802-1870)

Show more >



Dumas, Thomas Alexandre, 1762-1806



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

Details

Title The Titans, a three-generation biography of the Dumas

Creator	Maurois, André, 1885-1967. >
Subject	Dumas, Alexandre, 1802-1870 -- Family >
	Dumas, Alexandre, 1824-1895 -- Family >
	Dumas, Thomas Alexandre, 1762-1806 -- Family >

Contents	Generals France Biography.
Publisher	Translation of Les trois Dumas. New York, Harper C1957
Creation Date	C1957
Format	508 p. illus. 24 cm.
Source	Library Catalog
Identifier	LC : 57008173 /L/r933
Source	Library Catalog
Language	English

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**New UI:** How does the new UI meet new user expectations?

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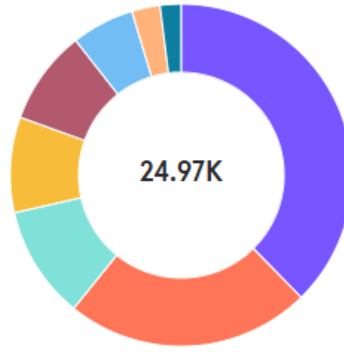


# NDE User Engagement Analytics

## All Events

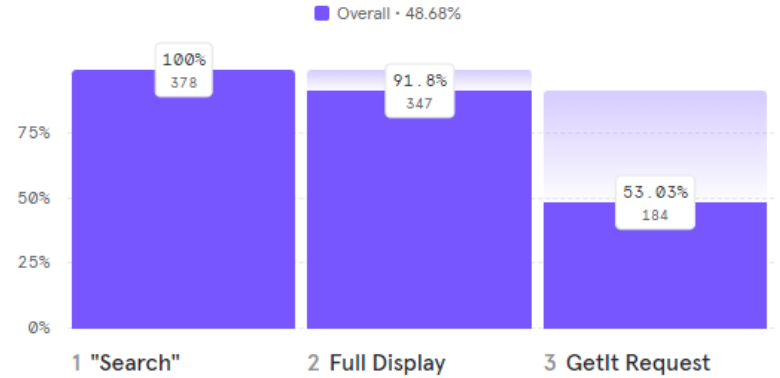
Total, last 12 months

Search Sign in Search Menu actions Next 4



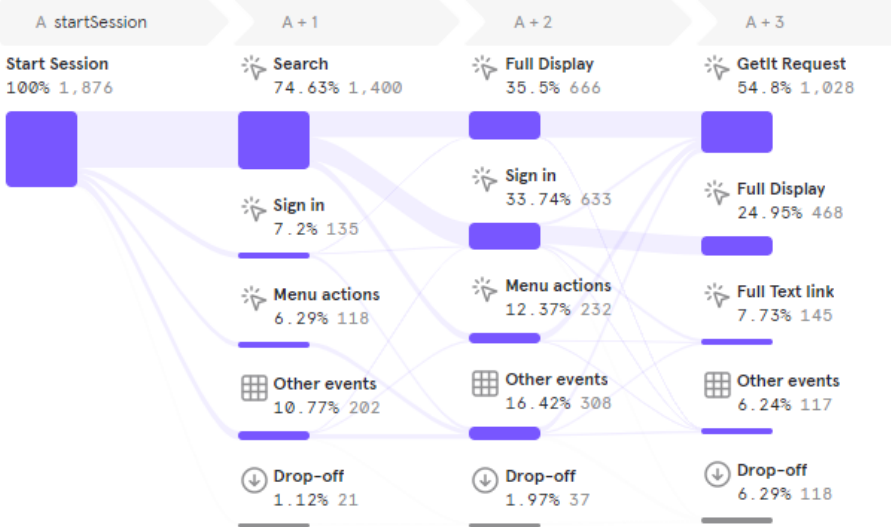
## Funnel From Search to Request

3-step Funnel · Last 12 Months



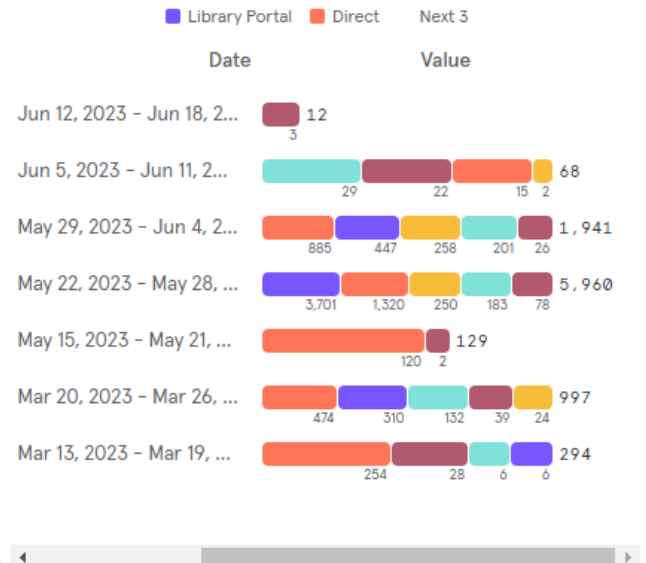
## User Journey

4-step Flow · Last 12 months



## Traffic Analysis

Total, last 6 months · Identify where the users come from to your l...



April 2024

Testing focus group launched

October 2024

Onboarding additional early adopters



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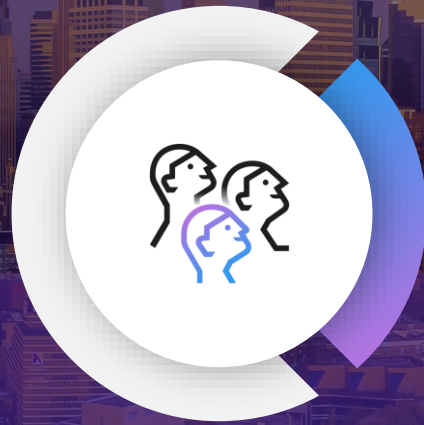
# Our Generative AI Values



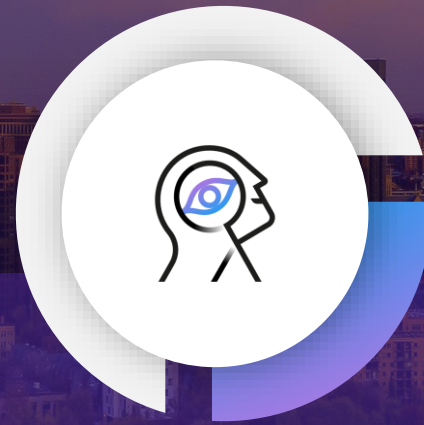
Based on  
trusted data



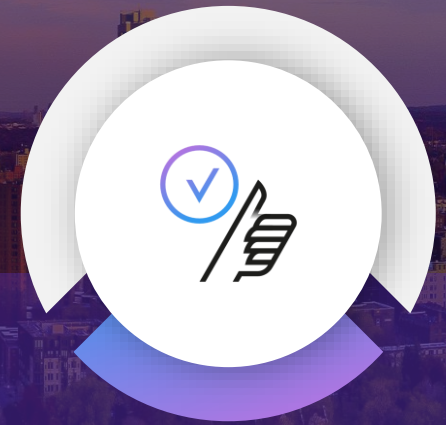
Attribution  
and access to  
cited works



Community  
collaboration



Be  
transparent



Sensitive to  
Intellectual  
Property

**Primo**

Research Assistant

**Q4 2024**

**Summon**

Research Assistant

**Q1 2025**

Trusted content

No hallucinations

Scholarly links and references



# Introducing: Primo Research Assistant



mobile phones and literacy



Central Discovery Index



ADVANCED SEARCH



All



Books



Articles



Journals



Images



Video/Film



Dissertations

Tweak your results

Expand My Results

Sort by Relevance

Availability

- Available online
- Peer-reviewed Journals
- Open Access

Resource Type

Subject

Creation Date

Journal Title

New Records

Language

Collection

Including "cell phones". Just search mobile phones and literacy



0 selected PAGE 1 1-10 of 4,142 Results

Save query

Personalize



1



ARTICLE

"Turn Your Cell Phones on": Mobile Phone Polling as a Tool for Teaching Information Literacy

Burkhardt, Andy ; Cohen, Sarah

Communications in information literacy, 2012-01, Vol.6 (2), p.191-201

While mobile technologies are ubiquitous among students and increasingly used in many aspects of libraries, they have yet to gain traction in information literacy instruction...

PEER REVIEWED OPEN ACCESS

Available Online



2



ARTICLE

When Ads Become Invisible: Minors' Advertising Literacy While Using Mobile Phones

Feijoo, Beatriz ; Sadaba, Charo

Media and communication (Lisboa), 2022-02, Vol.10 (1S2), p.339-349

The ability to identify and interpret the persuasive content that minors are exposed to via mobile phones was analyzed through semi-structured interviews of children aged 10 to 14 years along...

PEER REVIEWED OPEN ACCESS

Get PDF

Read Online

Available Online



3



ARTICLE

'I wanna go in the phone': literacy acquisition, informal learning processes, 'voice' and mobile phone appropriation in a South African township

Velghe, Fie

Ethnography and education, 2014-01, Vol.9 (1), p.111-126

The uptake of mobile phones has been especially remarkable in the developing world...



Discovery Research Assistant

Ask research questions. Explore relevant research. Discover new connections.

Ask a research question



Opens in new window



### Primo Research Assistant



Ask a new research question

#### Research history

New question...

- ? [How can I use Primo Research Assistant?](#)
- i Answers are AI-Generated. [Learn more.](#)

More

## Primo Research Assistant

Ask research questions. Explore relevant research. Discover new connections.

What is the impact of mobile devices on reading and literacy development



#### Example questions

- How does vitamin D deficiency impact overall health? →
- Did Picasso's time in Paris influence his artistic style? →
- Discuss the reception of Machiavelli's The Prince in modern times →
- What impact did the invention of the book press have in the daily life of people in that time? →



Primo Research Assistant



Ask a new research question

Research history

New question...

? [How can I use Primo Research Assistant?](#)

i Answers are AI-Generated. [Learn more.](#)

what is the impact of mobile devices on reading and literacy development

Searching academic articles for relevant resources.

Generating summary for 5 most relevant sources.

**Primo Research Assistant** [Ask a new research question](#)**Research history**

New question...

[How can I use Primo Research Assistant?](#) Answers are AI-Generated. [Learn more.](#) **What is the impact of mobile devices on reading and literacy development**

Searching academic articles for relevant resources.

Generating summary for 5 most relevant sources.

**Summary**

Mobile devices, such as tablets and smartphones, have been shown to positively impact literacy development in children by enhancing digital literacy skills <sup>1</sup>, improving phonological awareness and vocabulary learning <sup>2</sup>, and providing opportunities for self-supported learning through educational games <sup>5</sup>. However, the frequency of mobile device use may not significantly affect language and literacy skills in young children <sup>4</sup>. It is suggested that the quality of interactions with mobile media is more important than limiting screen time, and that educational games can be effective tools for improving literacy skills <sup>5</sup>. Overall, mobile technologies have the potential to contribute to children's language and literacy learning, but the nature of use and content selection are crucial factors to consider <sup>4</sup>.

copy text try again

**Sources****1 JOURNAL ARTICLE**

Development of students' digital literacy skills through digital storytelling with mobile devices

Churchill, Natalia 2020

**2 JOURNAL ARTICLE**

The Impact of E-Book Reading on Young Children's Emergent Literacy Skills: An Analytical Review

Valverde-Montesino, Susana et al. 2021

**3 EBOOK**

Mobile Technologies in Children's Language and Literacy

Oakley, Grace 2018

**4 JOURNAL ARTICLE**

Home literacy in the digital era: The role of mobile screen media frequency in a U.S. state

Turco, Rosa G. et al. 2023

**5 JOURNAL ARTICLE**

Kes Sesi: A mobile game designed to improve kindergarteners' recognition of letter sounds

Samur, Yavuz 2019

**View related results**  
on your library search**Related research questions**

How do mobile devices affect reading comprehension in children?

What are the effects of mobile device usage on literacy skills in adolescents?

Are there any studies on the relationship between mobile devices and reading fluency?

What is the influence of mobile devices on literacy development in adults?

Ask your next research question...

## Primo Research Assistant



Ask a new research question

### Research history

New question...

[How can I use Primo Research Assistant?](#)

Answers are AI-Generated. [Learn more.](#)

copy text try again

### Sources

#### 1 JOURNAL ARTICLE

Development of students' digital literacy skills through digital storytelling with mobile devices

Churchill, Natalia 2020

#### 2 JOURNAL ARTICLE

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#### 3 EBOOK

Mobile Technologies in Children's Language and Literacy

Oakley, Grace 2018

#### 4 JOURNAL ARTICLE

Home literacy in the digital era: The role of mobile screen media frequency in a U.S. state

Turco, Rosa G. et al. 2023

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Samur, Yavuz 2019



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### Development of students' digital literacy skills through digital storytelling with mobile devices



Churchill, Natalia. Educational media international, 2020

#### Abstract:

Developing digital literacy skills is essential for 21 st century learning, working and living. Emerging mobile technologies provide affordances that can be leveraged to advance these skills in a school educational setting. Digital literacy in the context of this paper encompasses media literacy, visual literacy, technology tools literacy and traditional literacy. This paper reports on a project designed to evaluate the development of digital literacy skills through digital storytelling with mobile technology tools (iPads and relevant apps). This approach involves primary school students conducting research, collecting and analysing data, and presenting their findings in the format of a digital story. The participating students planned, developed and presented their digital stories in a way that showcased their research skills, designs thinking and digital literacy skills. Results suggested that digital storytelling with mobile technologies contributes to...

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