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

- Dec 2018: Focus Areas
- Jan 2018: Coordinate with PWG
- Feb 2018: UX Focus Group
- Apr 2018: Initial concepts
- May 2018: ELUNA
- H2 2018: IGeLU
- 2019: Continuous cycles

- Presenting what was done and the future
- Face to Face meeting with Focus Group
- Start Development
- Demo to customers
- Incremental Releases
### 2018 Alma Enhancement Cycle

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

<table>
<thead>
<tr>
<th>INSTITUTIONAL REQUIREMENTS</th>
<th>SOLUTION FEATURES</th>
<th>ADDITIONAL CONSIDERATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meets institutional ID security/privacy</td>
<td>Free and fee-based Service</td>
<td>Applications to Sync Alma to the ID system</td>
</tr>
<tr>
<td>Least amount of staffing impact</td>
<td>Cloud hosting vs. Local hosting</td>
<td>Consortia : Potential multiple auth systems</td>
</tr>
<tr>
<td>Levels of institutional responsibility for ID product/system</td>
<td>User limits</td>
<td>Cost</td>
</tr>
<tr>
<td>Institutional workflow</td>
<td>2-factor authentication compatible</td>
<td>Patron ease of use</td>
</tr>
<tr>
<td></td>
<td>Integrates with Ex Libris products</td>
<td>ExL ability to support the institutional suth system</td>
</tr>
</tbody>
</table>
Institutional Authentication Methods Review

What type of password management is enabled for Staff Operator accounts?
(193 responses)

- Internal (inside Alma): 36.3%
- External authentication system: 22.3%
- Mix of Internal and External: 41.5%

What type of password management is enabled for Patron accounts?
(193 responses)

- Internal (inside Alma): 62.7%
- External authentication system: 14%
- Mix of Internal and External: 23.3%
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)

- Social authentication: 59 (30.6%)
- Locally-hosted: 110 (57%)
- Cloud-hosted: 70 (36.3%)
- Passwordless: 22 (11.4%)
- Other: 56 (29%)
Authentication Options
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
Social Login

Sign In

- Sign in with Email
- Sign in with Facebook
- Sign in with Google
- Sign in with Twitter

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   Register Now
Sign-in via email

- Alternative to social login
- Available for Primo (patrons) from June 2017
- Available for Alma (staff) from January 2018
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.
Ex Libris Identity Service
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
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.
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
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 aForgot Password link to Primo to allow patrons to change their passwords