

Experience Alma new and simplified Acquisitions workflow

September 2022 | Noam Fass



Agenda

- Research process
- Expected improvements
- Live demo see what's in it for you
- Next steps

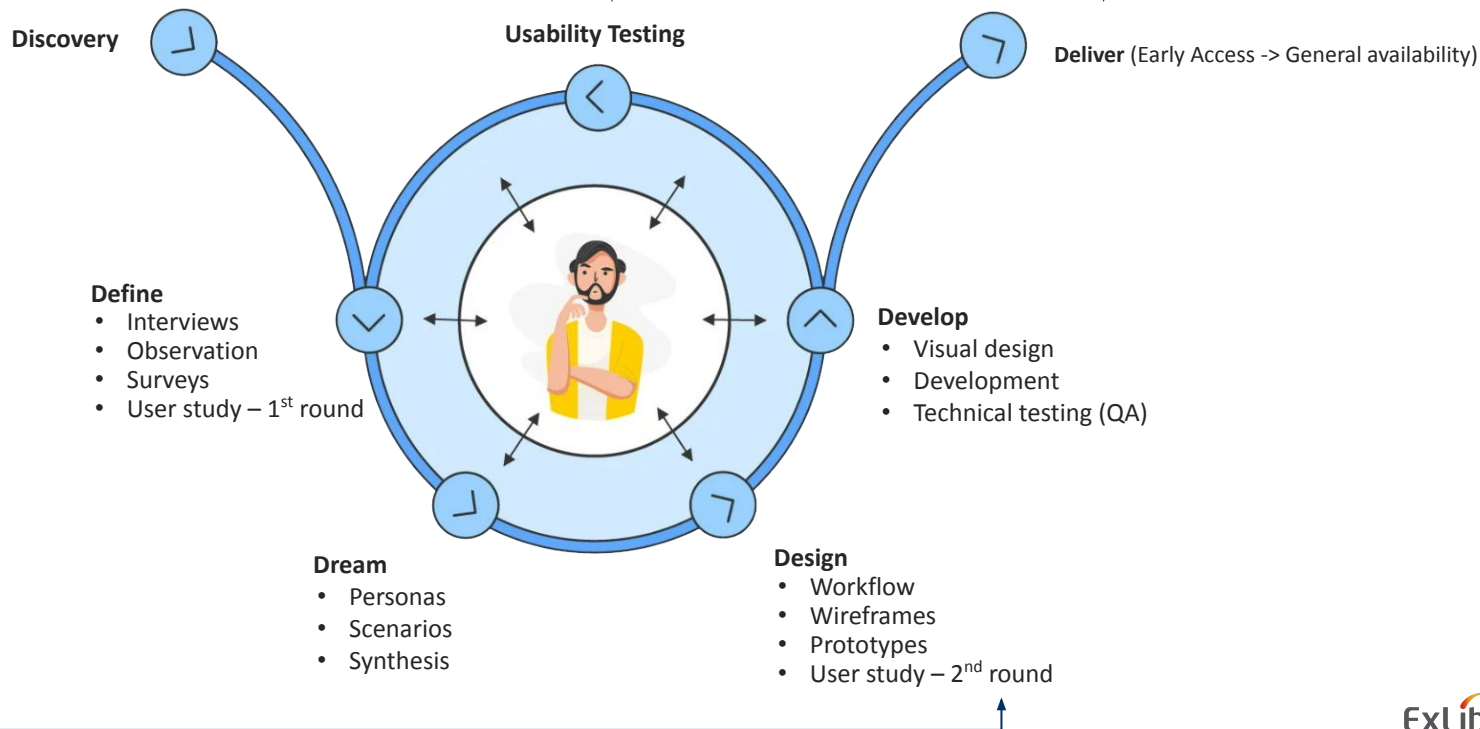




Research process

Research process – UX methodology

Alma UX focus group – Thanks!





Expected improvements

Expected improvements

Customers Feedback – What we heard?

- Workflow is complex and click heavy

- More here:



Main changes to address these pain points:

- New unified task list
 - Set to prevent users from the need to 'Go to task list' when searching for PO lines in various statuses
- New 'side-by-side' presentation
 - Allows users quick review and edit of PO line information as well as navigating to related workflows without losing focus on the origin point.



Live Demo

Existing PO line task list workflow - Demo

- [Env 01](#)
- [Env 02](#)



What's in it for you?

Multi select records

Bulk list actions, sensitive to the user's selection

Assign Multi : "Split view" (list + PO line information)
New order to "workflow step" facet
Facet for PO line in claim

"Full view"

PO line summary section + labels

The screenshot displays the ExLibris interface with several key components:

- Left Sidebar:** Contains filters for Assignment (Assigned to Me, Assigned to OL, Unassigned), Task Name (In Review, Manual Packaging, Auto Packaging), PO Line Claim (PO Line in Claim, PO Line no...), Alert (At least one of..., Created from I..., Duplicate acti...), and Purchase Type (Access Service..., Database - On..., Database - Sub...). The Vendor list includes 2SIMPLEUSA INC., 52 WOMEN, and 5MTL.COM.
- Main List:** Shows a list of PO lines. The first entry is "Venerable Philippine Duchesne : a brief sketch of the life and work of..." with PO Line 02-5820. The second entry is "Local DB 3103152001" with PO Line 15-310803. The third entry is "Das Bistum Münster. Im Auftr. d. Max-Planck-Inst. f. Geschichte bea" with PO Line 00000.
- PO Line Summary Section:** A detailed view of the first PO line, showing the title, vendor information (HARRASSOWITZ/HARR/Account (M)/BOC-BLO/197), funds (Theology Monograph Firm (100.0%) (FY-2002)), and workflow steps (Physical - One Time, In Review). It also displays the price "200.65 USD".
- Additional PO line sections:** Shows sections for "Owning library: O'Neill" with assigned staff (Staff, Ex Libris), alerts (4), and a "RUSH" status. Another section shows "Assigned to: John, Smith" with 1 alert.
- Bottom Table:** A table with columns: Library, Location, Call Number, Barcode, Availability, Item Policy, Item Descri..., and Receiving D... The first row shows "Library" and "1 of 42,924".

Slide panel to overlay origin point

Order lines PO Line

Refine by
Task Name: In Review
Clear all

Assignment
 Assigned to Me (336)
 Assigned to Ot... (929)
 Unassigned (830)

Task Name
 In Review (2095)

PO Line in Claim
 PO Line in Claim (1)
 PO Line not in... (2094)

Alert
 Access Model ... (168)
 At least one of ... (980)
 Created from I... (555)
[+ More \(17\)](#)

Purchase Type
 Database Service... (1)
 Digital - One Time (1)
 Electronic Boo... (484)
[+ More \(14\)](#)

Vendor
 AMALIVRE (3)
 AMAZON COM (1)
 Auto_Email_Na... (19)
[+ More \(47\)](#)

Purchase Order Lines

- Beihefte zur Wissenschaftl... PO Line: 09-00
 Physical - In Review
- Internationa Academic P... PO Line: 08-00
 Physical - In Review
- Dizionario bi Alberto... PO Line: 08-00
 Physical - In Review
- Proceedings Society of In... PO Line: 03-27
 Physical - In Review
- PO Line: 05-27
 Physical - In Review
- Journal of th Illinois State... PO Line: 12-00
 Electronic - In Review

Physical Item Editor

Relink to another bibliographic record Cancel Save

Sworn enemies : the divine oath, the book of Ezekiel, and the polemics of exile / C.A. Strine. Strine, C. A. 1975- (Casey Alan), De G...ter, v Berlin ; Boston : 2013 [3110290391 (hardcover : alk. paper)]

Holdings Theology and Ministry Library: Stacks; BS410 .Z5 Bd. 436
Holdings ID 22423725130001021 View all holdings
Barcode 39031032576274 View all items
Process type - MMS ID 99133372900001021 Browse shelf listing
Status Item in place

General ENUM/CHRON Notes History

General Information

Barcode	39031032576274	Generate	Copy ID	
Material type	Book		Item policy	
Provenance			Is magnetic	
PO Line	09-000019936	X	Issue date	
Receiving date			Expected receiving date	
Enumeration A			Enumeration B	
Chronology I			Chronology J	
Description		Generate	Pieces	
Pages			Receiving operator	
Replacement cost				
Physical condition				
Process type				

Inventory Information

Additional functionalities

Naming and order

Assignment ^

- Assigned to Me (47)
- Assigned to Ot... (160)
- Unassigned (896693)

Workflow Step ^

- In Review (287)
- Manual Packaging (6)
- Auto Packaging (2)
- Ready (33)
- Sent (1839)
- Waiting for Ma... (810)**
- Recurring Renewal (810)**
- Waiting for In... (4161)
- Under Evaluation (3)
- Under Evaluation(... (2)
- Deferred (14)
- Cancelled (18372)
- Closed (823072)

PO Line in Claim ^

- PO Line in Cla... (6060)
- PO Line no... (852408)

Main actions according to the PO line's workflow step

1 **Venerable Philippine Duchesne : a brief sketch of the life and work of...** Owing library: O'Neill
 PO Line: 02-5820 Assigned to: Staff, Ex Libris
 Vendor/Account: HARRASSOWITZ/HARR/Account (M)/BOC-BLO/197
 Funds: Theology Monograph Firm (100.0%) (FY-2002)
 Physical - One Time
 In Review 200.65 USD [Continue Workflow](#) ...

2 **Redskin trail : a life of Blessed Philippine Duchesne., London ; Burn...** Owing library: O'Neill
 PO Line: 02-5766
 Vendor/Account: HARRASSOWITZ/HARR/Account (M)/BOC-BLO/197
 Funds: English Monograph Firm (100.0%) (FY-2002)
 Physical - One Time
 Closed 59.03 USD [Reopen](#) ...

3 **Geschichte des Erzbistums Köln. In Verbindung mit August Franzen [et a...** Owing library: O'Neill
 PO Line: 000000346-00101 Renewal date: 23/10/1999 Alerts (2)
 Vendor/Account: HARRASSOWITZ/HARR/Account (M)/BOC-BLO/197
 Funds: History Periodical (919100.0%) (FY-1995)
 Physical - Standing Order Monograph
 Waiting for Manual Renewal 0.01 USD [Assign to](#) ...

Information "actions"

Change expected date ...

- Change Expected Date
- Assign To
- Relink
- Change Bib Reference
- Cancel
- Bib Description
- Invoice Lines
- Associated PO Lines
- Communications
- History
- Attachments

Enhanced claim and receive functions

1 **A selection of cases on the law of contracts : with references and cit...** Change expected date ...
 PO Line: 04-6030
 Physical - One Time
 Sent In Claim

Direct link to the Receive WB

Ordered Items (1)

Library	Location	Call Number	Barcode	Availability	Item Policy	Item Descri...	Receiving ...
1	Law	General Collection	B441323	Not Received			...

Item In Claim (1)

Library	Location	Call Number	Barcode	Item Description	Expected Recl...
1	Law	General Collection	B441323		01/09/2004 (From PO Line)

Receive the item directly from the PO line screen



What's next?

Next steps

Early testers - Started in August release currently 9 institutions testing

- Opt in/out in **production**
- “User Snap” tool allowing testers to leave their feedback from within the platform
 - A summary of the reported issues will be distributed
- Basecamp channel for announcements and general communication

General availability – **pending early testers feedback**

- [Dedicated documentation page](#)
- [Webinar recording](#) (May 17th 2022)



Questions – Ask Me Anything!

Thank you!

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What's in it for you?

- Seamless workflow
- **Task list as facets** – no extra step in order to "Go to task list"
- **Multi-select facets** – focus on what you need faster
- **Clearer information hierarchy**- find what they need faster and with less navigation needs
- **"Side -By-Side" presentation** - complete your tasks faster with less navigational needs
- **"Slide-Out" panel for extra information** - single page application experience and a clear sense of orientation
- **Resolve numerous pain points raised by the community**

Customers Feedback – What we heard?

- Workflow is complex and click heavy [[New unified list](#)]
- Need an end-to-end workflow that 1 person can do in 1 go [[New unified list](#)]
- Searching for POL is very slow [[New unified list](#)]
- Note to vendor field should move up in the screen and not ‘under the fold’ [[New unified list](#) / Future Enhancement]
- Quantity for pricing is not reflecting ordered items [[February release](#)]
- POL status ‘waiting for manual renewal’ is confusing [[April release](#)]
- Invoice line (tab) has an invoice number but is not clickable [[February 2021 release](#)]
- Add next to the ‘list price’ a ‘local price’ (make the exchange) [[New unified list](#)]
- EDI task list – no clear indication which library is the owner (POL owner) [[January release](#)]
- Have the PO line internal note searchable [[April release](#)]
- ‘Currency’ field presents all options and not only these which are configured to the vendor [Roadmap]
- Not enough fields are saved in the template [Roadmap]
- When viewing the POL's which were created via the import process (advanced search), there are no facets - this make the error handling process harder [[New unified list](#)]