

ExLibris[®]
Part of Clarivate

IGOLU
International Group of Ex Libris Users

Alma Acquisitions Update

Noam Fass
Alma Product Management

Agenda



New PO Line Interface

- Research process
- Live demo
- Next steps



Acquisitions - Coming Soon!

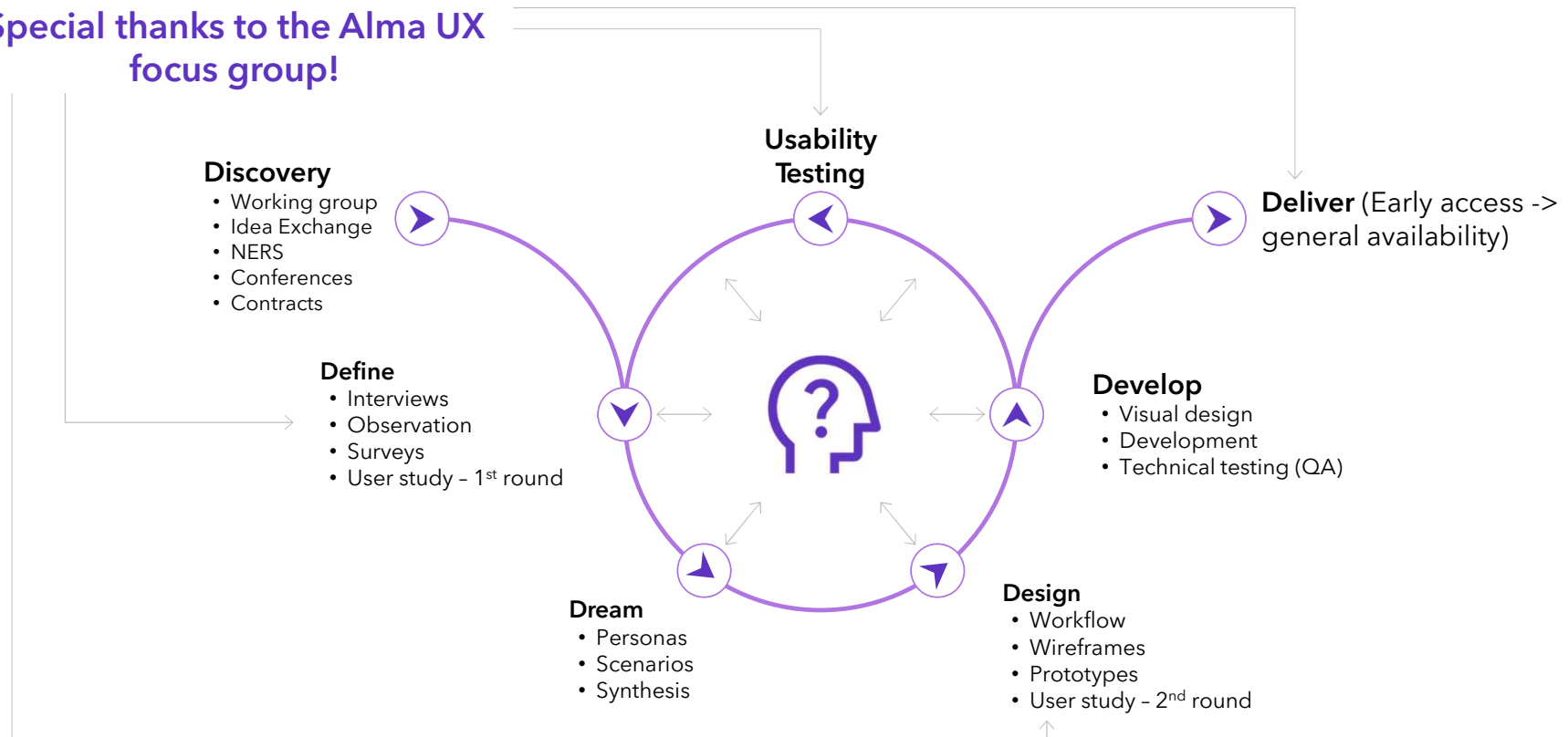
- Order It!



New PO Line Interface - Research Process

Research Process - UX Methodology

Special thanks to the Alma UX focus group!





New PO Line Interface - Expected Improvements

Expected Improvements



Customer 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



New PO Line Interface - Live Demo



General adaption syndrome, consisting of four stages -

- Shock**
- Anger**
- Acceptance**
- Commitment**

Existing PO Line Task List Workflow - Demo



Env 01



Env 02



Env 03



New PO Line Interface - How it Works

The screenshot displays a library management interface with several key components and annotations:

- Search Bar:** Located at the top, featuring a search icon and a dropdown menu currently set to "All". An annotation points to it with the text: "New advanced search with 'OR' option".
- Left Sidebar (Facets):** Contains several filterable sections:
 - Assignment:** Includes "Assigned to Me (13)", "Assigned to Ot... (349)", and "Unassigned (1451)".
 - Workflow Step:** Includes "In Review (329)", "Auto Packaging (5)", "Ready (233)", and "More (8)".
 - PO Line in Claim:** Includes "No (1432)" and "Yes (380)".
 - Alert:** Includes "The bib record i... (89)", "Open claims e... (200)", and "Electronic reso... (314)".
 - Purchase Type:** Includes "Access Service - ... (4)", "Database - Subsc... (4)", and "Database - One TL... (1)".
 - Vendor:** Includes "A D & L Vendors (7)", "A-R Editions Inc. (1)", and "AIP - The Americ... (5)".
 - Rush:** A section at the bottom of the sidebar.
- Main Content Area:**
 - Multi "Split view":** A list of PO lines with a "Facet for PO line in claim" annotation pointing to a filter.
 - "Full view":** A detailed view of a PO line for "0 to Rich The Everyday Woman's Guide to Getting Wealthy (Ebook Library...)". It includes fields for "Identifier", "MMS ID", "PO line owner", "Activation status", and "Assigned to".
 - PO line summary section:** A summary box on the right of the "Full view" containing "PO Line Information", "Ordered Portfolios", "Vendor Information", "Pricing and Funding", "Activation Information", and "Interested Users".
 - Additional PO line sections:** A list of other PO lines below the main one, each with its own summary and "Alerts" section.
- Annotations:**
 - "Assignment indication as facet - No automated assignment" points to the "Assigned to Me" filter.
 - "Multi 'Split view' (list + PO line information)" points to the list view.
 - "New order to workflow step facet" points to the "Workflow Step" filter.
 - "Facet for PO line in claim" points to the "PO Line in Claim" filter.
 - "'Full view' Quick navigation" points to the detailed view.
 - "PO line summary section + labels | Single Edit/Save action sensitive to the user's selection" points to the summary box.
 - "Additional PO line sections" points to the list of other PO lines.

Slide Panel to Overlay Origin Point

The screenshot displays a software interface with a sidebar on the left and a main content area. The sidebar contains a search bar and several filter categories: Assignment, Workflow Step, PO Line in Claim, Alert, Purchase Type, Vendor, and Vendor Account. The main content area is titled 'Purchase Order Lines' and shows a list of five items. A 'Vendor Details' panel is overlaid on the right side of the main content area, displaying information for the 'Ebook Library' vendor.

Vendor Details Panel:

- Name:** Ebook Library
- Code:** EBL
- Status:** Active
- Currencies:** ALL
- Libraries:** Alma University
- Vendor Type:** Material Supplier/Subscription Agent Access Provider Licensor Governmental

Accounts Table:

Active	Account Code	Description	Discount Percent	Libraries
1 ✓	Ebook Library	Ebook Library	-	Alma University

Additional Functionalities



Naming and ordering

- 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)
 - [Less](#)
- 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 200.65 USD
 Vendor/Account: HARRASSOWITZ/HARR/Account (M)/BOC-BLO/197
 Funds: Theology Monograph Firm (100.0%) (FY-2002)
 Physical - One Time
 In Review [Continue Workflow](#) ...

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

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



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
 Send In Claim

Direct link to the Receive WB

Receive the item directly from the PO line screen

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

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

Vendor Information [Receive](#)



Acquisitions - Future Enhancements

Future Enhancements

Order It! - harvest information from Amazon and automatically create a PO line in Alma

Browser bookmark

Num orders created per month for vendor Amazon	Size by Bibs	Size by Users
335	Medium	Medium
311	Medium	Small
308	Large	Large
290	Medium	Small
240	Medium	Medium
240	Small	Small
239	Large	Extra Large
225	Large	Extra Large
217	Extra Small	Small
211	Medium	Medium

The screenshot shows the Amazon product page for 'COVID-19: The Great Reset Paperback' by Klaus Schwab and Thierry Malleret. A 'Create a PO line' dialog box is open, allowing users to generate a purchase order line from the Amazon page. The dialog box includes the following fields:

- Title: COVID-19: The Great Reset
- Author: Thierry Malleret
- PO line information: PO line type: Print Book - One Time
- Vendor: Amazon
- Fund: Enter funs name or select form the list
- Price: 10.99 USD
- Number of items: 1
- Receiving note: (empty)

The Amazon page also shows the book's cover, a 'Great on Kindle' banner, and technical details like ISBN-10 (2940631123) and ISBN-13 (978-2940631124).

Does your institution want to be an "Order It!" early tester? Email me! Noam.Fass@clarivate.com



**Questions?
Ask Me Anything!**

ExLibris
Part of Clarivate

IGOLU
International Group of Ex Libris Users

Thank you!

Noam.Fass@clarivate.com

© 2023 Clarivate

Clarivate and its logo, as well as all other trademarks used herein are trademarks of their respective owners and used under license.

Future Enhancements

Receiving WB - new interface

The screenshot displays the ExLibris Receiving WB interface. The top navigation bar includes 'Research assets' and a search field. The left sidebar contains various menu items like 'Alma QA', 'Market', 'Acquisitions', 'Resources', 'Research', 'Discovery', 'Fulfillment', 'Admin', and 'Analytics'. The main content area is titled 'Receive new material' and shows a list of PO lines. The selected PO line is '12-000037109' for 'Yearbook of the Literacy Research Association, Literacy Research Association, 60th (2011), 2011237261'. Below this, there are 'Receiving Notes' and a table of 'Manage items (2 of 2)'. The table has columns for Location, Temp Loc, Date Received, Requests, Barcode, and Description.

	Location	Temp Loc	Date Received	Requests	Barcode	Description
1	O'Neill Stacks (STACK) (1) LB2365_R4 N3	No	15/04/2014	Yes	39031032309254	60th(2014)
2	O'Neill Stacks (STACK) (1) LB2365_R4 N3	No	-	Yes	39031032309943	61th(2015)



Expected Enhancements:

- Side-by-side interface
- Multi-select facets
- Labels
- Initial page load with no search
- Move existing filters to be facets
- Ability to add additional item information when creating a new item
- More...

Current Status: During 2022/23 we ran 2 user studies with 7 institutions and 15 users – start development in 2024

Library Benefits



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**

Customer 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](#)]
- Quantity for pricing is not reflecting ordered items [[February 2022 release](#)]
- POL status 'waiting for manual renewal' is confusing [[April 2022 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 2022 release](#)]
- Have the PO line internal note searchable [[April 2022 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](#)]

Developments 2022/23 (Release Notes)

- [Single Claim Letter for Multiple Claims from a Vendor](#)
- [Additional Community Zone collections for associating OASIS/GOBI Portfolios created via Real Time Order](#)
- [Vendor-Controlled PO Line Renewal - EBSCO](#)
- [Invoices - New Menu Entry to Present Invoices: Ready to be Paid](#)
- [Name Change to PO Line Workflow Step from: "Waiting for Renewal" to "Recurring Renewal"](#)
- [Licenses - Enhancements to LicenseTermsPermittedProhibited Options](#)
- [New PO Line Facet: Vendor Account](#)
- [Integration with ProQuest "RenewMe" and EBSCO's EBSCONET for vendor-controlled renewals](#)
- (Idea Exchange) [Note to Vendor Added to the Excel File When Exporting List of PO Lines to Excel](#)
- (Idea Exchange) [Search PO Lines By Their Internal Note](#)
- (Idea Exchange) [Enhancements to the PO Line Pricing Section](#)
- (Idea Exchange) [New "Owner" column in the "Manage EDI Tasks" page](#)
- (Idea Exchange) [Activation Notes in Electronic Resource Activation Task List](#)
- (Idea Exchange) [Editable Lines in Closed Invoices](#)