

# Fits Like a Glove

## Alma UX Customer Group Cooperation in Developing New Circulation Desk Interface

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**IGeLU 2024**  
**COPENHAGEN**

# Agenda



About the project

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Evolution of an interface

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Dynamics and discussion in Alma UX Customer Group

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Demo

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What's next?



# About the Project

# Alma UX Customer Group (Dana)



## Participants

- Over 90 members from different libraries around the world



## Meetings

- Monthly zoom meetings
- Individual meetings on specific topics



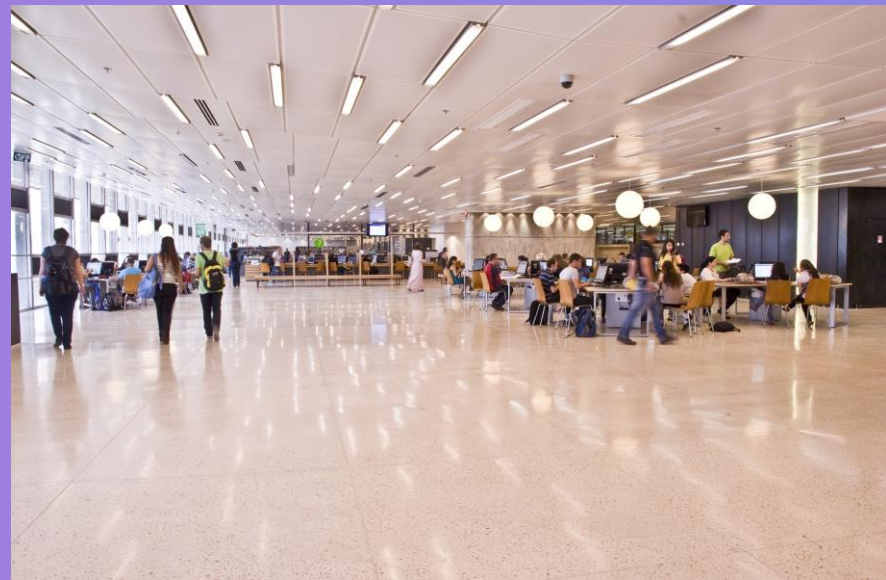
## Specific functional areas

- A dedicated group with expert participants for deeper discussions
- Presenting a solution and receiving feedback
- Early Access option



# A librarian's point of view :

## Case Study of the Younes & Soraya Nazarian Library, University of Haifa



Younes & Soraya Nazarian Library, University of Haifa is one central library, providing services to the entire university community (**ca. 26.000 patrons**) and its visitors.

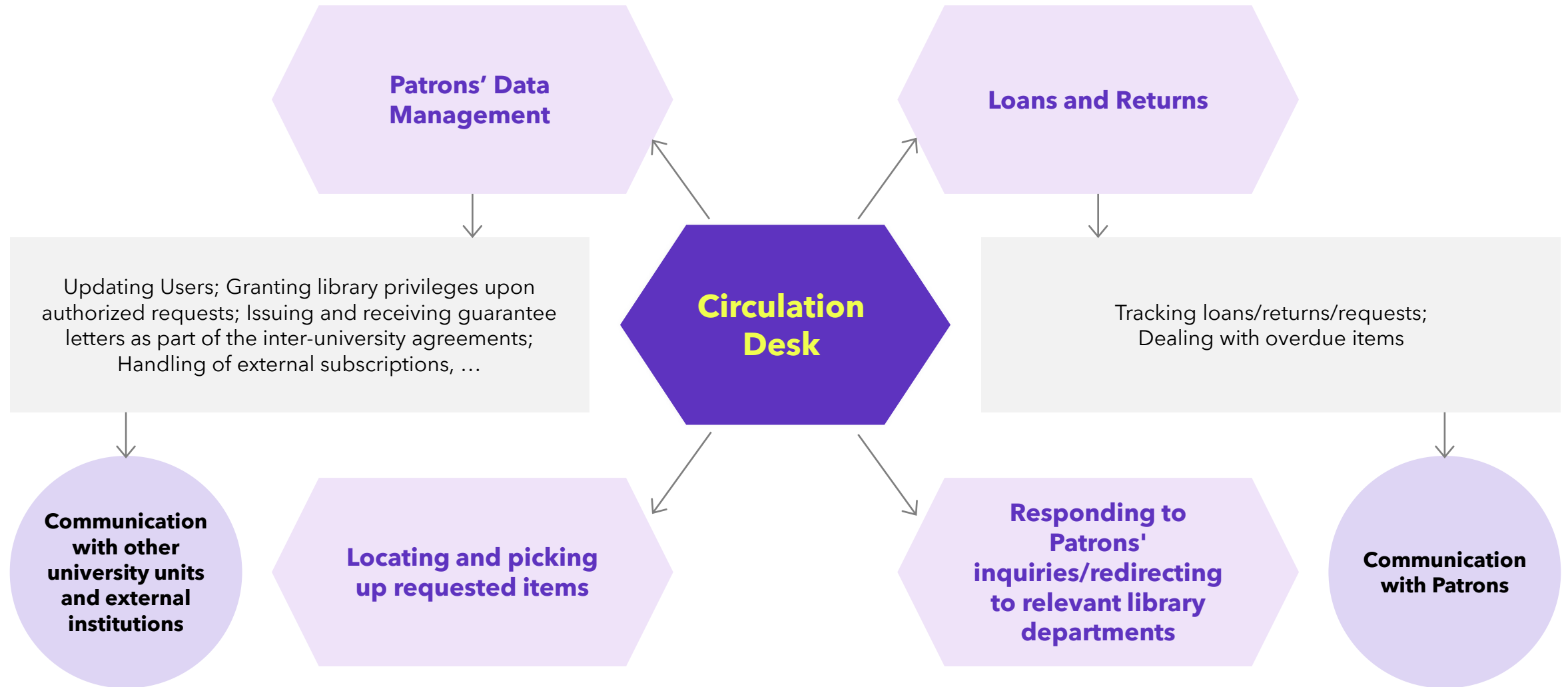


Circulation Team provides a **hybrid service**: (1) Front-line interaction at the Circulation Desk, (2) Answering phone calls, (3) Remote engagement through various online communication channels like Outlook, Glassix, and more.



Because these multi-faceted services must be performed **simultaneously**, unlike other Alma Areas, the Circulation Desk Area is jointly operated by permanent staff members alongside non-specialists - students and part-time employees who work in shifts.

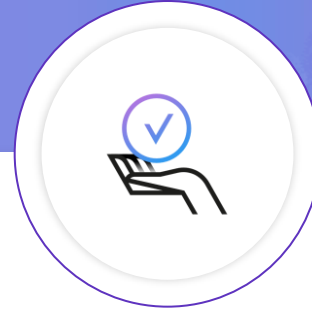
# Circulation Desk Microsystem



# Everyday situations at the Circulation Desk



The lecturer wants to know which books he has requested two years ago and whether he borrowed them or not?



Why didn't the automatic renewal of his/her books work? Is there a problem with books or with User's status?



Oh!! He forgot his ID card at the Circulation Desk ...  
Where can I quickly find his phone number to tell him to come back??

# Challenges of the Information Organization



Front-line interaction with patrons at the Circulation Desk need **speed and accuracy** which are crucial for both the **Customer's experience** and the **Circulation Team's feeling of professional competence and efficiency**.



The key to speed and accuracy is the **accessibility of information and ease of performing actions** at the Circulation Desk.



Today information is: **(1) Not visible enough, hidden** in the internal screens, requiring a lot of clicks; **(2) "Scattered"** on the screen or between several screens; **(3) Incomplete or non-existent**.



# The UX project is an **opportunity** for libraries:



Surface the problems and pain points of the current interface.

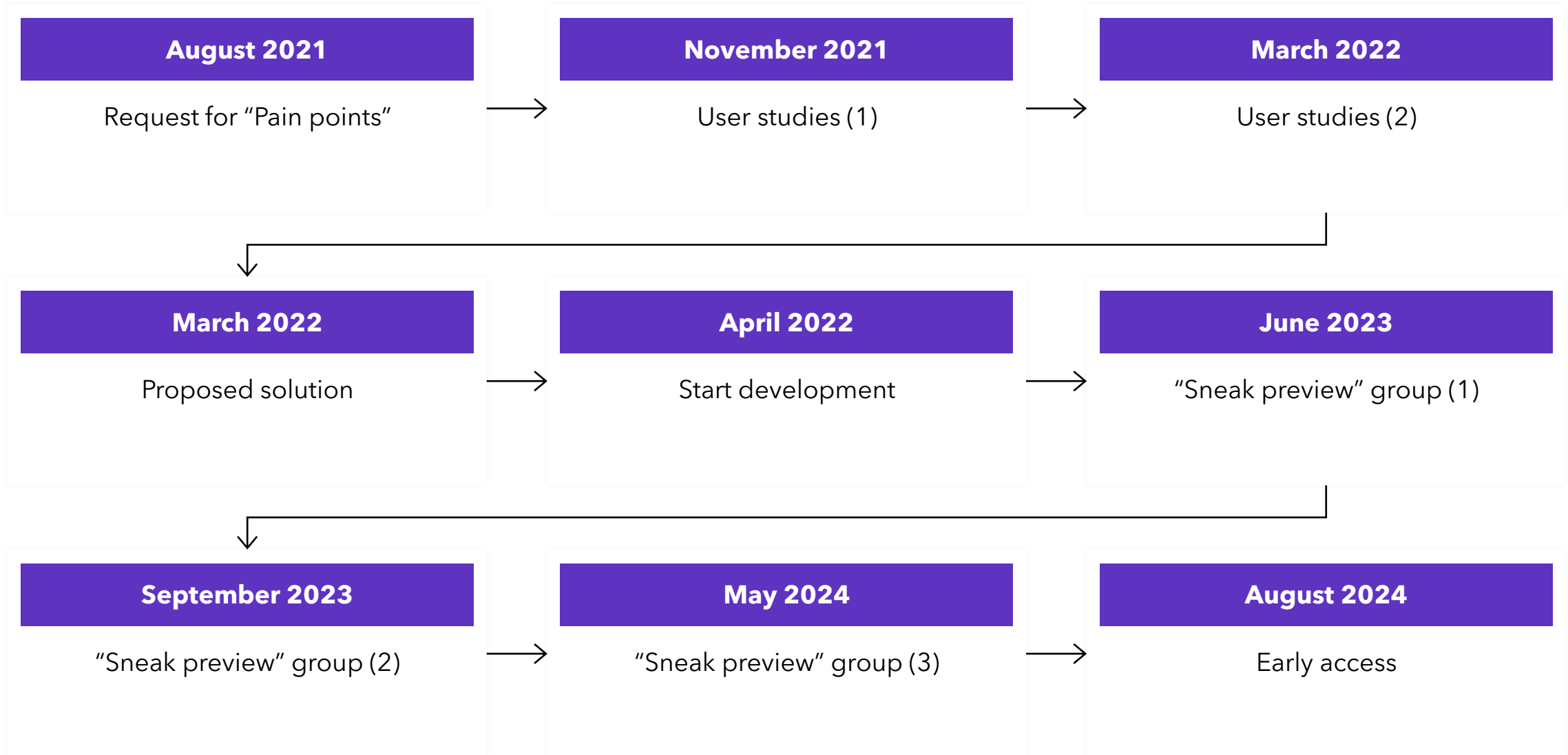


Take initiative and offer solutions based on our knowledge and experience.

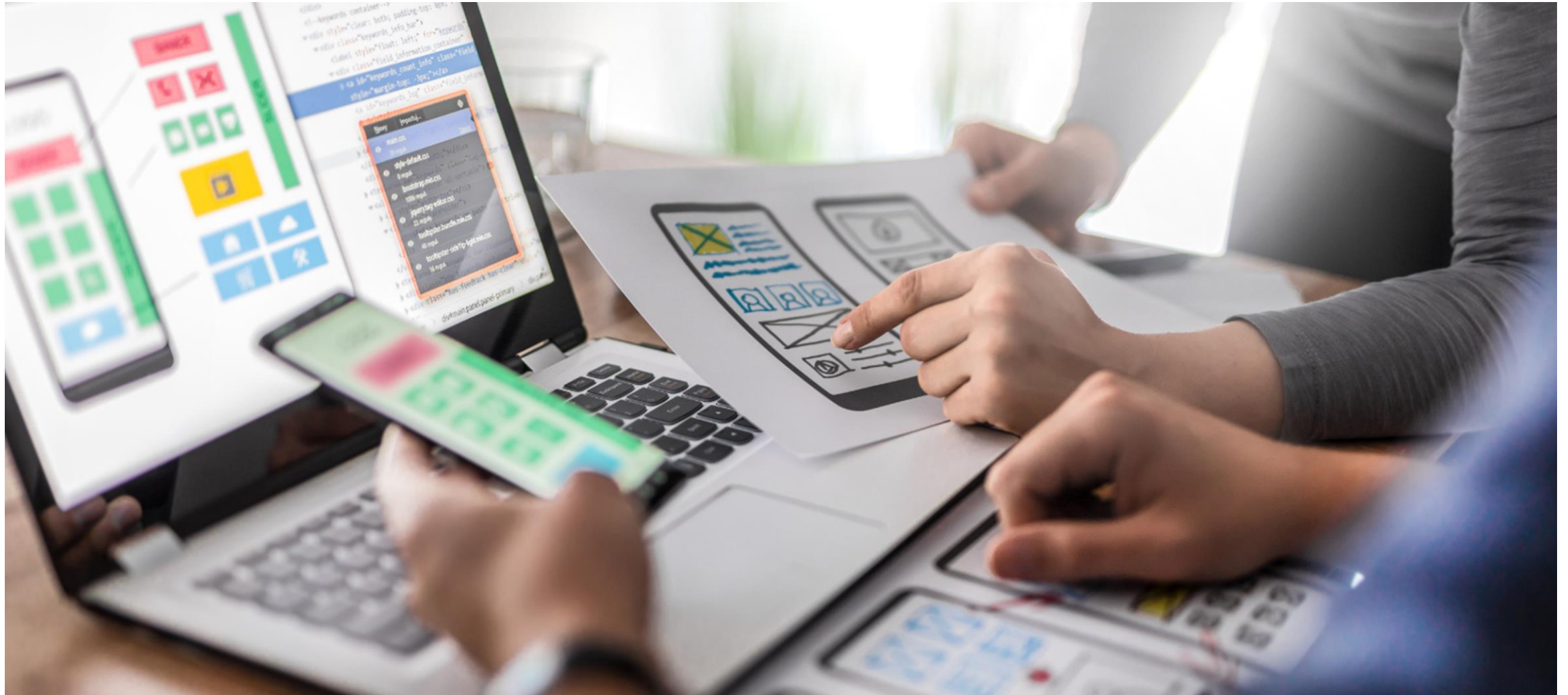


Conduct a broad and fruitful dialogue with libraries worldwide - to learn from the similarities and differences and exchange ideas.

# Project Timeline



# Evolution of an interface



# Current Circulation Desk: Challenges

## Loans of this session

Patron Services

Loans Returns Requests

Scan item barcode \*  Look-up or select  Create Item

Loan Display: Loans of this session

5. Counter is Missing

3+4 = Zigzag eye movement: Wandering all the way from the lower right part of the screen to the upper left part of it, and back.

4. Scan Item Barcode Box : Upper left corner of the screen

3. Patron Details: Lower right corner of the screen

## 1. Patron Details Pane:

- Located on the right side of the screen.
- Personal details are not "fixed" to the upper part of the pane. Adding User Notes "moves" them down until completely hidden from the view.
- To unhide patron details, we need to scroll down the bar.

## All loans

1 - 50 of 352 Search

Renew Selected Renew All Change Due Date

Loan Display: All loans

| Call Number | Title                 | Due Date  | Loan Status              | Fine | Barcode | Loan Date  | Item Policy  | Loan Notes |
|-------------|-----------------------|---|--------------------------|------|---------|------------|--------------|------------|
| 1           | PQ2713.U88 I5716 2022 | נוכחי / גיוס מוסו ; מצרפתית: שי סדיק.                   |                          |      |         |            | 14 Days      | ✓          |
| 2           | PR6005.H66 F5816 2024 | ד יוצא אחד / אגתה כריסטי ; תרגמה נ מיכל אלפון.          |                          |      |         |            | 's           | ✓          |
| 3           | PR6005.H66 E916 2023  | רעה תחת השמש / אגתה כריסטי ; תרגמה מאנגלית: מיכל אלפון. | 08/07/2024 20:00 Renewed | -    | 2197627 | 16/06/2024 | 14 Days (40) | ✓          |

6. Partial information on items in loans list  
Additional clicks needed for information retrieval

## 2. Existing Patron Details are incomplete:

- Name
- ID number
- User Status



# New UI: Sketch #1 (November 2021)

The screenshot shows a 'Patron Services' page for a user named Jane Aulenback. The interface is annotated with several callouts:

- Patron Details - Horizontal:** A purple box highlights the top header area containing the user's name, ID, and contact information.
- Scan Item Barcode Box:** A red box highlights a search input field with a barcode icon and the text 'Scan Item Barcode \*'.
- Return Item Box:** A red box highlights a search input field with a barcode icon and the text 'Click to Scan Item Barcode \*'.
- Patron Details - Vertical:** A purple box highlights the right-hand sidebar containing sections for 'Fines and Fees', 'System Notes', and 'User Notes'.
- Explosion of Errors!** A large red starburst graphic is placed in the center, with arrows pointing to the 'Scan Item Barcode Box' and 'Return Item Box'.

The main content area is divided into 'Loans' and 'Returns' sections, each displaying a list of items with their respective due dates and statuses.

# New UI: Sketch #2 (November 2021)

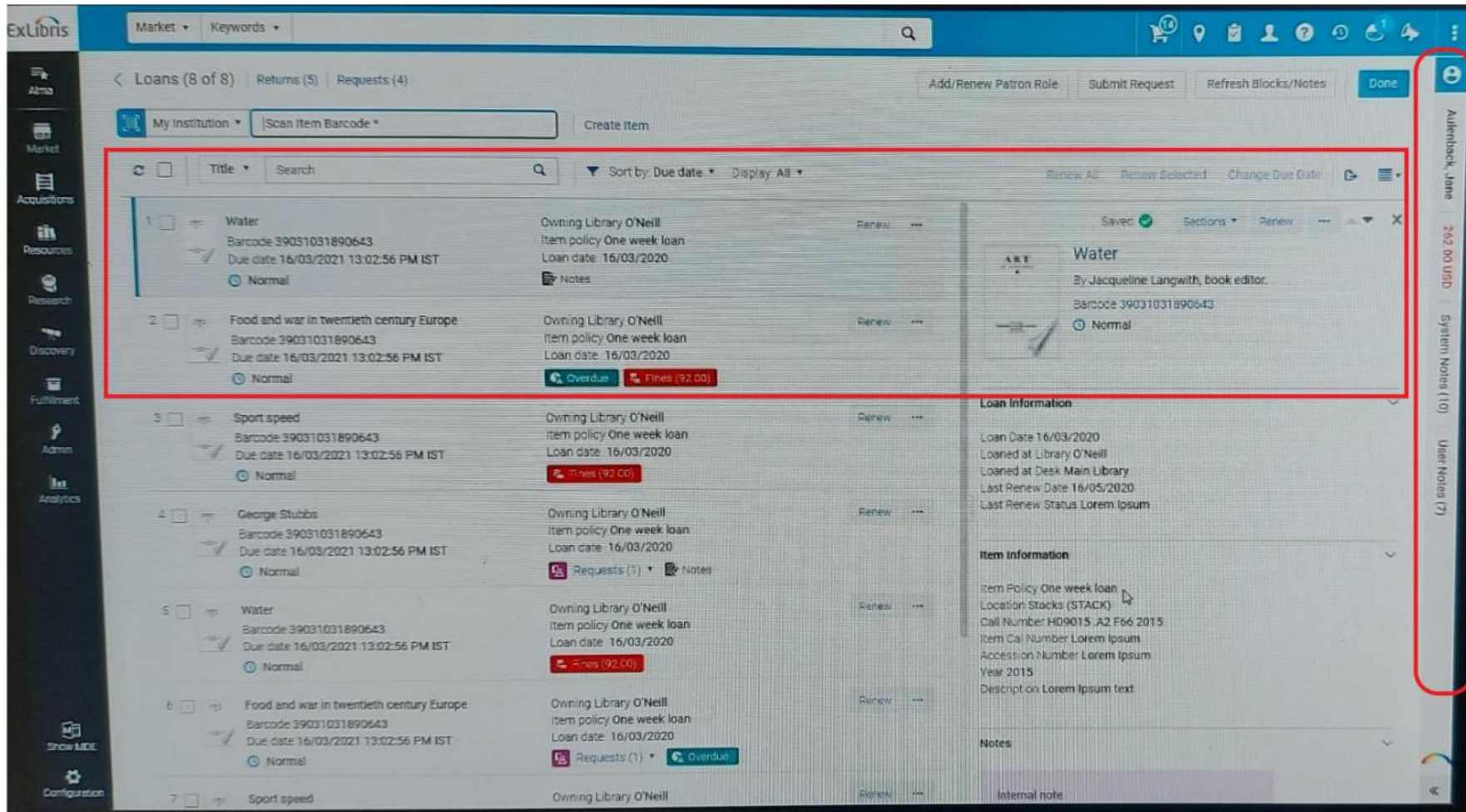
The screenshot shows a library patron services page for Jane Aulenback. The interface includes a top navigation bar with 'Market' and 'Keywords' dropdowns, a search bar, and utility icons. Below the navigation, there are buttons for 'Add/Renew Patron Role', 'Submit Request', 'Refresh Blocks/Notes', and 'Done'. The main content area is divided into several sections:

- Patron Profile:** Name 'Aulenback, Jane', ID '65758397', User group 'BC Undergraduate', Expiration date '30/08/2024', and Email 'Jane.Aulen@gmail.com'. There are links for 'Full user details' and 'Send report / receipt'.
- Fines and Fees:** A red-bordered box highlights 'Fines and Fees (15)' with an active balance of '262.00 USD' and a 'Pay' button.
- Loans, Requests, Returns:** A red-bordered box highlights 'Loans (8)', 'Requests (8)', and 'Returns (5)' with a 'To the left' label below it.
- Scan Item Barcode:** A red-bordered box highlights a 'Scan Item Barcode' input field with a 'To the right' label below it.
- System Notes:** A section titled 'System Notes (10)' containing multiple entries: 'User has 7 overdue item(s). 5 in this library.'
- User Notes:** A section titled 'User Notes (7)' containing multiple entries: 'User has 7 overdue item(s). 5 in this library.'

The bottom of the page displays a list of loaned items with details such as title, author, library name, item policy, loan date, and due date. Some items have associated fines.

# New UI: Sketch #3 (March 2022) - Display no. 1 (Default)

Patron's Details are **not visible** or "**closed**":



Patron Details are "folded" into the narrow strip on the right side of the screen and are not visible by default

# New UI: Sketch #3 (March 2022) - Display no. 2

Patron's Details are **visible** or "**open**":

The screenshot displays a library management system interface. At the top, a blue navigation bar contains icons for home, location, search, user, and help. Below this, a header section shows a counter for 'Loans (8 of 8)', 'Returns (5)', and 'Requests (4)'. A search bar is labeled 'My institution' and 'Scan Item Barcode'. The main content area is a table of loans with columns for item details, library, and actions. A 'Patron Details Pane' is open on the right, showing information for 'Aulenback, Jane' (ID: 65758397), including user group, expiration date, and active balance. The pane also lists system notes and user notes.

**Counter of loans, returns, requests**

**Above**

**Scan Item Barcode Box**

**Colored tags or badges**  
Flagging anything that needs librarian's attention - overdue items, fines, requests.  
Excellent innovation!!

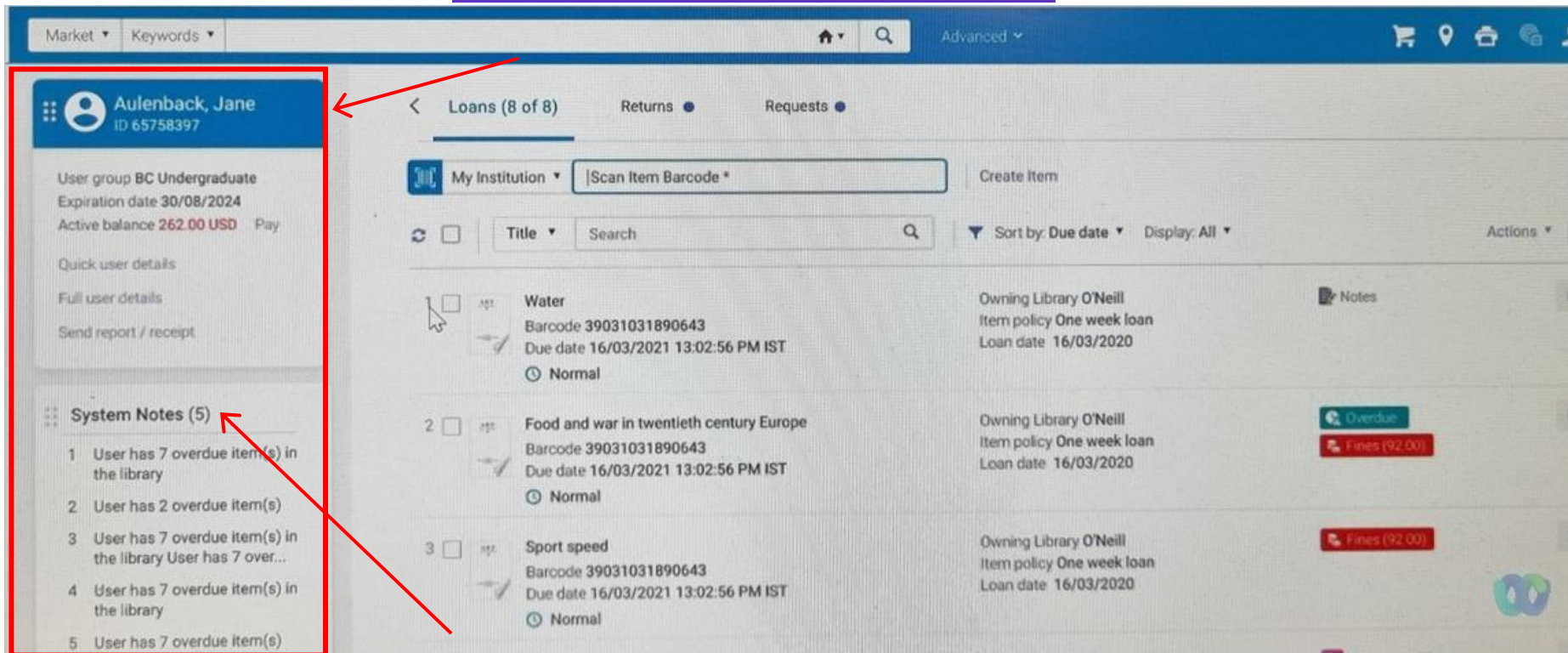
**Patron Details Pane contains all his personal and institutional information in one column:**

- Name
- User Status
- Expiration Date
- Fines and fees
- Notes



# New UI: Sketch #4 (January 2023)

1. Patron Details Pane has been moved to the left side of the screen!!



!! Two very significant improvements

\* One Landmark : our major development request has been approved:

Historical requests will be accessible at the Patron account level!!

2. A Distinction was made between:

- System Notes (Automatic alerts)
- User Notes (Manual notes)

# New UI: Sketch #5 (May 2023)



## All the information about Patron is concentrated in the Left Pane:

- Personal details
- Counter of loans, returns, requests
- User Status in the Institution
- Fines and fees
- Contact details
- System Notes (originated by system)
- User Notes (entered by librarians)

The screenshot displays the Ex Libris library system interface. The top navigation bar includes options like 'Users', 'All', and 'Main Library - Main Circulation Desk'. The main content area is titled 'Loans (1 - 6 of 6)'. On the left, a sidebar shows the patron's profile for 'Ex Libris Staff1' (ID: ex\_Impl), including a 'Loans (6)' counter, 'Returns (22)', 'Requests (0)', 'User notes (2 of 2)', and 'User group Alumni' with an active balance of 2.50 USD. The main area lists four loans with details such as title, author, barcode, loan date, due date, and item policy. A red arrow points to the 'Loans (6)' counter in the left pane.

# New Circulation Interface - Version 1 (May 2023)

## Early Access in Sandbox for the Focus Group

Round 1 - May-June 2023;  
Round 2 - July-August 2023.



### Some major feedbacks:

- **Scan Item Barcode Box** is too small and "gets lost" on the screen.
- **"Accordion"-like icon** inside the Scan Item Barcode Box is superfluent because of its explicit textual self-explanation.
- **Patron's photo** is too small for facial recognition.
- **Search box** is too large and "overburdens" the screen; its position below the **Scan Item Barcode Box** may easily cause confusion between the two.

The screenshot displays the 'Loans' page in the library's circulation interface. The page shows a list of loans with details such as item title, author, barcode, loan date, and due date. Annotations highlight specific areas of concern:

- A purple circle highlights the 'Scan Item Barcode' button, which is noted as being too small.
- A green circle highlights the 'Scan Item Barcode' button and the 'Create Item' button, with a note asking for the function of the 'accordion' icon on the left.
- A purple arrow points to the patron's photo in the first loan entry, with a note stating it is too small to identify the patron.



# New Circulation Interface - Version 2 (June 2024)

### All Patron Information

**Section 1: Personal details and account summary**

**Section 2: Institutional summary and Contact Details**

**Section 3: System Notes: Overdues, Requests**

**Section 4: User Notes entered by librarians**

### Actions and Lists Area

**Scan Item Barcode Box**

**Search, Sort and Filter Bar**

| Item | Title   | Call number                       | Loan date            | Barcode              | Due date                  | Status  | Actions             |
|------|---|-----------------------------------|----------------------|----------------------|---------------------------|---------|---------------------|
| 1    | The medieval world : Europe, 1100-1350 / Friedrich Heer ; translated from the German by Janet Sondheimer. | Call number D200 .H413            | Loan date 06/12/2021 | Barcode 100000350782 | Due date 16/06/2024 20:00 | Overdue | Notes (1) Renew ... |
| 2    | The information : a history, a theory, a flood / James Gleick.  | Call number Z665 .G547 2011       | Loan date 06/11/2022 | Barcode 1665474-10   | Due date 16/06/2024 20:00 | Overdue | Renew ...           |
| 3    | Predskazaniye dni Anny Akhmatovoi : razmysleniia o tvorcheskom puti / Valerii Dementev.                   | Call number PG3476.A324 Z585 2004 | Loan date 08/06/2023 | Barcode 1327883-10   | Due date 16/06/2024 20:00 | Overdue | Renew ...           |
| 4    | Evterpa v lapakh Gimeneia : ljubov i brak v zhizni velikikh russkikh poetov / Lev Anninskii.              | Call number PG2994 .A558 2011     | Loan date 08/06/2023 | Barcode 1707743-10   | Due date 16/06/2024 20:00 | Overdue | Renew ...           |
| 5    | Anti-Akhmatova / Tamara Kataeva.  | Call number PG3476.A324 273 2007  | Loan date 08/06/2023 | Barcode 1419591-10   | Due date 16/06/2024 20:00 | Overdue | Renew ...           |
| 6    | אהבת תלאביב / רחל עזראל-פרחי; [נולדוים בעשויים - ניבן פלס; צילומים מראשיתה של תלאביב - אודיה]             | Call number PJ5054.U83 A65 2001   | Loan date 12/02/2020 | Barcode 100014544597 | Due date 16/06/2024 20:00 | Overdue | Notes (1) Renew ... |

**List of Items Loaned to Patron**

### Selected Item Information

**Bibliographic Details, Barcode, Loan status**

**Loan Information**

**Item Information**

**Item Notes - System and Manual**



# Three-pane system (Aviva)



**All in Patron Information**



**Actions and Lists Area**

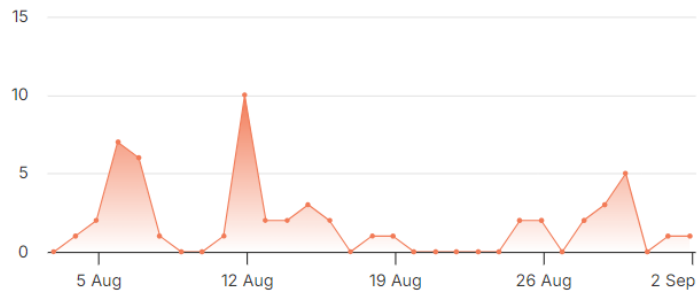


**Selected Item Information**

# Focus Group: Dynamics and Discussions



# Behind the Scenes



0 Sent to integrations

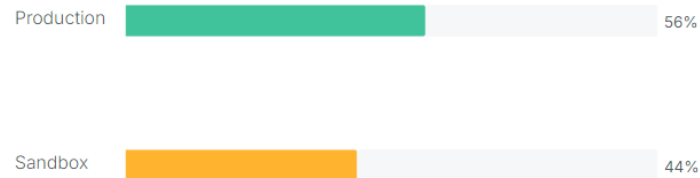
Sep 2, 24

Last feedback received

- 10 Open
- 19 In progress
- 26 Review
- 0 Done

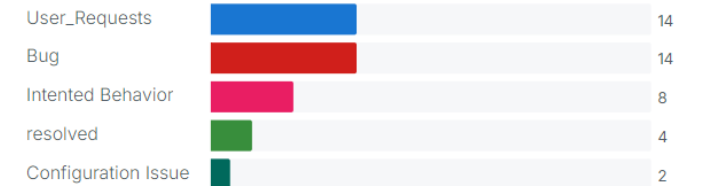
## Poll activity

Environment (required)



## Most used labels

46 labels used

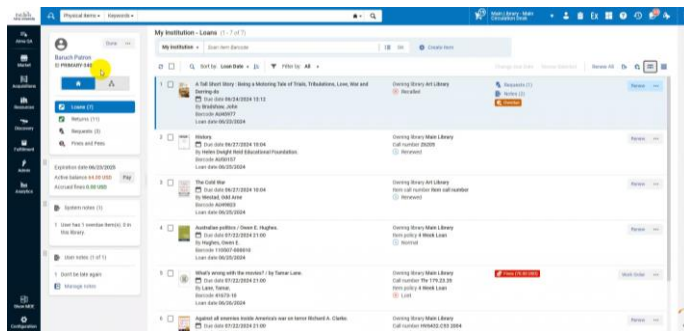


[View all](#)

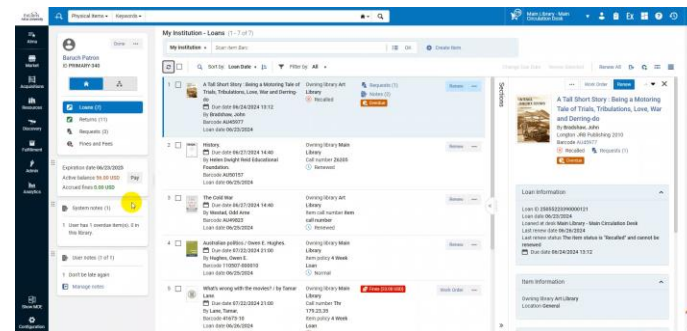
# New Circulation Desk interface: DEMO



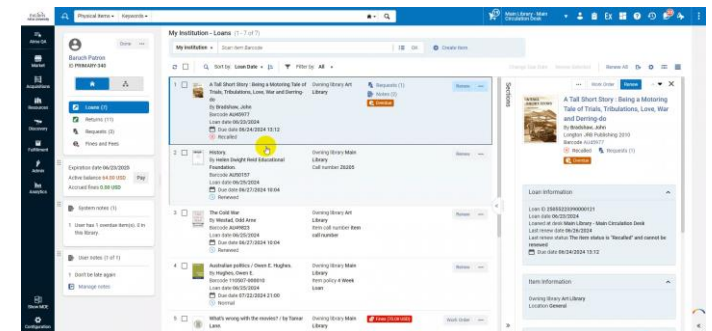
## Fine and Fees & Request History



## Bulk Actions

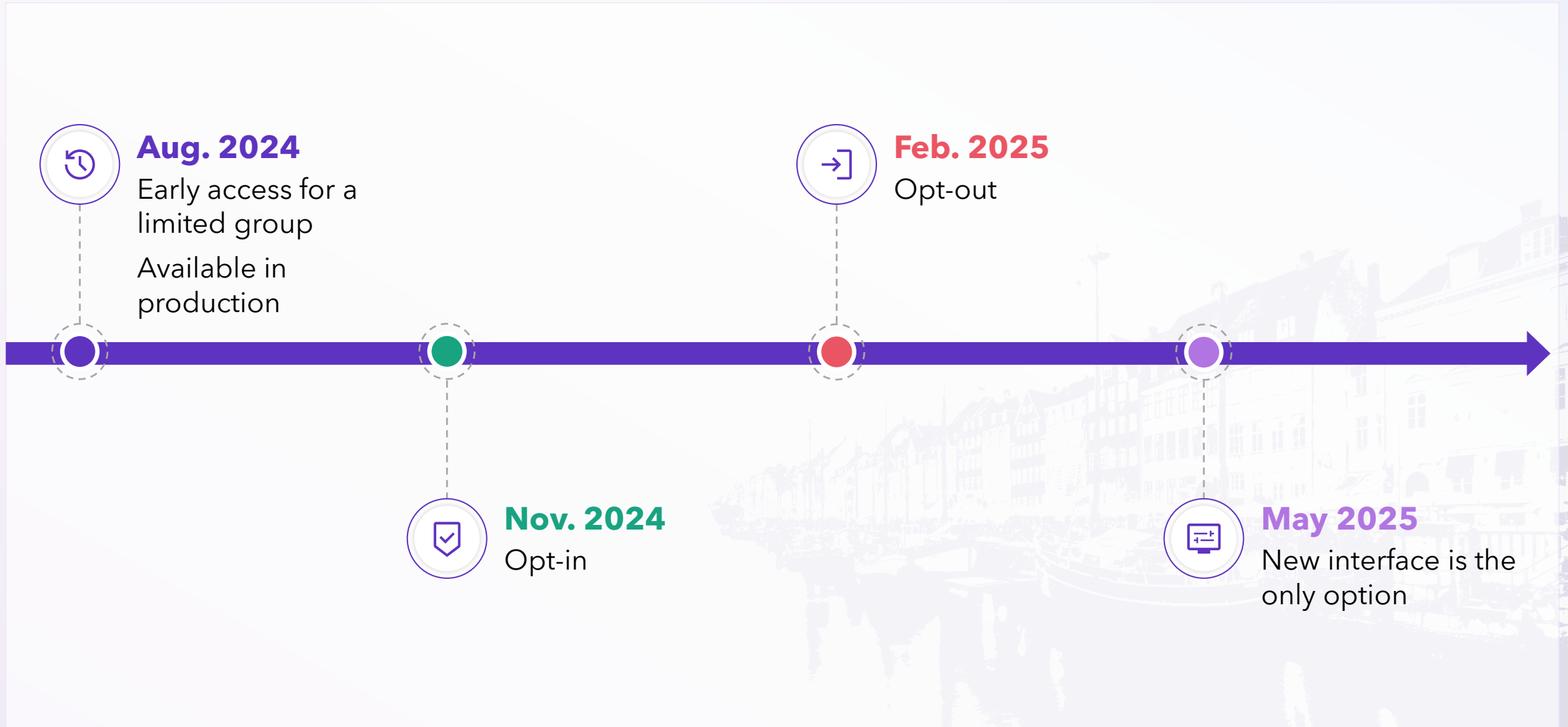


## Customizations





# What's Next?



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Thank you for  
listening!

