

## 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

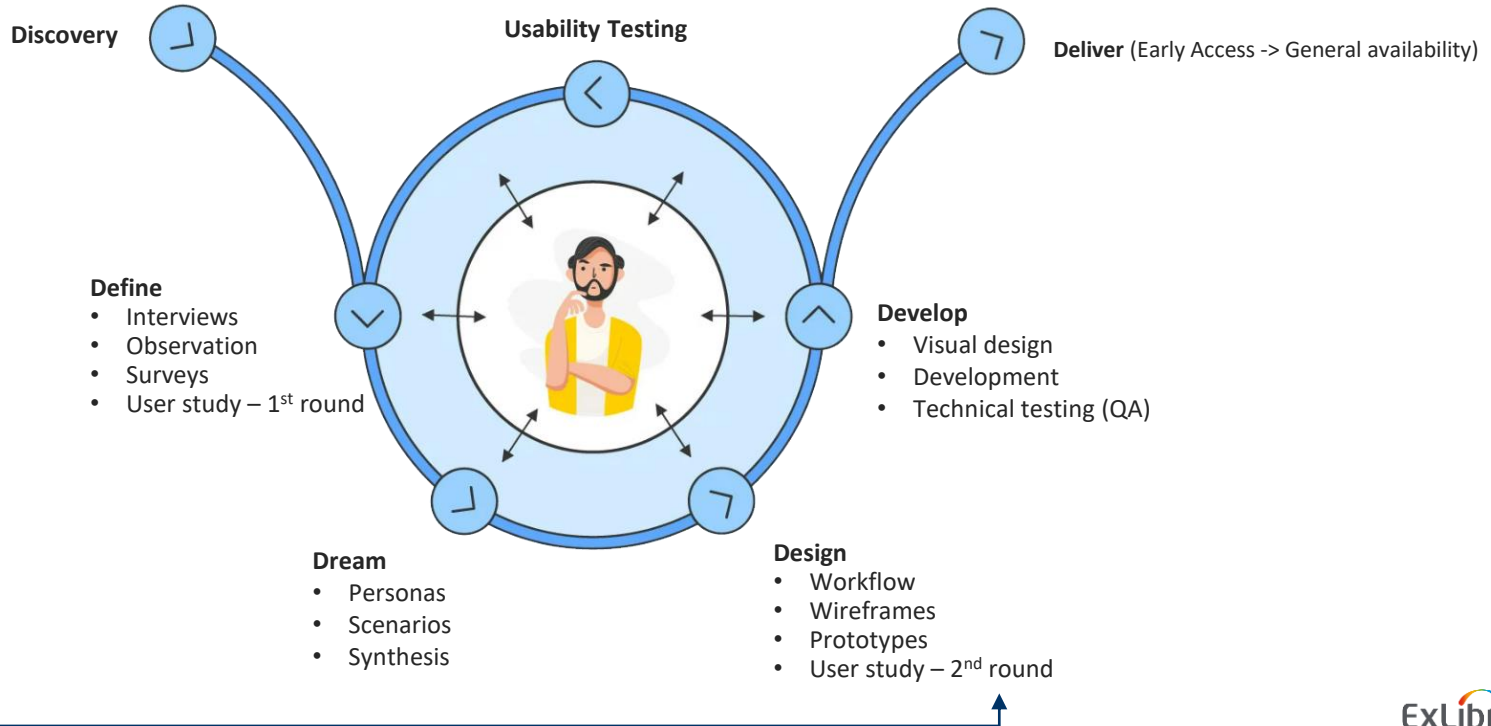




# Research process

# 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 a library management application interface. On the left, there is a sidebar with various filters and counts, including 'Assignment', 'Task Name', 'PO Line Claim', 'Alert', and 'Purchase Type'. The main area shows a list of PO lines. One PO line is selected, and its details are shown in a 'Full view' modal. This modal includes a title, PO line information, vendor details, and a price of 200.65 USD. Below the modal, there are additional PO line sections with view/edit mode options. At the bottom, there is a table with columns for Library, Location, Call Number, Barcode, Availability, Item Policy, Item Description, and Receiving Date.

PO Line: 02-5820  
Physical - One Time  
In Review  
Redskin trail : a life of Blessed Philippine Duchesne.  
London ; Burn...  
PO Line: 02-5766

Venerable Philippine Duchesne : a brief sketch of the life and work of the Foundress of the Society of the Sacred Heart in America / by G.E.M., New York ;, American Press,, 1914.  
acq.po\_line.po\_line.advance.owning\_library: O'Neill  
Vendor/Account: HARRASSOWITZ/HARR/Account (M)/BOC-BLO/197  
Funds: Theology Monograph Firm (100.0%) (FY-2002)  
200.65 USD

1 Venerable Philippine Duchesne : a brief sketch of the life and work of...  
PO Line: 02-5820  
Vendor/Account: HARRASSOWITZ/HARR/Account (M)/BOC-BLO/197  
Funds: Theology Monograph Firm (100.0%) (FY-2002)  
Physical - One Time  
In Review

Owning library: O'Neill  
Assigned to: Staff, Ex Libris  
Eitan\_label hello\_label  
Alerts (4)  
REF\_NL:ONL(1)  
RUSH  
200.65 USD  
Edit ...

2 Local DB 3103152001,  
PO Line: 15-310803  
Electronic Collection - One Time  
In Review

Assigned to: John, Smith  
Alerts (1)  
Edit ...

Library	Location	Call Number	Barcode	Availability	Item Policy	Item Descri...	Receiving D...
Add Items							

# Slide panel to overlay origin point

Order lines PO Line |

Refine by  
Task Name:    
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 \(47\)](#)

**Physical Item Editor**

 **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 - [Browse shelf listing](#)  
Status Item in place  
Item ID 23423725110001021  
MMS ID 99133372900001021

General **ENUM/CHRON** Notes History

General Information

Barcode	<input type="text" value="39031032576274"/> <input type="button" value="Generate"/>	Copy ID	<input type="text"/>
Material type	<input type="text" value="Book"/>	Item policy	<input type="text"/>
Provenance	<input type="text"/>	Is magnetic	<input type="text"/>
PO Line	<input type="text" value="09-000019936"/> <input type="button" value="X"/> <input type="button" value="⋮"/> <input type="button" value="↺"/> <input type="button" value="↻"/>	Issue date	<input type="text"/>
Receiving date	<input type="text"/>	Expected receiving date	<input type="text"/>
Enumeration A	<input type="text"/>	Enumeration B	<input type="text"/>
Chronology I	<input type="text"/>	Chronology J	<input type="text"/>
Description	<input type="text"/> <input type="button" value="Generate"/>	Pieces	<input type="text"/>
Pages	<input type="text"/>	Receiving operator	<input type="text"/>
Replacement cost	<input type="text"/>		
Physical condition	<input type="text"/>		
Process type	<input type="text"/>		

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...** Owning 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...** Owning 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 [et a...** Owning 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 ...**

## 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

**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)

**Direct link to the Receive WB**

**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 17<sup>th</sup> 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](#)]