



Alma Acquisitions Update

Noam Fass



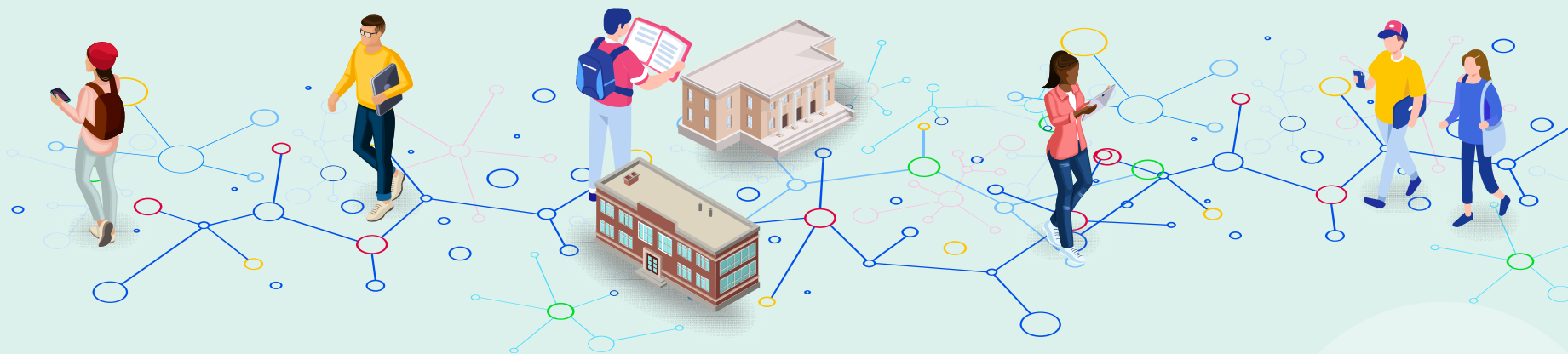
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Agenda

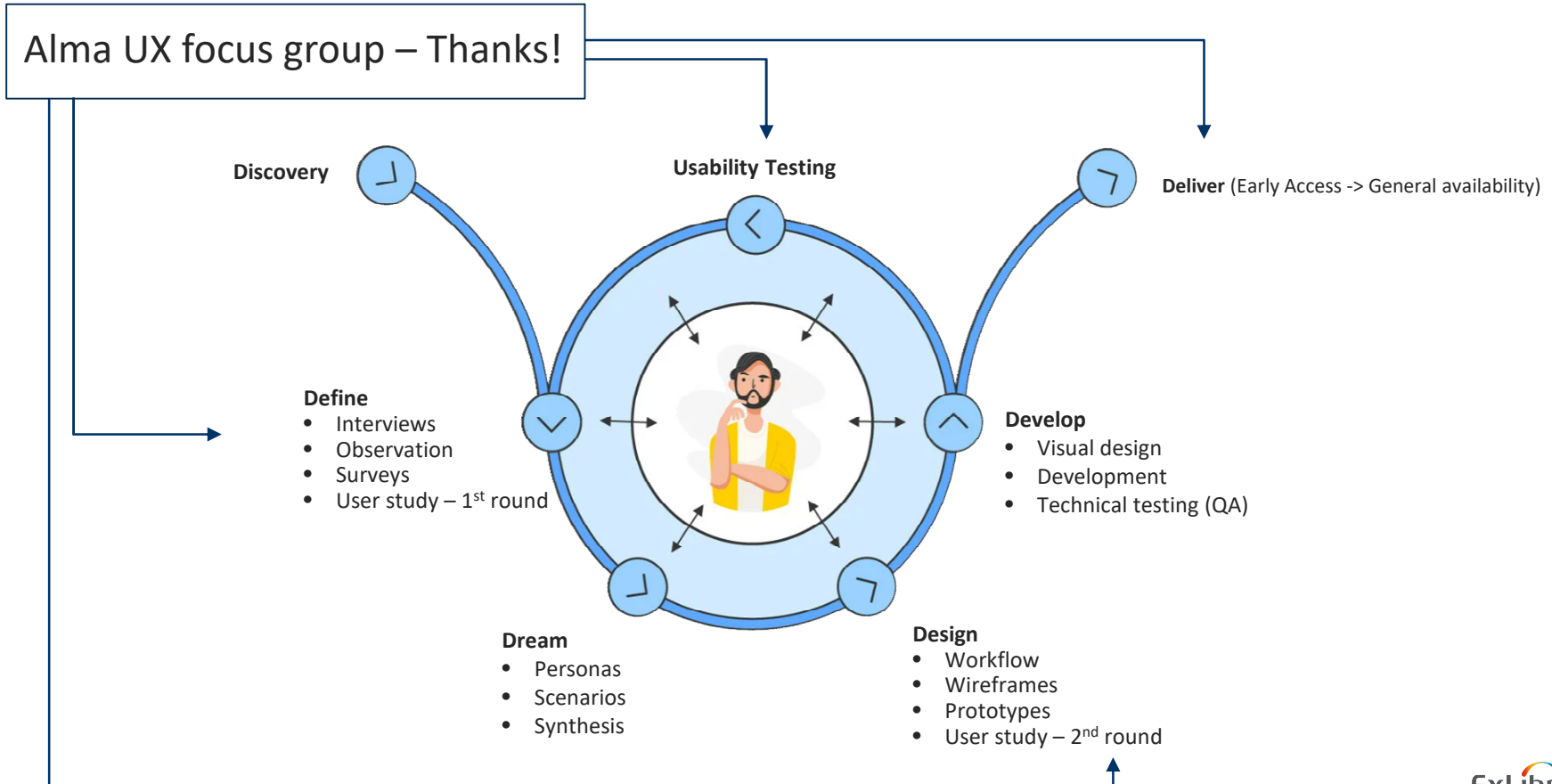


- New PO line interface
 - Research process
 - Expected improvements
 - Live demo see what's in it for you
 - Next steps
- Acquisitions - Future enhancements
 - Order It!
 - Receiving Work Bench



New PO Line Interface - Research Process

Research process – UX methodology





New PO Line Interface - 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.



New PO Line Interface - Live Demo

Existing PO line task list workflow - Demo

- [Env 01](#)
- [Env 02](#)
- [Env 03](#)



New PO Line Interface - What's in it for you?

New advanced search with "OR" option

"Split view" (list + PO line information)

New order to "workflow step" facet

Facet for PO line in claim

Quick navigation

PO line summary section + labels | Single Edit/Save action

The screenshot displays the ELUNA interface with several callout boxes highlighting new features:

- Search:** A search bar at the top with a magnifying glass icon and a dropdown menu set to "Order lines".
- Navigation:** A top navigation bar with "Main Library - Main Circulation Desk" and various utility icons.
- Left Sidebar:** A navigation menu with sections:
 - Assignment:** Assigned to Me (13), Assigned to Other (348), Unassigned (1451).
 - Workflow Step:** In Review (329), Auto Packaging (8), Ready (233), More (8).
 - PO Line Claim:** No (1432), Yes (380).
 - Alert:** The bib record i... (89), Open claims e... (200), Electronic reso... (314), More (14).
 - Purchase Type:** Access Service - ... (4), Database - Subsc... (4), Database - One Ti... (1), More (28).
 - Vendor:** A D & L Vendors (7), A-R Editions Inc. (1), AIP - The Americ... (5), More (51).
 - Rush:** (empty)
- Main Content Area:** A list of PO lines. Callouts point to:
 - Item 1:** "\$0 to Rich : The Everyday Woman's Guide to Getting Wealthy (Ebook Library...)" with callouts for "Identifier: 0-7314-0733-4", "MMS ID: 992275160000121", "PO line owner: Main Library", "Activation status: Not Activated E-Resource", and "Assigned to: Ex Libris Staff".
 - Item 2:** "\$0 to Rich The Everyday Woman's Guide to Getting Wealthy (Ebook Library...)" with callouts for "Identifier: 0-7314-0733-4", "MMS ID: 992275160000121", "PO line owner: Main Library", "Sent date: 06/13/2013", "Expected activation date: 06/13/2013", "Activation status: Not Activated E-Resource", and "Assigned to: Anna Allen".
- Right Panel:** A detailed view of a PO line with sections:
 - Line Summary:** "\$0 to Rich : The Everyday Woman's Guide to Getting Wealthy (Ebook Library), Wrightbooks, 2011, 0-7314-0733-4, ISBN".
 - PO Line Information:** Ordered Portfolios, Vendor Information, Pricing and Funding (50.00 USD), Activation Information (Electronic Book - One Time, In Review, Alerts (1)).
 - Interested Users:** Ex Libris Staff.
- Bottom Panel:** A section for "Additional PO line sections" showing "Alerts (1)", "50.00 USD", and "Assign to Me" button.

Slide panel to overlay origin point

Order lines ▾ All ▾

Assignment

- Assigned to Me (15)
- Assigned to Ot... (348)
- Unassigned (1449)

Workflow Step

- In Review (329)
- Auto Packaging (5)
- Ready (233)
- + More (8)

PO Line in Claim

- No (1432)
- Yes (380)

Alert

- The bib record i... (89)
- Open claims e... (200)
- Electronic reso... (314)
- + More (14)

Purchase Type

- Access Service - ... (4)
- Database - Subsc... (4)
- Database - One TL... (1)
- + More (28)






Vendor

- A D & L Vendors (7)
- A-R Editions Inc. (1)
- AIP - The Americ... (5)
- + More (51)

Vendor Account

Purchase Order Lines

Sort by: Title ▾

- 1  S0 to Rich : The (Ebook Libr... PO line: POL-89 Vendor/Account Library [1] Electronic B [1] In Review
- 2  0 to Rich The Ex (Ebook Library... PO line: POL-19 PO: PO-11910 (Vendor/Account Library Funds: Biology [1] Electron [1] Waiting for
- 3  S0 to Rich : The (MyLibrary... PO line: POL-17 PO: PO-30812 (Vendor/Account Funds: Account [1] Electronic B [1] Closed
- 4  1,000 Artists' B PO line: POL-44 [1] License Upg [1] In Review
- 5  1,000 Artists' B publication... PO line: POL-44

Vendor Details Ebook Library

Cancel Save

Summary Contact Information Contact People EDI Information Usage Data System Integration Invoices PO Lines Communications Attachments

Notes Analytics

Vendor General Details

Name * Ebook Library

Code * EBL Additional code

Financial Sys. code National tax ID

Status Active Liable for VAT

Currencies ALL Language English

Libraries Alma University

Vendor Type Material Supplier/Subscription Agent Access Provider Licensor Governmental

Accounts

Active	Account Code	Description	Discount Percent	Libraries
1 <input checked="" type="checkbox"/>	Ebook Library	Ebook Library	-	Alma University

Interfaces

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

The screenshot shows a list of three PO lines. Each line has a workflow step indicator and a corresponding action button. Blue arrows point from the workflow step to the action button.

- PO Line 1:** Workflow step: In Review. Action: Continue Workflow. Value: 200.65 USD.
- PO Line 2:** Workflow step: Closed. Action: Reopen. Value: 59.03 USD.
- PO Line 3:** Workflow step: Waiting for Manual Renewal. Action: Assign to. Value: 0.01 USD.

Enhanced claim and receive functions

The screenshot shows a PO line in a claim state. A blue box highlights the 'In Claim' status. A blue callout box points to the 'In Claim' status with the text 'Direct link to the Receive WB'. Another blue callout box points to the 'Receive' button at the bottom of the screen with the text '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 Recei...
1	Law	General Collection	B441323		01/09/2004 (From: 01/09/2004)



New PO Line Interface - What's next?

Next steps

Early testers - Started in August 2022, currently 100+ institutions testing

- 72 institution has at least 1 user using the new interface **in production**
- Total of 276 users testing the new interface **in production**

General availability – Gradual rollout - **pending early testers feedback**

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



New PO Line Interface – Questions? Ask Me Anything!



Acquisitions - Future enhancements

Future enhancements

Order It! - Harvest information from Amazon and automatically create 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 dialog box titled 'Create a PO line for this item' is overlaid on the page, containing the following information:

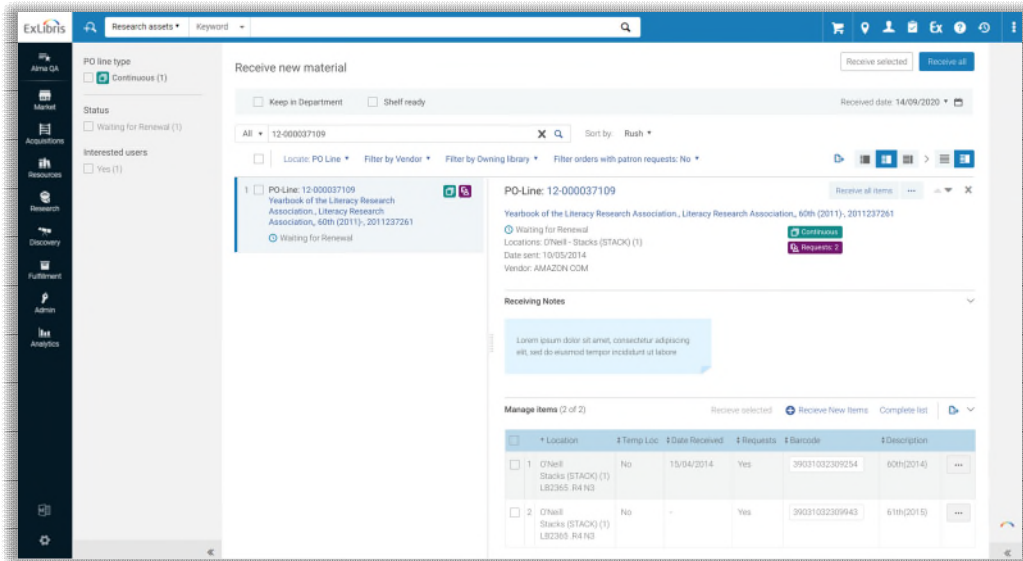
- Title: COVID-19: The Great Reset
- Author: Thierry Malleret
- PO line information: PO line type: Print Book - One Time
- Vendor: Amazon
- Fund: Enter fund name or select form the list
- Price: 30.99 USD
- Number of items: 1
- Resolving note:

The dialog box also includes a 'Cancel' button and a 'CREATE PO LINE' button.

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

Future enhancements

Receiving WB – new interface



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...

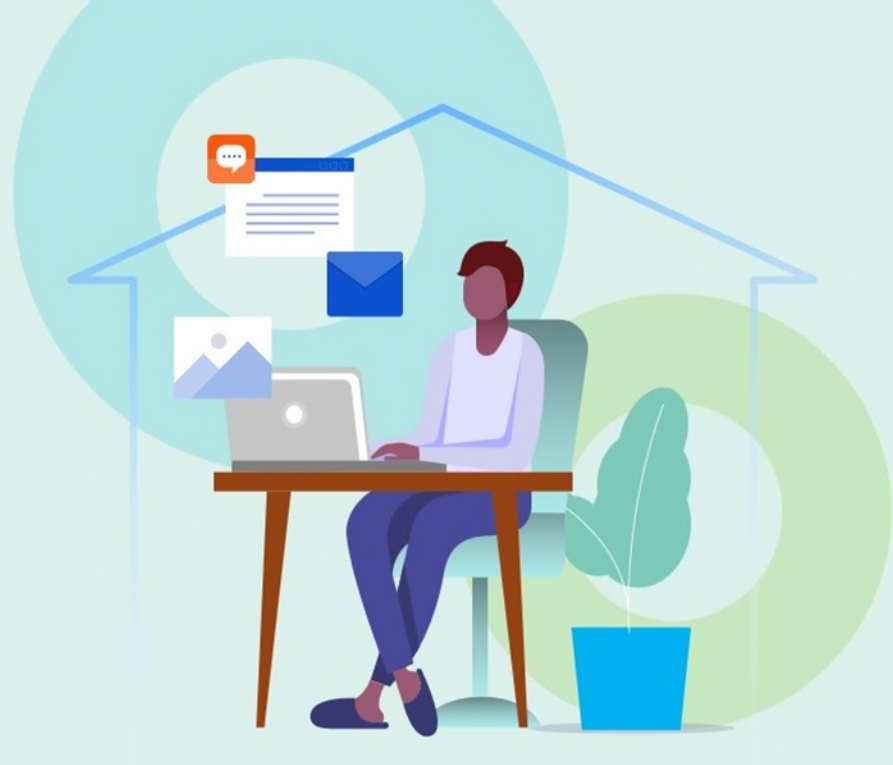
Status: post 2 user studies with 7 institutions and 15 users – start development in 2024



Future enhancements– 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](#)]
- 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](#)]















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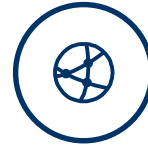
Our Team

People who work in marketing try to get the attention of target.



Our Services

People who work in marketing try to get the attention of target.



Our Maps

People who work in marketing try to get the attention of target.



Infographics

People who work in marketing try to get the attention of target.



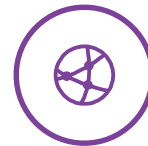
Calendar

People who work in marketing try to get the attention of target.



Cloud

People who work in marketing try to get the attention of target.



Target

People who work in marketing try to get the attention of target.



Contact Us

People who work in marketing try to get the attention of target.

Use Case Workflow



PERSONA: ABC

TASK: ABC

Step 1



campusM

Step 2



Leganto

Step 3



Primo

Step 4



Alma

Step 5



Esploro

Step 6

RefWorks

Slide Title Here

76%

The activities of a company associated with buying and selling a product

38%

The activities of a company associated with buying and selling a product

86%

The activities of a company associated with buying and selling a product

53%

The activities of a company associated with buying and selling a product

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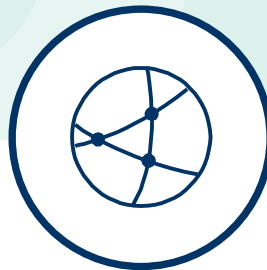
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Product Logos

ExLibris
Alma

ExLibris
Leganto

ExLibris
Esploro

ExLibris
Rapido

ExLibris
Primo

ExLibris
Summon

ExLibris
campusM

ExLibris
RapidILL

ExLibris
Pivot-RP

ExLibris
Rosetta

ExLibris
Research
Professional

Product Logos

Alma

Leganto

Esploro

RapidILL

Primo

Summon

campusM

Rapido

Pivot-RP

RefWorks

Rosetta

Research
Professional





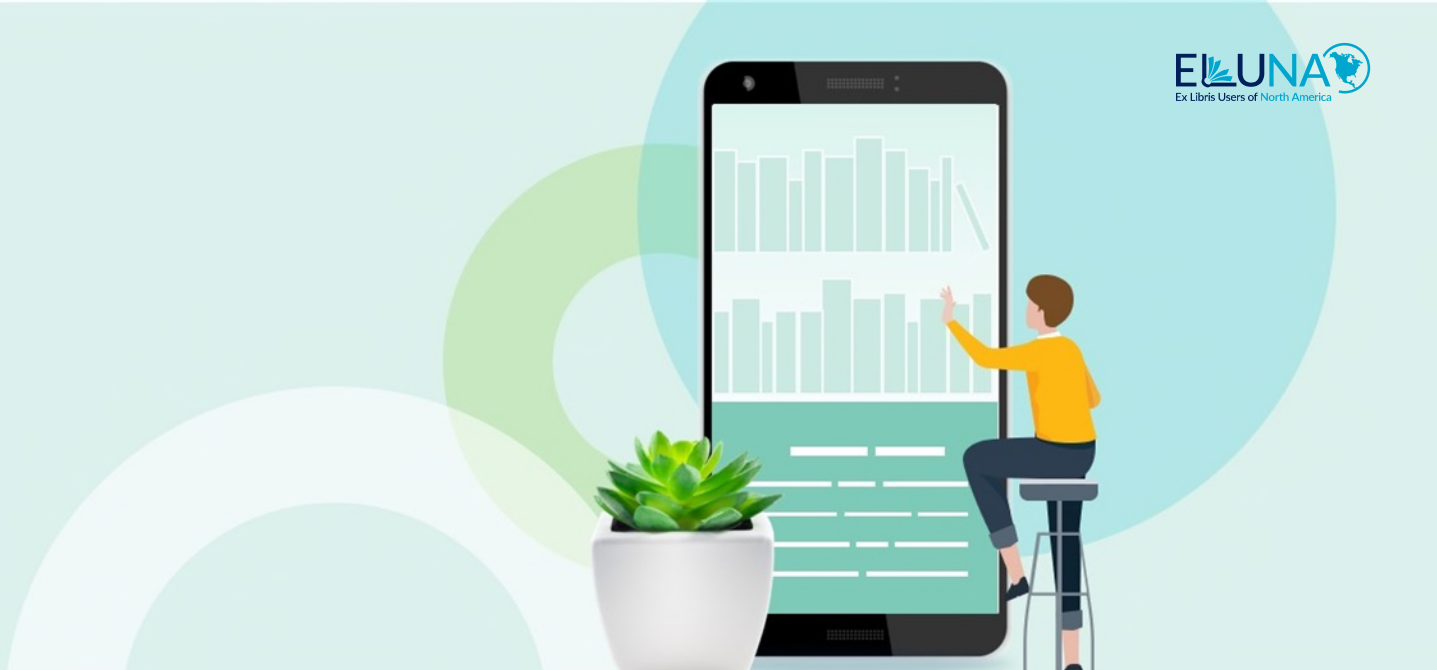












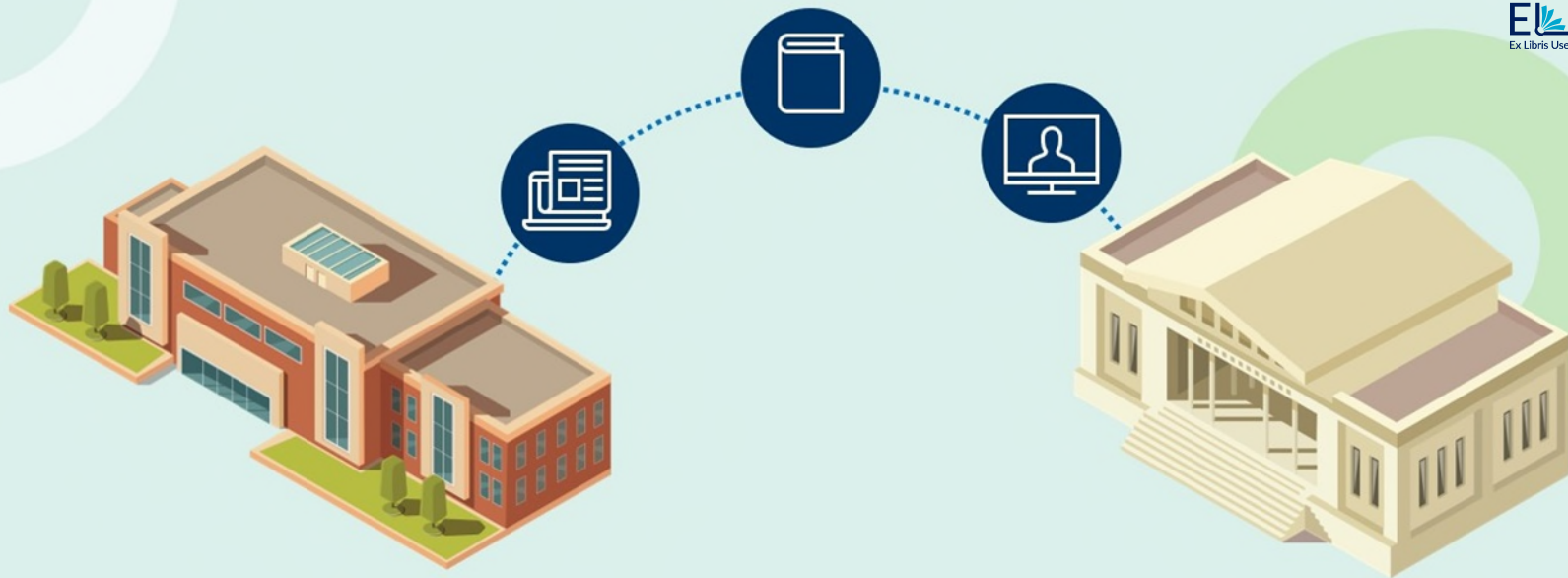














Thank you!



Thank you!



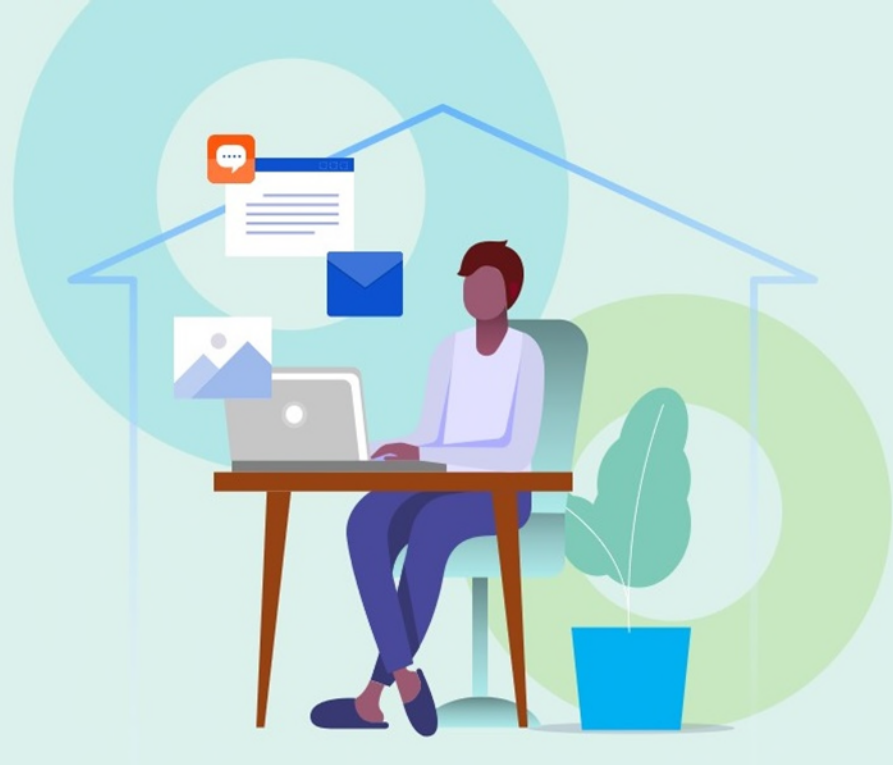
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