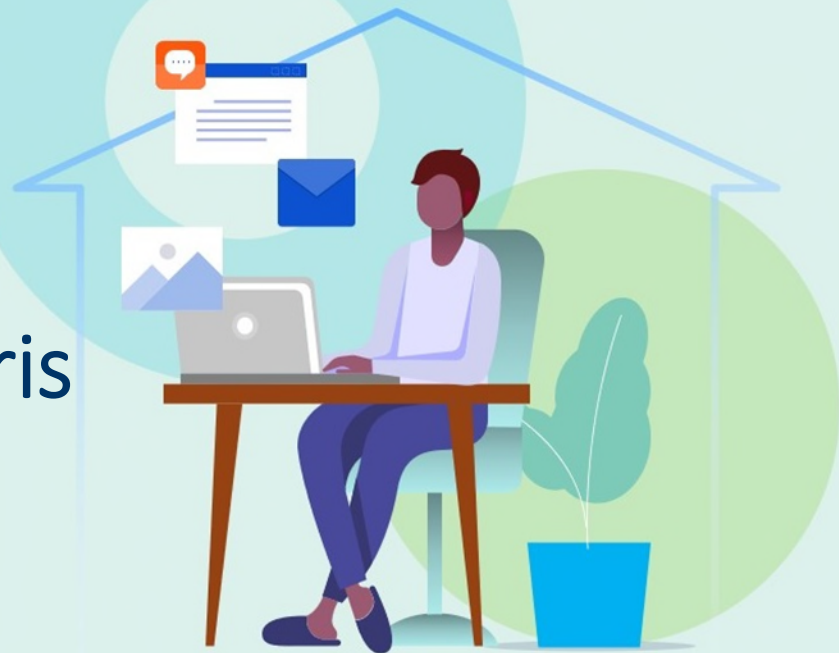


# The User Experience Focus Group and Ex Libris Two for One.

Catherine Grove, Northwestern University  
Raphael Gabbay, Ex Libris



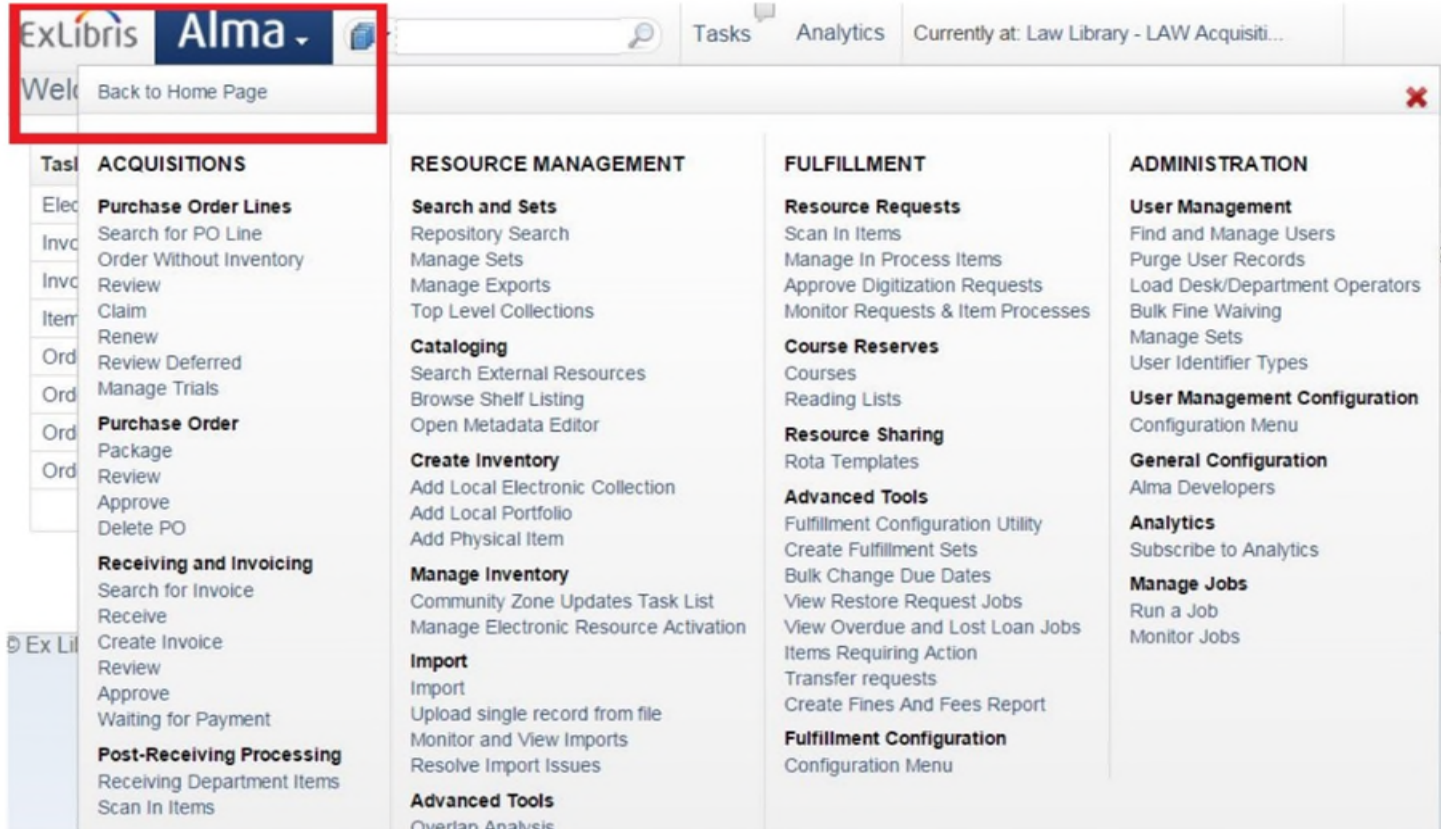
© 2023 Ex Libris | Confidential & Proprietary





- The UX Focus Group in Alma
- Feature development:  
a collaborative process-
  - Metadata Editor
  - 1:1 interviews on general UX
- Taking part in the UXFG

# Remember when?



The screenshot shows the Ex Libris Alma interface. A red box highlights the top navigation area, which includes the 'Ex Libris Alma' logo and a 'Back to Home Page' link. Below the navigation bar, the main content area is divided into four columns of menu items:

- ACQUISITIONS**
  - Purchase Order Lines
    - Search for PO Line
    - Order Without Inventory
    - Review
    - Claim
    - Renew
  - Review Deferred
  - Manage Trials
  - Purchase Order
    - Package
    - Review
    - Approve
    - Delete PO
  - Receiving and Invoicing
    - Search for Invoice
    - Receive
    - Create Invoice
    - Review
    - Approve
    - Waiting for Payment
  - Post-Receiving Processing
    - Receiving Department Items
    - Scan In Items
- RESOURCE MANAGEMENT**
  - Search and Sets
    - Repository Search
    - Manage Sets
    - Manage Exports
    - Top Level Collections
  - Cataloging
    - Search External Resources
    - Browse Shelf Listing
    - Open Metadata Editor
  - Create Inventory
    - Add Local Electronic Collection
    - Add Local Portfolio
    - Add Physical Item
  - Manage Inventory
    - Community Zone Updates Task List
    - Manage Electronic Resource Activation
  - Import
    - Import
    - Upload single record from file
    - Monitor and View Imports
    - Resolve Import Issues
  - Advanced Tools
    - Overlan Analysis
- FULFILLMENT**
  - Resource Requests
    - Scan In Items
    - Manage In Process Items
    - Approve Digitization Requests
    - Monitor Requests & Item Processes
  - Course Reserves
    - Courses
    - Reading Lists
  - Resource Sharing
    - Rota Templates
  - Advanced Tools
    - Fulfillment Configuration Utility
    - Create Fulfillment Sets
    - Bulk Change Due Dates
    - View Restore Request Jobs
    - View Overdue and Lost Loan Jobs
    - Items Requiring Action
    - Transfer requests
    - Create Fines And Fees Report
  - Fulfillment Configuration
    - Configuration Menu
- ADMINISTRATION**
  - User Management
    - Find and Manage Users
    - Purge User Records
    - Load Desk/Department Operators
    - Bulk Fine Waiving
    - Manage Sets
    - User Identifier Types
  - User Management Configuration
    - Configuration Menu
  - General Configuration
    - Alma Developers
  - Analytics
    - Subscribe to Analytics
  - Manage Jobs
    - Run a Job
    - Monitor Jobs

# You've come a long way, baby!






Repository Search

Find  where  contains

Limit results to:

- [Book \(668\)](#)
- [Computer file \(4\)](#)
- [Journal \(299\)](#)
- [Visual material \(15\)](#)

- [English \(976\)](#)
- [French \(7\)](#)
- [German \(3\)](#)
- [More \(4\) ▾](#)

-  **Neuroscience**  
Identifier: 0306-4522 Imprint: (Oxford ;, Pergamon, Vol. 1, issue 1 (Jan. 1976)-  
Type: Journal Language: English Medium Type: [electronic resource]. **Record number: (CONSER) 2002239187**  
Availability: [Electronic version](#) at Elsevier ClinicalKey Journals: Full Text  
[Electronic version](#) at Elsevier SD Backfile Neuroscience: Full Text  
[Electronic version](#) at Elsevier SD Freedom Collection: Full Text  
**and others**  
[Electronic Collection List](#) | [View It](#) | [Order](#) | [Document Delivery](#) | [Publishing information](#) | [More info](#)
-  **Neuroscience / Alan Longstaff.**  
Identifier: 9780415351881 Imprint: New York ;, Taylor & Francis, 2005.  
Type: Book Language: English Record number: (IEN)4796784-nwudb  
Availability: [Electronic version](#) at Online: Full Text  
[Electronic Collection List](#) | [View It](#) | [Order](#) | [Document Delivery](#) | [Publishing information](#) | [More info](#)
-  **Neuroscience / edited by Dale Purves ... [and others].**  
Identifier: 0878936971 (hardcover) Imprint: Sunderland, Mass. ;, Sinauer, ©2008.  
Type: Book Language: English Record number: (IEN)4771553-nwudb  
Availability: [Electronic version](#) at Online: Full Text  
[Electronic Collection List](#) | [View It](#) | [Order](#) | [Document Delivery](#) | [Publishing information](#) | [More info](#)
-  **Neuroscience / edited by Dale Purves ... [and others].**  
Imprint: Sunderland, Mass. ;, Sinauer Associates, ©2004  
Type: Book Language: English **Record number: (IEN)3772219-nwudb**  
Availability: [Electronic version](#) at Online: Full Text  
[Electronic Collection List](#) | [View It](#) | [Order](#) | [Document Delivery](#) | [Publishing information](#) | [More info](#)
-  **Neuroscience research**  
Identifier: 0168-0102 Imprint: New York, NY ;, Elsevier Science Pub Co. Print began with vol. 1, published Feb. 1984.  
Type: Journal Language: English Medium Type: [electronic resource]. Record number: (CONSER) 2003233375  
Availability: [Electronic version](#) at Elsevier SD Backfile Neuroscience: Full Text  
[Electronic version](#) at Elsevier SD Elsevier: Full Text  
[Electronic version](#) at Elsevier SD Freedom Collection: Full Text  
[Electronic Collection List](#) | [View It](#) | [Order](#) | [Document Delivery](#) | [Publishing information](#) | [More info](#)

# UX Focus Group in Alma

- **2015-2016:** A worldwide growing awareness for the need of User experience thinking and methodology in software companies
- **June 2016:** Integrating User Experience processes into Alma
  1. Internal process - Ex Libris recruits UX experts
  2. External process - Establishment of a User experience focus group.



# UX Focus Group in Alma



June 2016: Establishing UX Focus Group in Alma



# UX Focus Group in Alma

## The goal

Accompanying, directing and representing the user when addressing user experience in Alma

UX Focus Group activity concentrates on:

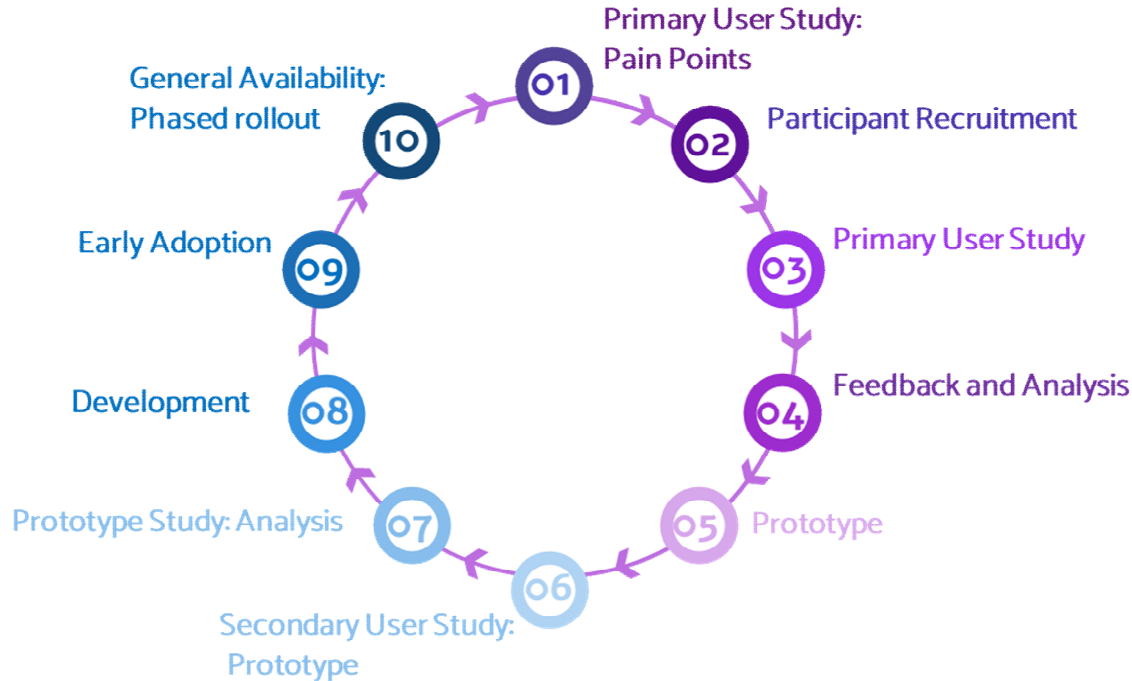
1. A monthly meeting centered around updates on the various UX tracks
2. Participation in user studies and early adoption processes
3. Ongoing communication with Alma Product team via Basecamp
3. Prioritization and guidance on UX issues in accordance with the product team in Ex Libris

# Challenges

- Achieving the ideal among many visions
- One product serving multiple needs
- Rate of change
- Time commitment
- Future vs immediate



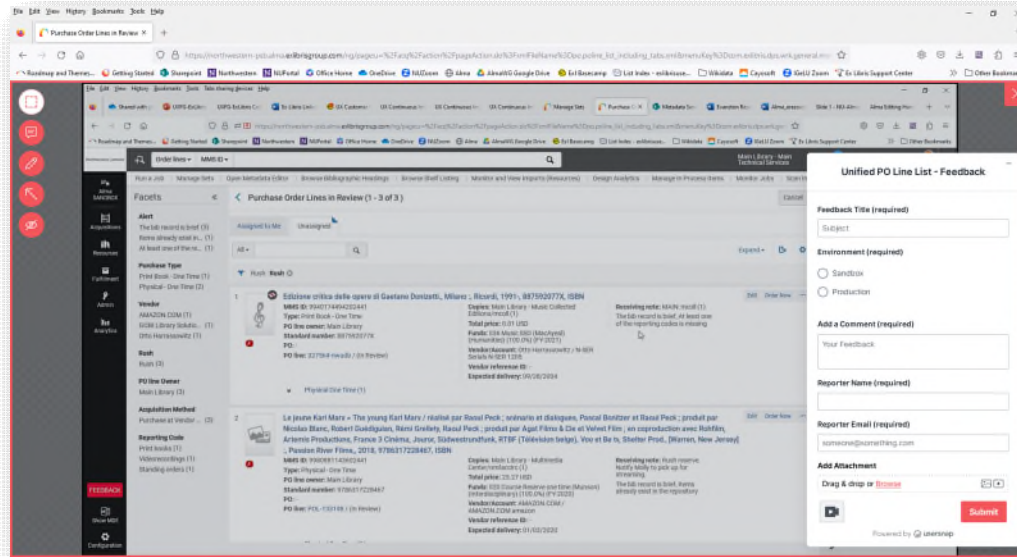
# Feature Development As a Collaborative Process



\* 10 step diagram created by Ruhama Amouyal and Rafi Gabbay

# Providing Feedback

- Feedback Tool



- User studies

- Upcoming example: Expand All functionality in the All Titles repository search
- Individuals have a 1-hour Teams session with UX expert at Ex Libris

# Metadata Editor Priorities

- More improvements were needed for the MDE in early 2022
- UXFG assembled improvements and voted on top priorities
  - Need easy way to open items from a holding (released May 2023)
  - Improve the functionality of copy-paste actions (released August 2022)
  - Remove or change 1-hour timeout (improved performance efforts)

# 1:1 Interviews: A Better User Experience



## Patron Services-New Layout

The screenshot shows a Patron Services interface with a feedback box overlaid. The interface has four main sections: Name, Comments, Summary, and EXL Notes. The feedback box contains the following text:

- Checklist verification
- Clarified issues
- design fine tuning

**The process verified User feedback was integrated into the design**

*Coming next: Repository search*

# Why join the UXFG?

- Direct input
- See Alma as it gets developed
- Early adoption
- Collaborate with and learn from other institutions and experts

# Thank you!





# Thank you!

Alice Tippit

David Scott

Denise Dudley

Gijs Noels

Catherine Grove

Drew Christensen

Susan Sundquist

Aaron Dobbos

John Blosser

Joe Ferguson

Ruhama Amouyal

Carrie Doyle

Ronald Carrier

Joy Panigabutra-Roberts

Aviva Levin-Belousov

Crystal Buss

Anette Munthe

Kim Blaylock

Naomi Galor

Curran Riley

Christine Rostgaard

Michael Dodson

Daphna  
Frimerman-Kolka

Andrea Steffek

Magnus Carlström

Mike Rogers

Sivan Kedar

Bettina Kann

Dave Allen

Wanda Rosinski

Dafna Mizrahi-Melcer

Jeffery Cruz

Karen Stone

Corinna Baksik

Ahava Cohen

# Thank you!

---

[C-grove@northwestern.edu](mailto:C-grove@northwestern.edu)

[Gijs.Noels@kuleuven.be](mailto:Gijs.Noels@kuleuven.be)

[Raphael.gabbay@clarivate.com](mailto:Raphael.gabbay@clarivate.com)

