

ExLibris[®]
Part of **Clarivate**

IGOLU
International Group of Ex Libris Users

Alma Acquisitions Update

Yochai Melamed | Noam Fass
Alma Product Management

Agenda



New PO Line Interface

- Research process
- Live demo
- Next steps



Acquisitions - Coming Soon!

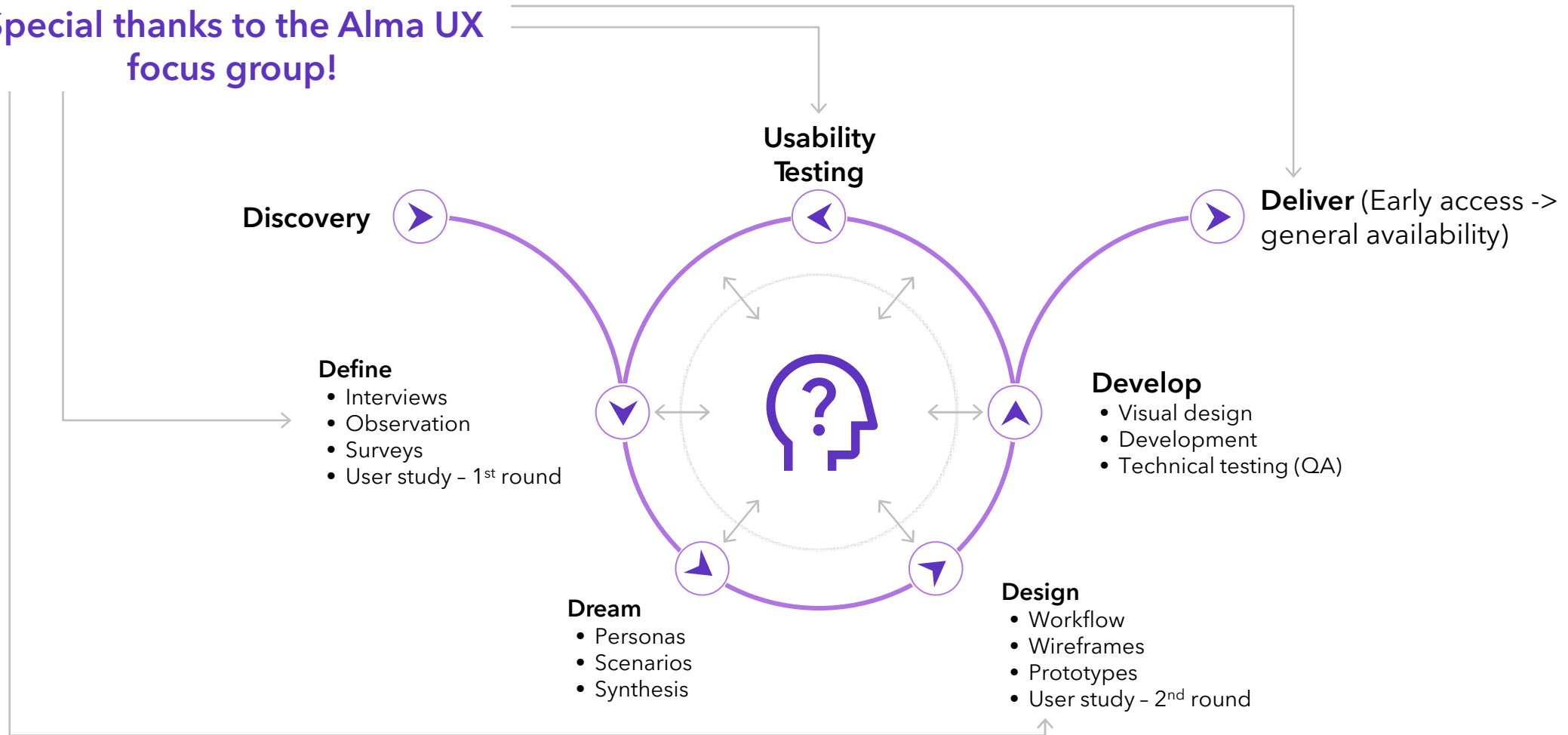
- Order It!
- Receive



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

Existing PO Line Task List Workflow - Demo



Env 01



Env 02



Env 03



New PO Line Interface - How it Works

New advanced search with "OR" option

Assignment indication as facet - No automated assignment

Multi "Split view" (list + PO line information)

New order to workflow step facet

Facet for PO line in claim

"Full view" Quick navigation

PO line summary section + labels | Single Edit/Save action sensitive to the user's selection

Additional PO line sections

Alerts (1)
Make sure to test access
Check with Catalog... ELUNA 2023

Alerts (2)
ELUNA 2023

Library
Electronic Book - One Time
In Review

PO Line Information
Ordered Portfolios
Vendor Information
Pricing and Funding
Activation Information
Interested Users

\$0 to Rich : The Everyday Woman's Guide to Getting Wealthy (Ebook Library), Wrightbooks, 2011, 0-7314-0733-4, ISBN
Assigned to: Ex Libris Staff
PO line owner: Main Library
Vendor/Account: Ebook Library/EBL/Ebook Library /Ebook Library
50.00 USD
Electronic Book - One Time In Review Alerts (1)

\$0 to Rich : The Everyday Woman's Guide to Getting Wealthy (Ebook Libr...)
PO line: POL-8909
Vendor/Account: Ebook Library/EBL/Ebook Library /Ebook Library
Electronic Book - One Time
In Review

Identifier: 0-7314-0733-4
MMS ID: 99227516000012
PO line owner: Main Library
Activation status: Not Activated E-Resource
Assigned to: Ex Libris Staff

Identifier: 0-7314-0733-4
MMS ID: 99227516000012
PO line owner: Main Library
Sent date: 06/13/2013
Expected activation date: 06/13/2013
Activation status: Not Activated E-Resource
Assigned to: Anna Allen

1,000 Artists' Books: Exploring the Book As Art, [Place of publication...]
PO line: POL-4454

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

Assignment
Assigned to Me (13)
Assigned to Ot... (348)
Unassigned (1451)

Workflow Step
In Review (329)
Auto Packaging (5)
Ready (233)
More (8)

PO Line in Claim
No (1432)
Yes (380)

Sort by: Title

1 of 91

Slide Panel to Overlay Origin Point

The screenshot displays a software interface with a sidebar on the left and a main content area on the right. The sidebar, titled 'Purchase Order Lines', contains several filter categories: Assignment (Assigned to Me, Assigned to Ot..., Unassigned), Workflow Step (In Review, Auto Packaging, Ready), PO Line in Claim (No, Yes), Alert (The bib record i..., Open claims e..., Electronic reso...), Purchase Type (Access Service..., Database - Subsc..., Database - One TI...), and Vendor (A D & L Vendors, A-R Editions Inc., AIP - The Americ...). The main content area is titled 'Vendor Details' and shows the details for 'Ebook Library'. The form includes fields for Name, Code, Financial Sys. code, Status, Currencies, Libraries, and Vendor Type. Below the form is a table for 'Accounts' with columns for Active, Account Code, Description, Discount Percent, and Libraries. The table contains one entry for 'Ebook Library' with a discount of 0% and associated with 'Alma University'. The interface also features a search bar at the top and a 'Save' button in the top right corner.

Additional Functionalities

1
2
3

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)

PO Line in Claim ^

- PO Line in Cla... (6060)
- PO Line no... (852408)

[Less](#)



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
Assigned to: Staff, Ex Libris 200.65 USD
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 [Continue Workflow](#) ...

2 Redskin trail : a life of Blessed Philippine Duchesne, London ; Burn... Owing library: O'Neill
PO Line: 02-5766
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... Owing library: O'Neill
Renewal date: 23/10/1999 Alerts (2) 0.01 USD
PO Line: 00000346-00101
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
 Sent [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			

Item In Claim (1)

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

Vendor Information [Receive](#)



**New PO Line Interface -
Questions?
Ask Us Anything!**



Acquisitions - Future Enhancements

Future Enhancements

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

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

Browser bookmark

The screenshot shows the Amazon product page for the book "COVID-19: The Great Reset" by Klaus Schwab and Thierry Malleret. A purple box labeled "Browser bookmark" points to the "Order It!" bookmark in the browser's top bar. 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 funs name or select form the list
- Price: 10.99 USD
- Number of items: 1
- Receiving note:
- Buttons: Cancel, CREATE PO LINE

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

Future Enhancements

Receiving WB - new interface

The screenshot shows the ExLibris 'Receive new material' interface. On the left is a navigation sidebar with icons for Alma QA, Market, Acquisitions, Resources, Research, Discovery, Fulfillment, Admin, and Analytics. The main area is titled 'Receive new material' and includes a search bar, filters for PO line type (Continuous), status (Waiting for Renewal), and interested users. A specific PO line is selected: '12-000037109' for 'Yearbook of the Literacy Research Association, 60th (2011)'. Below this, there are 'Receiving Notes' and a 'Manage Items' table.

	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**



**Future Enhancements -
Questions?
Ask Me Anything!**



Thank you!

Yochai.Melamed@clarivate.com
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.

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](#)