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Alma Acquisitions Update
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Alma Product Management

Agenda

New PO Line Interface

- Research process
- Live demo
- Next steps

Acquisitions – Coming Soon!

- Order It!
- Receive

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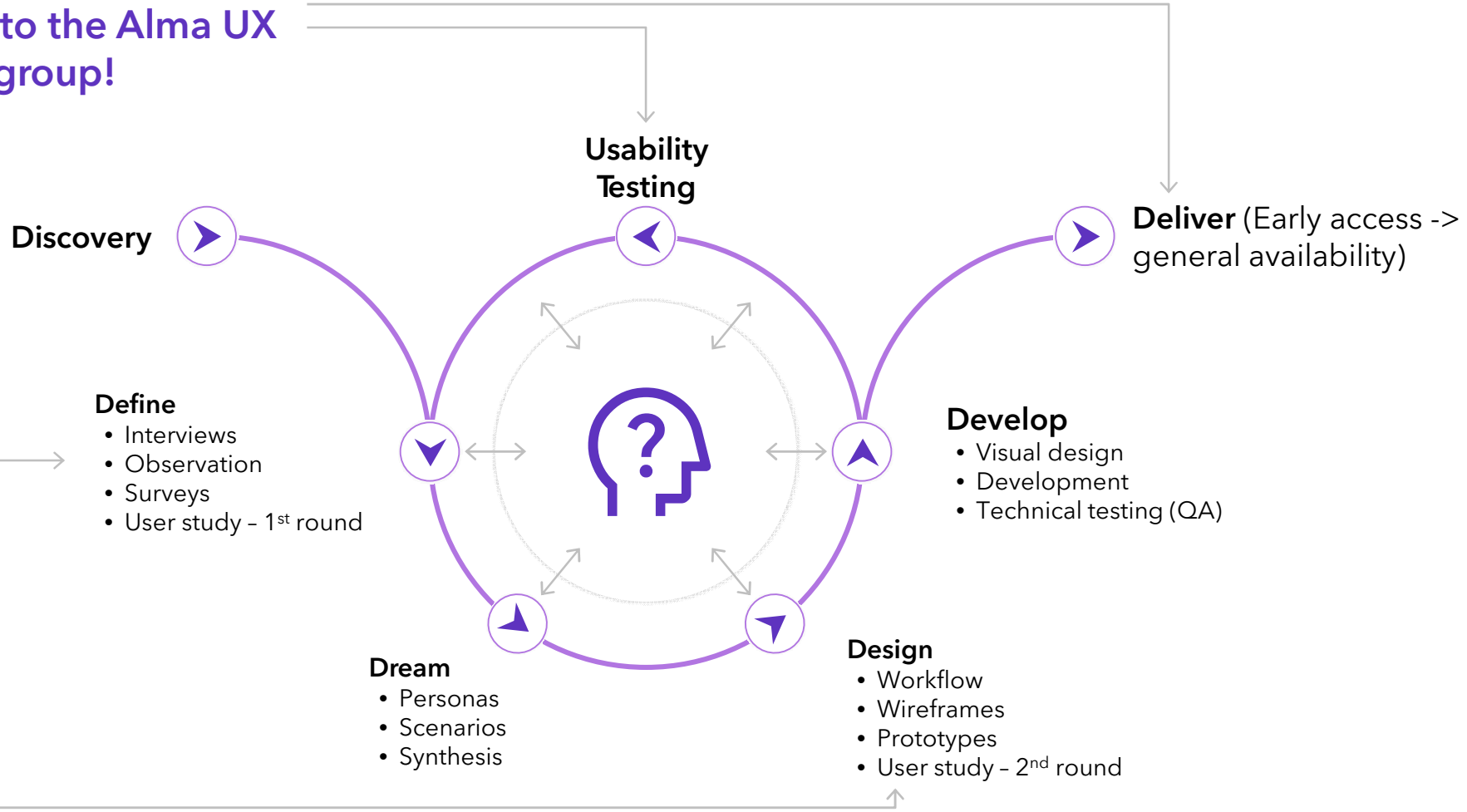
New PO Line Interface – Research Process

Research Process – UX Methodology

Special thanks to the Alma UX focus group!



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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

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New PO Line Interface – Live Demo

Existing PO Line Task List Workflow – Demo

Env 01

Env 02

Env 03

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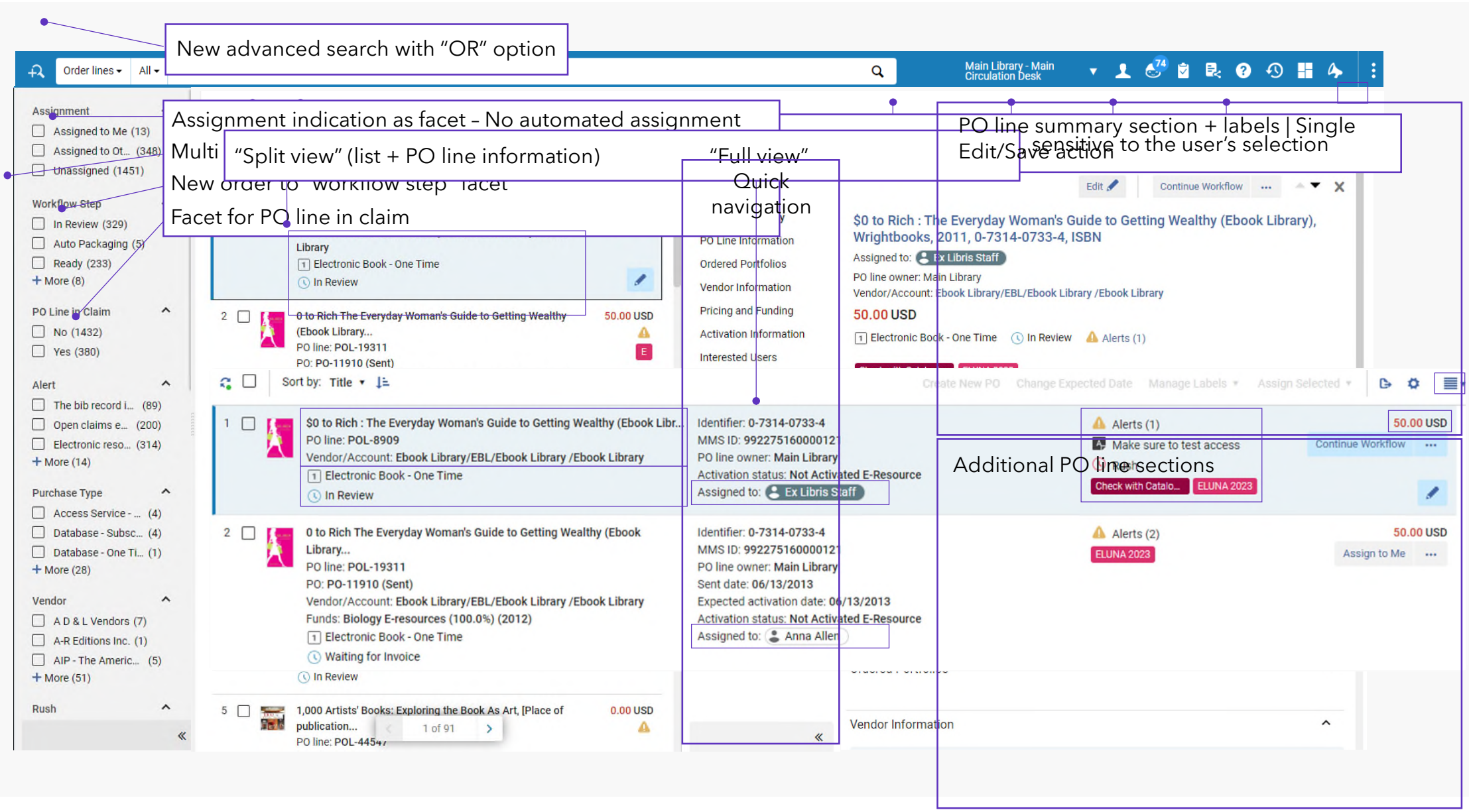
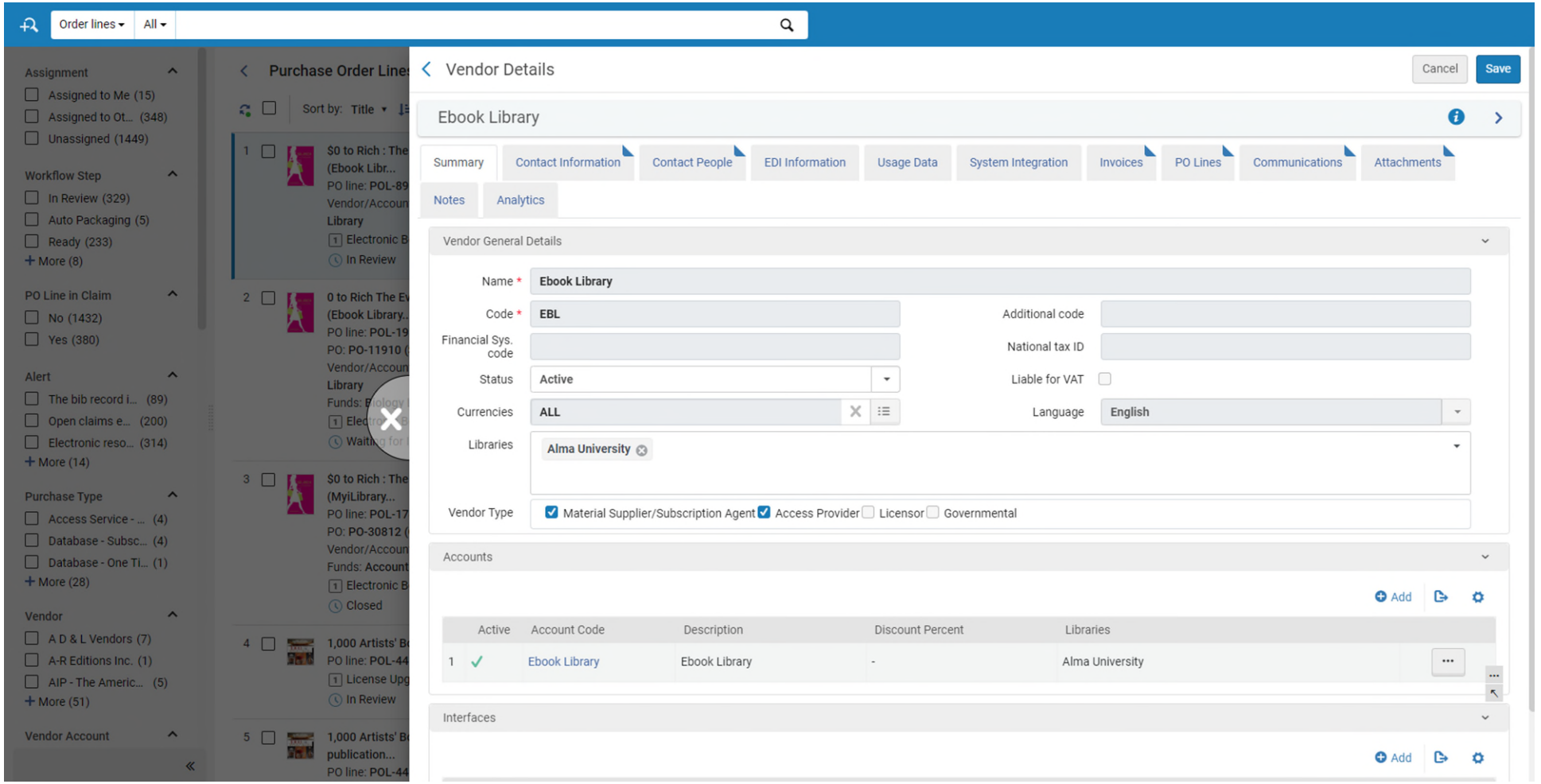
New PO Line Interface – How it Works


New advanced search with “OR” option
Assignment indication as facet – No automated assignment
Multi
New order to “workflow step” facet
Facet for PO line in claim
“Split view” (list + PO line information)
“Full view”
Quick navigation
PO line summary section + labels | Single Edit/Save action
sensitive to the user’s selection
Additional PO line sections
Order lines
All
Main Library - Main Circulation Desk
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)
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
Sort by: Title
1 of 91
PO Line Information
Ordered Portfolios
Vendor Information
Pricing and Funding
Activation Information
Interested Users
Edit
Continue Workflow
$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)
Create New PO
Change Expected Date
Manage Labels
Assign Selected
Make sure to test access
Check with Catalo...
ELUNA 2023
Alerts (2)
Assign to Me
Vendor Information
$0 to Rich : The Everyday Woman's Guide to Getting Wealthy (Ebook Libr...
PO line: POL-8909
Identifier: 0-7314-0733-4
PO line owner: Main Library
Activation status: Not Activated E-Resource
Assigned to: Ex Libris Staff
0 to Rich The Everyday Woman's Guide to Getting Wealthy (Ebook Library...
PO line: POL-19311
PO: PO-11910 (Sent)
Vendor/Account: Ebook Library/EBL/Ebook Library /Ebook Library
Funds: Biology E-resources (100.0%) (2012)
Waiting for Invoice
Sent date: 06/13/2013
Expected activation date: 06/13/2013
Assigned to: Anna Allen
1,000 Artists' Books: Exploring the Book As Art, [Place of publication...
0.00 USD

Slide Panel to Overlay Origin Point



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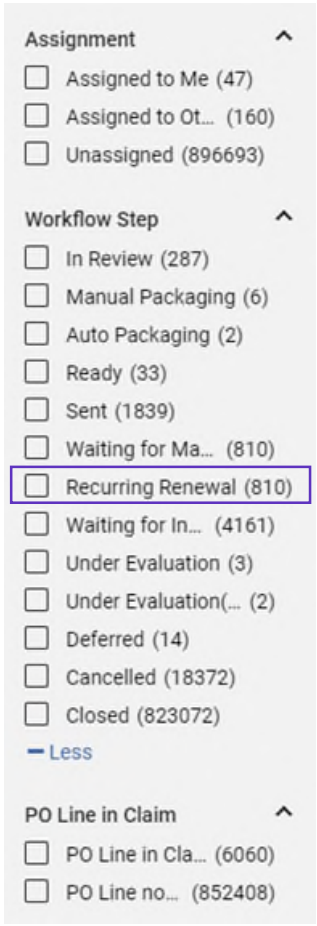
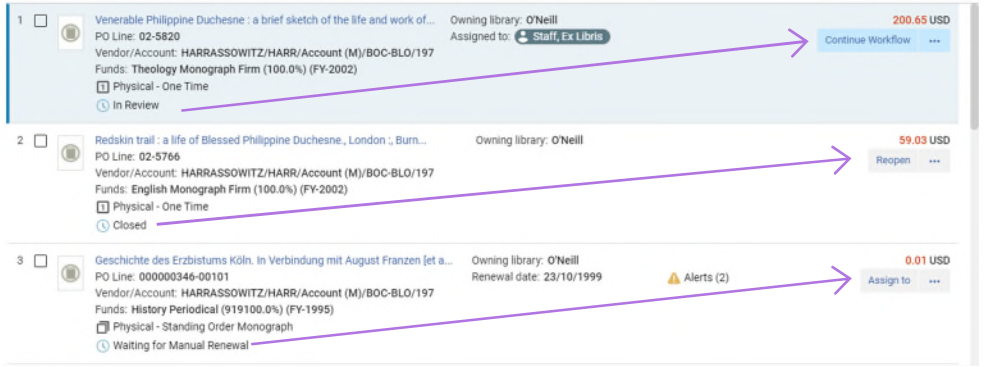
Additional Functionalities

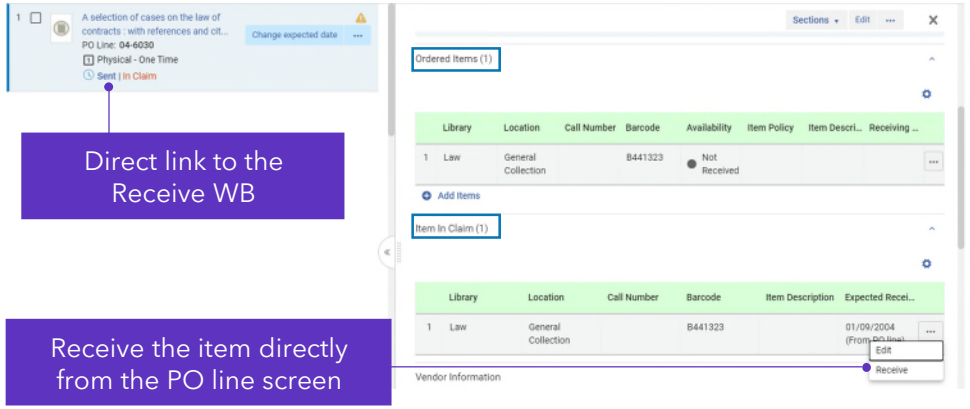
Naming and ordering



Main actions according to the PO line's workflow step



Enhanced claim and receive functions



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New PO Line Interface – Questions? Ask Us Anything!

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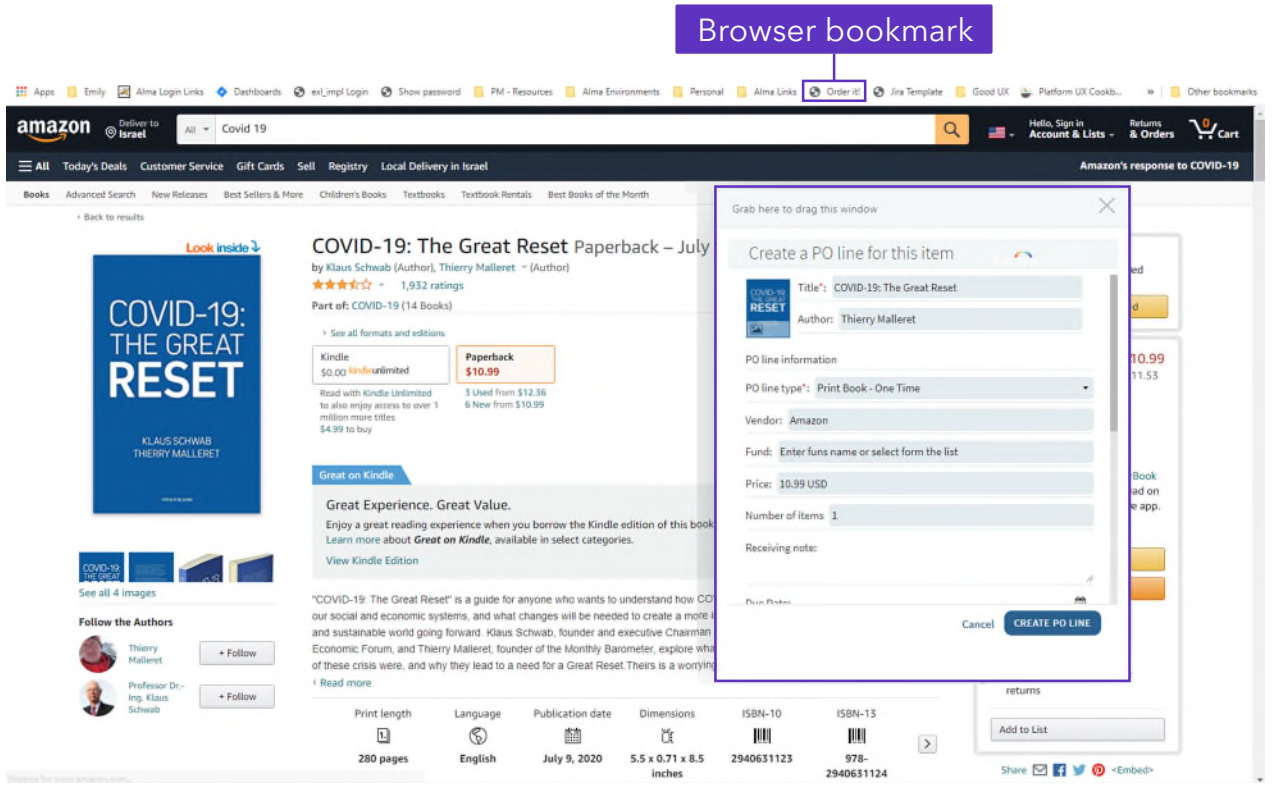
Acquisitions – Future Enhancements

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



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

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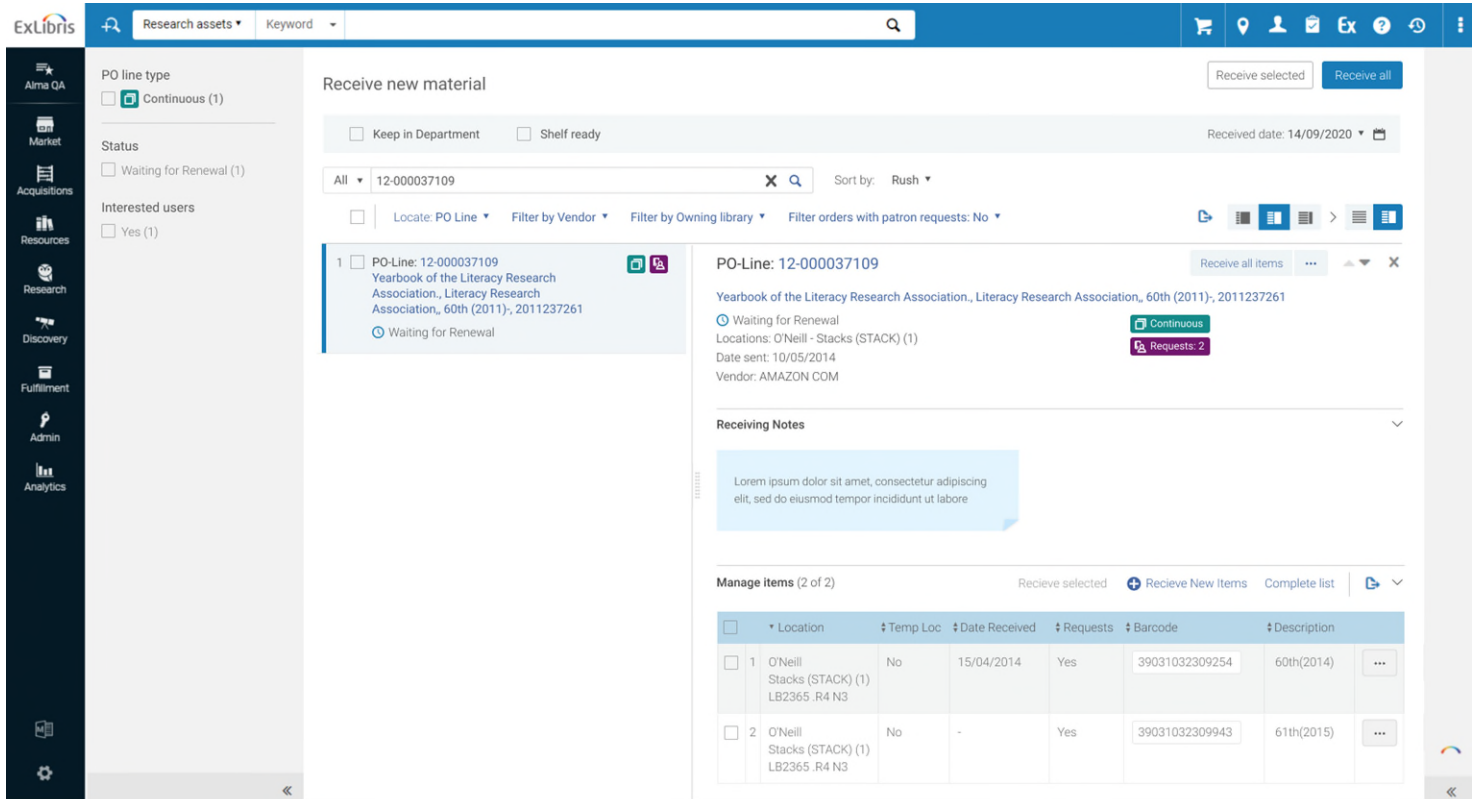
Future Enhancements

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…

Current Status: During 2022/23 we ran 2 user studies with 7 institutions and 15 users – **start development in 2024**

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Future Enhancements – Questions? Ask Me Anything!

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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**

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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]**

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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

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