E-Resource Management:
Where Does it Hurt?
Diagnosing Critical and Chronic Pain Points

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Agenda

- Alma E-resource Management pain points that could be addressed through the continuous improvement process, such as the activation wizard, task lists, and electronic resource editors.

- We also hope there is time to brainstorm ideas to resolve some of these issues.

- Target Audience: People who have worked for at least 1 year with Alma in the relevant area.

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Details needed

- The name of the person asking
- Institution name
- Who is it happening to?
- The specific workflow
- Problem
- What do you want to achieve?

Questions

- Can you indicate for which actions you are waiting the most?

- In which Alma workflows you feel you are making repetitive tasks, steps, filling redundant fields or forms?

- What kind of daily routine you have that you feel you can improve significantly with a few changes in Alma workflow?

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Examples of know pain points

- It would be very helpful if the faceting for a resource search included a facet for inventory type the way the old UI did so as, for example, to identify physical records that may have overlain electronic records in an import job, or to filter out older records that may have both physical and electronic holdings attached to physical record.

- Not enough distinction between activated and not activated portfolios - this might be helped with a different color theme?

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Examples of know pain points

- Provide better faceting in portfolio activation screens. The ability to filter by activation status is present in both SFX and Serials Solutions and is invaluable for clean-up tasks. More consistency would be good too--e.g. the electronic service editor portfolio search defaults to ISBN while the activation screen defaults to Title. In general the new UI is attractive, less eye-straining, and better laid out, so it's very much on the right track, but it still needs a lot of attention in terms of the amount of scrolling and unnecessary clicking, areas where clicking back arrow/exit/cancel leads to an endless loop, and lists presented in unsortable random order.

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Examples of know pain points – Portfolio

- The urls in some standalones have changed recently (for example: ebrary to proquest). It is impossible to just open the portfolio and change the url. The whole portfolio must be deleted, which you can't do from the MD editor. We then make a whole new portfolio. It would greatly improve our work speed to be able to just replace the old url, or at least, be able to delete the portfolio from the MD editor.

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