

The background of the slide is a panoramic view of Prague, Czech Republic, showing the dense red-tiled roofs of the city and the prominent Gothic spires of the Church of Our Lady before Týn in the center.

**Acquisitions:  
Where Does it Hurt?  
Diagnosing Critical and Chronic Pain Points**

Bettina Kaldenberg, Universitätsbibliothek Mannheim

Itai Veltzman, Ex Libris

# Agenda

- Alma acquisitions pain points that could be addressed through the continuous improvement process, including those involving creating purchase orders, receiving physical items, managing claims, and managing invoices.
- 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.

## 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?

## Examples of know pain points

- We have issues with local currency not being imported into the item record when you click allocate when receiving an item.
- We require for reporting puposes the display of the local price in addition to the foreign currency on the invoice lines tab and in the POL summary tabs

## Examples of know pain points

- Have replacement cost automatically populated in item records when receiving on continuous PO lines. It would be great if the cost was populated when the item was received.
- When creating a purchase order line, when I use the enter button after I put a price in, the window bounces with a RED incomplete notice due to not having entered the FUND yet

## Examples of know pain points

- When working on the POL Interested Users tab, please allow us to use a search bar to locate patrons with common names rather than flip through hundreds of pages. The quick search isn't always helpful so when I open up the list to search for the patron, the search bar that is stickied at top only works for library titles.

## Examples of know pain points

- Also, when going to the FUND, the ADD FUND button way at the bottom rarely shows up on my screen, so again, i have to go the scroll bar with my mouse. Too much space being used on the screens for such little information. TOO MANY CLICKS, NOT BEING ABLE TO SCROLL WITH PAGE DOWN OR ARROW KEYS.



## Examples of know pain points

- Why is it that every time data is entered into an acquisitions field (POL or invoice) dealing with money amounts that the entire page must be refreshed AND the cursor then moves to the top of the browser page?! Even if the page must be refreshed for that data field to be updated, why cannot the cursor be relocated to its original position?



IGELU 2018  
P R A G U E

[bettina.kaldenberg@bib.uni-mannheim.de](mailto:bettina.kaldenberg@bib.uni-mannheim.de)  
[itai.veltzman@exlibrisgroup.com](mailto:itai.veltzman@exlibrisgroup.com)

ExLibris<sup>®</sup>  
a ProQuest Company