Easier to Use with Greater Efficiency

The Alma UX Improvement Journey

Itai Veltzman, Alma Product Manager
The continuous improvement process
How the Alma Working Group & UX Customer Group are working with Ex Libris on the UX process

Workflows pain points
Identified specific areas that are routinely used by many customers and improve them

New systemwide tools
New UI features improving navigation and other aspects across all Alma screens

Metadata Editor new UI and improved workflows
An improved metadata editing user experience especially for editing workflows and interaction with other Alma screens
The Continuous Improvement Process
Early days

Monthly
release fixes here and there

Pain points
spreadsheet approach terminated

Awareness
of UX issues from the beginning of Alma

2015
attempt at working with six institutions

Alma UX Workshop
at February 2017, UX experts, PMs, & engineers worked with UX customer group
UX Customer Group Participants
The continues improvement goals

Improved efficiency

Easy to use
Workflows pain points
Workflows pain points – Focus areas

Physical Resource Management
Physical Item Edit

Electronic Resource Management
Activation Task List

Acquisition
Purchase order lines management,
Invoices management

Fulfillment
Information on user
Meet the E-resources team.

Up until today the head of department was using a shared spreadsheet and emails in order to distribute the various tasks in order to handle the E-activation for collections and portfolios in Alma.
"Sub-Task" concept

In order to assist Alma users to manage “non-linear” activation tasks which involves multiple users, each task can be broken down into multiple sub-tasks. Go to the next slide to see specific details.
New systemwide tools
## New systemwide tools

<table>
<thead>
<tr>
<th>Tool</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feedback messages</td>
<td>Released</td>
</tr>
<tr>
<td>My Activity Center</td>
<td>Recent documents</td>
</tr>
<tr>
<td>Multi facets selection</td>
<td>In analysis</td>
</tr>
<tr>
<td>Improve configuration</td>
<td>In mapping and code tables</td>
</tr>
<tr>
<td>Improvement in Menu</td>
<td>In design</td>
</tr>
<tr>
<td>Navigation tree</td>
<td>Initially for inventory</td>
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*In analysis*
Feedback Messages

• Rational
  • Adding new types – warning and success
  • Address the use case of missing mandatory fields
  • Improve workflow by providing next action
  • Improve feedback text
My Activity Center - Recent documents
Metadata Editor new UI and improved workflows
Metadata Editor high-level deployment plan

**Step 1 - Early adopter**
UX Customer Group members testing on development demo environment

**Step 2 – Testing with real data**
UX Customer Group members testing on sandbox and production environment

**Step 3 – Wider audience & limited functionality**
All users will be able to use record editing in the new metadata editor on sandbox and production environment

**Step 4 – All functionality**
All Alma users will be able to use all functionality of the new metadata editor on sandbox and production environment

**Step 5 – New as the default**
All Alma users will use as a default the new metadata editor on sandbox and production environment

**Step 6 – Old is out**
All Alma users will use only the new metadata editor on sandbox and production environment
An intuitive UI to expertise: original catalogers, copy catalogers, and light catalogers
Detailed record and editing information, indicating metadata assignments, attached notes, unsaved information, and more.
Robust record editing tools, including color coding, split screens, searching and browsing
Editing areas are maximized for convenience - and can be extended even further with collapsible interface elements.
Dynamic menus and navigation tools, clearly suited for each working area.
Always on: Metadata Editor runs in the background for quick access and easy updating.

A record can be put into the editing queue directly from Alma's staff-level search features.
THANK YOU!

Itai.Veltzman@exlibrisgroup.com