

# Alma UX: POLine tasklist?

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●●●●● *Webinar 31/10/2023*

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**1 /** Feature Roll-out

**2 /** UX Principles

**3 /** Demo

**4 /** Vragen?



# Feature Phased Roll-out (Back-end)

< Feature Rollout Preferences (1 - 2 of 2) ☰ 🔵

- 1 New Analytics
  - Category Analytics
    - Turned on
- 2 New Unified PO Line Task List
  - Category Acquisition
    - Turned off

### About

Phases

User Statistics

User Status List (9)

#### New Unified PO Line Task List

Category Acquisition

Description **The PO Line search result screens and task lists were updated and redesigned for better usability, performance, productivity and overall user experience. For more information see (s)New Unified PO Line List.**

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Phases ▲ ▼ ✕

Use this form to define whether the new layout is turned on OR turned off for all users

**Off by default (Default from August 2023 until October 2023)**  
Users may individually turn on the new layout

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User Statistics ▲

268  
USERS

9 (3.36%) Users in turn on mode

259 (96.64%) Users in turn off mode

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User Status List (1 - 9 of 9) ▲

9 Users who selected differently than the institution preference

### Feature Rollout Configuration

- New Analytics  
Category Analytics
- New Resource Sharing Task Lists  
Category Resource Sharing
- New Unified PO Line Task List  
Category Acquisition

### New Analytics

Category Analytics

Description **A new analytics User Interface along with several new features, such as new and more flexible scheduling system.**

Turn on new layout (Full Activation - August 2023 Release)

#### Additional Information

New view

Item #	Name	Type	Creator	Creation Date	Modification Date	Actions
1	AAA - Funds Burn Down	Dashboard	Staff, Ex Libris	11/08/2021	13/04/2022	Report in Favorites, View full report
2	ABB - COUNTER Reports Num of Unique Platforms Loaded- Graph	Dashboard	Staff, Ex Libris	13/04/2022	13/04/2022	Add To Favorites, View full report
3	API Usage	Dashboard	Staff, Ex Libris	13/04/2022	13/04/2022	Add To Favorites, View full report
4	API Usage	Dashboard	Staff, Ex Libris	25/04/2022	25/04/2022	Add To Favorites, View full report
5	API Usage	Dashboard	Staff, Ex Libris	10/04/2022	10/04/2022	Add To Favorites, View full report
6	Acquisitions - Fund Reports	Report	Staff, Ex Libris	11/08/2021	07/04/2022	Report in Favorites, View full report
7	Acquisitions Dashboard	Dashboard	Staff, Ex Libris	11/08/2021	11/08/2021	Add To Favorites, View full report
8	Analytics Objects Dashboard (Ex Libris)	Dashboard	Staff, Ex Libris	-	-	Add To Favorites, View full report

- **Sandbox:** twee weken voor de officiële uitrol wordt een nieuwe functie beschikbaar gesteld aan instellingen voor voorlopige testdoeleinden in de sandbox-omgeving (zie Alma Sandbox-omgevingen).
- **Fase 1 (standaard uitgeschakeld):** De officiële uitrol van de nieuwe functie – fase 1 – vindt plaats als onderdeel van een driemaandelijke release. Tijdens deze fase is de nieuwe functie niet standaard geactiveerd, maar kan deze worden ingeschakeld door instellingen en individuele gebruikers als ze dat willen.
- **Fase 2 (standaard ingeschakeld):** Enige tijd na de officiële lay-out, als onderdeel van een latere driemaandelijke release, begint fase 2 van de uitrol. Tijdens deze fase is de nieuwe functie standaard geactiveerd, maar instellingen en individuele gebruikers kunnen deze desgewenst uitschakelen.
- **Volledige implementatie:** de laatste fase van een uitrol vindt plaats als onderdeel van een latere driemaandelijke release. In deze release is de nieuwe functie voor alle gebruikers geïmplementeerd. Noch instellingen, noch individuele gebruikers kunnen zich vanaf dit moment afmelden.



# Feature phased Roll-out: libis.helpdocs

**KU LEUVEN** | All titles ▾ | Keywords ▾ | [Home] [Search] | [Location] [User] [Calendar 25] [Mail] [Help] [Refresh] [Grid] [Share] [More]

Design Analytics

Welcome, Administrator, Alma | 16/10/2023 [+]

**UPDATE** Opname links Webinar reeks: beheer E-bronnen - Meer info met betrekking tot de webinars (+ opname links) kunnen jullie terugvinden op [libis helpdocs!](#) [X]

**UITNODIGING:** Webinar "Nieuwe POLine list" (feature rollout) - Meer info met betrekking tot de webinar kan je terugvinden op [libis helpdocs!](#) [X]

- Alma Production
- Acquisitions
- Resources
- Discovery

Ticket indienen

## Kennisdatabase

Nieuws & Release Notes ▸ [Alma Feature Roll-out](#) [Zoeken]

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# Alma Feature Roll-out

Inhoud

- [Inleiding](#)
- [Alma Feature Roll-out](#)
- [Huidige Features](#)
- [Features \(Archief\)](#)

**RECENT BEKEKEN ARTIKELN**

- Basisopleidingen Alma
- Nieuws & Release Notes - Home

## Werven in de verschillende 'domeinen' binnen Alma

- Manage Sets (DONE)
- Resource Sharing workbenches/tasklists (DONE)
- **Analytics (ON by DEFAULT) – Full Activation November release!**
- **Unified PO line list (bestellijst) / Acquisition (OFF by DEFAULT)**  
-> ON by Default – November release!
- Werken met lijsten van bib records, holdings, items / Resource Management
- Circulation desk redesign / Fulfillment



# Gedeelde doelen voor de werven

(Zie presentatie LIBISnet Gebruikersdag 2023)

- Schermen overzichtelijker maken
- Sneller tot precieze resultaten komen door beter zoeken en filteren
- Heen- en weerklikken tussen schermen vermijden
- Snellere bewerkingen
- Meer mogelijkheden rond werkopvolging



Gedeelde doelen → zelfde ingrepen/oplossingen

- “Op maat” configuratie van de pagina
- Weg met de tabbladen
- Betere werking van de facets
- Side-by-side, slide-out & full page schermen
- Bulkbewerking ook in lange lijsten
- Snelle bewerkingen op hoofdscherm
- Labels en notes





# “Op maat” configuratie van de pagina!

The screenshot displays the 'Sections Customization' and 'Records Customization' panels in the LIBISnet interface. A green arrow points from the 'Records Customization' panel to the 'Customization' panel.

**Sections Customization Panel:**

- Choose the Order of Record Sections:**
  - PO Line Summary
  - Reporting Codes
  - PO Line Information
  - Ordered Items
  - Holdings for Ordered Items
  - Ordered Portfolios
  - Ordered Collections
  - Ordered Representations
  - Items in Claim
  - PO Line in Claim
  - Vendor Information
  - Pricing and Funding
  - Receiving Information
  - Activation Information
  - Renewal Information
  - Interested Users
  - Notes
- Hide Sections:**

Drag sections here to hide them

**Records Customization Panel:**

- Main Columns:**
  - First Column:** Use this column for primary data. It will always be displayed.
    - Title
    - PO line
    - PO
    - Vendor/Account
    - Funds
    - PO line creation date
    - PO line modification date
    - PO line type
    - Workflow step
  - Second Column:** Use this column for secondary data. It will not be displayed in narrow list.
    - Identifier
    - MMS ID
    - PO line owner
    - Copies
    - Sent date
    - Expected delivery
    - Expected activation date
    - Activation status
    - License status
    - Renewal date
    - Assigned to
    - 1st reporting code
    - 2nd reporting code
    - 3rd reporting code
    - 4th reporting code
    - 5th reporting code
- Badges and Icons:**
  - Third Column:** This column contains badges and indications. It will be displayed as icons in narrow lists.
    - Alerts
    - Invoice Lines
    - Attachments
    - Interested users
    - Receiving/Activation note
    - Labels
    - Note to vendor
    - Rush

**Customization Panel:**

- User Customization:**
  - Sections Customization (Customized)
  - Records Customization



# “Op maat” configuratie van de pagina!

The screenshot displays the LIBISnet interface for a Purchase Order (PO) record. The main record shows the following details:

- Title: <>, Amsterdam Amsterdam, Pegasus, 2013, Slavische Cahier s., 9789061433811, ISBN
- PO line owner: KU Leuven Libraries Artes Erasmushuis
- Vendor/Account: Pegasus/4410024
- Funds: 5GO-COLAR1-P9021 (100.0%)
- Price: 12.50 EUR
- Item: 1 Print Book - One Time
- Label: OWG Documentverwering

The 'Records Customization' dialog box is open, allowing for configuration of the record's display. It is divided into three columns:

- Main Columns:** Used for primary data, always displayed. Includes Title, PO line, PO, Vendor/Account, Funds, PO line creation date, PO line modification date, PO line type, and Workflow step.
- Second Column:** Used for secondary data, displayed in narrow lists. Includes Identifier, MMS ID, PO line owner, Copies, Sent date, Expected delivery, Expected activation date, Activation status, License status, Renewal date, and Assigned to.
- Badges and Icons:** Used for alerts and indications in narrow lists. Includes Alerts, Invoice Lines, Attachments, Interested users, Receiving/Activation note, Labels, Note to vendor, and Rush.

The 'Customization' panel on the right shows 'User Customization' with options for 'Sections Customization (Customized)' and 'Records Customization'.

# Weg met de tabbladen: PO line list

Facets << Purchase Order Lines in Review (1 - 3 of 3)

Alert

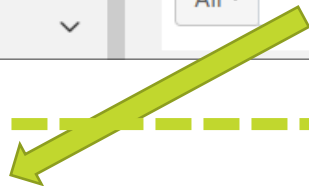
Items already exist ... (2)

At least one of the r... (3)

Purchase Type

Assigned to Me Unassigned Assigned to Others

All



Assignment

Assigned to Me (1)

Assigned to Ot... (148)

Unassigned (272471)

Workflow Step

In Review (170)

Manual Packagi... (67)

Auto-Packaging (92)

< Purchase Order Lines (1 - 20 of 272,620)

Sort by: Title

Create New PO Change Expected Date Manage Labels  Assi

1 <input type="checkbox"/>		<., Amsterdam Amsterdam, Pegasus, 2013, Slavische Cahiers,, 978906143...	Identifier: 9789061433811 MMS ID: 9992643808801488 PO line: POL-122459 PO: PO-2199828 (Closed) Vendor/Account: Pegasus/4410024716/Artes/A rtes/u0037847	PO line owner: KU Leuven Libraries Artes Erasmushuis Copies: KU Leuven Libraries Artes Erasmushuis - LSTL: Slavonic and East European Studies (open	 Alerts (3)
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- Gebruik van facets is een snelle manier om uit lange lijsten de juiste resultaten uit te halen
- Facets worden overal beschikbaar in Alma
- Werking wordt verbeterd
  - Filtermogelijkheden worden samengebracht in facet-kolom (weg met tabs)
  - Mogelijkheid om meerdere facets in 1 keer toe te passen



# Meerdere facets in 1 keer selecteren

- Nieuw: meerdere facets selecteren  
→ Apply
  - alle filters in 1 keer toegepast
  - gekozen filters boven facetlijst

→ Sneller resultaat

→ Duidelijker welke filters ingeschakeld zijn en welke nog kunnen ingeschakeld worden

Assignment ^  
 Assigned to Me (1)  
 Assigned to Ot... (148)  
 Unassigned (272475)

Workflow Step ^  
 In Review (170)  
 Manual Packagi... (67)  
 Auto Packaging (87)  
[+ More \(7\)](#)

PO Line in Claim ^  
 No (270028)  
 Yes (2596)

Alert ^  
 The bib record ... (352)  
 Open claims ex... (206)  
 Electronic reso... (290)  
 Not fully recei... (3805)  
 Subscription i... (4518)  
 Mandatory info... (277)  
 Items alrea... (108854)

Apply X

Refine by ^

Alert:  
Items already exist in the repository X

Assignment:  
Assigned to Others X

Purchase Type:  
Print Book - One Time X

Workflow Step: In Review X

[Clear all](#)

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Assignment ^  
 Assigned to Oth... (58)

Workflow Step ^  
 In Review (58)

PO Line in Claim ^  
 No (58)

- Probleem:

- je hebt een lijst in Alma (records, PO lines, requests, ...)
- je wil uitgebreide informatie bekijken van 1 van de resultaten
  - preview van een bib record uit een zoekresultatenlijst
  - details van een PO Line
  - uitgebreide informatie van een request

➔ Klikken leidt altijd naar een volgend scherm

➔ Om terug te keren naar lijst altijd *back* (en niet met de browser!)



Design Analytics

Find specific facet

Assignment

- Assigned to Me (1)
- Assigned to Oth... (152)
- Unassigned (276446)

Workflow Step

- In Review (121)
- Manual Packaging (95)
- Auto Packaging (39)
- + More (8)

PO Line in Claim

- No (274100)
- Yes (2499)

Alert

- The bib record is... (352)
- Open claims exi... (209)
- Electronic resour... (372)
- + More (12)

Purchase Type

- Access Service - ... (51)
- Database Service - ... (3)
- Electronic Collec... (283)
- + More (25)

Vendor

**Purchase Order Lines (1 - 20 of 276,599)**

Sort by: Title

Create New PO Change Expected Date Manage Labels Assign Selected

Line	Description	Identifier	Amount	Actions
1	<., Amsterdam Amsterdam, Pegasus, 2013, Slavische Cahiers,, 978906143...	Identifier: 9789061433811 MMS ID: 9992643808801488 Sent date: 08/07/2021 Expected delivery: 05/10/2021	12.50 EUR	Reopen ...
2	0123456789 numbers in graphic design., London, Laurence King, 2012., 9...	Identifier: 978-1-78067-003-4 MMS ID: 9988214160101488 Sent date: 06/11/2013 Expected delivery: 22/10/2014 Renewal date: 01/07/2015	40.00 EUR	Reopen ...
3	1.000 questions de français des quiz pour tester et améliorer votre fr...	Identifier: 9782321015116 MMS ID: 9992588407101488 Sent date: 08/03/2021 Expected delivery: 06/06/2021	3.36 EUR	Reopen ...
4	1+1=3? over samenwerkingsverbanden in de culturele sector., Leuven, La...	Identifier: 978-90-209-8688-4 MMS ID: 9974799280101488 Sent date: 11/12/2009 Expected delivery: 11/03/2010 Renewal date: 01/07/2015	16.96 EUR	Reopen ...
5	1-2-3 calligraphy! letters and projects for beginners and beyond., Lon...	Identifier: 978-1-4027-1839-7 MMS ID: 9991251050101488 Sent date: 24/06/2014	25.00 EUR	Reopen ...

1 of 13830

Sections

Reopen Change Bib Reference Relink Save as Template

<., Amsterdam Amsterdam, Pegasus, 2013, Slavische Cahiers,, 9789061433811, ISBN

PO line owner: -

12.50 EUR

PO line: POL-122459 / PO: PO-2199828

Reporting Codes

1st reporting code: Monograph (print)

PO Line Information

MMS ID: 9992643808801488  
Identifier: 9789061433811  
Acquisition method: \*-  
Invoice status: -

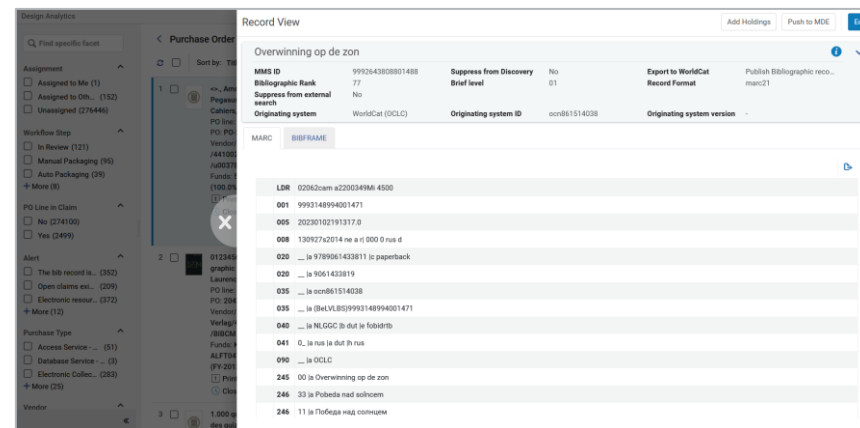
Material type: -  
Sent date: 08/07/2021  
Additional PO line reference field: -  
Associated PO lines: -  
Source type: Manual Entry

- Manual packaging
- Cancellation restriction

# Slide-out schermen (Full page)

- Een klik leidt niet meer naar een volgend scherm maar laat een scherm over de lijst schuiven

- voldoende breed om genoeg gegevens te tonen
- vaak ook bewerkbaar in het slide-out scherm
- eenvoudig te sluiten



The screenshot shows a library system interface. On the left, there is a 'Purchase Order' slide-out panel with various filters and options. The main area displays a 'Record View' for a specific record, showing details like MMS ID, Bibliographic Rank, and Suppress from external search. Below this, a MARC record is displayed in a table format.

MARC	BIBFRAME
LDR	02962cam a2200349M 4500
001	9993148994001471
005	20230102191317.0
008	1309272014 ne a r 000 0 rus d
020	... ja 9789061433811 (c) paperback
020	... ja 9061433819
035	... ja ocn861514038
035	... ja (R4VLIS)9993148994001471
040	... ja NLGGC (c) dut (c) folio/drb
041	0... ja rus (c) dut (c) rus
090	... ja OCLC
245	00 ja Overwinning op de zon
246	33 ja Pobeda nad solncem
246	11 ja Побѣда над солнцем

➔ Ook hier: snellere weergave en snellere terugkeer naar lijst

- Op alle lijsten wordt het mogelijk om meerdere items te selecteren – selectievakjes voor elk resultaat
  - Selecties worden ook onthouden wanneer je (in lange lijsten) op meerdere pagina's resultaten selecteert
  - Boven de lijst worden dan de mogelijke bulkbewerkingen zichtbaar
- Alle relevante records selecteren
- In 1 keer de ingreep uitvoeren

← Purchase Order Lines (1 - 20 of 276,601)

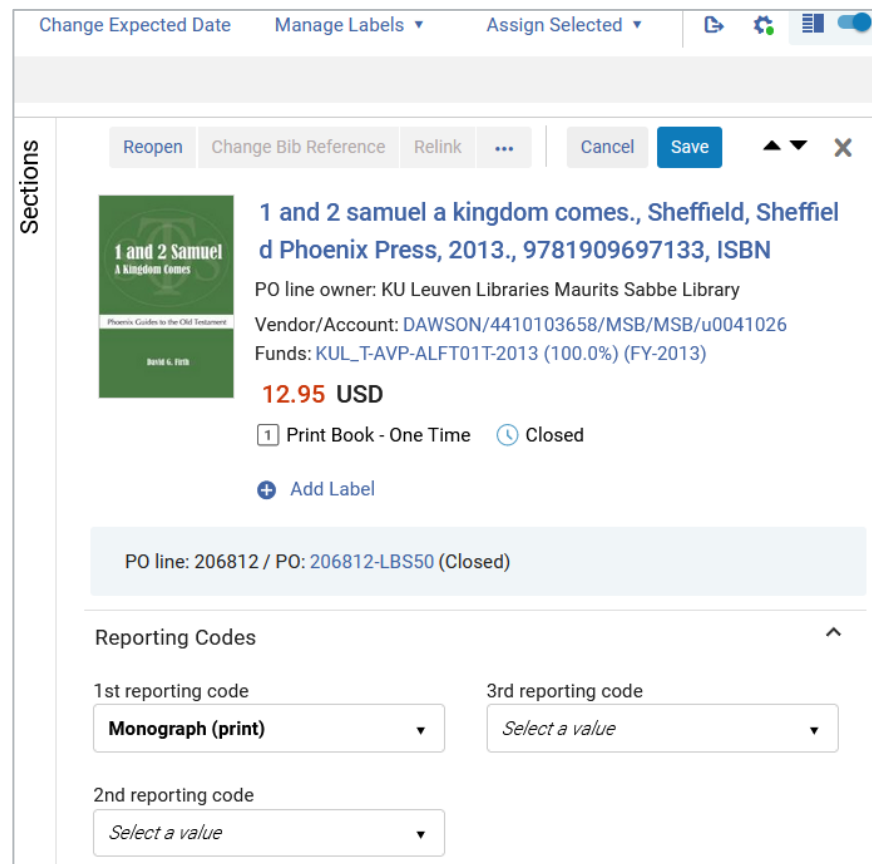
Create New PO Change Expected Date Manage Labels ▾ Assign Selected ▾

20 rows selected Clear Selection

1	<input checked="" type="checkbox"/>	<p>&lt;&gt;, Amsterdam Amsterdam, Pegasus, 2013, Slavische Cahiers,, 978906143...</p> <p>PO line: POL-122459 PO: PO-2199828 (Closed) Vendor/Account: Pegasus /4410024716/Artes/Artes /u0037847 Funds: 5GO-COLAR1-P9021 (100.0%) (FY-2021)</p> <p><input type="checkbox"/> Print Book - One Time <input type="checkbox"/> Closed</p>	<p>Identifier: 9789061433811 MMS ID: 9992643808801488 PO line owner: KU Leuven Libraries Artes Erasmushuis Copies: KU Leuven Libraries Artes Erasmushuis - LSTL: Slavonic and East European Studies (open shelf fourth floor) (1) Sent date: 08/07/2021 Expected delivery: 05/10/2021 <span style="color: orange;">⚠ Alerts (3)</span> <span style="background-color: orange; color: white; padding: 2px;">OWG Documentve...</span></p>	<p style="color: orange;">12.50 EUR</p> <p>Reopen ...</p>	<div style="display: flex; align-items: center;"> <div style="writing-mode: vertical-rl; transform: rotate(180deg); font-weight: bold; margin-right: 5px;">Sections</div> <div style="flex-grow: 1;"> <div style="display: flex; justify-content: space-between; align-items: center; margin-bottom: 5px;"> <span>Reopen</span> <span>Change Bib Reference</span> <span>Relink</span> <span>...</span> <span>Edit </span> </div> <div style="display: flex; align-items: center;"> <div style="margin-left: 10px;"> <p><b>1 and 2 samuel a kingdom comes., Sheffield, Sheffield d Phoenix Press, 2013., 9781909697133, ISBN</b></p> <p>PO line owner: KU Leuven Libraries Maurits Sabbe Library Vendor/Account: DAWSON/4410103658/MSB/MSB/u0041026 Funds: KUL_T-AVP-ALFT01T-2013 (100.0%) (FY-2013)</p> <p style="color: orange;">12.95 USD</p> <p><input type="checkbox"/> Print Book - One Time <input type="checkbox"/> Closed</p> <p><span style="color: gray;">+</span> Add Label</p> </div> </div> <div style="margin-top: 10px; background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc;"> <p>PO line: 206812 / PO: 206812-LBS50 (Closed)</p> </div> <div style="margin-top: 10px;"> <p>Reporting Codes <span style="float: right;">^</span></p> <div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc; margin-top: 5px;"> <p>1st reporting code: Monograph (print)</p> </div> </div> </div> </div>
2	<input checked="" type="checkbox"/>	<p>0123456789 numbers in graphic design., London, Laurence King, 2012., 9...</p> <p>PO line: 204269 PO: 204269-LBS50 (Closed) Vendor/Account: Stern Verlag/4410123922/BIRCM</p>	<p>Identifier: 978-1-78067-003-4 MMS ID: 9988214160101488 PO line owner: KU Leuven Libraries Artes University Library Copies: KU Leuven Libraries Special Collections - BCMAG-</p>	<p style="color: orange;">40.00 EUR</p> <p>Reopen ...</p>	

- In het rechtse detailscherm mogelijkheid om snelle aanpassingen te doen
  - detailscherm openen in bewerkingsmodus (vb. PO line list)
  - bepaalde velden onmiddellijk bewerkbaar en wijzigingen automatisch opgeslagen

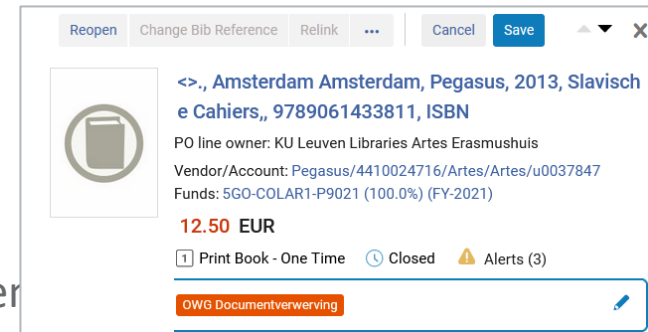
➔ Zelfde doel: het gaat sneller en je blijft bij de lijst



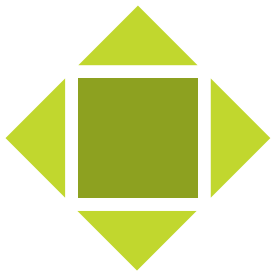
The screenshot displays the inline editing interface for a book record. At the top, there are navigation options: "Change Expected Date", "Manage Labels", and "Assign Selected". Below this, a toolbar contains buttons for "Reopen", "Change Bib Reference", "Relink", "Cancel", and "Save". The main content area shows the book cover for "1 and 2 Samuel: A Kingdom Comes" by David C. Fork. The title is "1 and 2 samuel a kingdom comes., Sheffield, Sheffield d Phoenix Press, 2013., 9781909697133, ISBN". The PO line owner is "KU Leuven Libraries Maurits Sabbe Library". The vendor/account is "DAWSON/4410103658/MSB/MSB/u0041026" and the funds are "KUL\_T-AVP-ALFT01T-2013 (100.0%) (FY-2013)". The price is "12.95 USD". There is a "Print Book - One Time" button and a "Closed" status indicator. Below this, there is an "Add Label" button. At the bottom, there is a section for "Reporting Codes" with three dropdown menus: "1st reporting code" (set to "Monograph (print)"), "2nd reporting code" (set to "Select a value"), and "3rd reporting code" (set to "Select a value").

- Notes bij PO lines
  - nu weggestopt op een apart tabblad
  - opgenomen als aparte section in detailscherm

- Labels (nieuw)
  - mogelijkheid om ‘werklabels’ toe te kennen
    - duidelijk zichtbaar in lijst
    - aparte facet → goed instrument om werklijsten



➔ Mits afspraken heel handige instrumenten voor werkopvolgging en -verdeling



# DEMO!

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## Contact



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