Library User Account Dashboard

Project Proposal

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For: SILS DIscovery Operations Subteam

Objective

Create a federated library account dashboard for users to see all elements of their account in one place, including (but no limited to):

- Loans (regular, inter-campus, and ILL) *from Alma*
- Requests *from Alma*
- Fines & Fees *from Alma*
- Invoices *from 3rd party invoicing software*
- Study room reservations *from LibCal*
- Research consultation appointments *from LibCal*
- Special Collections reading room reservations *from Aeon*

Motivation

The UCLA Library needs to replace a pair of aging software systems related to financial transactions with patrons: LibBill and Library Payments Online (LPO).

LibBill is an invoicing system. While Alma also provides invoicing, it is not sufficient for use cases outside of the typical late fees and replacements. Multiple departments in the Library (Special Collections, Preservation, and the SRLF) offer services that simply cannot be represented within the constraints of Alma invoices.

Library Payments Online (LPO) is a user interface that serves as a bridge between invoices (from Alma and LibBill) and the campus payment system (Transact Payments, formerly known as CashNet).
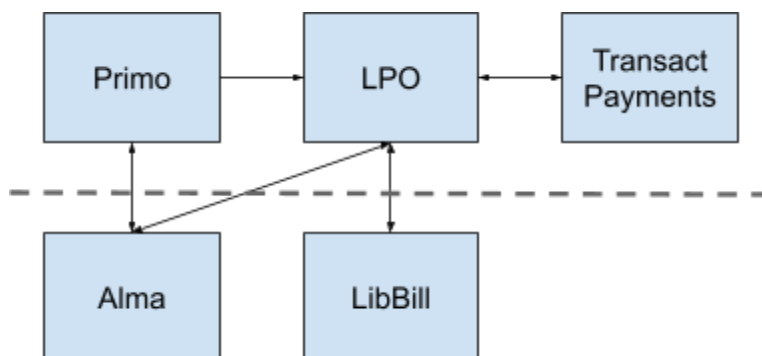
We had hoped that with the adoption of Alma that we could retire both of these systems. Unfortunately, there is no direct connection available between Alma/Primo and Transact Payments, so we must keep something like LPO as a bridge. Furthermore, the limitations of Alma invoicing means that something like LibBill will also continue to be needed.

Of these two systems LibBill is the one most in need of replacement. We have identified a sufficiently functional, cloud-based, 3rd party invoicing system, called **Xero**. *We intend to replace LibBill with Xero before the start of the FY25 fiscal year.*

Opportunity

The minimal effort required to move forward would be to purchase Xero and modify LPO to fetch invoice data from it instead of LibBill. However, given some of the usability issues with the Primo account interface, I am now also considering a replacement of LPO with a user interface that goes beyond just invoices and includes Loans and Requests from Alma as well as reservations from other sources like LibCal and Aeon.
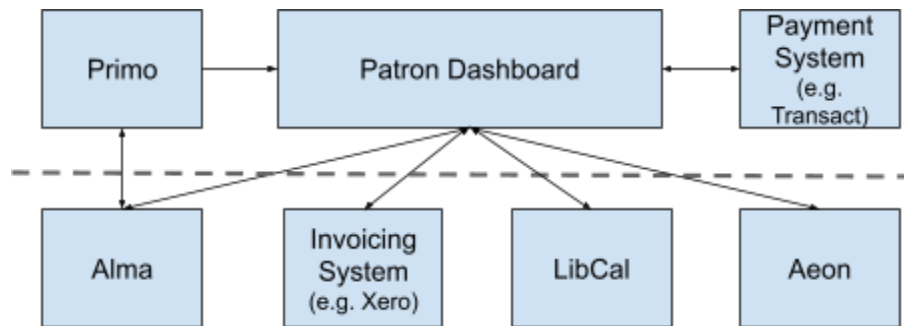
While such a project greatly increases the scope beyond the minimal effort, the user experience is also greatly improved. We will have full control over the user interface, thus allowing us to overcome the issues in Primo's user account interface. And by putting everything in one place, it will also make it much easier for patrons to find all of their information.

UCLA Library is considering this project locally, but given the collaborative effort of SILS it makes sense to discuss it as a possible group effort. We all use Primo and most of us also use LibCal and Aeon, so the benefits affect us all.

Constraints

Integrations. The platforms used for invoicing and for payment processing vary widely across the ten UC campuses. Therefore, the implementation of this dashboard must be done in a way such that each campus can connect to its preferred invoice and payment platforms. This would

require the development of custom connectors that can be plugged into the generic invoice and payment handler logic.

Configurability. While most of the campuses use LibCal and Aeon, not all of them would want information from those systems to appear in a dashboard. Therefore the system should be configurable in both its integrations and its display.