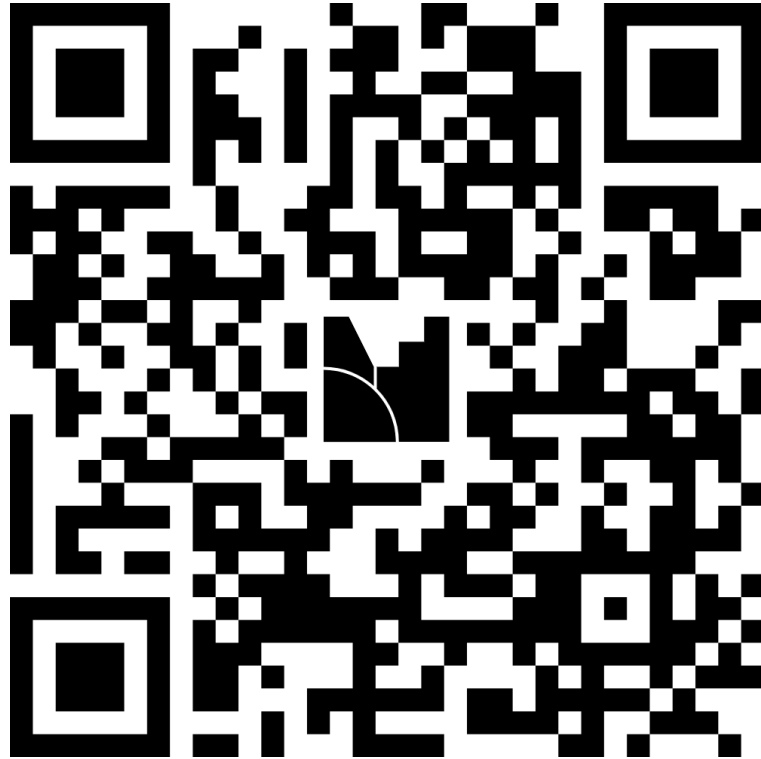


Fortune Telling:

Achieving accuracy through
integrating the LMS and
Finance systems

Adam Robinson & Heather Cripps
(Head of Academic Services) (Content Delivery Officer)

Which LMS/Finance system do you use?



<https://www.menti.com/al318p55feaj>

3336 1987

Why bother?

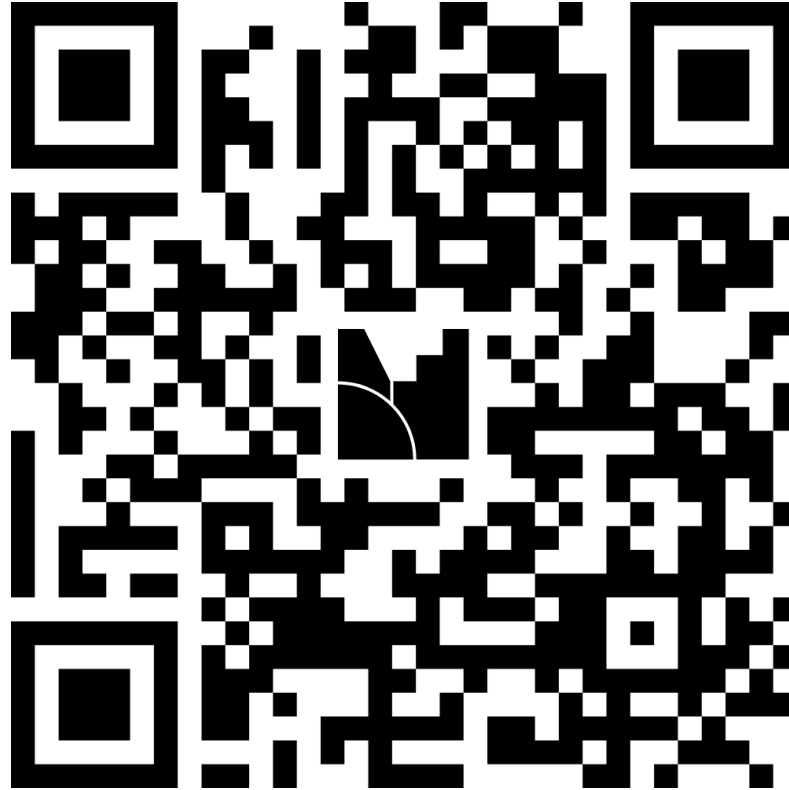
Time:

- Workflow duplication – approx. 260 p.a. hours spent receipting invoices
- Reconciliation – approx. 72 hours p.a. spent comparing LMS data with Finance reports
- Record keeping – COPO ledger – approx. 11 hours p.a.
- 'Log' updating – approx. 27 hours p.a.

Accuracy:

- Monthly financial reporting (the 'Log')
- Budget forecasting
- COPO expenditure tracking

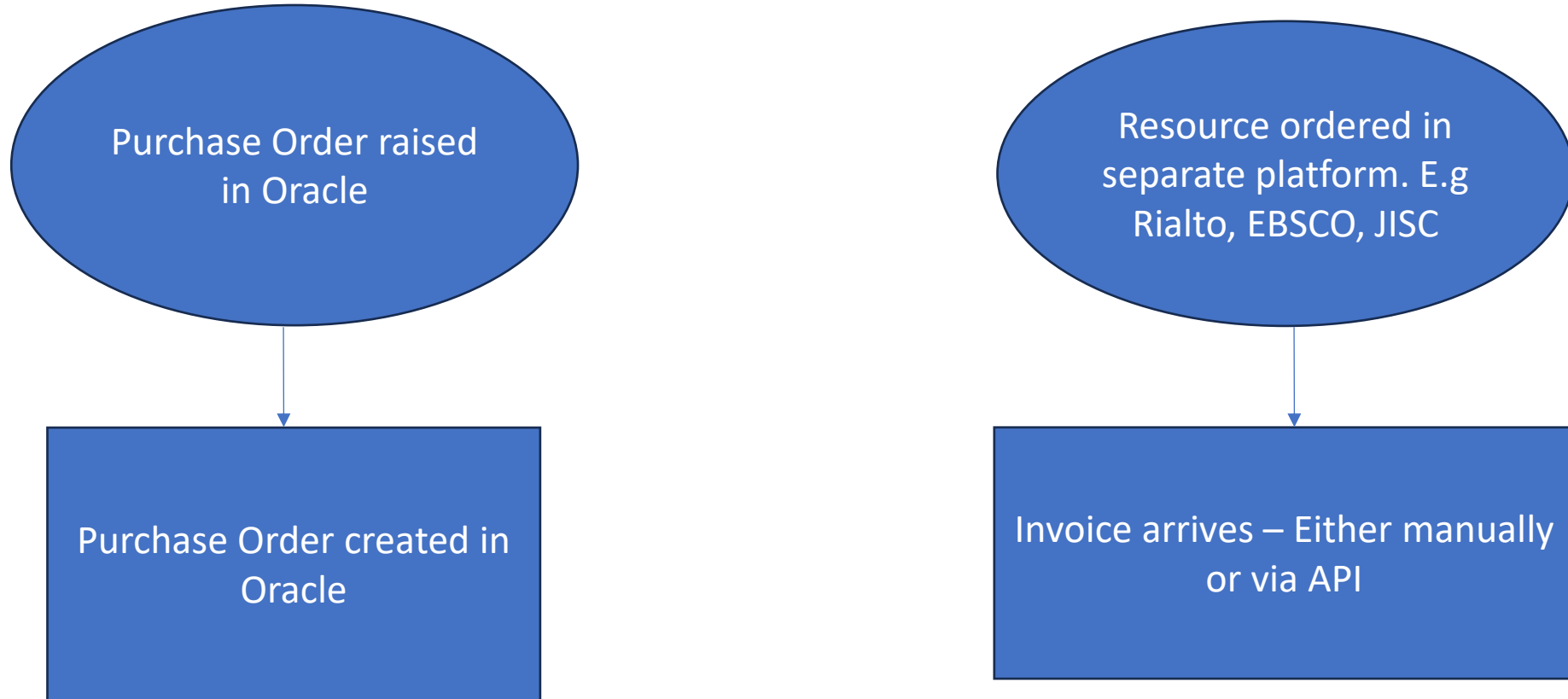
What are your challenges with finance?



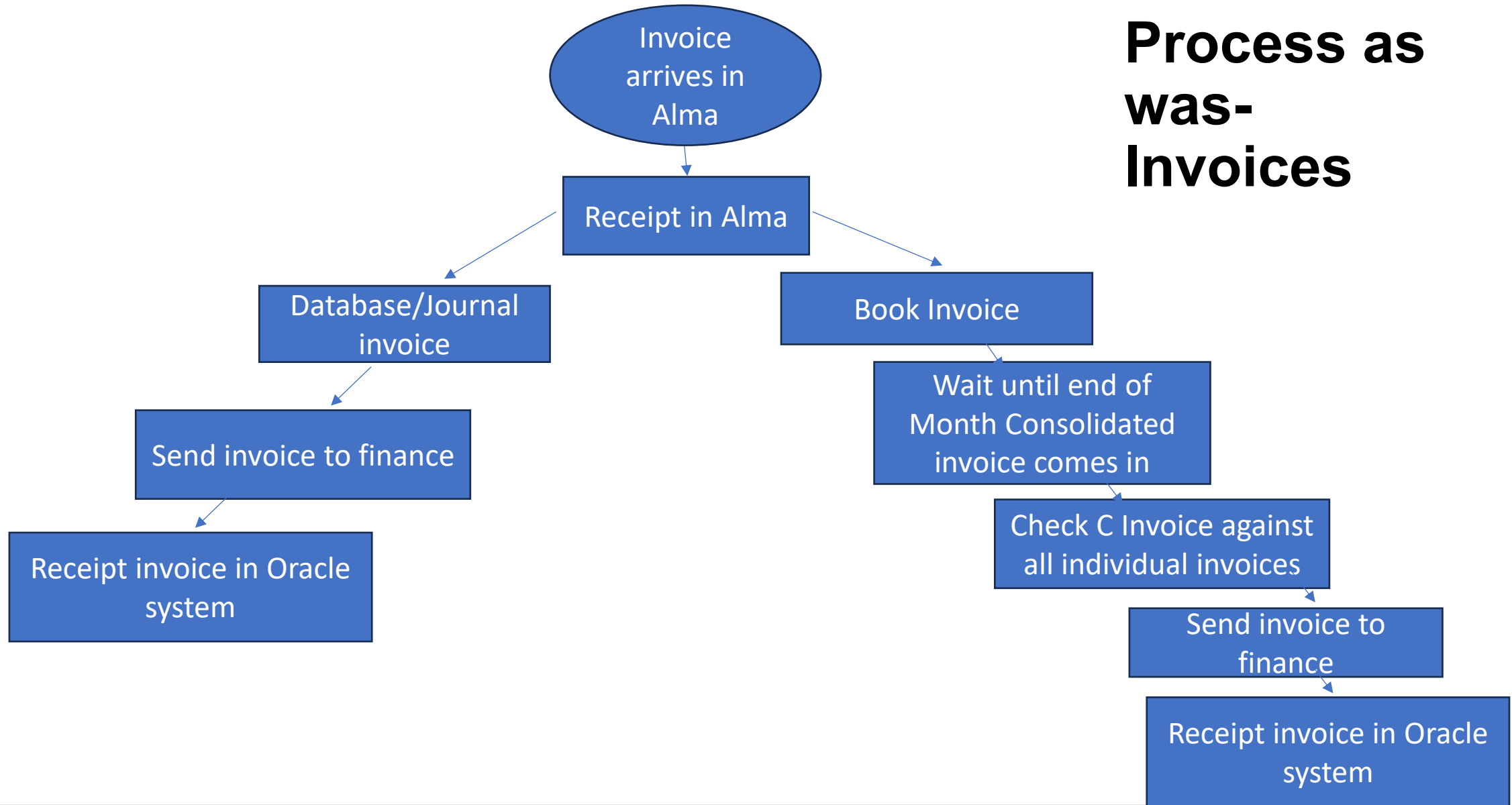
<https://www.menti.com/al318p55feaj>

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Process as was - Ordering



Process as was- Invoices



Process as was – Reconciliation

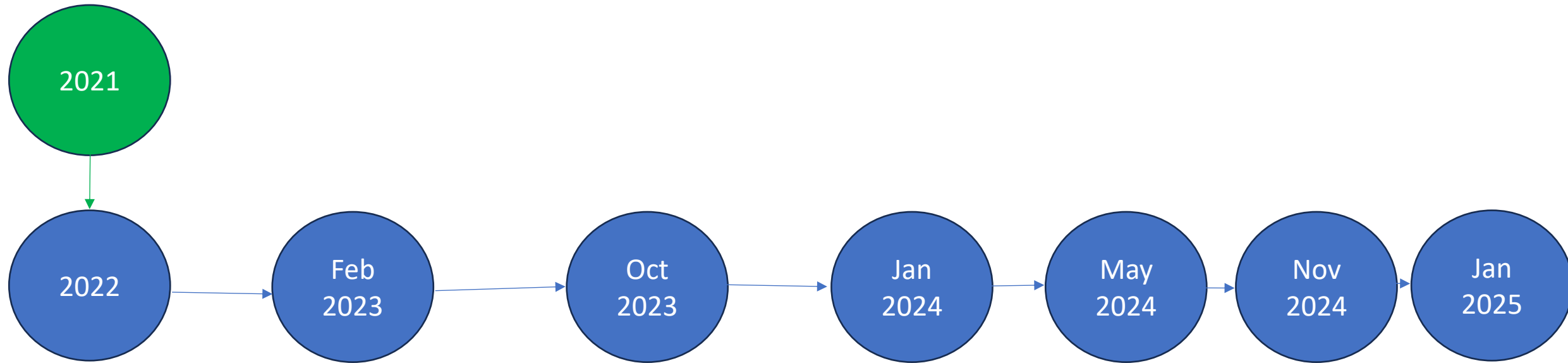


Heather runs
report to track all
payments in Alma

Finance run report
of all library
payments in Oracle
and send to Heather

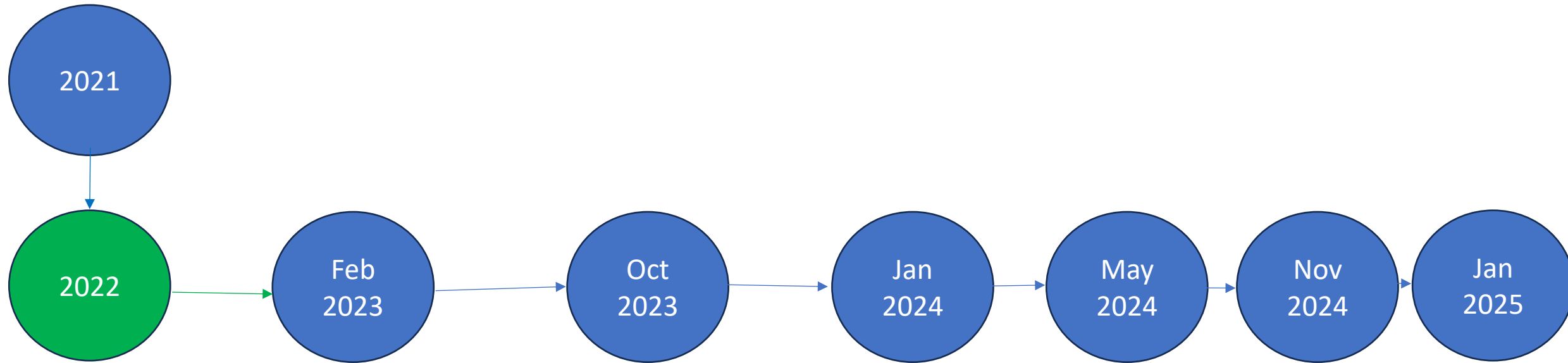
Heather spends six hours
trying to figure out why Alma
report does not match
finance report in any way.

A potted history



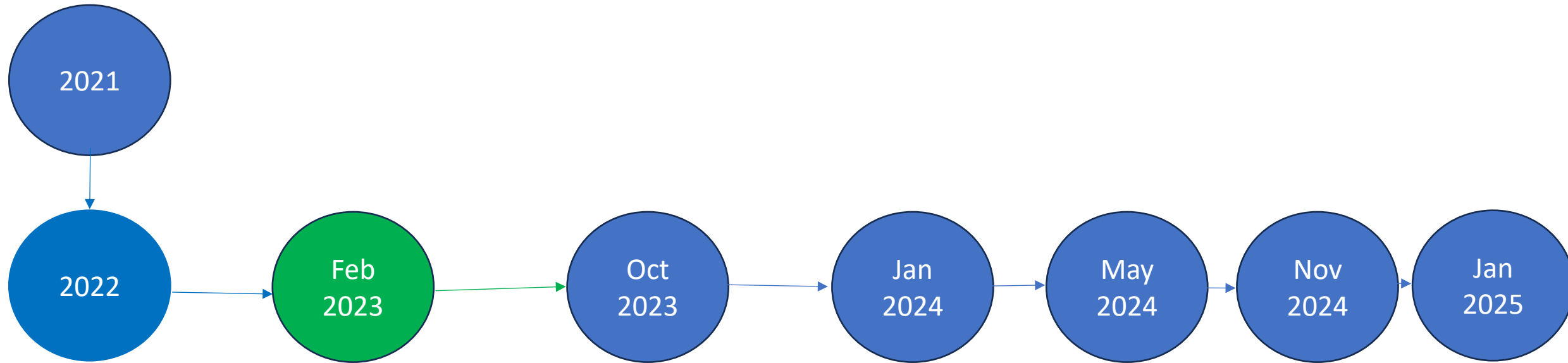
2021: Preparing for a systems migration & some wishful thinking...

A potted history



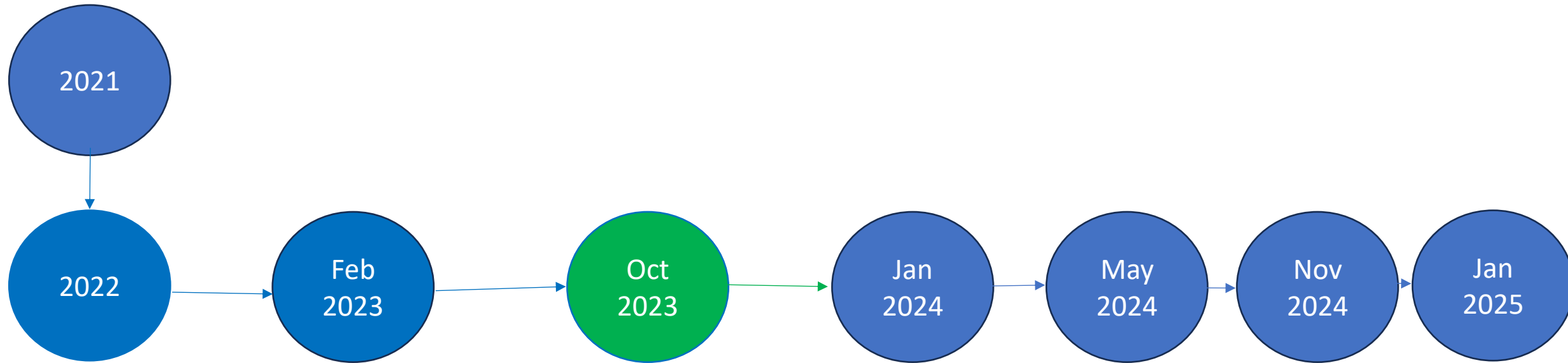
2022: Library Systems Migration (LMS/RLMS/Digitisation/ILLs/Acqs)
....and finance integration?

A potted history



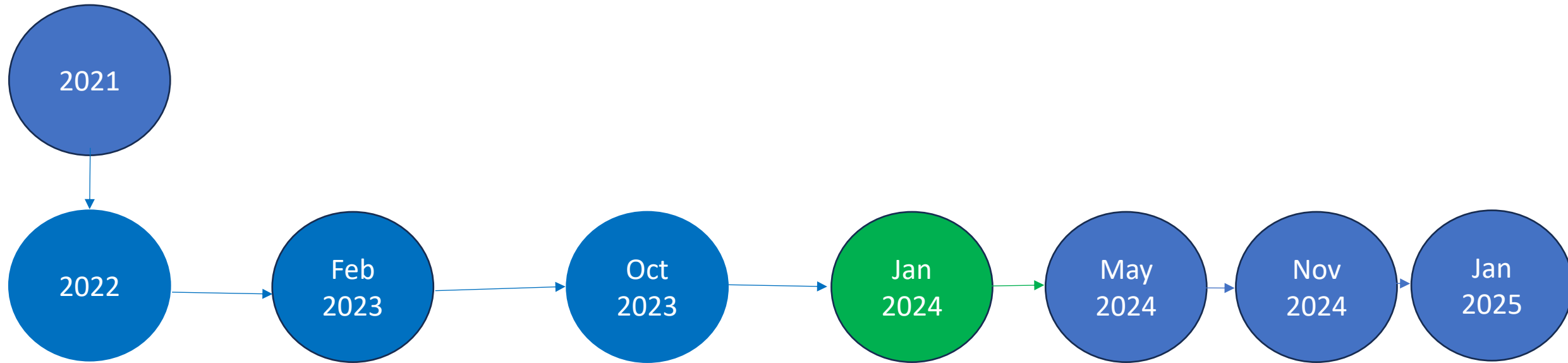
Feb 2023: Project initiated (almost) & consultancy scoping

A potted history



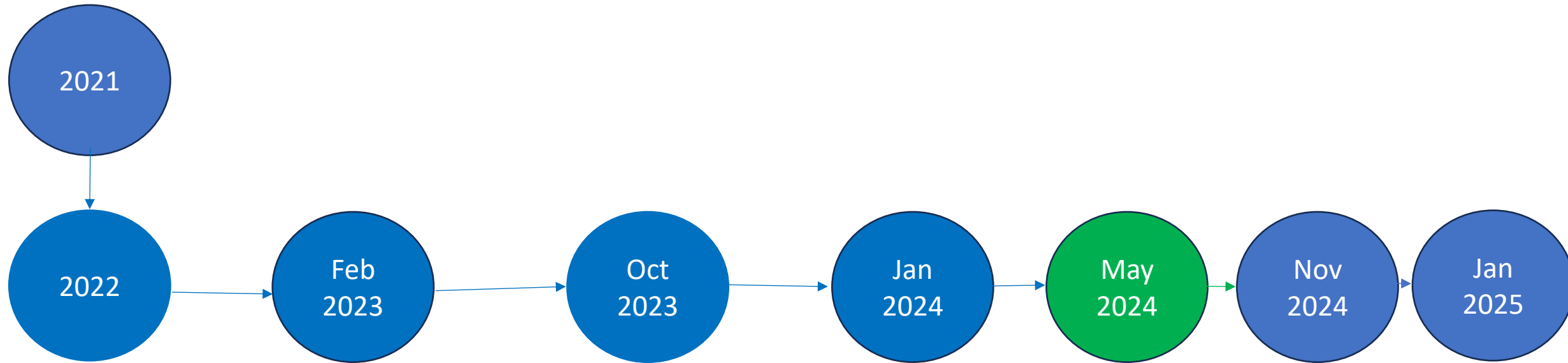
Oct 2023: Project launch imminent....? Staffing changes UoD and Namos

A potted history



Jan 2024: Project scoping...again

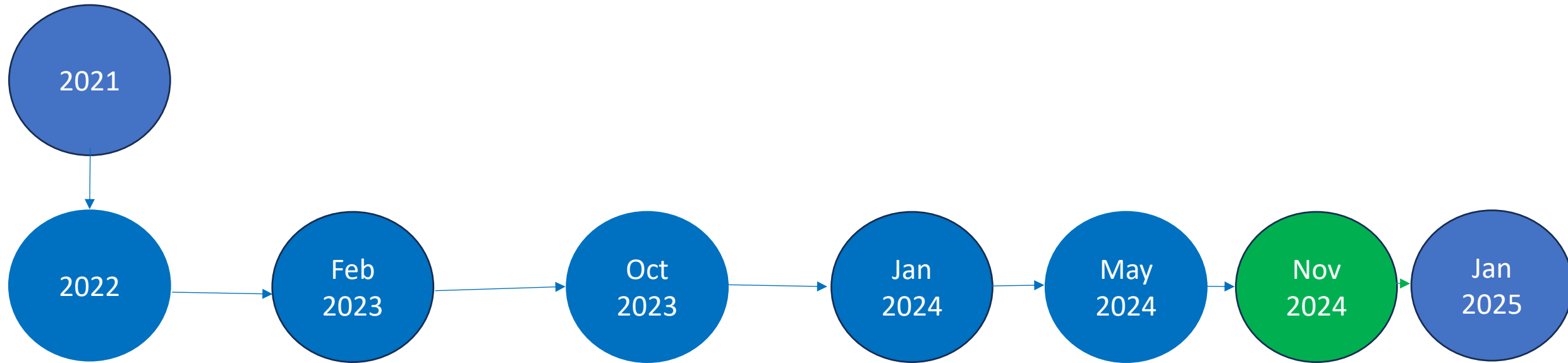
A potted history



May 2024: Project paused...again

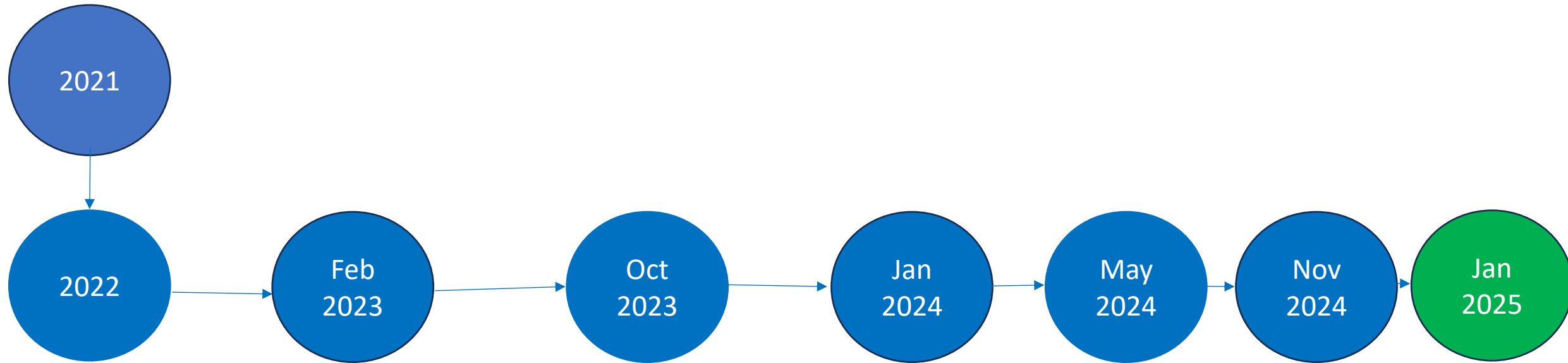
Middleware integration system Mulesoft replaces Oracle Integration Cloud

A potted history



Nov 2024: Kick off!

A potted history

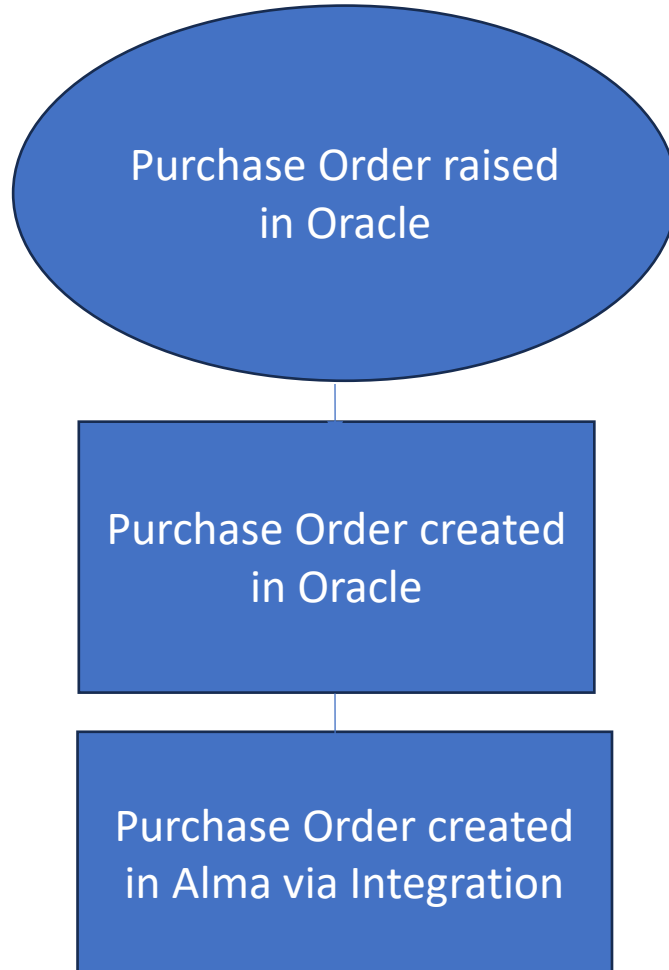


Jan 2025: Go live! More staff changes and time pressure for UAT

Who's who

Team	Role in project
Central Project Management Office	Oversee and manage project
Content and Digital Services team	Establish workflows, configure Alma, test, feedback, approve
Digital Services and Solutions team	Configure, implement, test integration, approve
Finance team	Test integration, approve
Namos consultancy	Develop Solution Design / Build integration
Infomentum (Mulesoft knowledge)	Advisory
Ex Libris	Advisory

Process now – Ordering In Oracle



Alma PO is Created successful

Hi Team-Alma PO is created, below are the details:-

Action	PO Number	Success
Alma PO is Created	[REDACTED]	True

Process Now – Ordering in Supplier sites

Resource ordered in
separate platform. E.g
Rialto, EBSCO, JISC
using PO number if
possible

< Shopping Cart (1 - 1 of 1)

1 items, Total: **24.99 GBP** [Send All to Approval](#) [Checkout All](#)

☐ Keyword Sort by: **Date Added** ▾

1 ☐  **Succeeding in Literature
Reviews & Research Project
Plans for Nursing Students**
by Whittaker, Andrew
2025, Learning Matters
Edition 5 / Newest Edition /
New Edition (2nd &
subsequent)

Paperback
9781529779813
P
Library activity
Available

24.99 GBP
[Remove](#) [...](#)

Qty: **1** ▾
Shelving Library/Location: * *Choose location* ▾
Fund: * *Choose fund* ▾

Item policy
Choose item policy ▾

Reporting codes
Choose reporting code ▾

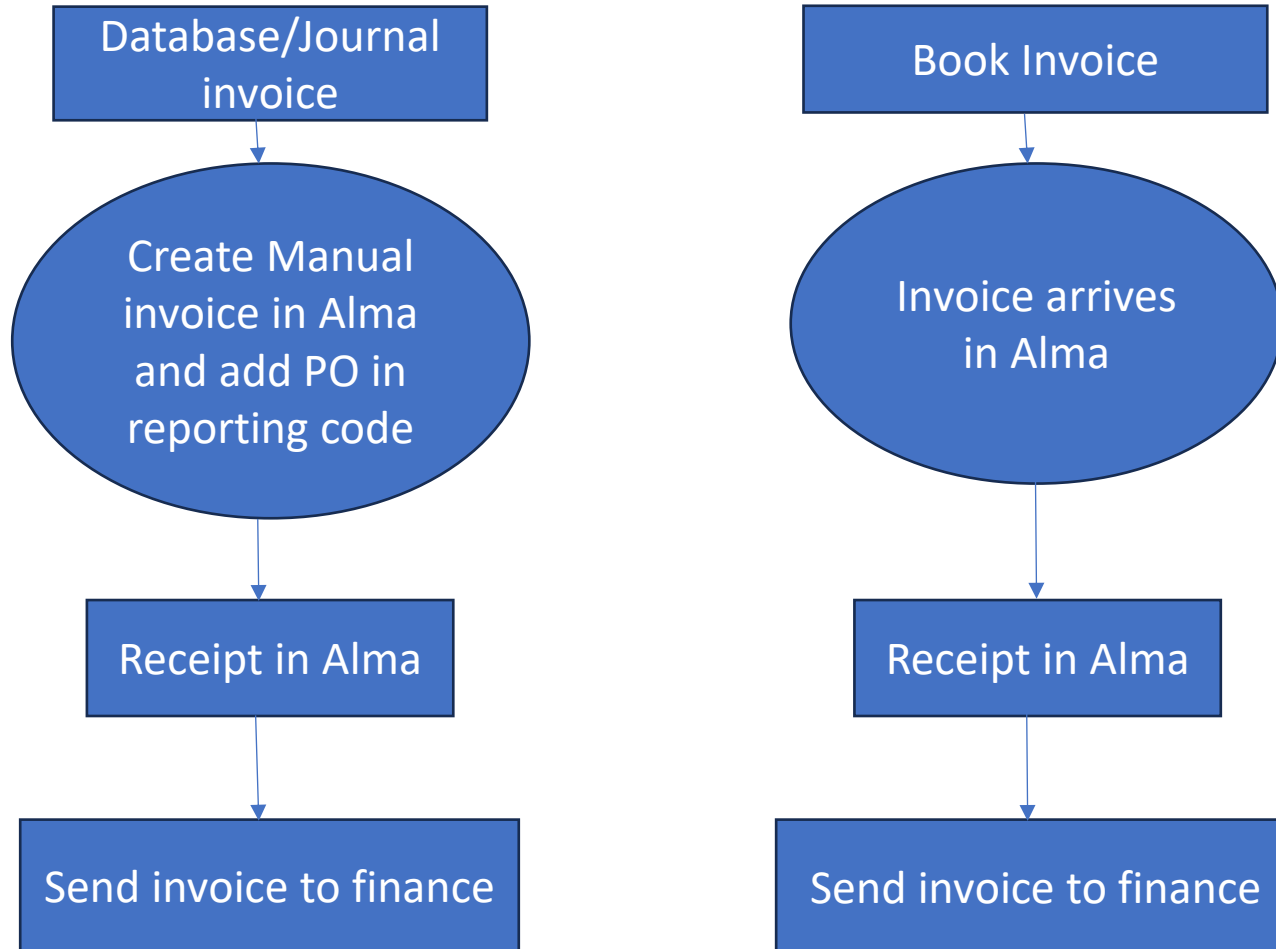
Search...

1st Reporting Codes ▾

☐ DEF [REDACTED]
☐ DEF [REDACTED]
☐ DEF [REDACTED]
☐ DEF [REDACTED]

Override call number

Process now - Invoicing



Invoice is receipted in Oracle
Automatically by the integration

Process Now - Invoicing

Finance Receipts Create Success

Hi Team, Receipts are created in Oracle. Please see below details.

Process	Invoice ID	PO Number	ReceiptNum Number	Success
Finance Receipts create interface Success	[REDACTED]	[REDACTED]	[REDACTED]	True

↩ Reply

↩ Reply all

➡ Forward

Process Now – Reconciliation



Heather runs
report to track all
payments in Alma

Finance run report
of all library
payments in Oracle
and send to Heather

Heather spends twenty
minutes making sure they
match which they mostly do!

What went well/successes

- Time saved for finance workflows
- More accurate financial tracking which aids both our team and the finance team
- The integration is automatic, and the workflow is easy to learn and complete
- Alma functionality for integration was already there – it wasn't too difficult to figure out where the integration was going to happen and there was only one very small configuration change needed
- Templates in Rialto helped reduce human error
- Other suppliers, such as Browns, were able to include the PO numbers in their ordering forms so the integration could be used. GOBI are also able to do this (Not yet tested.)

"Much better than I thought it was going to be" – One of my team

Challenges/lessons learned

- Communication issues between teams around testing. More time for testing period would have eased these challenges.
- Confirmation email lacking information and readability. This was only realised after testing and therefore couldn't be changed without NAMOS requesting further charges.
- Project took a long time and went through different staff members – reason for pressured testing was the project manager was moving on from the university and therefore we need to get it signed off before this
- Ex Libris could have been further involved and earlier.
- It took a long time for each team to get to grips with the other's workflows, Alma terms such as POL, and PO, were confusing to finance and NAMOS.
- Updates have been challenging from Finance or our IT team.

So, was it worth it?

- Workflow efficiencies
- Greater accuracy (feedback)
- Technical operations (no hiccups...yet)



Image created using Gemini

THANK YOU