

# How to Share a Use Case with WRLC HQ

## Overview

WRLC welcomes ideas from the community about Alma workflows and integrations that could work better, faster, or more reliably. This page explains how to share a use case with WRLC HQ using the **Community Use Case Suggestion Form**—the primary way to propose workflow improvements, automation ideas, or Alma-adjacent process changes.

You do not need to be technical to submit a use case. If something feels manual, repetitive, or harder than it should be, that's exactly the kind of feedback we want to hear.

## What is this form?

The Community Use Case Suggestion Form allows WRLC community members to describe:

- Workflow issues or challenges they encounter
- Opportunities for automation or process improvement
- Ideas that could benefit one institution or multiple institutions

These submissions help WRLC:

- Identify repetitive, time-consuming, or error-prone processes
- Understand real-world pain points across institutions
- Prioritize Library Open Workflow (LibOW) automations that deliver the most impact

## Why submit a use case?

When you submit a use case, you're helping to:

- Improve workflows not just for yourself, but for the broader WRLC community
- Surface shared challenges that may not be visible at the central office
- Shape where WRLC focuses its LibOW development time

Even ideas that don't turn into an immediate workflow still help inform future priorities and improvements.

## Where to find it

The **WRLC Community Use Case Suggestion Form** is available directly within Alma as a **Cloud App**. This allows you to submit ideas while you are already working in Alma—no separate login or external tools are required.

Before using the form for the first time, you will need to **activate the Library Open Workflows Cloud App**.

## First-Time Setup: Activating the Library Open Workflows Cloud App

If you have not previously used the Library Open Workflows Cloud App, follow these steps to activate it:

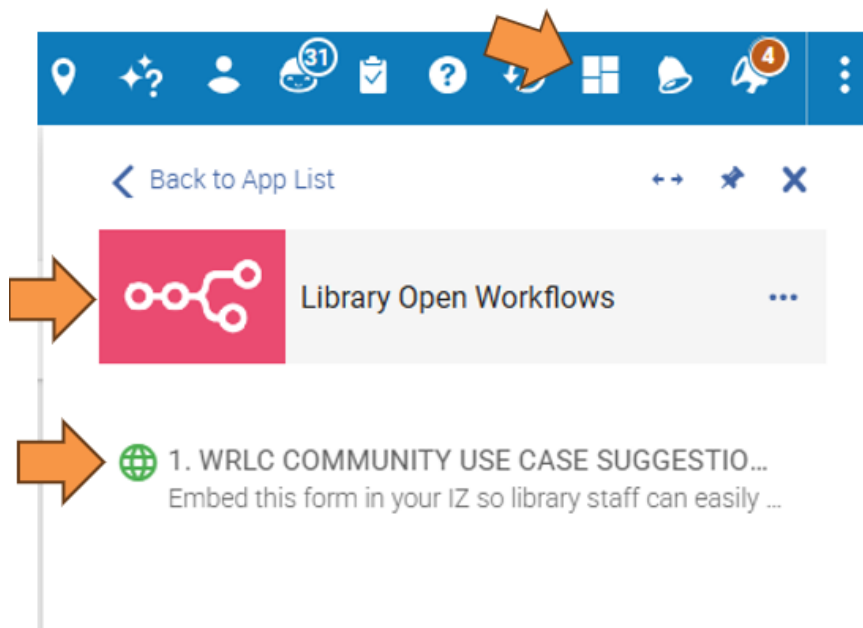
1. Open **Alma**.
2. Click the **Cloud Apps** icon in the Alma menu bar.
3. Select **Available Apps**.
4. Locate **Library Open Workflows** by either:
  - **Browsing** the list of available apps, or
  - **Searching** using the **magnifying glass** icon and typing keyword *Library*.
5. Select **Library Open Workflows** from the list.
6. Click **Activate**.
7. Click **Open**.

Once activated, the Cloud App will remain available in your **Activated Apps** list.

## Accessing the Use Case Suggestion Form

After activating the Cloud App, accessing the form only takes a few clicks:

1. Open **Alma**.
2. Click the **Cloud Apps** icon.
3. Select **Library Open Workflows** from the **Activated Apps** list.
4. Choose **WRLC Community Use Case Suggestion Form**.



Who can access the form?

The Cloud App is available to Alma users with standard administrator, manager, and operator roles. For a full list of roles, [click here](#).

## How to Submit a Use Case

The form asks a series of questions designed to provide WRLC HQ staff with enough context to evaluate, design, and (when possible) build a workflow. Below is what each question is asking—and why it matters:

### 1. Your name

So we can follow up with you if something is unclear, missing, or worth exploring further.

### 2. Your Institution (IZ)

Helps us understand whether an issue is local to one institution or shared across multiple IZs, which is a key prioritization factor.

### 3. Your Email Address

So we can follow up if something is unclear, missing, or worth exploring further. We won't spam you.

### 4. Summary of the Issue or Challenge

This is the high-level “what’s broken?” description. Think of it as the elevator pitch for the problem.

### 5. Desired Goal or Outcome

This tells us what “better” looks like to you. Sometimes the same problem can be solved in multiple ways—knowing the goal helps us design the right approach.

*Example: “Automatically notify the team when a report contains a specific value.”*

### 6. Current Workflow Description

Understanding the current steps helps us see:

- Where time is being spent
- Where errors creep in
- Which steps might be automated, simplified, or removed

If you would prefer to document this information as part of your attached file, simply note that fact here.

### 7. Current Workflow Frequency

How often a process happens directly affects the likely impact of an automation.

### 8. Stakeholders

Knowing who else benefits helps us assess broader community value—especially for workflows that could support multiple teams or roles or institutions.

### 9. Urgency

Urgency helps us distinguish between:

- Nice-to-have improvements
- Significant efficiency gains
- Issues that block work or create real risk

### 10. Process Time

Even rough estimates help us understand potential time savings and return on effort.

### 11. Additional Comments

This is your space to add context that didn't fit elsewhere—constraints, edge cases, or “things that always go wrong.”

## 12. Supporting Documentation (Optional but Very Helpful)

You may upload **one file (up to 4 MB)** to support your submission.

Helpful examples include:

- Screenshots of Alma workflows or settings
- Sample reports or exports
- Marked-up documents showing how data should look
- Step-by-step notes you already use for training or documentation

Attachments are optional, but they significantly speed up understanding and design, especially for complex workflows.

## What to Expect After You Submit

Once submitted:

- Your use case is logged and reviewed by the WRLC LibOW team
- We may contact you if clarification or additional detail would help
- Submissions are prioritized based on multiple factors, including:
  - Urgency
  - Time savings or efficiency gains
  - Number of institutions or stakeholders affected
  - Feasibility and complexity
  - Alignment with current capacity and initiatives

Not all submissions will result in a workflow build, and some strong ideas may not be addressed immediately as priorities evolve. Even when a workflow is not built right away, every submission helps inform future LibOW development and highlights shared needs across the community. The team will do its best to keep the community informed of progress through direct outreach, the [WRLC Newsletter](#), and updates to the [Workflow Catalog](#).

## Help or Follow-up

- Need help submitting a use case?
- Want to add additional information after submitting?
- Have questions about the status of a request?
- Experiencing issues with the form?

Please contact the [WRLC Service Desk using these instructions](#).

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