



CHAIR'S REPORT 2020

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Introduction

The IGeLU Chair's report is presented annually at the Conference General Assembly.

To save printing and wasting resources this report will be published onto the IGeLU web site.

The report also provides me with an opportunity to thank the large number of volunteers who form the backbone of IGeLU. These volunteers help drive the development of the Ex Libris products on your behalf and to meet your requirements. Essentially, they are the 'voice' of the community when discussing issues with Ex Libris.

This has been one of those year that we will not forget. We started off the year planning on holding the conference in Cardiff, Wales. But with the COVID-19 pandemic, we made the decision to deliver the annual conference as a digital event. This has raised a whole new set of issues that we were not prepared for and I would like to thank the Program Planning Committee in ensuring that the IGeLU 2020 Digital Conference is delivered in the professional manner that we are accustomed to.

The pandemic has also affected each one of us in many ways. It has affected the way we live, how we interact with our friends and family and how we deliver services to our customers. Hopefully 2021 will be a better year for us all.

What makes us unique?

IGeLU has over 400 members which represents over a thousand institutions. Both IGeLU and ELUNA are not-for-profit organizations which operate independently of Ex Libris. In brief our aims are to represent the collective voice of the community when dealing with Ex Libris to ensure that product development benefits both the customer (you) and Ex Libris.

Besides our official Product Development Collaboration Agreement, where Ex Libris commits to invest development resources to implement enhancement requests ranked and voted by our members, the ongoing discussions between our Working Groups and Ex Libris Product Managers guarantee a level of collaboration and interchange of views and vision that results in improved quality of services and the development of functionality our institutions and staff depend on daily.

The IGeLU membership gives each institution the opportunity to actively take part in this and provides the framework for all members to benefit from the results of this close and vibrant relationship.

Stay safe and healthy.

Dave Allen, IGeLU Chair

Steering Committee Activities

Steering Committee

The Steering Committee's (SC) main task is to help the Working Groups (WGs) do their job. It means taking care of financials and the stability of the organization in the long term. IGeLU uses a broad set of facilities such as our ZOOM meeting and webinar subscription, our WordPress website, our Google collaboration document infrastructure, Twitter, our new Conference App and the joint IGeLU and Ex Libris Users Group of North American (ELUNA) exlibrisusers.org email distribution lists platform.

The SC coordinates the work done by the Working Groups and takes care of initiating new groups as required. The IGeLU SC has periodical meetings with the ELUNA Steering Committee and with Ex Libris Executive Management to streamline work and discuss new developments. These meetings allow us to represent the customers' voice during the early stages of any new product developments.

Christian Haenger stepping down from the IGeLU Steering Committee

Christian Haenger has stepped down from the IGeLU Steering Committee due to a new role that he has taken up with the German Federal Archives. Christian has been actively involved in IGeLU for over 11 years through his work on the Primo and Content Working Groups and the IGeLU Steering Committee. His expertise and passion will be greatly missed by the Steering Committee and the community.

Betsy Friesen stepping down from the Alma Working Group

Betsy Friesen, who many know as the 'Mother of Alma', is retiring from work at the end of the year. As part of this transition to retirement, she has resigned from her role as Chair of the Alma Working Group. She has worked tirelessly over the years advocating on behalf of the global community. She has set a high standard that I hope to live up to and I wish her all of the best in her retirement and I for one will miss her energy and enthusiasm.

Jone Thingbø stepping down from the IGeLU Steering Committee

Jone Thingbø has stepped down from the IGeLU Steering Committee due to a new role that he has taken up outside of the library community. Jone's contribution to the IGeLU Steering Committee will be greatly missed.

IGeLU Steering Committee Roles

Each elected member of the SC has defined roles. These are as follows

Dave Allen – Chair and Alma, Content and Rosetta Liaison Officer and National and Regional User Group Liaison

Maribel Alvarado – Leganto and Summon Liaison Officer

Alex Forrest – Interoperability / Developers Community of Practice Liaison Office

Cindy Greenspun – Communications Officer and Voyager and Linked Open Data Liaison Officer

Christian Haenger – Content and Primo Liaison Officer

Augusto Ribeiro – Aleph Liaison Officer

Jone Thingbø – IGeLU Document Control and Linked Open Data Liaison Officer

Wei Xuan – Analytics Liaison Officer

Conference planning

Our conference is at the heart of the organization and without a planning committee we would never be able to have so successful and highly rated conferences. **Tracey Clarke** has been working tirelessly throughout the year organizing this year's conference and her commitment and energy are to be applauded especially as we faced new challenges in delivering this year's Digital Conference.

Finance, legal and administration

The IGeLU Treasurer **Guido Badalamenti**, takes care of IGeLU's finances, the members administration and all legal affairs. This almost invisible work is very important for the continuity of IGeLU and the work that he and his team undertake for IGeLU is much appreciated. I want to express my sincere thanks to **Guido Badalamenti**, **Fabrizio Di Fuccia**, **Duccio Di Blasi**, **Katia Pizzo** and **Katia Medaglini** for all their indispensable work and devotion to the community.

IT-services and infrastructure

Mark Dehmlo takes care of all internal IGeLU ICT services and infrastructure. The IGeLU's website is capable of hosting multiple websites. As a result, Mark has successfully set up and migrated the following Regional and National User websites to the IGeLU platform

- MELI – Israeli Ex Libris Users Group
- ELUQ – Ex Libris Users of QATAR

This web hosting is available for free to all Regional and National User Groups. Please contact IGeLU if you wish to take up this opportunity. Finally, Mark is also the developer and administrator of **NERS**. Without Mark, IGeLU would not have a unique, dedicated and flexible voting system that allows us to offer one of our major benefits to the community; the privilege to vote in enhancement cycles as part of the official Product Development Collaboration Agreement with Ex Libris.

Working Groups activities

It is important to note that **Working Groups (WG) are the backbone of IGeLU**. The working groups rely on community membership and I encourage members to volunteer to join the working Groups when positions become available.

Some Working Groups are Joint Working Groups with ELUNA, others IGeLU only. Their activities comprise:

- closely monitoring the use and development of the product
- managing the enhancement processes
- discussing relevant and urgent issues with Ex Libris' product management
- organizing Show & Tell sessions for members on topics
- conference programme planning, inviting presenters and manage the Q&A sessions
- attending to working meetings through the year to discuss and plan their activities

I want to thank the following incoming and past WG coordinators:

- **Camelia Anghel** - Aleph WG
- **Betsy Friesen, Amelia Rowe, Catherine Grove** - Alma WG
- **Joan Kolarik, Margaret Brand Wolfe** - Analytics WG
- **Karin Perols, Kathy Varjabedian** - Content WG
- **Mehmet Celik** - Interoperability/Developers WG
- **Sue Harmer** - Leganto WG
- **Xiaoli Li** - LOD WG
- **Knut Anton Bøckman**, Primo WG
- **Teresa Soleau, Kirsty Smith** - Rosetta WG
- **Jiri Pavlik**, SFX WG
- **Antonella Ward**, Voyager WG

and to all other members of these Working Groups for the work they have been doing for our community over the past year. Please refer to our website for the full list of WG members who have taken the time to represent the community.

I have requested each of the WG coordinators to provide me information for inclusion into this report. The following reports have been supplied:

Aleph WG

Camelia Anghel's report is as follows

Enhancements 2019-2020 information

- Aleph 23.4 - Conceptual Design for 'item-11 enhancement' ug#3320
- Aleph 23.4 - FSD for 'Delete Item Records - STA field' (UG# 3302 /ALP-5729)
- Aleph 23.4 - FSD for check record size (UG #3003 / ALP-1931)
- Aleph 23.4 - FSD for barcode scanning for RR loans (UG #3431 / ALP-5726)
- Aleph 23.4 - FSD for Aleph enhancement: Expanding ORCID from authority records to source record

Next Voting cycle started in August 2020 and ends in January 2021

- August 1st, 2020 – November 1st, 2020: New enhancements requests can be submitted on NERS
- November 2nd, 2020 – November 8th, 2020: Aleph PWG review the requests and submit them on NERS
- November 9th, 2020 – November 29th, 2020 – First voting cycle
- November 30th, 2020 – January 10th, 2021: Aleph PWGs work with Ex Libris to clarify requests and pointing
- January 11th, 2021 – January 30th, 2021 - Final voting cycle

- January 31th, 2021 – February 7th, 2021 – Aleph PWGs select most voted enhancements and send them to ExLibris

Aleph Roadmap:

- V23.4- minor release December 2020
- V24.0- major release June 2022

Product Updates scope based on input from:

- user groups initiated enhancements
- Ex Libris support
- Product Management

Other Product updates/upgrades considerations:

- User group enhancements
- Extended support for protocols and standards EDI
- Facilitate or support strategic URM/URD2 direction
- Infrastructure SW/HW certifications

Alma WG

Betsy Friesen has been the coordinator since 2012 and I would personally like to thank Betsy for her commitment and hard work that she has taken on as the Alma WG Coordinator. Betsy's report is as follows:

Alma WG Annual Report for 2020

The Alma Working Group (Alma WG) continues to work on behalf of the Alma community. Over the past year we accomplished some administrative tasks and worked with Ex Libris and other working groups on a variety of initiatives.

Administrative Tasks

After nearly eight years, the WG will move to new leadership in the fall. Amelia Rowe (RMIT, Australia and Catherine Grove, Northwestern University, USA) agreed to be co-coordinators to the joint IGeLU/ELUNA Alma Working Group. Additionally, Mary Greci (University of Oregon, USA) is our incoming Deputy Chair for Enhancement to replace our outgoing enhancements chair, Ann Miller (University of Oregon) and Megan Lee (Monash University, Australia) will take on the Deputy Chair for Communications.

Other members of the WG took on leadership roles for our Alma functional sub-groups.

- Leon Krauthausen (Freie Universitet Berlin): Acquisitions
- Marina Kalach (University of Haifa): Alma Digital
- Joe Ferguson (University of Tennessee, Knoxville): Fulfillment
- Bettina Kann (Oesterreichische Bibliothekenverbund und Service GMBH): Resource Management
- Gijs Noels (KU Leuven), Member at Large

The WG meetings were also regularly attended by liaisons from the Summon, Primo, and Leganto Working Groups. Alison Hitchens (ELUNA) and Dave Allen (IGeLU) are the Alma WG Steering Committee liaisons.

The WG was fortunate to have had 80 Alma users express interest for membership in the functional subgroups. Most of the volunteers were from the USA, which made selecting international representation a bit more difficult. We were able to establish groups of about 6 members, but didn't get to an official kick-off meeting prior to the onset of COVID-19. However, many of the subgroup members did participate in enhancement vetting this spring. More work will need to be done before IGeLU to get these sub-groups to proper working order.

Departures

Obviously with Amelia and Catherine taking over the coordination of the group, mean that Betsy Friesen will step down as coordinator of the group. In addition, Ann Miller will step down as Enhancement Chair. Megan Lee has taken another position and left the Working Group in August. Megan and Ann have served on the Working Group for 8 and 7 years, respectively.

NERS Enhancements

The Alma community completed the first voting round of enhancements. We sent the top 27 to Ex Libris staff for pointing in May. Ex Libris worked with requesters and other interested parties for the last two months. 5 enhancements were taken off the table for various reasons:

- 6968: Provide the ability to identify broken links to electronic and digital resources (50 development points)
- 6795: Improve Repository Search functionality with free text options for MARC tags and subfields in Advanced Search (125 development points)
- 6962: Resource sharing: updates to due dates of borrowing request loans to be reflected in resource sharing and fulfillment (30 development points)

During the next year, it may be prudent to look at our voting process, including how to encourage more institutions to vote that could vote, how to deal with large consortia that vote as a block, whether the Working Group should endorse enhancements, and how we might work through the vetting process throughout the year, instead of vetting all enhancements in a short period of time.

Alma Initiatives and Collaborations

Alma Working Group (WG) members worked together with staff from their own institutions and other Alma institutions on various focus groups. Potential action for the Alma Working Group is indicated for each group. Additionally, the WG will need to determine how best to liaise with the focus groups. Focus Group needs and progress will be evaluated on an annual basis.

- UX Focus Group
 - The UX Focus Group members have worked with Ex Libris for nearly 5 years. Work on Phase 2: redesign of the metadata editor started in 2017. For most of this phase, participants were responding to Ex Libris own ideas and ideas around resolving pain points reported by users. The new MDE will begin rolling out to the general public in September.
 - 2021 WG Action: Work with Focus Group and Ex Libris to make sure future UX work is a collaborative effort.
- Alma Authority Focus Group
 - This group was formed in March 2019 to provide advice to Ex Libris around the following:
 - Input regarding cataloging in context of authorities or authorities in the context of cataloging/metadata, including workflow

- Discussion of the different "flavors" used for authority control considering regional aspects, multi-lingual needs, and different methodologies (e.g., local, consortial, global, use of external providers, reliance on Alma)
 - Major changes or new trends regarding authority management
 - Functional defects in authority control, especially where standards aren't being observed
 - Needed new functionality, (e.g., potential contribution through Alma to national projects like NACO and SACO in the US)
 - Unfortunately, response to comments/questions isn't as frequent as members would like and Ex Libris has rarely given them anything to consider. There are also concerns about action on feedback.
 - 2021 WG Action: The Alma WG and Resource Management sub-group needs to work with Ex Libris and the Authority Focus Group members to see if we can get this effort back on track.
- Alma Consortia Focus Group
 - A user consortia group formed several years ago. This group meets every other month. Recent discussion topics include: COVID-19 processes, Primo VE, and development of Rapido. Regular attendees include: UNY, Orbis Cascade Alliance, Washington Research Libraries Consortium (WRLC), University of Wisconsin System, MnPALS, PASCAL, Cal State, GALILEO, TRAILS, CLiC. The current chair of the group is Johnna Horton, MnPALS.
 - 2021 WG Action: The Alma WG should liaise more frequently with this group to make sure issues are raised with Ex Libris as needed.
- Alma Performance Focus Group (entire Working Group)
 - Post-IGeLU 2019, the Alma Working Group had a kick-off meeting with Ex Libris in September to discuss Alma performance around screen rendering and job completion. In the spring, Ex Libris presented the Alma WG with progress they have made. The next report from Ex Libris is due in July.
 - 2021 WG Action: Work with Ex Libris to make Ex Libris improvement efforts more visible to users and monitor progress (or not) in the future
- DARA Focus Group (Smart Recommendations)
 - Focus Group participants meet with the DARA team on a quarterly basis. The Ex Libris team presents the Focus Group with recommendations to "improve workflow and optimize usage of Alma." Information on past recommendations are in Ex Libris documentation. Ex Libris has been receptive to the groups comments.
 - 2021 WG Action: Work with the Focus Group and Ex Libris to determine whether these recommendations are being used and offer suggestions for recommendations if warranted.
- Community Zone Management Group (CZMG)
 - The CZMG has functioned as an advisory group on the Community Zone (CZ) for several years. The Group worked with Ex Libris to create credible e records from print records.
 - Additionally, the Group is currently working with Ex Libris on:
 - Determining fields that should be blocked from editing on CZ records
 - CZ training
 - Provider zone records (potential to work upstream with vendors)

- Creating rules for brief CZ records
- 2021 WG Action: Potential recharge of group. Determine relationship with Resource Management Sub-Group and Content WG. Group needs new convenor.
- Cloud Apps Focus Group
 - This group was established by Ex Libris at ELUNA 2019. It will likely be sunsetted soon as the point of the group was to “enable the next level of extensibility and openness for products on the Ex Libris Higher Ed Platform” through creating apps for Alma that can be used in Alma. The Group’s members were mostly developers.
 - The App Center will be available to users in the August release
 - 2021 WG Action: Monitor use and any issues with the App Center.

If other institutions are interested participating in any of these focus groups please contact Betsy Friesen (b-frie@umn.edu), Catherine Rowe (c-grove@northwestern.edu), or Amelia Rowe (amelia.rowe2@rmit.edu.au).

Analytics WG

Led by **Joan Kolarik (Coordinator)** and **Davin Pate (Deputy Coordinator)**, the groups report is as follows

Challenges

Margaret Briand Wolfe left the Analytics Working Group coordinator position in May 2020. Handoff was to take place at ELUNA, but that changed.

Following planned SIWG Governance changes, the Group has engaged in discussions and thought about its position within the user organization. An important point raised was the fact that Ex Libris does not view OBIEE (Oracle Business Intelligence Enterprise Edition) as its own product. This is understandable, since the product is maintained by Oracle. Nevertheless, there is an Analytics product which continues to be created and developed by Ex Libris – that is the subject areas, dashboards, and reports stored within OBI. The Analytics Group will continue to work to redefine its role and coordinate with the Product Working Groups.

The fact that Ex Libris offers a single Analytics tool as a mission-critical component of multiple products, continues to drive a significant need for the centralized knowledge and experience which can be focused via this Group. Unfortunately, changes in Analytics often occur with little notice because of changes to the products which supply the data to Analytics (note that the opposite never occurs – that is, changes to underlying products never occur because of Analytics changes). The Analytics Group continues to struggle to be as proactive as possible regarding planned Analytics-related product changes.

During the year, the Group continued regular meetings with Yoel Kortick to discuss Analytics in Alma, Primo and Leganto along with pressing Analytics issues. In early 2020, the meetings moved from monthly to quarterly. Yoel is interested in broad changes to Analytics and not in the more detailed changes recommended in the Analytics Evidence documents. Ongoing and future topics include the Analytics bug and enhancements back-logs and Ex Libris’ Analytics road map. Summon discussions have been delayed by the ELUNA cancellation and will be rescheduled.

Accomplishments

The Group continues to

- monitor and maintain the Analytics listserv / communication
- provide regular updates on group's activities at conferences and on the organization websites
- provide subject-based programming at conferences and online
- initiate deep investigation into specific areas

The Group uses a shared account to update the Community Knowledge Center (CKC) evidence documentation in response to updates about releases and the meetings with Yoel and other Ex Libris staff. This allows the Group to contribute to the body of Ex Libris product knowledge without requiring ownership of Community Knowledge by any individual.

The Analytics Group, together with the Interoperability Working Group hosted a joint information meeting at IGeLU on Thursday, 29 August 2019 in Singapore. Analytics Group presentations included:

- Primo Analytics - A Primer
- Leganto Librarian Analytics Dashboard Focus Group
- Alma Analytics - Tips, Tricks, and Best Practices

In lieu of the 2020 ELUNA conference meeting, the ELUNA Analytics Group Update will take place online on Tuesday, 14 July 2020 and will include a (probably) recorded update from the Group with time for live Q&A at the end. IGeLU's planned 2020 conference, which will take place online in September, will also be online.

Ex Libris agreed to place at least 1 Analytics Group member on any Analytics-related focus groups or basecamps in the future. During the year, Analytics Group members participated in multiple groups:

- Leganto Analytics Dashboard
- New Cost Per Use Folder in E-Inventory Subject Area
- Adoption of COUNTER 5 Usage and integration into Alma Analytics
- Evaluation of Comparative Analytics Subject Area
- Evaluation of OBIEE v. 12 - Based on his experience in the project, Davin created and posted an OBI 11 -> OAS migration best practices document explaining how to move private, My Folders to Shared Folders before the upgrade

Inconsistent Measures / Facets List

Many Analytics subject areas share the same measures. It has been observed that these shared sections are not always consistently built. The Group is compiling a list of inconsistent measures and facets across Analytics subject areas. This is a much-needed expansion of last year's project to compare date fields across subject areas.

Types of differences:

- Things that are the same but differently named/located
- Things that look the same, but are not
- Things that are in 1 area but not in the other (when determined to be necessary in both)

New members:

- Michael Johnson from the University of Minnesota
- Tony Wai from Macquarie University

- Sam Tyler from Reading University

2020/2021 Goals

- Redefine group as needed in response to recent major changes
Group reorganization to Community of Practice
Remote / online conferences
- Review remaining evidence issues in updates to Group guidelines and decide how important, open issues can best be moved forward
- Broaden cross-subject area consistency reviews from dates alone to more fields (Inconsistent Measures / Facets List, currently in process)
- After NERS selections are made, assist in vetting selected enhancements for Analytics-related issues – subtasks:
- ELUNA/IGeLU SCs assist in obtaining an Analytics Group NERS login + 100 voting points allocated to Analytics issues in each of the 2021 NERS Alma & Primo voting rounds
NERS developer create method to flag or annotate NERS enhancements that Analytics Group recommends for 2021 voting
Analytics Group create process for selecting enhancements and then select that year's enhancements for in Alma & Primo 2021 NERS voting
- Review past NERS votes for zombie issues, such as the request for all MARC fields, and escalate important issues to the Steering Committee
- Evaluate need to integrate new products in Analytics Group coverage - Rialto, RapidILL, III, PrimoVE, Google Console Analytics
- Continue working to place an Analytics-savvy person in each new initiative – for example, Analytics will be crucial to the in-process consortial functionality being developed yet the group hasn't heard of anyone addressing Analytics issues in that project
- Understand Analytics needs across products – for example, this table lists, by product, the current number of open, published cases mentioning Analytics

Alma	247
Leganto	15
Primo	63
CDI	8
Aleph	1
Esploro	7
Summon	1
CampusM	5
UStat	1
360 Core (Client Center)	1
Primo Central	2

Content WG

Lead by **Karin Perols/Ulrikke Greve Olufsen** and **Kathy Varjabedian** the group has been monitoring the Summon, 360, SFX, Alma and Primo lists and reported major Content issues (linking, metadata, delivery) to the Ex Libris Content team. When possible, the WG provided direct feedback to the customers. The group has also been acting as a go-between between Ex Libris and some vendors when existing collections took too long to be updated. **Karin Perols** report is as follows:

Key activities in the past year:

Survey on Dealing with Content issues: A user satisfaction survey was conducted so that customers' opinions and concerns about Content support issues could be better understood. The survey asked

about experiences in submission and handling of Salesforce Content cases. Of the 226 respondents, 44% were satisfied or somewhat satisfied with how their support cases were handled, and approximately the same percentage was dissatisfied or somewhat dissatisfied. Themes from the comments included general satisfaction with support staff and with resolution of simple cases, and dissatisfaction with long resolution times for complex cases. Many responses revealed a gap in understanding how to use Salesforce, specifically publishing cases and the escalation process. Ex Libris closely reviewed the survey responses and responded to the CWG regarding changes in organization and training for support, and a commitment to providing more Knowledge Center information on the use Salesforce for content cases.

Provider Zone: The development of the Provider Zone in Alma, whereby providers can contribute and manage their collections, was a major effort by Ex Libris for which we had the opportunity to provide feedback. Along with the Alma CZ Management Group, we reviewed an extensive Provider Zone Onboarding document and had discussions with Ex Libris concerning metadata quality and record duplication between PZ and CZ records. The time spent to provide input contributed to the development of the PZ.

Central Discovery Index (CDI): CDI was another major development in the past year, and we provided input to decisions on Resource Types, design of CDI Single Activation from Alma, selection of Easy Activation collections, and PCI to CDI mapping. Several CWG members participated in beta testing and as Early Access customers. As CDI rolled out, we emphasized to Ex Libris the importance of transparency regarding collection contents and updates, and of the ability to identify the metadata sources of CDI records for analysis and troubleshooting. Review and discussion will continue next year.

NERS: Following the 2018 voting cycles for new content, some collections were added, but many had difficulties, and A&I database requests were put on hold by Ex Libris pending an A&I pilot project. Due to the many unresolved items and to the development of CDI, a NERS ballot was not held in 2019, but will be scheduled in the coming year.

ORCID IDs: The CWG monitored the inclusion of ORCID researcher identifiers in discovery, and shared concerns with providers and with Ex Libris. Many more ORCIDs have been added, but issues remain with the number of ORCIDs, how they are searched, and matching and display of ORCIDs for individual authors. These issues involve metadata standards, such as NISO ODI recommended practice, and the participation of both providers and Ex Libris.

The Content WG also worked on other issues including the PCI Open Access Database Evaluation Project; duplicate title-level records in PCI and Alma CZ; problems with certain widely used collections such as Alexander Street Press; temporary access to resources during COVID-19; and an Ex Libris proposal for making single title vendor record updates more quickly.

We collaborated to an extent with other working groups on issues involving content, and recognized the need for greater collaboration in order to deal with the increasing integration among products, and to better advocate for change in the library and publishing communities in handling content.

Membership

Current member list:

- Noémie Ammann, ETH Zürich, Switzerland, IGeLU Primo WG liaison
- Molly K. Beisler, University of Nevada, Reno, USA, NERS Co-coordinator

- Xiaotian Chen, Bradley University, USA, SFX WG liaison
- Christel Coquilleau, University of Lausanne, Switzerland
- Eleanor Craig, University of Sussex, UK
- Sally Donnelly, Southern Cross University Library, Australia
- Katie Dunn, University of Wisconsin–Madison Law Library, USA, Alma Law Library SIG liaison
- Richard Guajardo, University of Houston, USA, ELUNA Primo WG liaison
- Beth Juhl, University of Arkansas, USA, ELUNA Summon/360 WG liaison
- Stacy Magedanz, California State University San Bernardino, USA, Alma CZ Management Group liaison
- Ulrikke Greve Olufsen, University of Oslo, Norway, NERS Co-coordinator; Co-coordinator IGeLU (on parental leave from February 2020 until October 2020)
- Karin Perols, Karolinska Institutet, Sweden, Deputy Co-coordinator IGeLU
- Alex Petrie, South & East Metropolitan Health Services Library, Australia
- Charlie Remy, University of Tennessee at Chattanooga, USA
- Zorian M. Sasyk, Metropolitan State University–St Paul, USA
- Kathy Varjabedian, Los Alamos National Laboratory, USA, Co-coordinator ELUNA
- Selina Wang, Oberlin College, USA

Thanks to retiring members: François Renaville, Stew MacLehose, Melissa Gustafson and Brian Kern.

Thanks to our Steering Committee liaisons: ELUNA: Allen Jones; Pascal Calarco (June 2020-), Dale Poulter (June 2020-). IGeLU: Christian Haenger and Dave Allen (March 2020-).

Interoperability WG

The interoperability WG lead by **Mehmet Celik** created a position paper with the focus on an open platform and standards. The WG wants to create and enhance awareness within the community but especially within Ex Libris to consume and document their own APIs in the hope to create open API's. The Interoperability WG wants to focus more on institutional interoperability and help developers to develop. Not by doing all that work for you but by facilitating discussions, collaborations, etc.

Leganto

The IGeLU Leganto WG is led by **Sue Harmer** who has been a strong advocate for improvements to the to the product. **Sue's** report is as follows:

NERS 2020 ballot:

- Development points increased from 40 to 52 after Ex Libris refunded 12 points from a 2019 request, '6265 - Automatically checking if a newer edition exists' (deferred while Ex Libris continues to work on a solution)
- Two rounds of voting were conducted, for the first time
 - Round 1 included 70 enhancements
 - Round 2 included 14 enhancements
- 58 customers voted
- Ex Libris agreed to develop the top 11 enhancements

Collaborating with Ex Libris on focus groups:

- Tighter integration with Alma purchase request flow

- UX focus group -Ex Libris is in the final stages of gathering and analyzing research from faculty interviews from a diverse variety of schools across the world; the group will reconvene in September with UX expert, and start development of new UX in January 2021

Election of Working Group members:

- 8 candidates nominated to run in our first public election. Thank you to all who nominated!
- We welcomed 4 new members to the group:
 - Jeff Liu, Lingnan University, Hong Kong
 - Anthony Sinnott, University of York, UK
 - Kendall Kousek, Macquarie University, Australia
 - Veronika Leitner, Wirtschaftsuniversität Wien | Vienna University of Economics and Business, Austria
- Special thanks to Louise McGillis (Memorial University of Newfoundland) and Linda Sheedy (Curtin University) for their contributions to IGeLU Leganto WG; both resigned from the WG in 2020

Webinar series:

- [Course Cleanup in Alma and Leganto](#) presented by Greg Argo, University of St. Thomas; Peta Hopkins, Bond University; Yuan Zhong, UNSW Sydney

Linked Open Data WG

Xiaoli Li is the Linked Open data Coordinator. Her report is as follows:

Highlights of the Group's Activities:

The Linked Open Data Working Group (LOD WG) continued to provide information to both Ex Libris and customers about linked data developments within Ex Libris products and in the wider Library and cultural heritage communities.

Between Sept and Dec. 2019, the group published its monthly newsletter to a mailing list of over 400 members covering its activities highlighting the status of new product features, and also listing events and documents related to BIBFRAME, LD4 and other activities that had a bearing on the future of linked data in libraries, as well as upcoming conferences. The group decided to stop the monthly newsletter in Jan. 2020, instead, news and announcements were distributed to the mailing list as soon as they became available.

LOD WG also maintains a Dashboard of linked data features and roadmaps across products showing location of documentation on various Ex Libris sites and noting any issues with the features. Early in 2020, the group revised and re-organized the Dashboard to improve its usability.

The Working Group continued to lead and contribute to discussions with Ex Libris staff and community members about technical aspects of linked data features, often testing them as they become available. Laura Akerman was consulted on a series of conference calls that Ex Libris had with Getty institutions regarding ways of supporting Getty vocabularies (which are being published with a new linked data structure) in Alma for authority control. The group also held a question/answer meeting with Ex Libris staff and the Alma Product Working Group Coordinator to clarify some questions about future linked data editor plans. Another major task we undertook was to review, test and analyze the BIBFRAME 2.0 to MARC converter, released by the Library of Congress on May 1, 2020. This tool will have implications for Alma.

For this past year, we initiated a campaign to collect “Linked Data User Stories and Use Cases,” inspired by use cases Harvard shared with Ex Libris while partnering on the BIBFRAME publishing feature in Alma. Our goal was to open up the visioning to the larger Ex Libris user community, with an aim to fill in the picture more with end users that can better inform development of infrastructure. We organized discussions during and after IGeLU. We plan to share our findings with Ex Libris, the Alma, Primo and other Product Working Groups.

Members of the Working Group cover a broad mix of linked data experience across IGeLU and ELUNA, both with the technical end and with involvement in library organizations and initiatives. This contributes to our ability to keep Ex Libris and others aware of developments. Besides using the group’s listserv which includes more than 400 members, the group contributed to the following conferences:

- Aug. 2019: IGeLU Annual Conference
Organized a business meeting and K.T. Lam and Xiaoli Li gave a presentation titled “Linked Data in Alma: URIs and BIBFRAME Conversion of MARC Tag 880.”
- Oct. 2019: Ex Libris Products User Group, UK and Ireland Autumn Conference
Xiaoli Li gave a presentation on linked data and the issues associated with URIs supplied by Alma.
- July 2020: ELUNA 2020 Annual Meeting Online
Xiaoli Li reviewed the work the Linked Open Data Working group accomplished and revealed the group’s action plan for 2020-2021; Itai talked about Ex Libris’s plan and roadmap for developing linked data features.

Since Sept. 2019, the group has been involved in discussion regarding working group structure and governance initiated by ELUNA/IGeLU steering committees. In December, the group provided a 7-page -long document detailing the group members’ response to the “SIWG (Special Interest Working Groups) Governance - Final” proposal document created by ELUNA/IGeLU steering committees. In Jan. 2020, Xiaoli Li joined the IGeLU/ELUNA Working Group Governance Task Group which was convened to “discuss how to improve product communication and enhancement processes, particularly between product and non-product working groups (formally special interest groups).”

This past year has seen a few changes to the group’s membership. In January 2020, our devoted Co-coordinator, Laura Akerman, stepped down, but fortunately to the group, Laura remains as a member. In addition, we lost three valued members, Euwe Ermita, Alexandra De Pretto, and Adrian Pohl. We will look for new members once the new working group structure and governance has been put in place by ELUNA/IGeLU steering committees.

Action Plans for 2020/2021

In the coming year, we look forward to working more closely with the Alma, Primo and other Product Working Groups as Ex Libris moves forward with linked data features. We also commit to continuing to connect with the Ex Libris user and broader library linked data communities to further the realization of Linked Data’s promise for libraries. More specifically, we will:

1. Continue supporting development of linked data features in Ex Libris Products
 - Conduct a survey and develop a report on linked data landscape and trends
 - Engage with other linked data communities and monitor the development of linked data standards and practices

2. Form a strong supportive relationship with the Alma Working Group
 - Proactively get agenda on Alma meetings
 - Share user stories we have collected so far that relate to Alma
3. Determine roles for the working group and recruit new members once the new working Group structure and governance is in place
 - Add more liaisons to strengthen our relationships with other working groups
 - Focus on recruiting members from IGeLU community
4. Increase community's engagement by offering quarterly Town Hall meetings which will open to any Ex Libris user who is interested in linked open data

Primo WG

Knut Anton Bøckman is the WG coordinator and has been very active. Knut's report is as follows:

Again this year, the IGeLU Primo Working Group (WG) has enjoyed the close working relationship with our sister group in ELUNA. This news in brief therefore has many common points with the ELUNA Primo WG annual report.

Annual Enhancement Process (NERS)

The community submitted 123 new enhancement requests for the 2020 voting cycle. During the vetting process, the IGeLU and ELUNA Primo WG Enhancement Team, led by Bettina Kaldenberg, merged 18 requests; 2 were not votable due to release fixes, 1 was outside of scope, 1 was withdrawn, and 1 was sent to Alma for voting. 100 enhancements were presented to member institutions for voting. The first round of voting was extended three weeks, in recognition of the needs of the community to prioritise local efforts around the global COVID-19 situation, and was closed finally on April 15 with 36,087 voting points applied. The top 20 requests are now with Ex Libris for pointing, as we prepare for the second round of voting to start in the near future.

Central Discovery Index (CDI)

The Primo WGs of IGeLU and ELUNA did not play an active role in the transition from PCI (Primo Central Index) to CDI. In retrospect it would have been ideal to have a coordinated testing effort. The IGeLU / ELUNA WG ownership of the CDI effort was not clear, and some assumed that the Content WG was participating.

We learned that the CDI early adopters working with Ex Libris did not have a collaborative group as such. Each site had a separate basecamp with Ex Libris to manage the project for that institution or consortium, without a coordinated opportunity to consult with each other for testing, or review and learn from each others' experiences and feedback. This resulted in a lack of transparency in the development, design, and roll-out of CDI.

Nonetheless, two members of the WG, Stacey van Groll and Lee Houghton, have been particularly active in their testing and reporting of CDI issues, which have contributed to much needed improvements to the product and the documentation.

Monthly Meetings with Ex Libris Product Management

Every month the IGeLU and ELUNA Primo WG chairs/co-chairs have a conference call with Ex Libris Primo Product Management and related parties. Usually, Ex Libris attendees include Nili Natan, Yisrael Kuchar, and Christine Stohn.

This forum is very helpful to escalate issues and discuss the Roadmap, NERS progress and development, widespread incidents affecting the community, and as an opportunity to raise other issues as needed by direct conduit. It is also very valuable that both IGeLU and ELUNA Primo WG leaders participate, to make sure that everyone has been part of the same high-level conversations about Primo.

This year an especially important discussion occurred related to the timing of the May 2020 release for Primo sites using the Back Office. Some other product releases were delayed due to COVID-19 library closures, and the transition of staff to working remotely. It was suggested the Primo release should be delayed 3 months and combined with the August 2020 release. After discussion, and polling Primo WG members, we were nearly unanimous in deciding that continuing with the planned schedule was best for the community, as staff would have a month to adjust to new work environments before the release was installed on sandboxes. This decision achieved the least disruption to the development cycle and allowed users to get bug fixes and features sooner.

Angular upgrade

No decision has been made on the angular upgrade. The IGeLU and ELUNA WG chairs/co-chairs have discussed the matter with Ex Libris Product Managers, who have advised that they are continuing to evaluate risks versus rewards. The next step is to do outreach to the Primo developer community. No timeline is confirmed yet for this, as most folks are still making major work adjustments for this unusual

Rosetta WG

The following report was prepared by Kirsty Smith (outgoing Coordinator) and Teresa Soleau (incoming Coordinator):

While the in-person Rosetta Working Group meeting, which was to have been hosted by ZBW in Kiel, Germany, had to be cancelled, an online meeting was run over the planned meeting dates at the beginning of June. The online meeting went well and enabled a larger number of customers to participate (about 55 attended virtually compared to about 35 in person). A focus for the year ahead will be looking at how the Working Group can maintain and build on the momentum generated and continue to engage remotely throughout the year.

During the year, two enhancement request cycles were completed – 6.3 and 7.0. As the 6.3 Rosetta release was made into a maintenance update, it is expected that all the submitted enhancements will be delivered in 7.0.

This year, Ex Libris has worked with a group of developers from the community on API enhancements. As a result of that work the Rosetta APIs will be progressively moving to REST APIs from version 7.

Knowledge sharing has continued to be a focus for the Group, several customer-led webinars were run over the year focused on different preservation and delivery & access topics.

For 2020/21 we have a new Working Group committee in place with Teresa Soleau (J. Paul Getty Trust) moving into the Coordinator role, Kirsty Smith (National Library of New Zealand) leading one of the sub-working groups (Delivery & Integrations), and Kim Tryka (National Geographic Society) taking on the ELUNA Program Coordinator role. We still have one role to fill

(Deputy Coordinator) and finding ways to encourage Working Group committee participation from the Rosetta community remains a challenge.

Rosetta Working Group 2020/2021 Action Plan

- Create a “newbies” group within the larger working group to help onboard both new Rosetta customers and new staff at existing Rosetta institutions
- Conduct 2 rounds of enhancement submissions (October 2020 and April 2021)
- Focus work in the Format Library sub-working group on redesigning the Rosetta validation stack
- Focus work in the Delivery & Integrations sub-working group on updating the data model to accommodate hierarchical digital objects

SFX/bX WG

Jiri Pavlik is the WG Coordinator for this product and his report is as follows:

- Monitoring COUNTER 5 support development for USTAT
- Preparing SFX enhancement requests
- Undertaking regular monthly calls with Christine Stohn, SFX product Manager

Summon WG

Maribel Alvarado from the Steering Committee is currently working on creating a IGeLU Summon working Group. Please contact Maribel if you are interested in joining this working group.

Voyager PWG

Antonella Ward is the Voyager WG coordinator. The major activity of the group has been the migration of viable contents formerly in El Commons into the [Ex Libris Developers Network](#).

Steering Committee Planned 2021 Activities and Initiatives

The COVID-19 Pandemic has impacted IGeLU's ability to deliver on 2019/2020 activities. As a result some of the 2019/2020 activities will be carried across 2020/2021. The list of 2020/2021 planned activities are as follows

1. Deliver GDPR recommendations to Ex Libris
2. Involvement in Ex Libris' Diversity and Inclusion project
3. Deliver recommendations from the National/State/non-academic institutions
4. Rationalize the existing Product Development Collaboration Agreement
5. Redevelop the IGeLU website to meet member's requirements
6. Create an IGeLU Exploro Work Group
7. Create an IGeLU Resource Sharing Work Group
8. Provision of a shared ZOOM Webinar and Zoom Meeting subscription for use by the National and Regional User Groups
9. Provision of a shared ZOOM Webinar subscription for use by the Working Groups to deliver webinar to the community
10. Expand IGeLU membership into the South American and Asian communities.

Membership

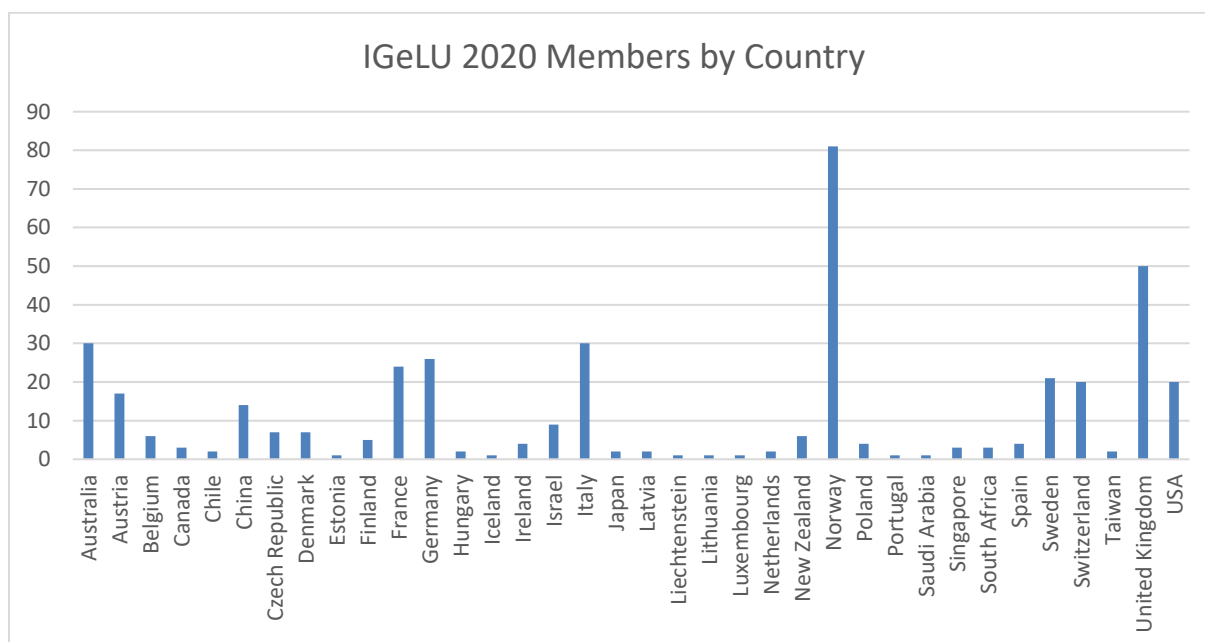
Since the last conference, we have had a small increase in our membership. This is significant considering the budget cutbacks that institutions are going through due to the COVID-19 pandemic.

The two main benefits of membership are:

1. Discount conference rates
2. NERS product enhancement voting which is covered by the IGeLU/ELUNA and Ex Libris Product Development Collaborative Agreement where the top voted enhancements are guaranteed to be developed by Ex Libris.

Our consortia membership is also expanding. We welcome two new consortia representing French and Italian institutions. Consortia memberships have a discounted membership rate and is becoming more popular with our members.

IGeLU 2020 membership is as follows.



Generally, IGeLU will have to invest more time and effort in reaching out to all new and existing customers in all regions of the world (APAC, EMEA and Americas).

IGeLU General Assembly & Budgets

Budgets

All budget information is transparent for members and non-members published on our website: <http://igelu.org/about/organisation/budget>.

This year we are expecting a larger than normal carryover. This is due to not running a physical conference this year. The savings from this year will be used to offset the 2021 conference.

We are proud and satisfied to be able to present a positive balance for 2020 and this will allow us to **keep the annual membership fee stable at €250**.

During the General Assembly at the conference you will be asked to approve to the budget.

Voting on open positions of the Steering Committee

This year there will be voting on four positions on the Steering Committee; a call for candidates had been published on our website and was distributed via the mailing lists. This year we are using NERS to carry out electronic voting for the first time. Information on voting can be found on our website at <https://igelu.org/archives/11906>. The successful candidates will be announced on Thursday at the closing session.

Dave Allen, IGeLU Chair