



12th - 15th September 2022

## CHAIR'S REPORT 2022

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# 2022 Chair's Report

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## Executive Summary

This report also provides me with an opportunity to thank the large number of volunteers who form the backbone of IGeLU (International Group of Ex Libris Users). 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.

Post COVID19 lockdowns we have pivoted our conference to follow a 'hybrid' model where we have both physical and virtual presenters and delegates. We will be using the IGeLU 2022 conference to determine what works, and what does not work in a hybrid conference environment. Some of the challenges that we have had to face include ensuring that the 'costing' model works, how to meet delegates expectations of a 'free' virtual attendance and how to cater for the delegates across the all time zones.

Another challenge / opportunity that we are contending with is the acquisition of ProQuest / Ex Libris by Clarivate and the consolidation of Innovative Interface and Ex Libris into a single business unit. As you can imagine the consolidated business unit needs to deal with Aleph, Voyager, Virtua, Sierra, Polaris and Alma library systems. There are also other areas on multiple products especially in Discovery and Digital Asset Management. The challenge that we will be faced with is how does IGeLU continue to represent the needs of this much larger and diverse community.

Unfortunately, the costs related to running our organisation has required us to increase annual membership from €250 to €300 per annum. This decision has not been taken lightly as we have managed to contain annual membership rates at €250 per annum for over 10 years. The full reasoning behind this decision can be found in the 'Membership' section of this report.

## What makes IGeLU 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.

**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 and to be the primary contact point with Ex Libris. This involves 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 and the joint IGeLU and Ex Libris Users Group of North American (ELUNA) Ex Librisusers.org email distribution lists platform to achieve this task.

The SC coordinates the work done by the Working Groups and is responsible for initiating new Product Working Groups and Communities of Practice as required. The IGeLU Chair has regular meetings with the ELUNA Chair 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.

### IGeLU Steering Committee Roles

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

Dave Allen (Australia) – Chair, Leganto, Rosetta and National and Regional User Group Liaison

Maribel Alvarado (Chile) – Analytics, Content, and Linked Open Data Liaison Officer

Knut Bøckman (Denmark) – Alma and Rialto Liaison Officer

Alex Forrest (Scotland) – RapidILL and Rapido Liaison Office

Cindy Greenspun (USA) – SFX and Voyager Liaison Officer

Augusto Ribeiro (Portugal) – Aleph and Summon Liaison Officer

Asbjørn Risan (Norway) – Primo and Consortia Liaison Officer

Petra Svanborg (Sweden) – Esploro Liaison Officer

### Conference planning

Our conference is at the heart of the organization and without a conference planning sub-committee we would never be able to have so successful and highly rated conferences. Tracey Clarke and François Renaville has been working tirelessly throughout the year organizing this year's conference and their commitment and energy are to be applauded.

## Finance, legal and administration

The IGeLU Treasurer, Guido Badalamenti, takes care of IGeLU's finances, membership 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 especially Katia Medaglini for all their indispensable work and devotion to the community.

## IT-services and infrastructure

Mark Dehmlow takes care of all internal IGeLU ICT services and infrastructure. 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 Group and Community of Practice activities

It is important to note that Working Groups (WG) and Communities of Practice (CoP) are the backbone of IGeLU. These groups rely on community membership, and I encourage members to volunteer to join these groups when positions become available.

Some groups are Joint IGeLU/ELUNA Groups, 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 program planning, inviting presenters and managing the product specific the Q&A sessions at the conference
- attending to working meetings through the year to discuss and plan their activities

I want to thank the following IGeLU coordinators:

- Camelia Anghel (USA) - Aleph WG
- Gijs Neols (Belgium) - Alma WG
- Davin Pate (USA) - Analytics Community of Practice
- Karin Perols (Sweden) - Content WG
- Mehmet Celik (Belgium) - Interoperability/Developers CoP
- Joan Kolarik (USA) - Esploro WG
- Jessie Donaghey (Australia) - Leganto WG
- Xiaoli Li (USA) - LOD CoP
- Stacey van Groll (Australia), Primo WG
- Teresa Soleau (USA) - Rosetta WG
- Jiri Pavlik (Czech Republic), SFX WG
- Steelsen Smith (USA), Voyager WG

- Sylvain Courret (Switzerland), Consortia CoP
- Ian Hey, (UK) – Rialto WG

I also would like to thank all members of these Working Groups and Communities of Practice 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 Working Group

Voting cycle started in August 2020 ended February 2021

- Aug 1<sup>st</sup>,2020– Nov 1<sup>st</sup>,2020: New enhancements requests can be submitted on NERS
- Nov 2<sup>nd</sup>, 2020– Nov 8<sup>th</sup>,2020: Aleph PWG review the requests and submit them on NERS
- Nov 9<sup>th</sup>, 2020- Nov 29<sup>th</sup>,2020– First voting cycle
- Nov 30<sup>th</sup>,2020– Jan 10, 2021: Aleph PWGs work with Ex Libris to clarify requests and pointing
- Jan 11<sup>th</sup>, 2021 – Feb 15<sup>th</sup>, 2021 - Final voting cycle
- Feb 15<sup>th</sup>, 2021 – Feb 21<sup>th</sup>, 2021 – Aleph PWGs select most voted enhancements and send them to Ex Libris

## Enhancement Requests 2020-2021:

1. Add a field to show partial personal information  
Due to the personal privacy, please add a field to show partial personal information, instead of the patron's full- name on the system. Such as my name is "陳恒毅", only show "陳○毅" in the new field.
2. Cir-23 -Prevent unwanted deletion of all patrons  
The field "Input file" should either be mandatory or a warning should be shown when its not filled. We accidentally executed the procedure without the input file parameter and after stopping had to reconstruct Oracle tables from backup with some data loss. I know about one other library that had deleted their patron data the exactly same way and would bet on it there have been more cases. While other non-destructive procedures control even whether the input file exists, this one has no checks on that whatsoever.
3. Fiscal year purge: Remove all vendors without any remaining orders or invoices.  
The idea is one can enter a fiscal year, or fiscal year start date (if the developers recommend this approach), and all prior financial related data would be removed. It would specifically not touch Bibliographic, holdings, or item information, but it would remove all orders, invoices, budget transactions,

and any related child tables. The records would be removed regardless of any status field or completeness. It specifically must remove all vendors without any remaining orders or invoices. Reason: This removes clutter and helps prepare a library for migration into Alma. It removes old incomplete invoices and vendors no longer in use, which could waste staff time and effort in a new system.

4. Prompt for confirmation before deleting memos  
Since the buttons for deleting a memo and for opening the referred record in cataloging are very close to each other and Aleph does not prompt for confirmation before it deletes a memo it can happen very easily that memos are deleted accidentally by clicking a few mm atop of the button that would open the referred record in cataloging. Therefore, we suggest to let pop up a confirmation prompt before deleting a memo.
  
5. Show 'Number of holds' and 'Your place in queue' on the page of account's hold requests list  
There is a waiting list on the reserved system, but it doesn't show 'Number of holds' and 'Your place in queue' on the page of account's hold requests list for title hold request. The patrons need to know their request information clearly on the website.
  
6. Validation check for duplicate fields with identical text  
We need a mechanism to check the BIB record for duplicate fields containing identical subfields and text strings. Typically these are duplicated subject headings in records sourced from large databases, e.g.  
  
650 \_0 \$aDogs\$vFiction.  
650 \_0 \$aDogs\$vFiction.
  
7. Validation checks across fields We need a mechanism to check the BIB record for duplicate fields containing identical subfields and text strings. Typically, these are duplicated subject headings in records sourced from large databases, e.g.

```
650 _0 $aDogs$vFiction.  
650 _0 $aDogs$vFiction. $data_tab/check_doc_line
```

can be used to create dependencies for subfields within the same field, but not across fields. To create dependencies for subfields across two or more fields would be extremely useful, e.g. if bib field 949 subfield "a" contains text "abc" then check that field 960 subfield "d" contains text "xy"

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## Sent to Ex Libris:

Title	Complexity			Points
	ReqID	Points	TotalVotes	
1. Validation checks across fields	7096	35	1690	85
2. Fiscal Year Purge- remove all vendors without any remaining orders or invoices	7099	60	1545	25
3. Show 'Number of holds' and 'Your place in queue' on the page of account's hold requests list	6521	20	225	5
4. Validation check for duplicate fields with identical text	7097	20	210	-15
5. Cir-23 - Prevent unwanted deletion of all patrons	5968	15	175	-30
6. add a field to show partial personal information	6522	50	170	-80
7. Prompt for confirmation before deleting memos	6549	5	60	-85

## Approved by Ex Libris

Title	ReqID	ReqStatus	ExLStatus	ityPoints	Points
1. Validation checks across fields	7096	Votable	Pending	35	85
2. Fiscal Year Purge- remove all vendors without any remaining orders or invoices	7099	Votable	Pending	60	25
3. Show 'Number of holds' and 'Your place in queue' on the page of account's hold requests list	6521	Votable	Pending	20	5
4. Prompt for confirmation before deleting memos	6549	Votable	Pending	5	0

## Most Voted Enhancements

1. Validation checks across fields (85 points)

We need a mechanism to check the BIB record for duplicate fields containing identical subfields and text strings. Typically these are duplicated subject headings in records sourced from large databases, e.g.

```
650 _0 $aDogs$vFiction.
650 _0 $aDogs$vFiction. $data_tab/check_doc_line
```

can be used to create dependencies for subfields within the same field, but not across fields. To create dependencies for subfields across two or more fields would be extremely useful, e.g. if bib field 949 subfield "a" contains text "abc" then check that field 960 subfield "d" contains text "xy"

2. Fiscal year purge: Remove all vendors without any remaining orders or invoices. (25 points)

The idea is one can enter a fiscal year, or fiscal year start date (if the developers recommend this approach), and all prior financial related data would be removed. It would specifically not touch Bibliographic, holdings, or item information, but it would remove all orders, invoices, budget transactions, and any related child tables. The records would be removed regardless of any status field or completeness. It specifically must remove all vendors without any remaining orders or invoices. Reason: This removes clutter and helps prepare a library for migration into Alma. It removes old incomplete invoices and vendors no longer in use, which could waste staff time and effort in a new system.

3. Show 'Number of holds' and 'Your place in queue' on the page of account's hold requests list (5 points)

There is a waiting list on the reserved system, but it doesn't show 'Number of holds' and 'Your place in queue' on the page of account's hold requests list for



title hold request. The patrons need to know their request information clearly on the website.

4. Prompt for confirmation before deleting memos (0 points)  
Since the buttons for deleting a memo and for opening the referred record in cataloging are very close to each other and Aleph does not prompt for confirmation before it deletes a memo it can happen very easily that memos are deleted accidentally by clicking a few mm atop of the button that would open the referred record in cataloging. Therefore, we suggest to let pop up a confirmation prompt before deleting a memo.

#### **Aleph Roadmap:**

- V23.4- minor released on January 26, 2021
- 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 Working Group Report

The Alma PWG's main focus this year was to establish and strengthen relationships with other advisory, focus, and working groups in order to increase transparency and efficiency, and to improve communications with Ex Libris in order to achieve better efficiency and provide clear priorities.

### Enhancement Process

Goal: Complete 2021 NERS Enhancement process and solicit enhancements and hold voting for 2022 Enhancement process

The Alma PWG completed the 2021 NERS Enhancement process. The PWG did not make any changes to the 2022 process. Based on the implementation of enhancements in the spring of 2022, the group identified improvements to ensure enhancements are more closely shepherded through by the WG.

This evaluation of the NERS 2021 procedure resulted in a few lessons learned:

- Make sure to have **detailed** "solutions proposed" from Ex Libris prior to the 2<sup>nd</sup> round of voting
  - Discussed via basecamp together with the submitter – the entire scope should be clear!
  - Detailed plans will help to avoid a change of plans when going to the development phase
- Make sure if plans change, during development, that this is being talked through asap with the submitter AND the Alma PWG in a **thorough** way.
  - Every NERS request should have active guidance from the PWG
- Make sure Ex Libris, in the end, delivers what has been agreed on based upon the detailed solution proposed.

The WG will be working on how to implement these changes in 2022-23.

### 2022 NERS Enhancement process - Results

The following five NERS requests will be implemented and developed in 2022 as a result of the Alma 2022 NERS enhancement process: ([High level solutions](#))

ReqID	Title	Complexity Points	Total Votes
7948	Revised title: Add "Not contains" or "Not equals" to Alma titles and inventory search indexes where "contains" or "equals" currently exist. (Original title: Adding "Does not contain" and "not" search option in Alma)	50	6785

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7876	Improve letter editing functionality	120	5075
7705	Make it possible to customize the cancellation reasons	10	4987
7934	Borrowing request with status Ready to be sent - should appear in task list	5	4791
7880	Add support for dynamic collections that are automatically updated using logical sets	80	4748

Please note that the Alma PWG decided to move forward with enhancement request 7880 in 2022 by already taking some complexity points from 2023 to make this happen. The PWG determined that the number of votes from the community justified this decision.

A special thanks goes out to Mary Greci to coordinate the Alma NERS enhancement process and to make sure we were able to meet the deadlines.

## Functional Subgroups

Goal: Continue progress on establishment of functional subgroups (Acquisitions; Digital; Fulfillment; Resource Management)

The Alma PWG decided to incorporate Alma Digital issues into the other subgroups and disband Alma Digital as its own subgroup based on the functional integration of Alma Digital with other areas. This will also give the PWG more flexibility in terms of membership and organization.

The Acquisitions subgroup continued its work this year with the Content Working Group on the Overlap Analysis tool, which was partially released in March 2022. Development will continue and include physical items by the end of 2022. Thanks to Leon Krauthausen for his perseverance on this project.

In addition, thanks to all functional subgroup chairs and members for their efforts in reviewing and following up on NERS 2022 enhancement requests!

## Work with Focus Groups and working groups

Goal: Ensure and improve coordination and communication among focus groups and other working groups

Much of the work the focus groups related to Alma is thanks to the various members of these groups.

- Community Zone Management Group ([IGeLU website](#))

- Updated their charge (Terms of Reference) - see also remit on the IGeLU website page
- CZ bib record editing survey
- CONSER record ingest process
- Analysis of local information in CZ records
- Welcomed 9 new members
  
- Alma Authority Focus Group
  - Chair rotation
    - Thanks to Pete Wilson for his work leading the group to define and submit priorities to Ex Libris, and to Liz Bodian for taking on the coordinator role in January 2022
  - Established liaison with Alma WG
  
- Alma Performance Focus Group
  - Worked with Ex Libris to ensure performance issues are managed and to make these efforts more visible to users and monitor progress
  - This specific focus was also passed on to the UX Focus group in order to make sure that the redesign of the Alma UI didn't impact performance. This, for example, resulted in a well considered delay of the 'sunset' of the new MDE.
  - Continuous effort to follow-up on Alma performance
  
- Alma UX Focus Group
  - Established some additional expectations for soliciting agenda to encourage topics of discussion from both the users and from Ex Libris
  - Identified and voted on priorities that are still required in the new MDE
  - 1:1 meetings between each UXFG institution and Ex Libris
  - Tracks worked on/in progress 2021-2022:
    - Acquisitions - PO Line task list
    - Fulfillment - Circulation desk
    - Repository search - all titles search, holdings search

- Documentation Focus Group
  - New group established by Ex Libris which the PWG conferred on setting up and soliciting membership
  - Established liaison with Alma PWG
- Analytics CoP
  - Reviewed [report](#) and discussed with Ex Libris. Ex Libris has taken the comments into account and solved the issues
  - Retention period for the new System Events SA will be limited to 3 years!
    - [Report](#)
- Consortia Focus Groups
  - Coordinated ELUNA and IGeLU groups and established new coordinator advisory group to provide consistent and clear communications with Ex Libris. Groups involved:
    - ELUNA Alma Consortia Focus Group
    - IGeLU Consortia Community of Practice
    - ELUNA/IGeLU Consortia Coordinator Advisory Group
- Linked Data WG
  - Reviewed and provided feedback on URI report
- CDI-related work
  - Two members of Alma PWG serving on new CDI Advisory Group
  - Alma PWG provided feedback on CDI pain points document from Content WG

General goal for the upcoming year: focus on developing web presence related to these areas as appropriate and provide more transparency/insights on what we're working on. (See also below: 'Documentation / Communication')

## **Relationship / contact with Ex Libris**

Goal: strengthen our relationship/communication with Ex Libris in order to maintain a transparent overview of all activities going on concerning Alma (and relatives).

Due to the Clarivate take-over and internal reorganization within Ex Libris, this became even more important. Dana Moshkovits took over the role as 'VP of Alma product management' and also within Alma product management and the UX project there were several changes.

During Monthly meetings between Alma PWG and Ex Libris Alma product management the following topics were discussed - Communication with the Alma Community

We discussed together with Ex Libris what the 'best' way would be to communicate with the Alma Community and how we should be able to reach everyone. One of the

principles is to communicate 'there' where Alma users are. This resulted in a new feature: Alma announcements where all kinds of communication can be done.

- Premium Sandbox Refresh – community survey
- Quarterly release cycle - resulted as a question from the community for consolidation
- QA: Quality assurance - continuous improvement
- NERS enhancement process follow-up
- Status updates on sub/focus groups (keep aligned if needed) :
  - UX updates
  - Performance Focus group
  - Analytics Focus Group

## Documentation / Communication

Continuous effort and Goal for the upcoming year!

- Developed basic website as part of new IGeLU site
  - Started to add Alma PWG minutes to the Alma web page
  - Added a page for the CZMG

## Goals / Roadmap 2023 (in brief)

### 1. NERS 2022-2023

Scope: Complete 2022 NERS Enhancement process and solicit enhancements and hold voting for 2023 NERS Enhancement process

- Identify and implement new process for shepherding enhancements
- Implement New system - AHA!
- As part of AHA implementation, identify and coordinate any necessary shared enhancement procedures with other WGs

### 2. Functional (sub)groups

Scope: Continue progress on establishment/reviewing of functional subgroups  
**(Acquisitions; Fulfillment; Resource Management)**

- (re)Define/refine scopes of functional subgroups related to needs?
  - Cfr 'digital' subgroup (see above)
- Develop regular meeting cadences based on needs of the individual subgroups
- Review and confirm membership of the functional subgroups
- Participate (even more) in 2023 Enhancement cycle with more responsibility
- Collaborate with Ex Libris on workflows and functional topics

### 3. Transparency / Communication

Scope (1): Continue progress on sharing the Alma PWG activities with the community

- Primary Focus on providing content to the IGeLU website for Alma PWG
  - Adding meeting notes/minutes to the Alma page
  - Adding web presence for related FGs

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- Determine whether a mid-year webinar or update for the Alma community
- Scope (2): Continue progress on coordinating/following up on Alma related Focus, advisory, working, CoP groups.

## Analytics Community of Practice Report

### Initiative One: Data Dictionary Style Document

- Priority: 1
- Additional ELUNA/IGeLU Groups: ALMA initially but over time will expand.
- Scope Statement: Ex Libris developing a data dictionary utilizing existing analytic documentation. Will involve multiple members of the Analytics group
- Estimated time to delivery: Undetermined. We have attended one meeting with Ex libris and are expecting the draft of the first subject area soon
- When does work start? Discussions began back in 2015-2016. The first draft was provided July 2022.
- The number of people involved: 3-4 from the Analytics CoP. Other non-committee members from around the world

### Initiative Two: Leganto Focus Group (Analytics)

- Priority: 1
- Additional ELUNA/IGeLU Groups: Leganto Working group is working with the Analytics Community of Practice in a joint effort with Ex Libris to improve Leganto Analytics.
- Scope Statement: Leganto Working group is working with the Analytics Community of Practice in a joint effort with Ex Libris to improve Leganto Analytics.
- Estimated Time Delivery: Unknown. Group has not met at this time.
- Number of people involved: 2 from Analytics CoP.

### Initiative Three: Analytics Listserv Review

- Priority: 3
- Additional ELUNA/IGeLU Groups: None
- Scope Statement: We created a volunteer monitoring list to review Analytic Question through the various listservs. CoP members sign up for slots. The goal is to cover more of the analytic listserv questions and provide assistance to different universities.
- Estimated time to delivery: Ongoing
- Number of People involved: All Analytics CoP members

### Initiative Four: Out of The Box Analytic Report Basecamp

- Priority: 3
- Additional ELUNA/IGeLU Groups: ALMA and Primo
- Scope Statement: Ex Libris is revising the Out of the Box Analytic Reports. Will involve multiple members of the Analytics group
- Estimated time to delivery: Undetermined. Delivery based on the availability of Ex Libris and development.
- When does work start? This was just reopened in a discussion with our Ex libris Liaison. timetable is not available yet.



- The number of people involved: 3-4 from the Analytics CoP. Other non-committee members from different universities are also involved.

## **Initiative Five: ELUNA Learns session**

- Priority: 1
- Additional ELUNA/IGeLU Groups: None
- Scope Statement: Develop presentations and provide information on upcoming Analytics projects. Develop a presentation on Data Dictionary announcement, Inventory Duplication reports (or something similar), and other presentations as needed.
- Estimated Time to Delivery: November 2022
- The number of people involved: 3-4 from the Analytics Community of Practice.

## **Accomplishments this year:**

Completion of the following initiatives:

- Inconsistent Measure Report. Analytics Group found and with Ex Libris help corrected over 90 inconsistencies in labelling within Analytics.
- Event/System Events. Community issue that was raised regarding Event to System Event Report changes resulted in Ex Libris adding additional data points that were previously not included in the report.
- Successful in creating the first joint analytics Ex Libris update that provided analytic updates to many Ex Libris' products.
- Establishing a list monitoring to assist people with analytic questions.

## Content Working Group Report

The Content Working Group (CWG) engages in activities, on behalf of the Alma, SFX, 360, Primo, Primo VE, CDI, Summon and Rialto user communities, that support the development and management of the knowledge bases and indexes that underlie the aforementioned products.

Karin Perols is the coordinator for IGeLU, and Charlie Remy is the coordinator for ELUNA.

### Key activities in 2021-2022 has been the following:

Compiled and prioritized CDI pain points report

CWG reached out to the WG's for the systems mentioned above and collected and compiled a CDI pain point report that was shared with the Steering committees of both IGeLU and ELUNA who then shared it with Ex Libris.

The top pain points were the following:

- Poor data quality negatively impacts patron discovery and access
- Insufficient Ex Libris support to address metadata issues
- Slow rights updates
- Outdated and offensive subject headings appearing in subject facet
- Primo and Summon author facets do not include CDI results
- Lack of EBSCO content in CDI

Participating in the formation of a CDI Advisory Group

The discussion between the Steering committees and Ex Libris has led to the formation of a CDI Advisory Group with members from the WG's for Content, Primo, Summon, Alma, SFX, DEI and relevant Ex Libris product management. The group is led by Pascal Calarco (ELUNA) and Maribel Alvarado (IGeLU).

There will be a review of progress after one year. The scope of the group is to:

- Discuss and prioritize resolution of pain points
- Discuss enhancement process and make recommendations for future
- Communicate progress to user community about Data Excellence Initiative deliverables related to CDI

The Provider Relations Group

The subgroup of the CWG formed in late 2020 with CWG members and Ex Libris Provider Relations staff. The group had bimonthly meetings during the last year but is currently waiting for a new contact from Ex Libris.

The group organized an initial provider roundtable with 5 providers. There were discussions about metadata standards, OA, perpetual access, representation of non-book/journal content, etc.

They also completed feedback to improve provider resources on Ex Libris website.

## Collection Overlap Analysis Advisory Group

Members from the CWG beta tested and provided feedback on improved Alma overlap analysis functionality.

## NERS 2021

We held a NERS vote for content in July 2021. From the requests sent in Ex Libris processed 12 requests and at the end of May 2022 2 were completed, 3 were in progress and 7 were closed.

## Advocacy and other business 2021-2022

We advocated for the restoration of DOAJ coverage dates in KB's and Alma automated holdings from more providers and updated our charter.

Other issues CWG has provided Ex Libris with feedback on:

- Data excellence initiative
- Update issues with critical KB collections
- CDI QuickLinks
- CDI Hybrid linking
- MARC record enrichment
- Content support
- Provider platform changes
- Open access content in KB's
- ProQuest Ebook Central chapter records in CDI

## Plans for the coming year

- Make recommendations to Steering Committee for content-based request process similar to recent Ex Libris shared agreement for product development
- Actively participate in CDI advisory Group
- Continue work of Provider Relations subgroup
- Hold additional provider summits to discuss pertinent issues
- Conduct provider survey to better understand provider needs and wants

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- Look into making the meetings more convenient for different time zones to increase member engagement

Current membership list:

- Beth Juhl, University of Arkansas, USA
- Charlie Remy, Dartmouth College, USA, Coordinator ELUNA
- Claire Chan, Hong Kong Academy for Performing Arts, Hong Kong
- Deborah Tomaras, Marist College, USA, ELUNA Primo and DEI Liaison
- Galen Jones, The Open University, UK, Alma CZMG Liaison
- Jennifer Carroll, University of New Hampshire, USA, Rialto Liaison
- Jiri Pavlik, National Library of Technology, Prague, Czech Republic, SFX Liaison
- Karin Perols, Karolinska Institutet, Sweden, Coordinator IGeLU
- Kathy Varjabedian, Los Alamos National Laboratory, USA
- Larisa Smyk, University of Waterloo, Canada
- Molly K Beisler, University of Nevada, Reno, USA
  
- Noémie Ammann, ETH, Switzerland, IGeLU Primo Liaison
- Piamsuk Thungkawee, Srinakharinwirot University Library, Thailand
- Rogene McCoy, South Metropolitan Health Services Library, Australia
- Sally Donnelly, Southern Cross University Library, Australia
- Selina Wang, Oberlin College, USA
- Stephanie (Step) Schmitt, University of California Hastings Law Library, USA, Alma Law Library SIG liaison
- Tamar Ganor, The Hebrew University of Jerusalem, Israel, Provider relations subgroup chair
- Xiaotian Chen, Bradley University, USA

Steering Committee Liaisons are:

- Maribel Alvarado (IGeLU)
- Pascal Calarco (ELUNA)

Thank you to retiring members:

- Christel Coquilleau, University of Lausanne, Switzerland Eleanor Craig, University of Sussex, UK
- Richard Guajardo, University of Houston, USA Stacy Magedanz, CSU San Bernardino, USA Ulrikke Greve Olufsen, University of Oslo, Norway
- Zorian M Sasyk, Metropolitan State University - St Paul, USA

# 2022 Chair's Report

## Esploro Working Group Report

Coordinator, Joan Kolarik (Weizmann Institute/IGeLU > Drexel University)

Deputy coordinator, none

### Challenges

- Startup and regular meetings through a period of major changes
  - the Ex Libris/ProQuest acquisition by Clarivate
  - many subsequent staff changes at Ex Libris
  - major product and focus changes, such as
    - transition from GRID to ROR for organizational identifiers
    - Microsoft Academic closed and was replaced by OpenAlex
    - Stronger focus on full RIM system with multiple additional modules rolled out
  - Current coordinator switched jobs and moved to a different region
- Small but growing customer-base
- Finding sufficient volunteers and a deputy coordinator
- No development points yet.
- Loss of customer-created Community Knowledge Articles when Ex Libris transitioned to ProQuest support interface

### Accomplishments

The Group continues to

- monitor and maintain the Esploro listserv for communication
- provide updates on group's activities at conferences and on the organization websites
- provide subject-based programming at conferences and online
- investigate ways to impact future Ex Libris development
- meet monthly with Ex Libris Product Manager and staff

### Meetings

- The group's start was announced at the August 2021 IGeLU meeting (ELUNA group was formed earlier in the year)
- Only 1 IGeLU Esploro Working Group meeting was held during the year, on 7 Dec 2021
- Community Discussion Meetings - over the course of the year, in coordination with the ELUNA Esploro Working Group, meetings were held, recorded, and posted for the entire community:
  - October 2021, topic = Researcher Profiles (not recorded)
  - November 2021, topic = Outreach
  - April 2022, topic = Organizations (2 meetings, 1 APAC, 1 NA, in an attempt to make the time zone coverage more inclusive)

The Esploro community has had an impact on product development via community feedback resulting in

- date change for new public interface
- prioritization of public interface accessibility (VPAT/WCAG 2.1 report)
- asset transfer to ORCID returned to H1 2022 after brief reprioritization to later in the 2022/2023 road map

At IGeLU 2022, there will be only 2 Esploro-related presentations in addition to the IGeLU Esploro Working Group presentation (ELUNA 2022 was only administrative, so there was only an ELUNA Esploro Working Group presentation)

- Lots of Links: Creating Interactive Analytics Dashboards (though the techniques described can be used in any Analytics section, most examples will be from Esploro) / Joan Kolarik
- Are two tools better than one? Challenges and opportunities in research data management using Converis and Esploro / Paolo Buoso

## 2022/2023 Goals

- Encourage Ex Libris alignment with community priorities. This conversation was started during the past year, kicked off by a survey of customer priorities and the importance of existing enhancements as planned in the road map
- Consider merging the ELUNA and IGeLU working groups along with Converis with subgroups or Communities of Practice to address specific geographic, product- or module-oriented needs in a still-small market
- Attend monthly Analytics meetings to provide Esploro liaison
- Determine if Joan can remain as coordinator and, if not, find a replacement
- Find a deputy coordinator
- In-depth review of Esploro Analytics. This was last done in 2021 and, because of ongoing changes, needs to be repeated periodically
- Begin preparations to join enhancement process
  - Learn the new enhancement process software
  - Use the Idea Exchange as a source for testing
  - Establish a clear plan for receipt of Esploro development points
- Promote more Esploro-related presentations for 2023 IGeLU conference
- Create a realistic group meeting schedule and hold regular group meetings
- Organize more community discussion meetings, preferably continuing the 2-meeting approach in order to make these meetings more accessible to a broader audience
- Regular updates to the new IGeLU Esploro Working Group section (<https://igelu.org/products-and-initiatives/product-working-groups/esploro/>)

# 2022 Chair's Report

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## **Interoperability / Developers Community of Practice**

The Interoperability / Developers Community of Practice continues 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 Working Group Report

The Leganto Product Working Group meets monthly. In addition, the Coordinator attends regular meetings with other Product Working Group Coordinators, Steering Committee Liaisons (IGeLU and ELUNA) and Ex Libris Leganto Product Management. Working Group minutes can be accessed on the [IGeLU website](#) (membership login required).

### Working Group membership changes

- In August 2021 Jessie Donaghey took over as Coordinator of the Working Group from Sue Harmer, who had retired.
- At the beginning of 2022 the WG welcomed two new members: Massimiliano Cilurzo from the University of Salerno, Italy, and Eva Reblin from Technische Universität Berlin, Germany.
- In June 2022 Kael Driscoll from the University of Western Australia joined the group and stepped into the NERS Enhancements Coordinator role.
- In July 2022 we said a fond farewell to Kendall Kousek as she changed institutions and left the group. Kendall joined the group in 2020 and took on the Enhancements Coordinator and Deputy Coordinator roles; she has provided fantastic support for the NERS ballots, advocating for the community, and collaborating with our ELUNA counterparts. Kendall's dedication and wealth of Leganto knowledge will be missed by the group.

### NERS 2022 ballot

- As per the revised 2021 Product Development Collaboration Agreement Between Ex Libris and IGeLU and ELUNA, Leganto's development points increased from 40 to 50 for 2022.
- Ex Libris agreed to develop the top three enhancements, see the [2022 Leganto Enhancement Results](#) for details.
- Two rounds of voting were conducted:
  - Round one included 75 enhancements voted on by 89 members
  - Round two included 21 enhancements voted on by 84 members

Voting members by Region Round One Round Two		
Africa	1	
Asia Pacific	19	23
Europe	24	19
North America	33	30
South America	1	2
United Kingdom	11	10
<b>Grand Total</b>	<b>89</b>	<b>84</b>



## Customer Focus Groups

### Leganto new UX/UI 2022-2023 Focus Group

- Ex Libris is developing a new Leganto user interface (UI) to improve the user experience (UX) for instructors, students, and librarians. The focus group was formed after a call for volunteers went out to the Leganto community, participants include instructor/teaching and learning staff plus a library participant from each Leganto institution.
- Participants have the opportunity to impact the decision-making process and influence the overall user experience of the new UI.
- The focus group includes members from Norway, Australia, Hong Kong, UK and USA

### Leganto Librarian Analytics Reports 2022-2023 Focus Group

- The focus group will work with Ex Libris to collect and organize operational, day-to-day and strategic or "big picture" Leganto analytics that will be available as out-of-the-box Leganto reports.
- Participants will meet with Ex Libris and present their existing Leganto reports and reporting needs.
- Ex Libris will then collate selected reports and along with the participants identify reports that should be added to the out-of-the-box reporting in Analytics.
- The focus group includes members from Italy, Australia, Canada, USA, UK and Norway.

For more details on the focus groups, see the [Leganto WG News Posts](#) on the IGeLU website.

Last year's focus groups have wrapped up. See the reports on the IGeLU website:

- [Student Success Measures Focus Group](#)
- [LTI 1.3 Focus Group](#)

### Leganto-L mail list

- A new initiative of the WG has been to send out a summary of recent posts to the Ideas Exchange for Leganto. Feedback from the community has been positive and has initiated discussion amongst the community and Ex Libris as well as promoted ideas to receive more votes.
- Subscriptions to the Leganto-L list have increased to 906 this year, including new subscriptions from Japan, Mexico, Switzerland and Taiwan.

### 2023 initiatives for the WG

- Support the UX/UI and Analytics Focus Groups
- Schedule Leganto relevant webinars for the community

## Linked Open Data Community of Practice Report

In 2021, the Linked Open Data Community of Practice Working Group identified the following four major actions:

1. Work with Ex Libris to develop linked data features;
2. Organize virtual community meetings;
3. Develop a report on URIs;
4. Update the group's website.

We are very happy to report that we've made significant progress. Below are the summaries of our achievements for each of the above actions.

### 1) Work with Ex Libris to develop linked data features

In assisting Ex Libris's development of linked data features, we served as a conduit between Ex Libris and the following two member libraries:

- Library of Congress: exploring the possibility of adopting BIBFRAME Editor as an Alma Linked Data editor;
- University of Pennsylvania: exploring the collaboration on developing tools connecting Alma and Sinopia (Cloud-based linked data editor).

### 2) Organize virtual community meetings

A subgroup of the LOD working group, consisting of Catherine Grove, Ken Varnum, Nancy Fallgren (-Mar. 2022), and Xiaoli Li, planned and organized the following two community meetings:

- *Enabling Catalog Discovery with Linked Data!* December 9, 2021. Over 100 people attended the event. The meeting recording, slides, and Q&A are available [here](#).
- *URIs in Ex Libris Products*, April 28, 2022. Over 80 people attended the event. The meeting recording, slides, and Q&A are available at [here](#).

### 3) Develop a report on URIs

A subgroup of the LOD working group, consisting of Laura Akerman, Nancy Fallgren (-Mar. 2022), Greta Heng, K. T. Lam (-Jan. 2022), Amanda Xu, and Lihong Zhu, reviewed best practices associated with URIs, analyzed a set of cataloging records generated from the five Ex Libris linked data services (MARC to BIBFRAME conversion, Linked Data enrichment, RDA/RDF (via API), JSON-LD as embedded in Primo, and "Linked data" as displayed in Alma metadata editor), and drafted a thorough report on URIs. The draft report was shared with other working groups and ELUNA and IGeLU Steering Committees. The highlights of the report were presented at the community meeting held on April 28, 2022. The final report including the LOD working group's findings and recommendations along with the comments from both Alma and Primo working groups was submitted to the Steering Committees. We are waiting for written response from Ex Libris and the approval from the steering committees before

publishing the report.

#### 4) Update the group's website

A subgroup of the LOD working group, consisting of Ebe Kartus, Greta Heng, and Ken Varnum, attended training in Feb. 2022 and completed the revision of the LOD website.

Besides the accomplishments mentioned above, the working group maintained information channels to and from interested customers (the user story form, the Dashboard, and our mailing list which has over 400 members). In addition, the working group members have kept abreast of current trends in linked data by conducting research on various linked data topics and serving on other linked data groups. The research topics conducted in the past year include: market research on StarDog's knowledge graph, Elsevier SciBite's Semantic Search and Discovery, graph database management solutions, and best practice in text analytics and NLP (Natural Language Processing). Below is a list of external linked data groups with which the working group members are associated:

- LD4 Discovery Affinity Group and LD4 Wikidata Affinity Group
- PCC BIBFRAME Interoperability Group
- PCC Linked Data Advisory Committee
- PCC SCA Task Group on Enhancing Metadata and Practices in MARC Bibliographic Records
- PCC Sinopia Cataloging Affinity Group
- Semantic Web Meetup
- Share-VDE National Bibliographies Working Group
- University of Washington MARC21 to RDA Vocabularies project
- W3C BIBFRAME2SCHEMA.ORG Community Group

To help formulate the working group's work plan for 2022/2023, we conducted a survey and received 37 responses. We want to express our gratitude for the community members who took the time to provide their thoughtful input.

Lastly, we are sad to say goodbye to two dedicated members: K.T. Lam and Nancy Fallgren. Thank you, K.T. and Nancy, for your valuable contributions. On a happy note, we welcomed two members: Heather Pretty (Liaison from Alma Authority Control Focus Group) and Vickie Kline (liaison from ELUNA Summon Working Group). Their expertise will be a great addition to our group.

## Primo Working Group Report

### Working Group Members

The IGeLU Primo Working Group (WG) is led by Stacey van Groll as Coordinator and Lee Houghton as Deputy Coordinator. The IGeLU Primo WG continues to work collaboratively with the ELUNA Primo WG throughout the last year. Several of our members also act as Liaisons maintaining close ties and communication with other groups in our member community, with our full current member list and responsibilities as follows:

- Stacey van Groll, University of Queensland, Australia – WG Coordinator, Conference Planning, CDI Advisory Group
- Lee Houghton, Nottingham Trent University, UK – WG Deputy Coordinator, Enhancements Coordinator
- Noémie Ammann, ETH Library, Switzerland – Liaison to Content Working Group
- Gaith Bader, University of New South Wales, Australia – Enhancements Team
- Paul Harding, University of York, UK – Liaison to Analytics Community of Practice, Enhancements Team
- Mark Kluzek, University College London, UK – Liaison to Linked Open Data Community of Practice
- Ulrich Leodolter, Austrian Library Network and Service Ltd, Austria – Developer Community Liaison
- Jennifer McNally, University of Salford, UK & WHELF – Liaison to Consortia Community of Practice, Enhancements Team
- Manuela Schwendener, Universität Basel, Switzerland – Enhancements Team
- Andrea Zech, Free University of Berlin, Germany – Enhancements Team
- Nir Zinger, University of Haifa, Israel – Enhancements Team

We are also supported by Asbjørn Risan, as our Liaison with the IGeLU Steering Committee, but have been missing a conduit to the Alma WG after the Liaison from Alma WG stepped down in December 2021, Marina Kalach.

### Member changes

In late 2021 we ran an open call for new members, and we were pleased to welcome Mark Kluzek, Manuel Schwendener, and Andrea Zech. Shortly after, we ran an additional open call, and also welcomed Nir Zinger. The additional call was initiated by saying farewell to Boaz Dotan, University of Haifa, Israel. Boaz was a longstanding member from 2012, actively participating in many initiatives and activities including on the Enhancements Team for several years and most recently as Liaison to the Analytics Community of Practice. We extend our thanks to Boaz for many years of service and commitment to Primo product development for our member community. Our new members joined the Primo WG from our first meeting after the IGeLU 2021 Conference, in September 2021.

## Annual Enhancements Process (NERS)

The community submitted 129 new requests for the 2022 Primo enhancements round. All requests were processed by the IGeLU and ELUNA Primo WG Enhancements Team, led by Lee Houghton as Enhancements Coordinator and including members Gaith Bader, Paul Harding, Jennifer McNally, Manuela Schwendener, Andrea Zech, and Nir Zinger. During the review, 15 requests were merged, 2 rejected, and 4 were withdrawn as already supported. In consultation with the Alma WG, 8 submissions were transferred from Alma to Primo. As in previous years, efforts were made to align our Primo enhancement cycle key dates with the Alma enhancement cycle dates to facilitate this transfer, with also close alignment with the Leganto dates. At the conclusion of our Enhancements Team review, 108 enhancements were included in the voting round. The voting period was extended an additional week to four weeks, due to system issues experienced in the voting platform, allowing time for these to be resolved prior to the closure of voting and ensuring an open and transparent voting process. The final voting tally across all submissions was significant at 56033 votes by 378 accounts (an increase of almost 6000 votes over 2021), and a great sign of the continuing engagement with the Primo enhancements process, as a key benefit of IGeLU or ELUNA membership. Through scoping and pointing discussions with Ex Libris Primo Product Management, it was determined that an additional round of voting was required this year, with 3 requests rejected including the No.1 ranked request and the pointed solutions differing from the original description in a number of other top ranked requests. The additional round of voting was conducted on 17 requests, with ultimately a total of 47645 votes by 294 accounts. In subsequent discussions, 7 requests were approved for delivery within a year for a total of 205 points, by agreed use of 5 points from 2023. We thank Ex Libris Primo Product Manager for working with the Primo WG/s productively and collaboratively to ensure this excellent outcome, and also extend thanks to the IGeLU and ELUNA Steering Committees for negotiating the increase in Primo allocated development points to 200 from 2022 (previously 150), with the 2021 revision to the Product Development Collaboration Agreement. Finally, the Primo WG has also been actively engaged and contributing to Steering Committee initiatives considering improvements to the system infrastructure underpinning the yearly enhancements process, with Enhancements Task Force representation by Stacey van Groll, and Lee Houghton taking an active role in these efforts as Enhancements Coordinator.

## Tracking and delivery of enhancements (NERS)

There is a continuing strong focus on ensuring the Primo WG not only manages the current year enhancements round, but also monitors and follows up on delivery of successful enhancements in previous rounds. Stacey van Groll, as WG Coordinator and with oversight responsibility, regularly updates the Primo community via posts to the Primo listserv, as well as updates to the 'Primo enhancements' page on the IGeLU website. This one-stop-shop page logs timelines for yearly rounds, as well as tracking successful submissions and their delivery timelines from 2014 onwards.

This page can be found at <https://igelu.org/products-and-initiatives/product-working-groups/primo/primo-enhancements/>.

In the last year, we have noted some enhancements delivered with lower consultation, consideration of feedback, and variation to agreed scoped descriptions than is desirable. We've been working with both the ELUNA Primo WG and Ex Libris Primo Product Management to raise concerns, discuss options for greater collaboration and active testing, and refocus on moving forward together productively.

## Meetings with Ex Libris Product Management

Every month the IGeLU Primo WG Coordinator Stacey van Groll and Deputy Coordinator Lee Houghton, along with ELUNA Primo WG Chairs, meets with Ex Libris Primo Product Management, most commonly Nili Natan, Yael Shahar, and Yisrael Kuchar. Additional Ex Libris management attend as needed, such as Christine Stohn, for CDI Product Management. These meetings are an opportunity to raise issues of concern affecting the community, discuss Roadmap items, collaborate on the enhancements process and associated development items, and provide feedback on items which Ex Libris raises for consultation. On occasion, additional meetings are scheduled to discuss specific items with more dedicated time and focus, also attended by additional Ex Libris staff such as the Developer team and additional community representatives, as appropriate to the item under discussion. Stacey van Groll also meets fortnightly with Ahuva Mazuz (VP Development), with additional opportunity for technical discussions specifically for CDI and related impacts on Primo, with positive outcomes including contributing to both streamlined corrective work and long-term Data Excellence initiatives.

## Community support

The Primo WG has actively supported our member community in several ways in the last year including:

- Mark Kluzek - our Liaison to the Linked Open Data Community of Practice - coordinated our contribution to the 'Linked Open Data URI Report'
- Noémie Ammann - our Liaison to the Content Working Group - coordinated our contribution to the 'CDI Pain Points Report'
- Ulrich Leodolter - our Developer Community Liaison - presented in the July 2022 webinar 'Preparing for the Angular 1.8 Upgrade in Primo/Primo VE', and continues to work collaboratively with Ex Libris Primo Product Management and the ELUNA Primo WG to support our member community in this transition

We've also increased our active communication of our activities and community support by:

- Working with the IGeLU Steering Committee on the transition to the new IGeLU website at the start of 2022, including ensuring a well-functioning and up-to-date home for all Primo content: <https://igelu.org/products-and-initiatives/product-working-groups/primo/>
- Monthly posting of meeting notes from 2022 onwards: <https://igelu.org/products-and-initiatives/product-working-groups/primo/minutes/>
- Creation of a new 'Primo - Community Support' page to host key documentation, starting with a compilation page of useful bookmarklets written

by almost a dozen active members of our community and Ex Libris:  
<https://igelu.org/products-and-initiatives/product-working-groups/primos/primos-community-support/>

In addition, while the Primo WG does not have direct responsibility for the Ex Libris Primo Idea Exchange, our member Manuela Schwendener has taken great initiative this year in engaging with members of our community through that forum, for both new and longstanding submissions.

## Advocacy activities

The Primo WG has a constant and continuing focus on seizing all opportunities to advocate on behalf of our community, raise concerns, share feedback and suggestions, and work collaboratively towards beneficial Primo product development.

Some notable activities over the last year include:

- Standing item focus on the Angular upgrade transition, including consultation on timelines for rollout and communications
- Continuing to raise Third Party addons issues, including responsibility expectation, support, fixes, and upgrades, such as for APA 7<sup>th</sup> CSL
- CDI Advisory Group participation, commencing May 2022 after supporting the community drive for this initiative from October 2020
- Providing feedback and suggestions for additional support and building community understanding for CDI across products through Ex Libris hosted webinars
- Contributed to the call for high level agenda items by the IGeLU Steering Committee for the visit to Ex Libris HQ in April 2022, including 1. Ongoing impact of CDI on Primo UI, features, and functionality; 2. Equity of development between Primo on Back Office and Primo VE; 3. Support issues with 3<sup>rd</sup> party components; and 4. Loss of visibility for published cases in the November 2021 Salesforce upgrade
- Securing a fix for Primo Analytics for accurate actions for non-UTC timezones, corrected in April 2022
- Achieving a timing shift in May 2022 for APAC Back Office sites for Saved Search Alerts, resolving issues by taking them out of alignment with CDI Updates
- Consistent position for expectation of equitable development and functional parity for all Primo customers whether on Primo Back Office or Primo VE, as well as customer autonomy of choice by opt-in development
- Promoting the GDPR Focus Group Report for Primo related items and development via a user-controlled personalization menu, with introduction of Search History settings in My Account from August 2022
- Accessibility standing item, keeping focus strong and raising issues with initial coverage and prioritising timely fixes, including with targeted raising of issues in May 2022 and expectation of a new VPAT accessibility compliance audit and report
- Early access testing, feedback, and collaborative help content re-write for the CDI Activation Analysis Tool

# 2022 Chair's Report

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- Encouraging Ex Libris engagement with the community through Idea Exchange response, particularly for top voted submissions
- Gained improvements to detail of Primo Release Notes and Resolved Issues additional date annotations, and addition of Primo-related CDI Release Notes
- Raised issue and secured additional fix in June 2022 for CDI addata in Link Resolver, for missing publication title for Text Resource and Report typed records
- and ongoing consultation items also as raised by Ex Libris, including Primo VE Dedup keys, Primo VE MARC out of the box fields and normalization options, new search and facet design developments, login requirement for Send To Email, and adjustments to Primo pagination



# 2022 Chair's Report

## Rialto Working Group Report

The Rialto product working group is newly formed, having started meeting in February of this year. The working group is busily creating the joint websites with the [IGeLU website](#) just launched and serving as the primary site, and the ELUNA website is soon to follow. As the product working group is such a new group, many members are early adopters and come from a technical services background. Therefore, many calls for additional members with selector experience have been made to various listservs and at the recent ALA conference. Finally, there will be one presentation at the IGeLU conference in September, and we hope there will be interest in a cross-presentation for ELUNA.

Committee Members:

Alison Ambi	<a href="mailto:aambi@mun.ca">aambi@mun.ca</a>	ELUNA	Deputy Chair
Ian Hey	<a href="mailto:IHey@uclan.ac.uk">IHey@uclan.ac.uk</a>	IGeLU	Chair, Website co-editor
Jennifer Matthews	<a href="mailto:matthewsj@rowan.edu">matthewsj@rowan.edu</a>	ELUNA	Chair, ELUNA Website co-editor
Esther Arens	<a href="mailto:eea16@leicester.ac.uk">eea16@leicester.ac.uk</a>	IGeLU	Website co-editor
Jennifer Carroll	<a href="mailto:jennifer.carroll@unh.edu">jennifer.carroll@unh.edu</a>	ELUNA	Content WG liaison
Jennifer Mezick	<a href="mailto:jamezick@utk.edu">jamezick@utk.edu</a>	ELUNA	Analytics WG liaison
Janet Morrow	<a href="mailto:j.morrow@northeastern.edu">j.morrow@northeastern.edu</a>	ELUNA	ELUNA Website co-editor
Elize Rowan	<a href="mailto:elize.rowan@ed.ac.uk">elize.rowan@ed.ac.uk</a>	IGeLU	Leganto WG Liaison
Monica Szunejko	<a href="mailto:monika.szunejko@monash.edu">monika.szunejko@monash.edu</a>	IGeLU	
Ian Thomas	<a href="mailto:ithomas@swin.edu.au">ithomas@swin.edu.au</a>	IGeLU	
Debra Gold	<a href="mailto:dgold@lakeheadu.ca">dgold@lakeheadu.ca</a>	ELUNA	
Lori Wienke	<a href="mailto:lori.wienke@oneonta.edu">lori.wienke@oneonta.edu</a>	ELUNA	
Rami Attebury	<a href="mailto:rattebur@uidaho.edu">rattebur@uidaho.edu</a>	ELUNA	
Joe Ferguson	<a href="mailto:joe@utk.edu">joe@utk.edu</a>	ELUNA	Alma WG liaison
Pascal Calarco	<a href="mailto:Pascal.Calarco@uwindsor.ca">Pascal.Calarco@uwindsor.ca</a>	ELUNA	SC Liaison, CDI WG Liaison
Knut Bøckman	<a href="mailto:knab@kb.dk">knab@kb.dk</a>	IGeLU	SC Liaison

## Rosetta Working Group Report

Rosetta Working Group 2022/2023 Action Plan

Prepared by Teresa Soleau (Coordinator)

- Hold 5 open discussion sessions (1.5 hours long) on a variety of topics
  - Scope Statement: We are continuing our series of open discussions aimed to be less about writing enhancements and more about sharing our experiences. Hoping to get more interaction from newer customers (or newer staff at long time customers). Topics to be finalized at the Aug working group meeting, but they include: digital preservation (left over from last year) and governance (not enough time to discuss at annual meeting)
  - Estimated time to delivery: N/A
  - When does work start: Sep 2022
  - Number of people involved: 5 people from SC to lead discussions; unknown number of customers contributing
  
- Draft code of conduct for the working group
  - Scope Statement: As part of revising our terms of reference this year we decided to implement the IGeLU code of conduct this year until we had time to form a group to evaluate it and make any necessary changes for our group.
  - Estimated time to delivery: 12 months
  - When does work start: unknown - will start forming the group in Sept 2022
  - Number of people involved: 4-5? We will ask for a volunteer to lead the group and 3-4 other members to participate.
  
- Focus work in the Digital Preservation sub-working group on redesigning the Rosetta validation stack and maintaining format library
  - Scope Statement: Building on first enhancements to the validation stack which have already been implemented (e.g., separating validation from extraction) or have been handed in and are awaiting implementation (e.g. risk assignment), we will evaluate which processes need to be adapted further to best leverage the benefit. Currently in discussion with Ex Libris is an enhancement request around multiple file format identification tools. In parallel, the group is reviewing and updating the format library, the core shared file format knowledge base within the system.
  - Estimated time to delivery: ongoing
  - When does work start: ongoing
  - Number of people involved: 10 - this work is being led by the Digital Preservation sub-working group
  
- Focus work in the Delivery & Integrations sub-working group on evaluating the data model changes being made to accommodate hierarchical digital objects (called structural IEs)

# 2022 Chair's Report

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- Scope Statement: After working for years to refine the request, Ex Libris incorporated the first set of changes (MVP) in Rosetta version 7.2 and released changes in 7.3 that will allow even more customers to test. We will test these and provide feedback in order to make sure the change is meeting user needs.
- Estimated time to delivery: ongoing
- When does work start: now
- Number of people involved: expect at least 7-8 people to test and provide feedback

## SFX Working Group Report

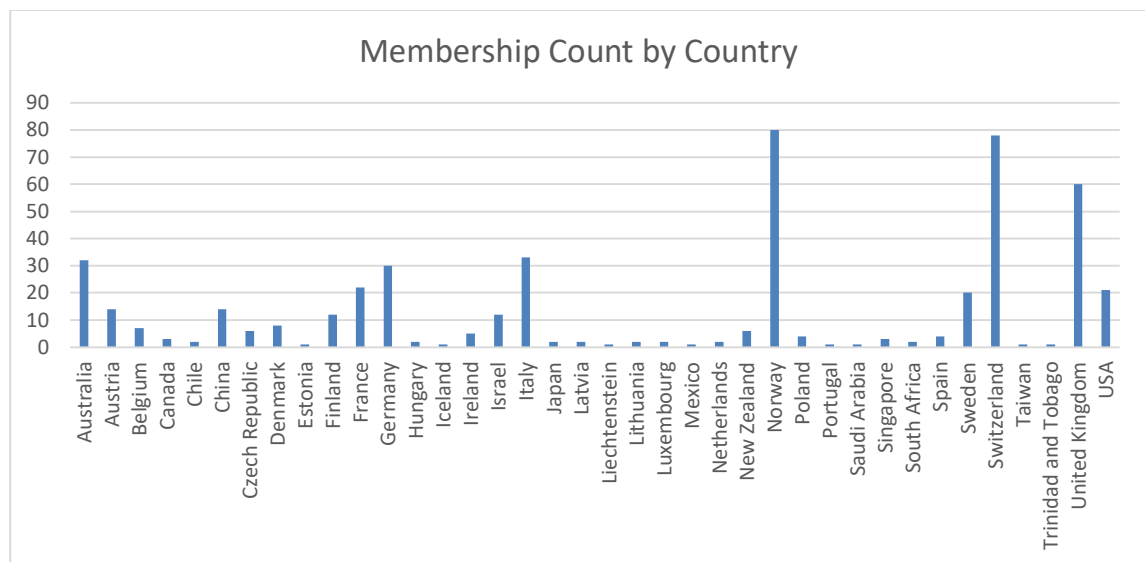
There were regular monthly SFX WG meetings with SFX product manager where development and issues were discussed. Updates were shared in SFX customers e-mail list and at IGeLU and ELUNA conferences. CELUS supporting COUNTER 5 is now used as Ustat replacements by SFX customers.

There will be regular monthly meetings SFX WG with SFX product manager. SFX customers representatives will be encouraged to join SFX WG, it will be useful to have some more North America and Asia SFX customers representatives in the group. WG will discuss running new enhancements voting round in AHA replacing NERS. WG will continue to explore synergies among SFX and technologies like KBART automation, GetFTR, Seamless Access, Open Source ILS. Updates will be shared in SFX customers e-mail list, SFX news at IGeLU website and at both IGeLU and ELUNA newsletters and conferences.

## Report on Steering Committee 2021/2022 Activities and Initiatives

The Chair's Report 2021 listed out a series of activities and initiatives that were to be undertaken on the year. Results of these activities are listed below

1. Continue advocacy of the importance of the IGeLU User Community  
This is an ongoing activity and is more important with the consolidation of Ex Libris and Innovative Interfaces into a single business unit.
2. Advocate for greater IGeLU involvement in Ex Libris developments around Controlled Digital Lending (CDL)  
It is expected that this Ex Libris development will be expanded to the global community
3. Diversity, Equity and Inclusiveness  
This is an important topic and covers such items as decolonization of the catalogues, ensuring that the Ex Libris products conform to accessibility guidelines through to ensuring that the IGeLU organisation has a diverse representation. The IGeLU Steering Committee would like volunteers from the community to take part on this initiative. If you are interested please contact [chair@igelu.org](mailto:chair@igelu.org).
4. Improve internal procedures and policies  
This is an ongoing activity to ensure the long-term viability of IGeLU and in addition will cover governance issues.
5. Membership  
Current memberships by country is as follows



6. Improve communications between the membership and the Steering Committee, Working Groups and Communities of Practice

# 2022 Chair's Report

Currently the IGeLU Steering Committee minutes are published to the website at <https://igelu.org/sc-minutes>. Other avenues to improve communication between the membership and the IGeLU organization need to be implemented.

7. Deliver a hybrid 2022 conference  
This has been undertaken and lessons learned will help determine the future of this type of conference format
8. Summon WG reactivation  
This is an ongoing activity. Any Institution interested in being part of the Summon WG please contact [chair@igelu.org](mailto:chair@igelu.org)
9. NERS evaluation.  
The evaluation process is now completed and IGeLU and ELUNA have agreed upon implementing the Aha cloud-based product. Development is underway to address issues with consortia block voting.
10. Create an IGeLU Resource Sharing Work Group  
This is an ongoing activity.
11. Rationalize the existing Product Development Collaboration Agreement – Stage 2  
This has been placed on hold pending the finalisation of the Clarivate acquisition and restructure. It is expected that both IGeLU and ELUNA will advance with this in 2022/2023

## Steering Committee 2021/2022 Planned Activities and Initiatives

The list of 2022/2023 planned activities are as follows

1. Continue advocacy of the importance of the IGeLU User Community  
This is particularly important with the acquisition of ProQuest / Ex Libris by Clarivate.
2. Advocate for greater IGeLU involvement in Ex Libris developments around Controlled Digital Lending (CDL). Refer IFLA Statement on Controlled Digital Lending <https://www.ifla.org/publications/node/93954>
3. Diversity, Equity and Inclusiveness  
This is an important topic and covers such items as decolonization of the catalogues, ensuring that the Ex Libris products conform to accessibility guidelines through to ensuring that the IGeLU organisation has a diverse representation.
4. Improve internal procedures and policies  
This is an ongoing activity to ensure the long-term viability of IGeLU and in addition will cover governance issues.
5. Membership  
IGeLU will continue seeking to increase its membership base. To achieve this, we will need to increase our membership drive in Europe, Middle East, Africa, Asia and South America
6. Improve communications between the membership and the Steering Committee, working Groups and Communities of Practice  
Currently the IGeLU Steering Committee minutes are published to the website at <https://igelu.org/sc-minutes>. Other avenues to improve communication between the membership and the IGeLU organization need to be implemented.
7. Deliver a hybrid 2023 conference
8. Summon WG reactivation
9. Implementation of the NERS replacement system (Aha).
10. Create an IGeLU Resource Sharing Work Group  
This is a carryover from the 202/2021 activities.
11. Product Development Collaboration Agreement Stage 2  
This is a carryover from 2021/2022 and will be concentrating on the CDI and KB processes

## Membership

IGeLU has managed to keep annual membership at the same rate of €250 per annum for over 10 years. Unfortunately, we had to review the membership rate and the new annual membership rates are

- €300 per annum for an Institutions
- €250 per annum for each institution in a consortia

This decision was not made lightly and is based on

- Costs associated with implementing a more robust infrastructure  
As IGeLU has grown we have had to review our infrastructure that supports our product mailing lists and the NERS enhancement voting system. These products rely heavily on a single person to support and maintain. This has been viewed as unacceptable risk to the organisation. To overcome this risk, we have migrated our product mailing lists from an inhouse supported product to a cloud based hosted solution. In addition, we are in the process of migrating the inhouse developed NERS Enhancement Voting System to a cloud-based product (Aha). This activity will make IGeLU's infrastructure more resilient, but with a side-effect of an increase in operating costs.
- Increased costs because of COVID-19  
We are all aware of the increased costs because of COVID-19. These costs translate to increases in services that IGeLU relies on, including increases in the running of the conference, airfares and accommodation.

The main benefits of IGeLU membership remains unchanged. These include

- 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.
- Access to the various product email lists
- Access to Ex Libris Product Managers via the IGeLU product Working Groups and Communities of Practice. These groups ensure that product development continues in the 'right' direction and meets the global community's requirements.
- Access to product mailing lists
- Access to Ex Libris Senior Management via the IGeLU Steering Committee
- Web and email list hosting for National and Regional Groups
- Discounted conference registration fees



# 2022 Chair's Report

## 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 last year. The savings from this year will be used to offset the 2022 conference.

We are proud and satisfied to be able to present a positive balance for 2022.

The Financial Statements approval by the members will be undertaken using the NERS voting system

### Voting on open positions of the Steering Committee

This year there will be voting on five 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 be using NERS to carry out electronic voting. Information on the candidates can be found at <https://igelu.org/about/organisation/elections/>. The successful candidates will be announced at the 2022 Hybrid Conference during the IGeLU Business meeting

**Dave Allen, IGeLU Chair**