

Alma Product Working Group ELUNA/IGeLU Report 2021-22

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 ExLibris prior to the 2nd 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 ExLibris, 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	ComplexityPoints	TotalVotes
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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
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 definitely 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 ExLibris. Exlibris 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 ExLibris 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 ExLibris, 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 ExLibris Alma product management the following topics were discussed:

- Communication with the Alma Community

We discussed together with ExLibris 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
 - 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.