Alma Product Working group Update

Gijs Noels (LIBIS KULeuven) – Catherine Grove (Northwestern), co-chairs
Cardiff September 14, 2022
Who we are

- ELUNA co-chair / Linked Data WG / UX Focus Group – Catherine Grove, Northwestern University
- IGeLU co-chair / Consortia Coord Group chair / UX Focus Group – Gijs Noels, LIBIS KU Leuven
- Deputy Chair / Fulfillment Subgroup / CDL Advisory Group / Rialto WG / UX Focus Group – Joe Ferguson, University of Tennessee
- Acquisitions Subgroup / Analytics CoP – Leon Krauthausen, Freie Universität Berlin
- Resource Management Subgroup / UX Focus Group / IGeLU Consortia CoP – Bettina Kann, OBVSG Austria
- Enhancements Coordinator – Mary Grenci, University of Oregon
- ELUNA Steering Committee – Emily Tuck, Texas Medical Center
- IGeLU Steering Committee – Knut Bøckman, Copenhagen University
- Alma Authority Focus Group – Margaret Corby, Kansas State University
- Alma Consortia Focus Group – Brandon Dudley, California State University
- Community Zone Management Group / CDI Advisory Group - Stacie Traill, University of Minnesota
- Content WG – Xiaotian Chen, Bradley University
- Leganto WG – Joe Montibello, Dartmouth College
- Summon WG – Nick Pavlovic, Liberty University
- Primo WG (ELUNA) – Daniel Naas, University of Kentucky
- Primo WG (IGELU) - ??
- NEW Member at Large!!!!??
Our Work – Serve the Community
(Alma Product Working Group ELUNA/IGeLU Report 2021-2022)

Enhancement Process
- NERS 2022 results
- Enhancement procedure Improvements

Alma Related ‘Groups’
- Functional Subgroups
- Focus Groups
- Collaboration with ‘Other’ groups

Collaboration / coordination
- Efficiency - streamlining
- Direct contact with ExLibris

(more) Transparency
- New Website
- Communication / Documentation
# 2022 Enhancements - Results

*(High level solutions)*

<table>
<thead>
<tr>
<th>ReqID</th>
<th>Title</th>
<th>ComplexityPoints</th>
<th>TotalVotes</th>
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<tbody>
<tr>
<td>7948</td>
<td>Revised title: Add “Not contains” or “Not equals” to Alma titles and inventory search indexes where “contains” or “equals” currently exist. (Original title: Adding &quot;Does not contain&quot;and &quot;not&quot; search option in Alma)</td>
<td>50</td>
<td>6785</td>
</tr>
<tr>
<td>7876</td>
<td>Improve letter editing functionality</td>
<td>120</td>
<td>5075</td>
</tr>
<tr>
<td>7705</td>
<td>Make it possible to customize the cancellation reasons</td>
<td>10</td>
<td>4987</td>
</tr>
<tr>
<td>7934</td>
<td>Borrowing request with status Ready to be sent - should appear in task list</td>
<td>5</td>
<td>4791</td>
</tr>
<tr>
<td>7880</td>
<td>Add support for dynamic collections that are automatically updated using logical sets</td>
<td>80</td>
<td>4748</td>
</tr>
</tbody>
</table>
Enhancement Improvements

• 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 (via functional subgroups)

• Evaluation still ongoing

• Question: cross product enhancement procedures?

• AHA implementation (NERS-2.0)
Alma Related ‘Groups’
(The many faces of Alma)

Functional Subgroups

- Acquisitions
  - Overlap Analysis Tool released in March
- Fulfillment
- Resource Management
- Alma digital
Alma Related ‘Groups’
(The many faces of Alma)

Focus groups
- UX Focus Group
  - Holdings search
  - MDE priorities / sunset
  - Resource Sharing task list
  - Acquisitions PO Lines
  - Fulfillment Circulation desk
  - …

Documentation Focus Group
(new!)
- Membership formed
- Meeting in May

Alma Authority Focus Group
- Authority priorities submitted to Ex Libris in 2021
- Basecamp discussions on non-filing characters and punctuation
Alma Related ‘Groups’
(The many faces of Alma)

Community Zone Management Group
- CZ bib record editing survey
- CONSER record ingest process
- Analysis of local information in CZ records
- Welcomed 9 new members

Consortia Groups
- ELUNA Alma Consortia Focus Group (NA consortia)
- IGeLU Consortia CoP
- ELUNA/IGeLU Consortia Coordinator/Advisory Group

Participation in:
- CDI advisory Group
- Analytics CoP
- Corporate / state libraries CoP
Collaboration / Coordination
(Too? many faces of Alma)

- Coordinate groups
  - Work together / not next to each other!
    - Identify ‘overlap’
    - Identify and clarify priorities (Efficiency)
    - Serv the entire Community
      - but… be aware of ‘local’ / specific needs!
  
⇒ Challenge!

- Direct communication with Exlibris
  - Translate/follow-up on the needs of the Community
    - Quarterly release cycle
    - Performance & Quality Assurance
    - Premium Sandbox refresh (Community survey)
    - Follow-up on the Enhancement process – NERS
    - Align with other ‘groups’
    - Alma Announcements (thoughts?)
    - …
Looking ahead

(Continuity and more Transparency)

Communication

- **New website**
  - Reports
  - Minutes Alma PWG meetings
  - …

- Channels
  - Alma announcements?
  - Mailinglist
  - Basecamp environments
  - …
Q&A

☐ If needed
Questions?

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