

## **Alma Product Working Group ELUNA/IGeLU Report 2022-23**

The Alma Product Working Group's focus this year was to work on the defined Goals for 2022-23:

- running, streamlining and enhancing the Alma NERS process
- sharing the Alma PWG activities with the community
- establishing and strengthening relationships with other advisory, focus, and working groups
- improving communications with Ex Libris in order to achieve better efficiency and provide clear priorities.

### **Organization Alma PWG (general)**

The current list of members of the Alma working Group can be found on the Alma Product Working Group [homepage](#) of the IGeLU website. Last year we were happy to welcome Emma Clift (Macquarie University) as a new Alma PWG member. She replaced Marina Kalach as an Alma member at large, and she is liaising with the IGeLU Primo Working Group!

Due to this call for a new Alma PWG member we revised/reinstated the IGeLU and ELUNA Joint Working Group [membership terms](#). We agreed on a pragmatic approach concerning the term of two years with a limit of three terms in a row. In some cases where there is difficulty in finding members to serve on the group, or to retain members for extra terms (for example past chairs), exceptions can be made. An effort should be made to ensure that there is some continuity with membership such that not all experienced members rotate off at once.

One of the goals for 2023-24 is to work on 'backup' and succession planning concerning key roles, including the enhancement coordinator role.

### **NERS Enhancement Process (2022-23)**

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

2022 NERS enhancements will be delivered/implemented by ExLibris in time during the 2023 release cycles. The status of NERS 2022 enhancements are updated at the [ExLibris Knowledge center](#).

In summer 2023 the Alma PWG formed an internal task group to develop a checklist and clearly document the internal steps of the enhancement process. The group will also identify recommendations or potential areas for change.

## 2023 NERS Enhancement process - Results

The following seven NERS requests will be implemented and developed in 2023 as a result of the Alma 2023 NERS enhancement process:

[\(High level solutions\)](#)

Title	ReqID	Complexity Points	TotalVotes
Ability to schedule manual jobs	8373	30	4459
Ensure email is delivered with DKIM protocols	8197	20	4384
Display user's loan due date in borrowing request screen	8125	10	4213
Enable viewing of Requests history in Alma	7877	25	4163
Allow auto renewal to restart after blocks removed	8345	20	3342
Editing items via Receiving, Save & Receive items	6669	30	3200
Make an easy way for items to be removed from 'in transit' status	8338	10	3057

Please note that the Alma PWG decided to move forward with enhancement request 7880 (**Dynamic collections that are automatically updated using logical sets**) in 2022 by using some complexity points from 2023. This means we 'only' had 145 complexity points to spend for the 2023 cycle.

A special thanks goes out to the subgroups, the subgroup coordinators, and especially to Mary Greci to coordinate and to enhance/streamline the Alma NERS enhancement process, based upon the 'lessons learned' from the previous enhancement cycles, to make sure we were able to meet the deadlines and have a smooth process.

## Functional Alma Subgroups

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

Because of the extent and complexity of Alma as a product the Alma PWG formed these functional subgroups in order to be able to rely on a group of highly capable people regarding the various functional areas in Alma. The core role of these groups is to review NERS requests.

The Alma PWG wants to benefit even more from the shared knowledge in these groups by engaging these groups, or some dedicated subgroup members, in following-up on the entire end-to-end process of NERS requests and by having more opportunities to feedback to ExLibris regarding the development of the product (for example on UX-related matters)

A special thanks goes out to the subgroup chairs Leon Krauthausen, Bettina Kann and Joe Ferguson for coordinating these groups.

Please note that the Alma digital subgroup was dissolved due to a lack of need at the time, but with a growing interest in Alma Digital by the user community and Ex Libris, a new formal Alma digital work group was formed this year, and it will operate as a subgroup of the Alma PWG for its first year.

## 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.

- Alma Digital Work Group (NEW)

The Alma PWG contributed to the Alma digital working group Terms of Reference document in advocating for a close relationship of this new group with the Alma PWG.

Extract from the ToR:

*“Alma Digital has many dependencies and commonalities with Alma but is also treated as a separate product in many aspects, by ExL and customers. The need has been raised by customers and ExL, in order to formalize communication around Alma Digital roadmap and enhancement requests.*

*Recognizing the nature of Alma Digital as it exists now and its direction for the future, the Alma PWG recommends that the Alma Digital group be created initially as a subgroup of the Alma PWG. This would create a strong foundation for the needed connections between the groups. As Alma Digital matures into an independent product, the subgroup's status under the Alma PWG will be evaluated after 1 year by the SCs. After evaluation options to be considered include*

- *creating an independent Alma-Digital Working Group*
- *creating separate IGeLU and ELUNA Alma-Digital Working Group*

*The formation of the group will be crucial in order to have a representative group that reflects Alma Digital activities on the short term, including a formal liaison to current CDL activities but also on the long term incorporating preservation (Rosetta on the Higher ed. platform) and the evolution to a standalone solution.”*

Next steps: the IGeLU and ELUNA Steering Committees will send out a call for members so we are able to organize ourselves in order to work together.

- Community Zone Management Group (Galen Jones, chair; Stacie Traill, Alma PWG liaison)

The CZMG works with Ex Libris on issues related to the metadata practices and guidelines within the Community Zone. This year the group's highlights included:

- Presented webinar sponsored by Ex Libris: CZ Metadata Overview, Contribution and Best Practices
- Proposed removal of most 506 fields
- Proposed removal of 655 “Electronic books”
- Gathered feedback on OCLC numbers in CZ records
- Established new liaisons to Authority FG and Linked Open Date CoP

- Alma Authority Focus Group (Liz Bodian, coordinator; Margaret Corby, Alma PWG liaison)

The Alma Authority Focus Group continued conversations with Ex Libris to explain and advocate for the long-standing priorities identified for authorities functionality in Alma. We appreciate the group's perseverance on these issues. Priorities for development are the following:

- Respect MARC subfield coding when linking bib headings
- Partial linking of name/title headings
- Partial linking and flipping of subdivided LCSH headings

The AAFG also provided feedback to Ex Libris via Basecamp on topics including the following:

- Use of subfields in indexing and searching
- Punctuation in MARC fields and authority matching

- Alma Performance Focus Group (Deprecated)

In practice there is no formal Alma performance focus group with fixed members and dedicated recurring meetings. Alma performance issues are mostly being handled in depth via the UX Focus group concerning specific areas. For instance, the UXFG brought up issues related to the new POLine list, and the final sunset of the new MDE was multiple times delayed because of performance issues and the new POLine list.

In addition the Alma PWG gets recurring updates from ExLibris Alma Product management of the overall progress concerning Alma performance and actions taken by ExLibris in terms of continuous improvement. (Last update: March 2023)

- Alma UX Focus Group

The main focus of the Alma User Experience Focus group was related to the design and implementation of next gen lay-out and UX features across several functional areas.

Overview of the different tracks:

- Final Sunset new MDE
- Final Sunset new Resource sharing workbenches
- Implementation next gen POLine list (early testing on production)
- Circulation desk (early testing initial development)
- Manage sets (early testing on development)
- Alma Analytics (off by default)
- All titles (design - user studies)

Other important topics handled:

- Introduction phased feature roll-out (Based upon the 4 different phases: early testing (sandbox), off by default, on by default, final production implementation (Sunset))
- Follow-up on 1:1 meetings list related to circulation desk comments/features and all titles related topics
- Shifts in focus Group participants:
  - Signed off: University of Wisconsin, University of Tennessee  
Both institutions were engaged from the very beginning of the Alma UXFG and we would like to thank them for all their efforts!
  - New member: University of Queensland
  - Call for new members in progress!

- Training and Documentation Focus Group

The Training and Documentation Focus Group met at ELUNA and provided feedback to Ex Libris on their consolidation of the Customer Education Webinars and Webinars Explore & Learn pages.

- Consortia Groups

The Alma PWG actively advocated between ExLibris, ACFG (the North American Alma Consortia Focus Group) and The IGeLU Consortia CoP to work together in defining consortia areas and scopes to enhance and/or develop. This resulted in the creation of the ACAG (the Alma Consortia Advisory (coordinator) Group) which consists of the chairs from the different Consortia groups and dedicated ExLibris Consortia product coordinators and owners. One of the first achievements is the work that's being done currently concerning network Zone central management. Based upon feedback and input from the entire consortium community ExLibris is working on designing, developing and implementing a conceptual solution to improve the distribution of NZ configuration.

### **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).

The Alma PWG continued working on a transparent, open and constructive collaboration with ExLibris Alma Product management. During Monthly meetings a variety of topics were handled, agreed on and discussed in depth. A few examples of the topics discussed:

- 'NERS' procedure (enhance the entire process of feature development - not only for NERS developments)
- Performance
- QA: Quality Assurance
  - Trying to understand the entire design/implementation cycle of a new feature
  - Bug fixing (dependencies) / backlog
- Evaluation Alma Announcements (ExLibris communication to the community)
- Cookie consent (GDPR) and digital adoption by Pendo
- Follow-up on progress (focus) group activities:
  - UX Focus Group
  - Consortia Groups
  - Authority Focus Group
  - Linked data group
  - Analytics focus group
  - Creation of the Alma digital working group
- Follow-up on disablement/switch of support features in Alma:
  - Guide me
  - Known issue list
- Alma Roadmap
- Release notes

## Documentation / Communication

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 (See for instance the [CZMG page](#))

Continuous effort and Goal for the upcoming years!

Specific Goal next year: engage an Alma member with a dedicated “Communication” role to make sure The Alma IGeLU webpages are up to date!

## Goals / Roadmap 2023-2024 (in brief)

### (1) NERS 2023-2024

- Scope: Complete 2023 NERS Enhancement process and solicit enhancements and hold voting for 2024 NERS Enhancement process
  - Identify and implement new process for shepherding enhancements (involve subgroup members actively in following-up on NERS implementations on basecamp)
  - Implement new system - AHA! (postponed last year)
  - As part of AHA implementation: collaborate/engage in identifying and coordinating any necessary shared enhancement procedures with other WGs
  - Guide/train/support the Alma digital working group with their NERS enhancement process

### (2) Organization Alma PWG

- Scope (1): Continue progress on coordinating/following up on Alma related sub, focus, advisory, working, CoP groups.
  - Establish a close collaboration with the Alma digital working group
  - Subgroups: participate (even more) in 2023 Enhancement cycle with more responsibility
  - Engage a ACFG (North American Alma Consortia Focus Group) liaison
- Scope (2): Continue progress on implementing/formalizing the IGeLU and ELUNA Joint working group membership terms
  - Follow-up on two yearly terms
  - Organize succession planning + backups for key roles (See for instance Enhancement Coordinator role)

- Scope (3): Continue progress on 'strengthen our relationship/communication with Exlibris in order to maintain a transparent overview of all activities going on concerning Alma (and relatives)'

### **(3) Transparency / Communication**

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

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

In order to achieve this, formalize a dedicated Alma 'Communication' member role and engage one of the existing or a new Alma member for this role!