IGeLU CHAIR'S REPORT 2023

1st August 2023

2023 Chair's Report

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Executive Summary

This report provides me with the 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 ensure that these products meet your requirements. Essentially, they are the 'voice' of the community when discussing issues with Ex Libris.

IGeLU is a volunteer organisation and we rely on members who wish to become more active in the community by being part of a Working Group (WG) or Community of Practice (CoP). If you are interested, please chair@igelu.org or the relevant Working Group or Community of Practice Coordinator.

A continuing challenge that we, as a community, are faced with, is the ongoing changes that have resulted from the Clarivate acquisition of Ex Libris / ProQuest. The Ex Libris and Innovative products now reside in the Academic and Government (A&G) Portfolio within Clarivate. With the finalisation of the new management structure I am hoping that the company can now start concentrating on improving existing services as well as developing new services such as Artificial Intelligence (AI) based offerings.

Some of the items that IGeLU are working on or completed include:

1. Alma-Digital Working Group Terms of Reference
2. Salesforce Advisory Group terms of Reference
3. New enhancement platform to replace NERS
4. Allocation of development points to new products
5. CDI (Content Discover Index) enhancement process
6. Creation of an AI (Artificial Intelligence) mailing list to discuss issues and for Ex Libris to ask the community for feedback as they progress along the AI path.

I am also pleased to announce that we will not be raising IGeLU membership fees for the 2024 membership period.

In the preparing the 2023/2024 IGeLU budget we had to take into consideration a one-off higher than normal IGeLU contribution to the 2024 conference. This is due to the location of the IGeLU 2024 Conference.

Dave Allen, IGeLU Chair

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What makes IGeLU unique?

IGeLU has over 500 members which represents over a two 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.

The main items that make us unique are

- 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 guarantying 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,
- Regular meetings with Ex Libris Senior management where we openly discuss issues from support through top new development opportunities.

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.

IGeLU Steering Committee

The Steering Committee's (SC) main task is to help the Working Groups (WGs) and Communities of Practice (CoP) 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) exlibrisusers.org email distribution platform.

The SC coordinates the work done by the WGs and CoPs and is responsible for initiating and / or approving new Working Groups and Communities of Practice. The IGeLU Chair has regular meetings with the ELUNA Chair and with Ex Libris Senior 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 (SC) Members and Roles

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

- Dave Allen (Australia) – IGeLU Chair and Esploro, Leganto, Rosetta and National and Regional User Group Liaison
- Knut Bøckman (Denmark) – Alma Liaison Officer
- Alex Forrest (Scotland) – RapidILL, Rapido, Rialto and Content Liaison Office
- Cindy Greenspun (USA) – SFX and Voyager Liaison Officer
- François Renaville (Belgium) – Content and CDI Liaison Office, Conference Planning
- Augusto Ribeiro (Portugal) – Aleph and Summon Liaison Officer
- Asbjørn Risan (Norway) – Primo and Consortia Liaison Officer
- Wei Xuan (Canada) – Analytics, Developers and Linked Open Data Liaison Officer

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Conference Program Planning Committee

The Conference Program Planning Committee is a sub-committee of the IGeLU Steering Committee. The sub-committee's role is to plan and deliver the annual IGeLU conference. The conference sub-committee is led by François Renaville and Tracey Clark. We also have many volunteers on the IGeLU Conference Program Planning Committee. I would like to thank the Conference Program Planning Committee for working tirelessly throughout the year organizing this year's conference and their commitment and energy are to be applauded. Please refer to our website for the full list of volunteers on the Conference Program Planning Committee.

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 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 / ELUNA coordinators:
- Camelia Anghel (USA) - Aleph WG
- Gijs Neols (Belgium) - Alma WG
- Davin Pate (USA) - Analytics CoP
- Sylvain Courret (Switzerland) - Consortia CoP
- 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
- Paulina Harper (USA) – National/State/Corporate Libraries CoP
- Stacey van Groll (Australia) – Primo WG
- Aronne Watkins (Switzerland) – Rapido WG
- Courtney Taulbee (USA) – RapidILL WG
- Ian Hey (UK) – Rialto WG
- Sam Allog (Netherlands) – Rosetta WG
- Jiri Pavlik (Czech Republic) – SFX WG
- Jim Hammons (USA) – Summon WG
- Steelsen Smith (USA) – Voyager WG

I also would like to thank all members of these Working Groups (WG) and Communities of Practice (CoP) 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 and CoP Coordinators to provide me a brief report of their activities for inclusion into this report. These reports are as follows:

Aleph Working Group

This report was submitted by Camelia Anghel. This will be her last report as Coordinator of the ALEPH Working Group as she has moved on to new opportunities within her institution.

Under an Agreement with our sister organization (ELUNA) – IGeLU has taken primary responsibility for the Aleph Community.

Aleph Enhancements:

- Voting Cycle for 2023 - 2026
  - April 20th,2023 – July 20th,2023
- New enhancements requests can be submitted on NERS
  - July 21st, 2023 - July 28th,2023
- Aleph WG review the requests and submit them on NERS
  - July 31st, 2023 – Oct 30th, 2023
- Aleph Enhancements Voting Cycle Nov 1st, 2023 – Dec 20th, 2023
  - Aleph WGs work with ExLibris to clarify requests and pointing
- Dec 21st, 2023 – Jan 4th, 2024
  - Aleph WGs select the most voted enhancements and send them to ExLibris

Aleph Roadmap 2023-2026
- Aleph 23
  SP 23.4.4 - planned for 07/Aug/23
- Aleph 24
  Version 24.0 (Major Release) - 15/Jul/22
  SP 24.0.1 - 06/Mar/23 – was released
- Version 24.1 (Minor Release) - Planned June 2024

- Version 24.2 (Minor Release) - Planned December 2025

Aleph 24.1 new development:
- Working with Ex Libris development team:
- Fiscal Year Purge- remove all vendors without any remaining orders or invoices – NWERS request ID 7099.

Alma Working Group

This report was submitted by Gijs Noels.

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 WG activities with the community
- establishing and strengthening relationships with other advisory, focus, and working groups
- improving communications with Ex Libris to achieve better efficiency and provide clear priorities.

Organization Alma WG - 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 WG 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 WG 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 Ex Libris 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 WG 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.

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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	Request ID	Complexity Points	Total Votes
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 WG 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 Grenci 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 WG formed these functional subgroups 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 WG 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 Ex Libris 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 WG 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 WG contributed to the Alma digital working group Terms of Reference document in advocating for a close relationship of this new group with the Alma WG.

  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 WG recommends that the Alma Digital group be created initially as a subgroup of the Alma WG. 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 WG 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 WG 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 WG 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 WG gets recurring updates from Ex Libris Alma Product management of the overall progress concerning Alma performance and actions taken by Ex Libris in terms of continuous improvement. (Last update: March 2023)

- Alma UX Focus Group
  The 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 meeting 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 WG actively advocated between Ex Libris, 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 Ex Libris 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 Ex Libris in order to maintain a transparent overview of all activities going on concerning Alma (and relatives).

The Alma WG continued working on a transparent, open and constructive collaboration with Ex Libris 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

- o Linked data group
- o Analytics focus group
- o Creation of the Alma digital working group
- Follow-up on disablement/switch of support features in Alma:
  - o Guide me
  - o Known issue list
- Alma Roadmap
- Release notes

Documentation / Communication
Continue progress on sharing the Alma WG activities with the community

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

Organization Alma WG
- Scope (1): Continue progress on coordinating/following up on Alma related sub, focus, advisory, working, CoP groups.
  - o Establish a close collaboration with the Alma digital working group
  - o Subgroups: participate (even more) in 2023 Enhancement cycle with more responsibility
  - o 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
  - o Follow-up on two yearly terms
  - o 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)'

Transparency / Communication
- Scope: Continue progress on sharing the Alma WG activities with the community

o Primary Focus on providing UP TO DATE content to the IGeLU website for Alma WG:
  - 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!

Analytics Community of Practice

This report was submitted by Peter Davin

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 are in the process of developing a joint online location that both the community and Ex Libris will access and update.
- When does work start? Discussions began back in 2015-2016. The first draft for Fund Expenditures was provided July 2022.
- The number of people involved: Any Analytics Team member. Other non-committee members from around the world, Ex Libris.

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: Revisions are ongoing. Expected time of completion is 2024 based on information from Analytics Members.
- Number of people involved: 2 from Analytics CoP.

Initiative Three: Analytics Review of Column Headings (NERS 7952) - Priority: 1
- Additional ELUNA/IGeLU Groups: None
- Scope Statement: The Analytics CoP Observed that the NERS 7952 was more of an inconstancy/bug issue rather than an enhancement. We are currently compiling a report to submit to the Steering Committee and then to Ex Libris for review and fixing of the issues.
- Estimated time to delivery: Draft report should be released by ELUNA 2024.
- Number of People involved: Six-Seven Analytic CoP members.

Initiative Four: Collection Development Tool - Priority: 2
- Additional ELUNA/IGeLU Groups: Potentially Alma Working Group.
- Scope Statement: A Basecamp is in the process of formation that will examine new data visualization and other Collection Development Data tools that would assist libraries in retention and collection decisions.
- Estimated time to delivery: Ongoing
- Number of People involved: Six Analytics Team members.

Accomplishments this year:
1. Completion of the following initiatives:
   - Providing feedback on the Analytics UI Update. Continuing to push for fixes to Problems resulting from the Analytic UI updates.
   - Began data dictionary work in July with Fund Expenditures subject area.
   - Advocated for the expansion of Local Parameter fields to include an increase in the number of fields and the comprehensive mapping of indicators and subfields.
   - Expand roster to include additional members from IGeLU and ELUNA
2. Ex Libris Unresolved Concerns:
   - Increased issues with Primo Analytic regressions and lack of communication between Ex Libris on Primo cantered issues

Consortia Community of Practice

This report was submitted by Sylvain Courret.

New members
Early 2022 we ran an open call for new members. It was repeated and relayed by Ex Libris during summer. After an open meeting in IGeLU, we were pleased to welcome the Spanish CSUCC and the German HBZ consortias. They both provided very valuable inputs and presentation for the group.

Advocacy activities
The group focused on collecting needs. A list of wanted features was co-builded with different inputs from group members. They were detailed and some use cases were added. Then an internal voting process (similar to NERS) was set for group members to prioritize among all features. The output document was communicated to the ACFG group who consolidated all inputs from the community. The final document was communicated to Ex Libris and influenced the roadmap, some features being implemented in 2023.

Presentation
Some tools were presented that facilitates Central Office daily business. Those presentations are a great source of inspiration and an ice-breaker to trigger discussions or raise interest for different softwares (including cloud apps).

Practices sharing
Multiple practices were detailed in order to help other group members or to get their thoughts and inputs. Main focus aeras were e-resources management, NZ and bibliographic records issues, user management and fulfillment tricks. Consortia topologies differs and getting some system librarians views of their internal organization (as CSUCC did) is a very efficient way to understand better how consortia could define their optimal topology.

Content Working Group

This report was submitted by Karin Perols.

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.

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Key activities in 2022-2023 has been the following:

Participating in the CDI Advisory Group
The discussion between the Steering committees and Ex Libris 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 was led by Pascal Calarco (ELUNA SC) and Maribel Alvarado (IGeLU SC) in 2022 and in 2023 François Renaville (IGeLU SC). The scope of the group was 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 current status is that the Steering Committees are considering a dedicated CDI enhancement process. The proposed plan is to consider different aspects coordinated by Primo/Summon/CWG.

Ideas Exchange cleanup
We assisted Ex Libris in a cleanup of content ideas in Ideas Exchange. The goal of the cleanup is to be able to close outdated / completed ideas and focus on those requiring Ex Libris' attention.

- The work started in December 2022 with 756 ideas from the years 2017 to 2022. There were 507 "Old" ideas spread over the years shown below:
- 2017: 206 ideas, 100 reviewed, 67 marked complete; others ExL is investigating.
- 2018: 169 ideas, not yet started.
- 2019: 132 ideas, 100 reviewed for 360; Ex Libris has marked complete or merged about 30 of these.
- 2020 - 2022: New ideas 232.

New routines for new content from existing providers
We gave feedback to Ex Libris on how to handle community suggestions for new content from providers that already have content in the knowledge bases. The new routine for doing this is to use Ideas Exchange for this (instead of tickets in Salesforce) and these were checked each week by Ex Libris. This way everyone can see the suggestions and there is no need to put in tickets for suggestions already submitted. No voting is needed in Ideas Exchange for Ex Libris to start working on these.

Proposed New provider voting process.
We have discussed a new voting process for content from providers that are not in the Ex Libris content products whatsoever. The suggestion is as follows:

- Annual votes for IGeLU and ELUNA members
- Use Ideas Exchange as a source for suggestions.
- Focus on new content providers.
- Call for new submissions on listservs for 2-3 weeks.
- Curated ballot
- Regional focus to make it possible to add content that might not get a high number of votes in Ideas Exchange
- Frequent updates from Ex Libris on "ballot winners"

The plan for 2023 is to hold the vote in November with Ex Libris beginning outreach to providers in early 2024.

New Content listserv

We started a new listserv dedicated to content issues and questions in Ex Libris content products. The uptake has been very good and the list has close to 1500 members. Ex Libris' content newsletter is now distributed exclusively via this list.

Began working with new staff at Ex Libris
- Tamar Ganor (Content Product Manager)
- Vivien Antwi (Director, Provider Relations)

New members

We added new members from countries whose primary language is not English (Finland, France, Lithuania, and Norway).

Advocacy and other business 2022-2023

1. Other issues CWG has provided Ex Libris with feedback on:
   a. Salesforce categories for Content. We have suggested streamlined and improved categories to make it easier to file a ticket and help get cases routed to the right support.
   b. Advocated for more providers to be added to Autoholdings.
   c. Newspaper search in Primo.

2. Plans for the coming year
   a. Content vote for new providers
   b. CDI enhancement vote (working in conjunction with Primo and Summon WGs)
   c. Follow up on effectiveness of new Ideas Exchange workflows for new content from existing providers.
   d. Ongoing discussions about content support issues
   e. Ongoing discussions about Provider Relations issues
   f. Consider opportunities to collaborate with Ex Libris on content related community education initiatives.

Esploro Working Group

This report was submitted by Joan Kolarik

Challenges
- Small but growing customer-base
- Finding sufficient volunteers and a deputy coordinator – new deputy and 2 new members were added during the year
- Upcoming development points
- Ongoing lack of customer ability to create Community Knowledge Articles because of Ex Libris transition to ProQuest support interface
- Coordinator change – Joan Kolarik and Margie Pembroke will switch coordinator responsibilities at IGeLU 2023

2023 Chair's Report

Accomplishments

The Group continues to

- meet monthly (during the past year, meetings were bi-monthly and are now on a monthly schedule)
- monitor and maintain the Esploro listserv for communication
- provide updates on group's activities at conferences and on the IGeLU website
- provide subject-based programming at conferences and online
- investigate ways to impact future Ex Libris development
- meet monthly with Ex Libris Product Manager and ELUNA coordinator
- coordinate activities with the ELUNA Esploro Working Group
  - in this past year and the previous year, assisted with ELUNA-WG-led community survey and roadmap survey, described in ELUNA Esploro WG report (https://el-una.org/leadership/working-groups/esploro-working-group/)
- provide an Esploro liaison at monthly Analytics CoP meetings

Community Discussion Meetings

In coordination with the ELUNA Esploro Working Group, meetings were held, recorded, and posted for the entire community:

- Integrations (October 2022)
- Smart Harvest (December 2022)
- Quality Control (February 2023)
- At IGeLU 2023, there will be 4 Esploro-related presentations in addition to the IGeLU Esploro Working Group presentation (vs 2 at IGeLU 2022)
- Adding Library Control of Business Logic to Alma User and Esploro Researcher Processing / Joan Kolarik
- Integrating Research Assets in Research Repository (Esploro) using Smart Expansion via Alma / Hala Elgohary et al.
- The integration experience at Southern Cross University / Margaret Pembroke et al.
- Working with Alma, Converis and Esploro in the life cycle of institutional research outputs / Paolo Buoso et al.

2023/2024 Goals

1. Work with the community and Ex Libris to improve Esploro functionality, encouraging Ex Libris alignment with community priorities
2. Run first test enhancement process (NERS) with community
   a. Learn the NERS software
   b. Use the Idea Exchange as a source for testing
3. Promote more Esploro-related presentations for 2024 IGeLU conference
4. Organize at least 4 more community discussion meetings throughout the year, continuing the 2-meeting approach in order to make meetings more accessible to the entire community.

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. The group continues to run the popular Developers Day as part of the annual IGeLU conference.

2023 Chair's Report

Leganto Working Group

This report was submitted by Jessie Donaghey.

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 May 2022, Massimiliano Cilurzo from the University of Salerno, Italy left the Working Group as he moved onto a new opportunity within his institution. We greatly appreciate Massimiliano's contributions and wish him the best of luck in his future pursuits. We plan to recruit a new member in the coming months.

NERS 2023 ballot

Ex Libris agreed to develop the top four enhancements, see the 2023 Leganto Enhancement Results for details.

Two rounds of voting were conducted:

Round one included 64 enhancements voted on by 99 members

Round two included 19 enhancements voted on by 98 members

Voting members by Region	Round One	Round Two
Africa	1	
Asia Pacific	17	19
Europe	26	21
North America	40	38
United Kingdom	15	30
Grand Total	99	98

In collaboration with the ELUNA Leganto WG a webinar was held to demonstrate an Analytics report that would help with identifying new editions of titles on reading lists. This was in response to the withdrawal of the NERS enhancement #8417 "Automatic identification of the new editions of titles already in a reading list" from the second ballot as Ex Libris identified it as outside the scope of Leganto. Webinar recordings are available on the Leganto WG Past Events page of the IgeLU website.

Coming in 2024, Leganto will increase from 50 to 75 development points for NERS.

Leganto New UX/UI

Ex Libris is developing a new Leganto user interface (UI) to improve the user experience (UX) for instructors, students, and librarians.

Leganto New UX/UI 2022-2023 Focus Group

Ex Libris completed the Leganto new UX/UI meetings with library staff and instructors to discuss potential features and workflows for the new UI.

Instructors' direct input provided valuable insights into user perspectives on functionality.

Selected institutions will be early adopters in June 2023, with others gaining access from September 2023, and the current UI will be withdrawn in October 2024.

Leganto Early Adopters Testing
Several institutions including members of the Product Working Group are part of the Leganto Early Adopters Testing. Instructors and librarians from these institutions are providing feedback to Ex Libris on design, workflows and bugs before the new UI is launched in September.

Leganto Librarian Analytics Reports 2022-2023 Focus Group
Ex Libris made changes to the initial plan based on feedback from individual meetings and will focus on developing reports from the University of Sheffield over time.

Valuable perspectives were gained from participants and an open channel will remain with Ex Libris for feedback on Leganto reports in the future.

While additional group meetings were not originally planned, Ex Libris may establish a new focus group and will approach participants for their input when the time comes.

For more details on the focus groups, see the Leganto WG News Posts on the IGeLU website.

Idea Exchange Review
An Idea Exchange review on ideas submitted between 2016 and 2019 was undertaken by the Working Group in conjunction with Ex Libris to free up votes for the community.

Two categories were identified: ideas unlikely to be developed and should be closed, and ideas still relevant and with popular support to remain open.

Ex Libris added closure comments to flagged ideas, and users had a month to respond or provide more details to keep an idea open.

Leganto-L mail list
The WG continues to routinely send out a summary of recent Idea Exchange posts to promote to the community new ideas and generate discussion.

Subscriptions to the Leganto-L list have increased to 984 this year, including new subscriptions from Brazil, Colombia, Korea, Luxembourg and Philippines.

Linked Open Data Community of Practice

This report was submitted by Xiaoli Li

In 2022, the Linked Open Data Community of Practice Working Group (the "LOD Working Group") identified the following four major actions:
1. Work with Ex Libris to develop linked data features;
2. Organize virtual community meetings;
3. Support libraries' DEI projects; and
4. Support the implementation of RDA in RDF.

To accomplish this work, we established four subgroups comprised of members of the LOD Working Group. We are very happy to report that we have 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
    Subgroup members: Laura Akerman, Catherine Grove, Jim Hahn, Mark Kluzek (convener until March 2023), Xiaoli Li (convener, April 2023-), Hans Schürmann, Amanda Xu, and Lihong Zhu.
    *   Addressed some issues outlined in "URIs in Ex Libris Products: Report of current conditions and best practices"
    *   Helped with redesign of APIs
    *   Provided support for implementing BIBFRAME cataloging
    *   Collaborated on ORCID iD in URI form for $1 Real World Object to be indexed in Alma, and display in Primo

2. Organize virtual community meetings
    Subgroup members: Laura Akerman, Catherine Grove, Greta Heng, Ebe Kartus, Vickie Kline, Mark Kluzek, Heather Pretty, Ken Varnum (convener), and Amanda Xu.
    This group planned and organized the following two well-attended virtual community meetings:
    *   A Sinopia, Marva and Alma Linked Data Implementation, January 12, 2023. Meeting recording: https://youtu.be/Q0-ABLG4dyQ
    *   Lightning talks: Utilizing Linked Data Features in Ex Libris Products, April 26, 2023 Meeting recording: https://youtu.be/4cAybWR8oIM
    More than 150 people attended each of the events.

3. Support libraries' DEI projects
    Subgroup members: Greta Heng, Xiaoli Li (convener), and Verónica R. Parsiale.
    This group reviewed a list of vocabularies and submitted two requests to Ex Libris:
    *   Adding Homosaurus (https://homosaurus.org/) to the Alma Refine List
    *   Adding ORCiD (https://orcid.org/) to the Alma Refine List
    *   Along with subgroup 1, collaborated with the Ex Libris linked data team to incorporate Homosaurus.org & ORCiD into Alma Refine
    The group is still working with the Ex Libris linked data team on both initiatives.

4. Support the implementation of RDA in RDF
    Subgroup members: Laura Akerman (convener), Ebe Kartus, and Lihong Zhu.
    This group researched and monitored uses or projects to make use of RDA Registry linked data entities, elements, and terminologies in resource description, advised Ex Libris on current and future functionality, and is planning to release an environmental scan report later this Summer. In addition, the group contributed to the University of Washington (UW) project to provide a MARC21 to RDA linked data mapping.

Ex Libris' linked data focus group
Beyond the accomplishments mentioned above, the working group collaborated with the Ex Libris linked data team to develop a process for soliciting participants in a linked data focus group. The focus group will work collaboratively with Ex Libris on use cases based on the Ex Libris plan for basic end-to-end workflows of using BIBFRAME in production. More specifically, the focus group will help with

design review, testing and using BIBFRAME in production, reporting issues, and suggesting solutions and critical enhancements.

The focus group commenced in June 2023. Below are three major milestones for the work of the group:
- June 2023 - April 2024: be part of development cycles, such as design review and testing.
- May 2024 - December 2024: use BIBFRAME in production, provide feedback on the workflows, report issues, and suggest improvements.

As of July 2023, the focus group consisted of the following libraries: Emory University, Harvard University, Memorial University, the National Agricultural Library, Newcastle University (UK), Northwestern University, University of Pennsylvania, Princeton University, and University of California Davis.

Other activities
The working group continued to maintain information channels to and from interested Ex Libris customers, including the user story form, the Dashboard, mailing list, and Slack channel. It is worth mentioning that the number of subscribers to the group's listserv has increased more than 10% over this past year.

The working group members have kept abreast of current trends in linked data by conducting research on various linked data topics and serving on various linked data groups, including actively organizing and attending linked data events. The research topics conducted in the past year include market research on Cambridge Semantics's knowledge graphs, and Elsevier
SciBite's Semantic Search and Discovery, graph database management solutions, and best practice in text analytics and Natural Language Processing.

Below is a list of selective 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 URI Guidance Subgroup
- PCC Sinopia Cataloging Affinity Group
- Lotico New York Semantic Web
- Share-VDE National Bibliographies Working Group
- University of Washington MARC21 to RDA Vocabularies project
- W3C BIBFRAME2SCHEMA.ORG Community Group

Lastly, we are sad to say goodbye to Mark Kluzek and Hong Ma. Thank you, Mark and Hong, for your valuable contributions. On a happy note, we welcomed four new members: Jim Hahn (University of Pennsylvania), Verónica R. Parsiale (International Labour Organization Library), Stefan Schuh (Austrian Library Network and Service Ltd), and Hans Schürmann (Swiss Library Service Platform). In addition, Wendy Robertson (University of Iowa) joined the group as a liaison to the Esploro Working Group and

Wei Xuan (University of Manitoba Libraries) is our new liaison to IGeLU Steering Committee. Their expertise will be a great addition to our group.

Primo Working Group

This report submitted by Stacey van Groll

Working Group Members

The IGeLU Primo Working Group (WG) is led by *Stacey van Groll* as Coordinator and *Mark Kluzek* as Deputy Coordinator. The IGeLU Primo WG works collaboratively with separate sister group ELUNA Primo WG. Several members also act as Liaisons maintaining close ties with other groups in our community, with our full current member list and responsibilities as follows:

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

Connection was re-established with the Alma WG in December 2022 after a gap from December 2021, welcoming *Emma Clift* as Liaison from the Alma WG. Communication is also maintained with the Linked Open Data Community of Practice by Liaison from this group from June 2023, *Ebe Kartus*. We are supported by *Asbjørn Risan*, as our Liaison with the IGeLU Steering Committee.

Member changes

In February 2023 we farewelled Lee Houghton, who stepped down from the Primo WG. Lee joined the Primo WG in 2017, bringing a strong accessibility focus and liaising directly with engaged members of our community in this area. Lee also worked for several years as a member of the Enhancements Team, including taking an organisational role as Enhancements Coordinator from 2020, as well as an additional leadership role of Deputy Coordinator from 2021. We thank Lee for his impressive commitment to the Primo WG over six years of service for our member community. With the significant gap left by Lee's departure, we adjusted positions for some members. Mark Kluzek stepped into the Deputy Coordinator role, moving from his previous role as Liaison to the Linked Open Data Community of Practice. Nir Zinger also took on more organisational responsibility as Enhancements Coordinator, bringing the experience of two years of work reviewing requests on the Enhancements Team.

Annual Enhancements Process

The IGeLU and ELUNA member Primo community submitted 141 new requests for the 2023 Primo enhancements round. All requests were processed by the collaborative Enhancements Team, comprised of members of both the IGeLU and ELUNA Primo WGs. This team was co-led initially by Lee

Houghton and then Nir Zinger as Enhancements Coordinator for IGeLU, and included IGeLU WG members Gaith Bader, Paul Harding, Jennifer McNally, Manuela Schwendener, and Andrea Zech.

During the review, 19 requests were determined to be not votable with 9 merged, 5 Roadmap, 2 withdrawn by submitter, and 3 already supported. In consultation with the Alma WG, 1 submission was transferred from Alma to Primo, and 3 submissions were transferred from Primo to Alma.

At the conclusion of the review process, 119 enhancements were included in the voting round, as the highest number of votable submissions in the Primo ballot since 2015.

The final voting tally in the initial voting round was significantly lower than 2022 at 51229 votes by 332 accounts (a drop of 4800 votes).

Potential causes for this drop in engagement could be the Primo ballot closing one week earlier than the Alma ballot. This was done to avoid the Easter observance period but may have caused members to miss voting for Primo. Efforts are made for close alignment of these core product enhancement cycles for reasoning such as ability to transfer requests rather than having to withdraw, if submitted for the wrong product. This is important as selecting the right product for enhancement submission is sometimes becoming more difficult for the member community to determine, with overlaps to Alma for Primo VE and Central Discovery Index (CDI) content in Primo. It is acknowledged though that there may be negative outcomes of aligning timelines, such as high workload for community members in considering multiple product enhancement lists at once. This has led in prior years to the decision to increase the initial voting period from two to three weeks, with community feedback. Improvements are being further considered for future cycles, including an even longer initial voting period. Closer collaboration with Ex Libris Primo Product Management is also planned, as there was a need to extend the pointing period for two weeks due to falling across the Easter period, and the complexity of some submissions requiring extensive consultation.

At the conclusion of this long pointing process, it was determined by the IGeLU and ELUNA Primo WGs that an additional round of voting was required. The decision-making for this was a high number of points for some submissions, varying scoped solutions for several submissions, and 3 requests not pointed by Ex Libris. One of these was advised soon to be delivered #8292, 1 was rejected as the submission premise did not match existing or possible practice #8206, and 1 was determined to be better handled as a collaboration point of Primo VE and Primo Back Office alignment between Ex Libris Primo Product Management and the IGeLU and ELUNA Primo WGs #8130.

The additional round of voting was conducted on 17 requests, with ultimately a total of 46431 votes by 298 accounts, which is a typical lower level of engagement experienced with additional rounds of voting.

The top 3 requests of #8126, #8210, and #8134 were successful for delivery within a year, as aligned cleanly with the 195 points available for Primo in 2023 and bearing in mind 5 points borrowed in 2022.

Ex Libris Primo Product Management also agreed to deliver an additional 2 submissions of #8157 and #8141 as part of the 2024 Roadmap, not requiring any additional community points.

We thank Ex Libris Primo Product Management for working with the IGeLU and ELUNA Primo WGs productively and collaboratively to ensure this excellent outcome for the Primo community.

Tracking and delivery of enhancements (NERS)
There is a continuing strong focus for the Primo WG not only to manage the current year enhancements round, but also monitoring and follow up on delivery of successful enhancements in previous rounds. Stacey van Groll, with oversight responsibility as Coordinator, regularly updates the 'Primo enhancements' page on the IGeLU website. This one-stop-shop page logs delivery timelines for successful submissions from 2014 onwards, as well as useful information on the entire process and historical details for ongoing reference. This page can be found at https://igelu.org/products-and-initiatives/product-working-groups/primo/primo-enhancements/.

The Primo WG continues to expect and encourage a high degree of consultation and collaboration with Ex Libris Primo Product Management in delivery of enhancements per the Product Development Collaboration Agreement, flagged as a concern in 2022 and into 2023.

Meetings with Ex Libris Product Management
Every month the IGeLU Primo WG Coordinator Stacey van Groll and Deputy Coordinator Lee Houghton (departed) and Mark Kluzek (current), along with ELUNA Primo WG Chairs, meets with Ex Libris Primo Product Management. This is most commonly Nili Natan, Yael Shahar, and Yisrael Kuchar. Additional Ex Libris staff attend as needed, such as Christine Stohn for Central Discovery Index discussions.

These meetings are an opportunity to raise issues of concern affecting the community and advocate for improvements, discuss Roadmap items and product development, collaborate on the enhancements process and associated deliverables, and provide feedback on items raised for consultation. In an effort to strengthen focus on enhancements and meet the collaboration and consultation expectations for development and delivery, Enhancements Coordinator Nir Zinger began attending these meetings also from July 2023.

Stacey van Groll also meets fortnightly with Ahuva Mazuz (VP Development), with additional opportunity for technical discussions for CDI and related impacts on Primo, extending in 2023 also to Linked Open Data and AI.

Community support
Primo WG members have collaborated across our member community in the last year, including notable efforts:

- Paul Harding - our Liaison to the Analytics Community of Practice - has engaged passionately on Primo WG behalf to the Analytics CoP, as a strong advocate for continuing pressure on Ex Libris Product Management to address ongoing Primo Analytics issues
- Noémie Ammann - our Liaison to the Content Working Group - admirably fulfills the responsibility of strong two-way communication, consistently sharing detailed content-related updates from the Content WG, particularly important for the key Central Discovery Index overlap area into Primo

We are also continuing to enhance community support and communications by:
- Adding new resources to the 'Primo Community Support' page on the IGeLU website including (https://igelu.org/products-and-initiatives/product-working-groups/primo/primo-community-support/):
  - creating 'Primo Sites and URLs', a compilation by Stacey van Groll of 450+ sites, useful for work such as environmental scans for Primo features in similar institutions
  - linking to 'PrimoViews.org', as created and hosted by Manuela Schwendener, including both original work and community compilation resources

- o linking to our ELUNA Primo WG sister site, with a focus on compiling customisation resources
- Half of the Primo WG members sharing their work collaboratively with the Primo community by presenting sessions at IGeLU 2023 Conference: Andrea Zech, Gaith Bader, Jennifer McNally, Stacey van Groll, and Ulrich Leodolter
- Continuing to share monthly updates on Primo WG activities and advocacy on the IGeLU website: https://igelu.org/products-and-initiatives/product-working-groups/primo/minutes/

In addition, while the Primo WG does not have direct responsibility for the Ex Libris Primo Idea Exchange, our member Manuela Schwendener continues to take great initiative over another year of engaging with members of our community through that forum, monitoring new and longstanding submissions.

Advocacy activities
The Primo WG has a constant and continuing focus on leveraging 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:

- Year-long involvement from May 2022 through May 2023 in the collaborative CDI Advisory Group (representative: Stacey van Groll)
- Support for the Primo community through the Angular 1.8 upgrade transition, particularly by Ulrich Leodolter, ultimately delivered successfully and with minimal disruption in November 2022
- Highlighting issues with Primo cases not being updated by Support in a timely fashion for firm releases or to indicate delays, with internal Ex Libris process adjustments advised in November 2022
- Supported additional Primo VE development to include access to the Primo Analytics API, achieved November 2022
- Advocated for equitable access to update materials by inclusion of the Q&A portion in recorded Primo Webinars, for community members not able to attend live, with this now included from January 2023
- Supporting adjustment to mapping for 505 $t from main title to addtitle for Primo VE sites, to improve ranking and allow for separate boosting in follow up to 2020 NERS item #6552, and changed February 2023
- Worked to encourage expansion of features available in the Feedback Tool introduced as part of 2021 NERS items #7371 and #7430, with additional improvements in August 2022, November 2022, and February 2023
- Campaigned for better alignment with GDPR and privacy concerns for Search History settings introduced in August 2022, with ability to adjust the default configuration fulfilled in February 2023
- Contributed to a compilation report of Support concerns in February 2023 by all WG and CoPs, providing case examples and details to the IGeLU and ELUNA Steering Committees for raising to Ex Libris Support
- Taking advantage of a call in February 2023 to provide a list of major issues to the IGeLU Steering Committee, for raising in meetings with Ex Libris Senior Management in March 2023. The detailed submission by Primo WG included:
  - o Summary topics of 1. communication and consultation issues with the Primo WGs related to delivery of Primo NERS items, 2. poor QA and regression issues in Primo releases for both 'front-end' interface and 'back-end' analytics, and 3. development

changes to Primo for which the Primo WGs is not advised or consulted in advance, as well as concern for development priority balancing between new features versus defect corrections, and equitable language support

- o Primo Analytics had a particular focus also with suggestion to have a dedicated product owner to improve the area, with issues raised of 1. Features released but associated beacon tracking actions not added until a later release, 2. Feature and analytics are released together but it is found the data is not being recorded ie sub-standard QA, 3. Regressions with data previously tracked no longer being tracked, 4. Poor prioritisation of cases reporting such issues, despite that there is data loss every day while the defect continues, 5. Parity issues with Ex Libris failing to develop Primo APIs with Primo VE, and 6. Ex Libris refusal to investigate reported Analytics issues

  - o An additional item was also flagged of published case visibility, as lost in November 2021 and the ongoing negative impact for community collaboration particularly given Ex Libris Primo Product Management does not document all Known Issues or Resolved Issues in Release documentation

- Engagement in collaborative discussions with ELUNA Primo WG counterparts and Ex Libris by Stacey van Groll through attending the ELUNA Annual Meeting in May 2023. Thanks are extended to the ELUNA Steering Committee for providing this opportunity
- Raising scenarios for improvement with the Grobid AI tool introduced in March 2023, with enhanced results for known item citation searches achieved in July 2023
- Advocating for enhanced documentation of the Resource Type Filters introduced in February 2023, and also feature improvement for Primo VE to bring it into alignment with Primo managed by Back Office for views granularity, advised for correction in the 2nd half of 2023
- Raising concern to senior Ex Libris management of the impact on customer environments and analytics data with the increase in machine learning AI tools, flagged in early 2023 and ongoing
- Engaging actively with DEI initiatives, including suggestion of collaboration with the Content WG and Ex Libris to provide a list of representative Central Discovery Index collections to encourage activation, rather than to remove autonomy by Ex Libris enforcing the CDI EasyActive model on all new customers with the reasoning of preventing unconscious bias

Additional standing items of continual advocacy include expectation of equitable development for all Primo customers regardless of deployment model, as well as autonomy of choice by opt-in development; expectation of accessibility focus in Primo by new features introduced with accessibility in mind, as well as transparent information provided on the latest external audits and outcomes; and encouraging direct Ex Libris engagement with the community through Primo community listserv and Primo Idea Exchange.

Future focus
In the remainder of 2023, ongoing into 2024 and beyond, the Primo WG will be focusing on some key initiatives:

1. Engagement in the New XP Focus Group, for collaborative development of the New Discovery Experience. WG member representatives will be Manuela Schwendener, Paul Harding, and Nir Zinger
2. Developing a report on Primo VE development issues for features and functionality still lacking which are enjoyed by sites using Primo managed by Back Office. WG member representatives will be Stacey van Groll (Co-Chair with ELUNA Primo WG), Ulrich Leodolter, Nir Zinger, Noémie Ammann, and Andrea Zech
3. Improvements in the yearly enhancements process, including potential for platform migration

2023 Chair's Report

RapidILL Working Group

This report was submitted by Courtney Taulbee.

The RapidILL working group consists of members from seven ELUNA libraries and one IGeLU library. Meetings are held monthly to discuss ongoing projects and address issues that are brought up on the RapidILL listserv.

Membership Changes

When the RapidILL working group was created, it ran on a calendar year basis for membership terms. Therefore, in 2022 the roles were filled primarily by other members outside of the current committee. The current chair joined the working group in May 2022 as the deputy chair because the position became vacant. Also in the summer of 2022, there was a decision to request that members from outside of the United States serve on this committee and a call was made for up to three people to join the working group who met this criterion. Two were added to the committee that summer. In September 2022 a call for new members took place, and the following members began service in January 2023 when the majority of the 2022 members rotated off the committee. Courtney Taulbee, Wendy Ellis, Deb Gilmore, and Nicola Sikkema stayed on the committee. For organizational effectiveness, it was determined that it would be better for the group to have membership terms similar to those of other ELUNA working groups. The current membership agreed to expand the usual one-year terms to a year and half term so we will all be working together through the next ELUNA conference in 2024.

RapidILL Listserv

The RapidILL listserv continues to be a primary resource for RapidILL customers to use to express questions and concerns with the product. Highlights from the past year can be categorized in the following groupings:

- RapidILL Workflow
  - Example: How much time spent on fixing incomplete citations
- RapidILL Platform Issues
  - Example: Reporting of technical issues pertaining to RapidILL
- Resource Sharing Community Announcements
  - Example: RapidILL Ukraine initiative
- Resource Sharing Topics of Interest
  - Example: Statistic gathering questions

RapidILL Working Group Website

Deb Gilmore, International Member-at-Large, analysed the different working group webpages on the ELUNA website and compared and contrasted the content and formatting found on these other pages. She documented this information and provided it to the ELUNA steering committee for their work on creating new website working group templates.

NERS Enhancement Voting

A much-discussed topic of conversation over the past year has been about participating in enhancement voting procedures, like that of working groups for other Ex Libris products. Once it was determined that the NERS platform was going to be used for another year, the group worked together to create this option for RapidILL users. Additionally, it was decided to unite with the Rapido working group and combine the voting process for both platforms. This is the first year that this is being offered to the community for both products. Once the groups have been through the process, they will then

determine whether it makes sense to continue to have a joint voting process or create separate ones for each product.

The timeline for the RapidILL/Rapido Voting is below.

Rapido/RapidILL	Actions and Events
May 9th, 2023	Call for proposals and submissions open
August 1st, 2023	Last chance to submit new enhancement requests for this year's voting in NERS
August 2nd, 2023 - August 29th, 2023	The Enhancements Team reviews, dedupes, scopes, verifies, transfers to other NERS when necessary, and sets up the vote
September 5th, 2023 - October 17th, 2023	First round of voting
October 18th, 2023 - October 24th, 2023	The Enhancements Team reviews the results, and prepares them for Ex Libris to assign complexity points
October 25th, 2023 - November 7th, 2023	Ex Libris adds complexity points to the top voted results. The Enhancements Team determines if a second round of voting is needed
November 8th, 2023 - November 13th, 2023	Extra time assigned for clarification with Ex Libris
November 14th, 2023 - December 8th 2023	If necessary, a second round of voting takes place
	The NERS agreement states that Ex Libris will develop the accepted enhancements within one year

Future Areas of Consideration
Some areas of interest of the working group include the aforementioned review of the NERS voting enhancement and determining if
1. Enhancement voting for RapidILL should continue
2. If it is decided to continue with the voting process, should Rapido and RapidILL continue to combine or should they separate the voting procedures for each product

Other goals for this upcoming year include:
1. conducting a webinar about RapidILL and Alma integration
2. creating a guide about best practices that contains suggestions for using RapidILL. A guide such as this may be useful to new and existing customers.

Rapido Working Group

This report submitted by Aronne Watkins

Short overview

The IGeLU Rapido Working Group was formed in August 2022, and promotes collaboration and communication among Rapido customers and Ex Libris. The IGeLU Rapido Working Group meets monthly and attends regular meetings with the ELUNA Rapido Working group and Ex Libris to discuss issues, open points and the Rapido Roadmap.

The Rapido WG engages in various activities:
- Prepare and execute the Rapido NERS ballot each year
- Contribute to conferences
- Work with Ex Libris management on roadmap priorities
- Develop and facilitate focus groups with Ex Libris management
- Coordinate community drive

Completed tasks
- The Rapido WG completed its setup (kick-off, meetings and work environment, role and task attributions)
- Together with the RapidILL WG and the ELUNA Rapido WG, the group setup the NERS timeline and voting process for Rapido/RapidILL. Having a combined process has made it more difficult to review enhancements and this could result in some inequality in voting results.

Open tasks
- The Rapido WG is working on the publication of its new webpage on igelu.org
- An Open Meeting at IGeLU in Leuven is in preparation
- The moderation of a couple of sessions at IGeLU in Leuven is scheduled
- The Rapido WG is working on the redaction of articles on Rapido for the WG webpage and on the identification of useful documents that can be shared on the WG webpage

Ongoing tasks
- Outreach to find new WG members
- Regular exchanges with ELUNA Rapido WG and Ex Libris Product management
- Collaboration on Rapido Listserv
- Evaluation of incoming NERS requests

Rialto Working Group

This report was submitted by Ian Hey

The group was formed roughly 2 years ago and now have a full allocation of members and representatives from most other working groups. Our newest liaison is Charlie Remy from the content group. We meet with Ex Libris every month and report back to the group the week after.

Both co-chairs attended the ELUNA conference in Los Angeles, it was a great event and an excellent conference. Ian will be attending the IGeLU 2023 conference in Leuven in September and hopefully other members of the group will going in person as well

We will hopefully be able to do a public vote for new content in October, this has been a long drawn-out process while it was decided which platform we would use. The list has been extracted from Ideas Exchange

We are currently in the process of setting up two subgroups one looking at Best Practices and the other looking at the extract from the Ideas Exchange.

Rosetta Working Group

This report was submitted by Sam Alloing

Open Discussion sessions
We had four open discussion sessions, they are intended to share knowledge and experience.
- Governance and advocacy
- METS 2 draft
- Structural IEs
- Monitoring and Reporting

The sessions are 1,5 hours with multiple presentations per subject. After the presentations there are discussions on the subject. The open discussion session is recorded so it is possible to see them later. There will soon be a new call for subjects. We aim to have 4 to 5 subjects over the course of a year.

Community activity
Rosetta Working Group Annual meeting (5--7 June)
- The meeting was hybrid this year. There were 83 registered, 41 in-person and 42 remote. The in-person part of the meeting was in The Hague at the National Library of the Netherlands.
- Participants wanting to follow the in-person meeting could do so via Zoom. There were also online regional meetings for participants outside of Europe. They didn't have an agenda, but some discussions amongst participants.
- The in-person meeting had introductions from institutions, reports on the last year from the different working groups and Ex Libris. There were also presentations on achievements from customers. The bulk of the sessions were on the Ex Libris plans for the SaaS environment for Rosetta. There sessions on gathering the concerns of participants and those were discussed with Ex Libris.
- This year we also had a Hackathon. It was hybrid as well. The questions from users were answered.

DRAG user community
- The German speaking Rosetta User Community. There is every year a very active German speaking user group meeting, with presentations on the member activity. Normally it is organised in May

Possible presentations

Proposal for a presentation on wikidata submitted by Sam Alloing, Daniel Greenberg and Dan Shor. The presentation is about using wikidata as a knowledge base for file formats and applications. Ex Libris will present a potential design for implementing this in Rosetta and the expected benefits, challenges and considerations on implementing wikidata information into Rosetta. The proposal is submitted and by 31 July it will be clear if the proposal is accepted. The presentation is online from 28-29 October.

Enhancement requests

Due to the announcement that Rosetta will move to the Ex Libris SaaS platform, the new enhancements will be limited in the coming year.

Enhancement requests implemented in Rosetta 7.4
- Bulk risk assignment to file formats
- Multiple file format identification
- Enhanced date field search

Enhancement requests in the soon to be released Rosetta 8.0
- Rosetta 8.0 is installed on the hosted environment for customers to get early access and to test features.
- Expected enhancement requests:
  - Enhance itemized set functionality
  - Set privileges-group on IE export
  - Rosetta version API

Enhancement requests later release of 8.1
This is a future release and not everything is accepted for this release
- Generate Logical StructMap from existing Logical structMap

Sub-working groups and Steering committee
- Digital Preservation Working Group
- Delivery and Integrations Working Group
- System Operation Working Group
- Now with the move to the new SaaS environment, there will also be Topical groups formed by Ex Libris and an Advisory Board. This is to give direction to the new SaaS environment as it forms.

Summon-360 Working Group

This report was submitted by Jim Hammons.

The ELUNA Summon-360 Working Group is pleased to share this report of highlights for the 2022-2023 activity year.

Membership changes, 2022-23
- Jim Hammons assumed the role of WG chair in May 2022, succeeding James Day. The WG appointed its first-ever Vice Chair this year, Nick Pavlovic.

- The WG welcomed Augusto Ribeiro as liaison from the IGeLU Steering Committee. Dean Lingley, just elected to the ELUNA Steering Committee, has joined us as SC liaison.
- Virginia Dearborn joined the WG in May 2023. Wendy Crist, Vickie Kline, Faye O'Reilly and Nick Pavlovic all joined in 2022. Former members Beth Juhl, Susan Wynne, Leigh Mihlrad, and Jeremy McGinnis rolled off the WG.
- Susan Johns-Smith led the Enhancement Team for the 2022 NERS round, succeeding Jim Hammons. Wendy Crist joined the team in 2022 and is leading the 2023 round. Virginia Dearborn has joined the team, taking Angela Sidman's place.

Enhancement Process Highlights

In 2017, the Working Group decided to use the Idea Exchange in tandem with NERS to manage enhancement voting for the Summon and 360 user communities. The Summon Idea Exchange, being open to all users, give the global user community a chance to influence the ballot. The Enhancement Team typically obtains an export of current Idea Exchange requests in June or July, spends several weeks vetting the list, and shapes it into a set of requests which are then loaded into NERS for a vote in the Fall. IGeLU and ELUNA member institutions then vote over 2-3 weeks, followed by the customary pointing process and final selection of roadmap commitments in collaboration with Ex Libris project managers Brent Cook (Summon) and Amy Pemble (360/Intota). The project managers also choose items directly from the Idea Exchange, and because the WG incentivizes posting ideas, we can rightly claim influence beyond the NERS process.

A total of 13 NERS Roadmap Commitments for 2022 and 2023 emerged from the enhancement process:

- Display coverage dates for E-journals in Summon results.
- Refine content type Web Resource to identify online newspaper articles.
- LTI support for Summon for integration with LMS.
- Ensure Open Access link Is available for Open Access content.
- Collection Discovery for Summon over Alma
- Allow for the ordering of E-Journal Portal results.
- Mandatory sender e-mail field in Summon when sending citations.
- Improve the Quick Look pane layout.
- Display 5XX fields in Summon.
- "Include matches in Full Text" to search suggestions.
- Ability to customize the order of elements in the right pane.
- Ability to match language settings of Summon with 360 Link
- Prevent eBook and computer file records from merging.

Examples of other Idea Exchange requests that made it on the roadmap thanks, in part, to visibility provided by the WG's enhancement include:

- support for more citation formats,
- a prompt to save changes in the Summon Admin Console,
- additional automatic holdings updates in 360 Resource Manager,
- scopes for Summon searches, and
- adding Unpaywall as a selectable resource indexed in Summon.

Increased Engagement with Content and CDI Advocacy Issues

Admittedly, the Summon-360 Working Group was largely a spectator during the process of assembling the "CDI Pain Points" document. From one perspective, the transition to CDI was a continuation of the

status quo for Summon sites, as the CDI is rooted in the legacy Summon index. On the other hand, Summon customers have always had issues with the index. With the leadership of Selina Wang, our liaison to the CDI working group, and encouragement of Allen Jones, ELUNA Chair, we as a working group have focused more attention and energy on CDI issues, and content issues. Specific actions taken included amplification of items in the Pain Points document of specific concern to Summon sites, a face-to-face meeting with CDI product manager Christine Stohn, and, with respect to Content, contributing lessons learned from our enhancement process (described above) to the development of the Content Working Group's process.

SFX Working Group

This report was submitted by Jiri Pavlik

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 replacing Ustat received several updates with enhancements like tags, interest type multimedia, title list overlap, integration of COUNTER registry.

KBART automation is running fine with Wiley and Elsevier, Taylor&Francis support is in development.

Roadmap
1. There will be regular monthly meetings SFX WG with SFX product manager.
2. SFX customers representatives will be encouraged to join SFX WG.
3. WG will discuss running new enhancements voting round in AHA or NERS.
4. WG will continue to explore synergies among SFX and technologies like KBART automation, GetFTR, Seamless Access, Open Source ILS, add-ons like LibKey or Lean Library.
5. Updates will be shared in SFX customers e-mail list, SFX news at IGeLU website and at both IGeLU and ELUNA newsletters and conferences.

Voyager WG

This report was submitted by Steelsen Smith. Under an Agreement with our sister organization (ELUNA) – ELUNA has taken primary responsibility for the Voyager Community.

The Voyager Product Working Group continues to serve the interests of the shrinking but still significant Voyager community. The group meets monthly via Zoom and is responsible for coordinating ongoing development as well as identifying improved ways to support remaining libraries. This includes basic maintenance of the mailing list and engagement with steering committees from IGeLU and ELUNA, as well as relevant working and interest groups.

Over the past year the group has coordinated an enhancement cycle for Voyager 10.5 and 10.6, provided feedback on the NERS move, fielded questions from the Program for Cooperative Cataloging, and began an assessment of the Voyager community's needs.

2023 Chair's Report

The group lost two members over the past year, Antonella Ward, our past chair, and Laura Rounds, our enhancement coordinator. We are extremely grateful for their service and expertise over the years, and wish them the best in their future endeavors.
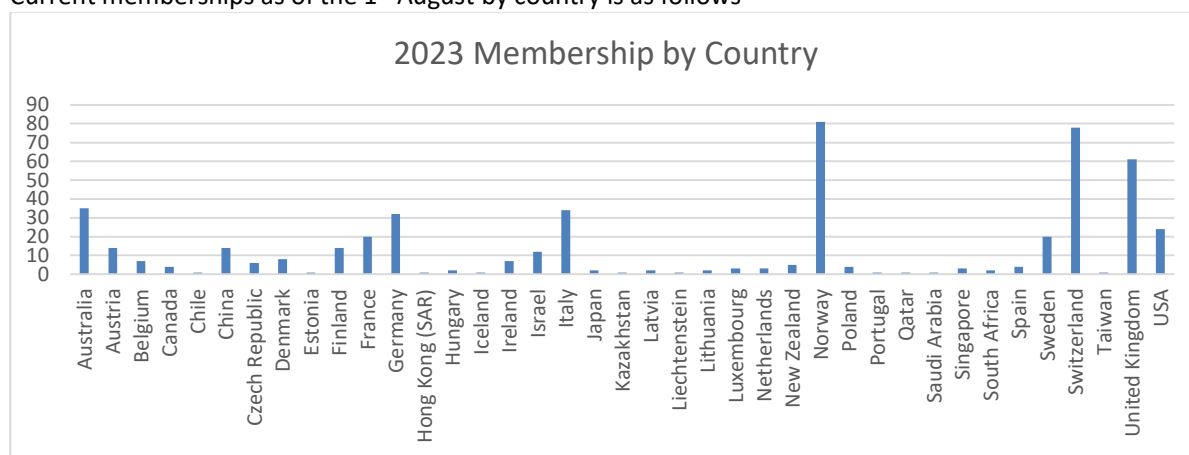
The remaining membership will continue the project to engage with the Voyager community to determine how to support our collective needs and collaborate with Ex Libris to assess ways they may help. Additionally, Ex Libris has offered to allow the Voyager community to use the development points that were not consumed during the previous vote for a round of 10.6 development. The Working Group is looking forward to coordinating this process.

However, the most pressing need in the short-term is to grow the group to allow us to be more representative of the community and also to ensure that we have the person-power to tackle more ambitious projects.
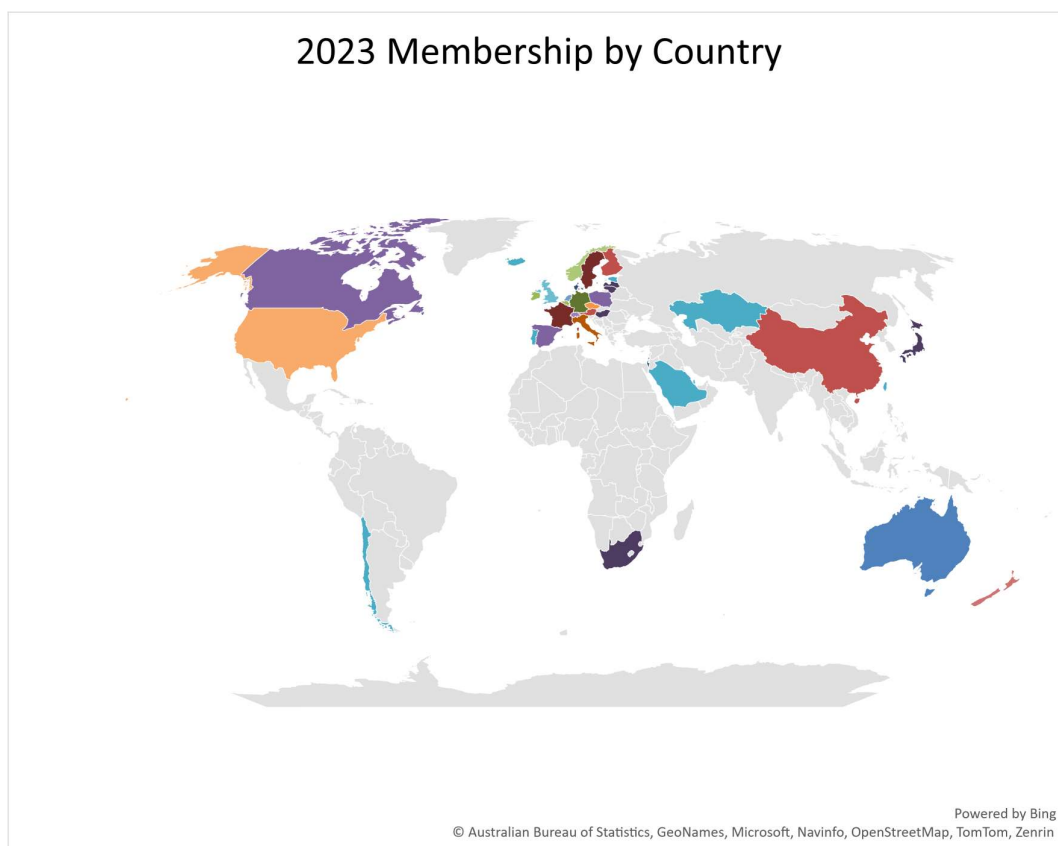
Report on Steering Committee 2022/2023 Activities and Initiatives

The Chair's Report 2022 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. 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 such things as accessibility guidelines, local requirements and local language support. We need IGeLU representation on the DEI group and if you are interested in being part of this important group please contact the IGeLU Chair (chair@igelu.org).
3. 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.
4. Membership
   Current memberships as of the 1st August by country is as follows

2023 Membership by Country

2023 Chair's Report

2023 Membership by Country

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5. Improve communications between the membership and the Steering Committee, working Groups and Communities of Practice
   Currently the IGeLU Steering Committee minute 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.

6. Deliver a hybrid 2022 conference.
   This has been undertaken and lessons learned have been used in the development of the IGeLU 2023 Conference.

7. IGeLU Summon WG reactivation.
   This is an ongoing activity. Any Institution interested in being part of the IGeLU Summon WG please contact chair@igelu.org

8. NERS evaluation.
   The evaluation process is now completed and IGeLU and ELUNA have agreed upon implementing the Aha cloud-based product for collection of enhancement requests.

9. 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 2023/2024

Mailing Lists

In mid-2022 the IGeLU/ELUNA mailing lists were moved from the USA based service provider to a EU based service provider. The main reasoning for this relocation was to conform to GDPR requirements. Unfortunately, one of the major impacts of this relocation was the serious disruptions to our mailing list services. This was seen with some of the mail taking more than 36 hours to be delivered. This has now been corrected and I would like to thank John Greer from the University of Montana, USA for

working on and resolving this problem. The mailing list service is now stable and is currently processing just over 1 million emails per month.

Product Development Collaboration Agreement – Addendum Update.

In March 2023 the Product Development Agreement was updated and signed off by Ex Libris and IGeLU and ELUNA.

The updates impacted the following products.

- Aleph - 45 development points (reduction from 75 points)
- Alma - 225 development points (increase of 25 points)
- Alma-Digital - 50 development points (new)
- CDI - 100 development points (new) - to be used for software related enhancement requests
- Esploro - 50 development points (new)
- Leganto - 75 development points (increase of 25 points)
- Primo - 150 development points (reduction of 50 points which have been reallocated to CDI)
- RapidILL / Rapido - 50 development points (new) - to be shared between the two products
- Rialto - 50 development points (new)
- Summon - 150 development points (reduction of 50 points which have been reallocated to CDI)

In the 2021 agreement 50 additional development points were allocated to Primo and Summon for the purpose of handling CDI software enhancements. These points have been taken back from Primo and Summon for the exclusive use for CDI software development.

This update recognises the new products being offered by Ex Libris and the growing importance of CDI (Central Data Index).

Steering Committee 2023/2024 Planned Activities and Initiatives

The list of 2023/2024 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 Artificial Intelligence especially with the newly release EU AI Act.
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
   As IGeLU expands its activities and to maintain the current membership fee at €300 per annum, IGeLU will need to increase its membership base. To achieve this, we will need to increase our membership drive in Europe, 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 minute 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 2024 conference.
8. IGeLU Summon WG reactivation.
9. National/State/Corporate Libraries Community of Practice reactivation
10. Recruit IGeLU and ELUNA members to the Aleph Working Group.
11. Recruit IGeLU members to the Alma-Digital Working Group.
12. Recruit IGeLU members to the Salesforce Advisory Group.
13. Support the Rosetta Working Group while Rosetta is being redeveloped to run on the Ex Libris cloud platform.
14. Implementation of the NERS replacement system.
    This will involve
    - implementation of the Aha product for collection of enhancement requests from the community
    - evaluation of the suitable voting platform.
15. Rationalize the existing Product Development Collaboration Agreement – Stage 2
    This is a carryover from 2022/2023 and will be concentrating on the addition of Content to the formal agreement.

Membership

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 Ex Libris Senior Management via the IGeLU Steering Committee
- Web and email list hosting for National and Regional Groups
- Discounted conference registration fees

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.

Due to the location of the IGeLU 2024 Conference we have had to allocate a one-off extraordinary larger than normal contribution for the running of the conference.

The 2024 Budget 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 positions on the Steering Committee; a call for candidates has been published on our website and was distributed via the mailing lists. The successful candidates will be announced at the 2023 Conference during the IGeLU Business meeting.

Dave Allen, IGeLU Chair