

# Alma Product Working Group Update

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ELUNA co-chair of the Alma WG

Gijs Noels, KULeuven / LIBIS  
IGeLU co-chair of the Alma WG



# Agenda

## What - Why?

- ToR - Mission
- Dependencies

## Who?

- Members
- Liaisons
- Shifts?

## Ongoing?

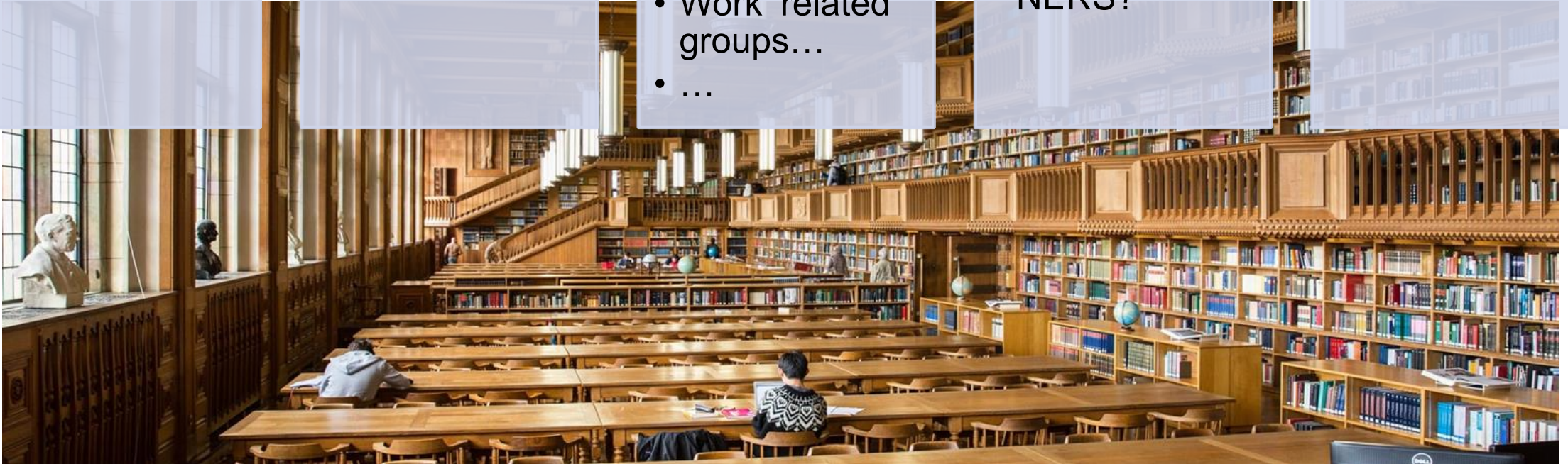
- NERS
- Collaboration ExLibris
- Work 'related' groups...
- ...

## Looking ahead?

- Goals 2023 - 2024
- Discussion NERS?

## Questions?

- Q&A
- Other?

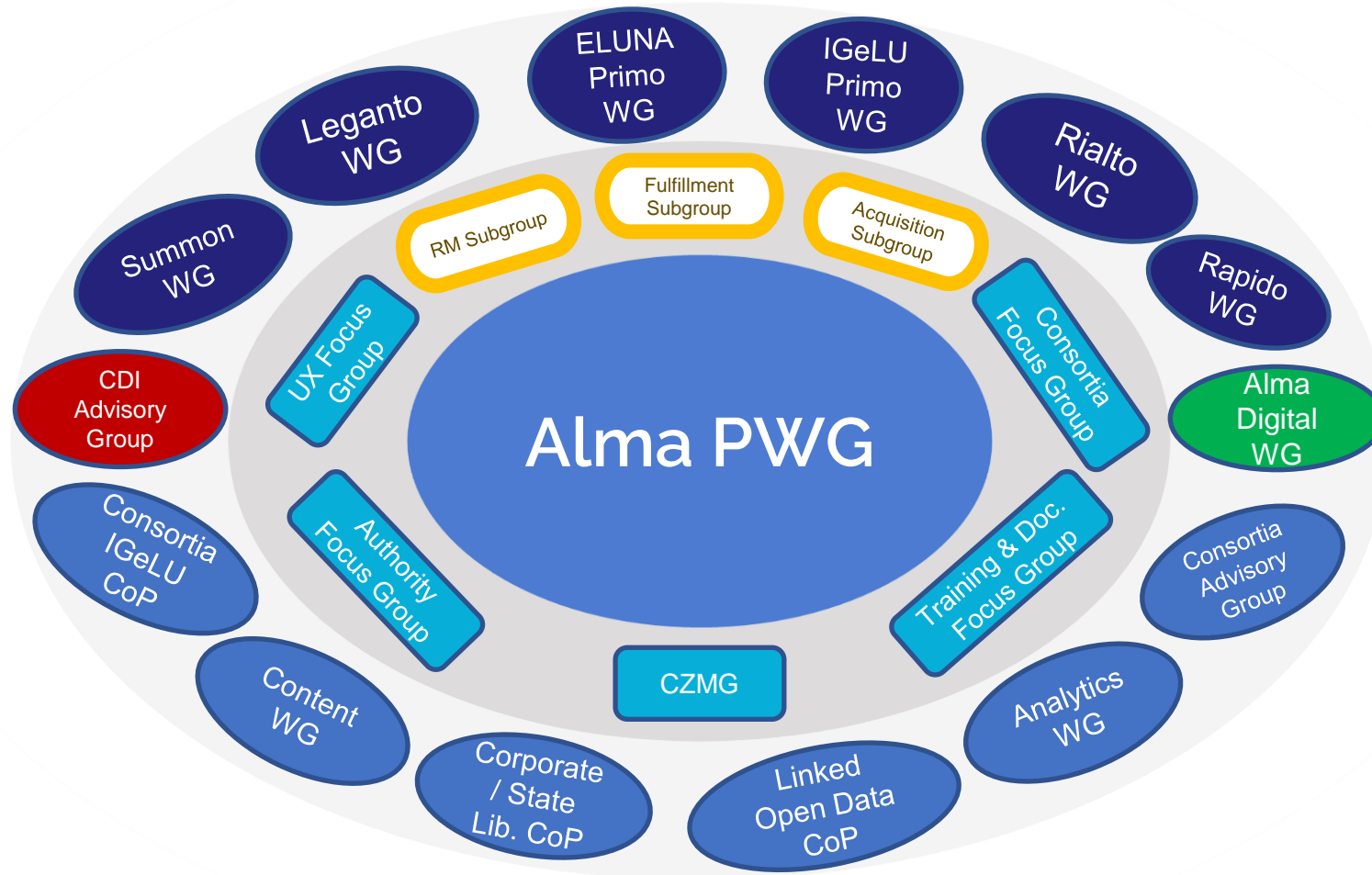


# Mission



- Joint group between ELUNA and IGeLU
- Represent the Alma User Community to ExLibris
- Advocate for the interests of all Alma users, through discussion and negotiation with Ex Libris
- Actively partner with Ex Libris staff to improve Alma functionality
- Be responsible for establishing and reviewing the purpose of Alma advocacy groups

# Dependencies – ‘THE’ Alma network



SC



SC

# Alma WG Members

## Core Group Members

- **Catherine Grove**, Northwestern University – co-chair (ELUNA) / Linked Data CoP / UXFG / Training and Doc FG
- **Gijs Noels**, LIBIS KU Leuven – co-chair (IGeLU) / Consortia Coord Group chair / UXFG / Consortia CoP
- **Joe Ferguson**, University of Tennessee – Deputy Chair / Fulfillment Subgroup / UXFG / Rialto WG
- **Mary Grenci**, University of Oregon – Enhancements Coordinator
- **Leon Krauthausen**, Freie Universität Berlin – Acquisitions Subgroup / Analytics WG
- **Bettina Kann**, OBVSG Austria – Resource Management Subgroup / UXFG / Consortia CoP
- **Emma Clift**, Macquarie University – Primo WG (IGeLU) / member at large

## Liaisons & SC representatives

- **David Schuster**, Binghamton University – Alma digital WG
- **Stacie Traill**, University of Minnesota – Community Zone Management Group / CDI Advisory Group
- **Margaret Corby**, Kansas State University – Alma Authority FG
- **Xiaotian Chen**, Bradley University – Content WG
- **Daniel Naas**, University of Kentucky –Primo WG (ELUNA)
- **Katie Sanders**, University of Wisconsin – Rapido WG (ELUNA)
- **Joe Montibello**, Dartmouth College – Leganto WG
- **Nick Pavlovic**, Liberty University – Summon WG
- **Vacant**– Alma Consortia ACFG (ELUNA)
- **Knut Bøckman**, Royal Danish Library – Steering Committee (IGeLU)
- **Allen Jones**, The New School – Steering Committee (ELUNA)



# Alma WG members

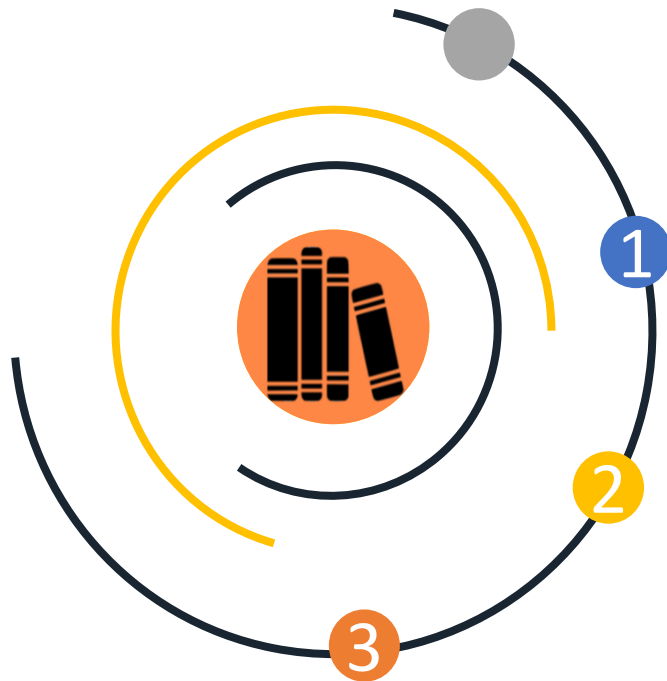
Thank you!!!

- Brandon Dudley, Alma Consortia Focus Group liaison
- Zorian Sasyk, Content WG liaison

New members this year!

- Xiaotian Chen, Content WG liaison
- Emma Clift, member-at-large and IGeLU Primo WG liaison
- Nick Pavlovic, Summon WG liaison
- Katie Sanders, Rapido WG liaison
- David Schuster, Alma digital WG

# Ongoing!



1. NERS
2. Collaboration ExLibris Alma Product Management
3. (Some) Work done by the related groups
  - ☐ UX Focus Group
  - ☐ Consortia Groups
  - ☐ CZMG
  - ☐ Authority Focus Group

# NERS - overview

NERS 2022 -([High level solutions + Status – RELEASED!](#))

NERS 2023 (198 enhancement requests / 140 Complexity Points)

<b>Title</b> ( <a href="#">High level solutions</a> )	<b>ReqID</b>	<b>Complexity Points</b>	<b>TotalVotes</b>
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



# NERS – enhancement Procedure!

(Collaboration between the Alma user community and ExLibris)

Feature evolution (idea, scoping, sculpting) and implementation?



# NERS – enhancement Procedure!

(Collaboration between the Alma user community and ExLibris)

- TOP 25 enhancements requests are reviewed
- For each enhancement request:
  - *basecamp discussion with NERS submitter AND Alma (sub) group representative*
    - verify that the understanding of the requirements are aligned
    - outline high level solution (ExLibris)
    - receiving *confirmation for high level solution (Alma Community)*
  - Work with R&D to receive a baseline estimation (ExLibris)
  - Assign complexity points – it is not necessarily the baseline effort (ExLibris)
- Complexity points are communicated to PWG for second round of voting
- Final votes communicated to Ex Libris
- List of NERS enhancements for the cycle are finalized according to priority and complexity points Start Implementation:
  - Add High level solution to [NERS article](#)
  - *Share FSD (full scale dev.) with NERS submitter AND Alma (sub) group representative*

# Ongoing Concerns!

(Continuous focus between Alma WG and ExLibris)

- Quality Assurance (QA)
  - Understanding the Ex Libris process
  - Compiling QA issues and regressions
- Collaboration & Communication
- Alma response times
- Support
  - Compiled use cases of problematic support responses



# Work done?

## ☐ 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

## ☐ CZMG

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

(Galen Jones, chair; Stacie Traill, Alma PWG liaison)



# Work done?



## ❑ 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.

- ACFG (North American Alma Consortia Focus Group)
- IGeLU Consortia Cop

(Tuesday, September 12, 2023 at 2:35 PM–3:05 PM Brussels - Room Couvreur (M01.E50))

- ACAG (Alma Consortia Advisory Group)

Current Focus: network Zone central management!

## ❑ Authority Focus Group

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

(Liz Bodian, coordinator; Margaret Corby, Alma PWG liaison)

# Looking Ahead!!

(Goals 2023-2024)

## (1) NERS 2023-2024

Complete 2023 NERS Enhancement process and solicit enhancements and hold voting for 2024 NERS Enhancement process

### Task Force:

- 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





## NERS 2023-2024 (Enhancement cycle)

- What do you like about the process?
  - What would you not want to see change?
- What do you not like about the process?
  - What would make it more effective or easier?
- What barriers do you experience?
  - What do you think prevents people from voting?
- What would your ideal enhancement voting process look like?
  - More enhancements? Fewer? Same time as Primo? Two months apart?
- Ideas for changes?
  - Targeted areas? Pre-distributed points? Stronger vetting?

# Looking Ahead!!

(Goals 2023-2024)

## (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)'

# Looking Ahead!!

(Goals 2023-2024)

## (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!

# Q & A

## 1. New PO Line (UX):

A question regarding new PO Line: When placing an order, the "Save" button is now prominent in the layout. We find that more orders get stuck in review, when people think they are sent. Would it be possible to customize the color and placing of the buttons? So that institutions could highlight "order now" or "save and continue" as fits the local workflow.

## 2. Order Templates (UX):

A question regarding order templates: Editing order templates is cumbersome work, and in our big library with many departments and location we struggle to keep a list of public templates. It would be so nice to have the same kind of overview of them, as we do now with PO lines. Could order templates be listed, with easy overview of their features? Could they even be bulk edited or deleted? Could each Alma edit their own list of templates (same feature as template display configuration in MDE)?

# Q & A

## 3. Language label configuration Resource Sharing:

Request to enhance language configuration of messages in Resource Sharing We need to be able to customize Resource Sharing messages based on the language defined in the partner record in both Alma and Primo

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# Thank you

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