Alma Working Group ELUNA/IGeLU - Report 2023-24

The Alma Product Working Group primarily focused this year on:
(See also goals 2023/2024)

- Organization/working Alma Working Group:
    - renew the Alma Working Group Term of Reference
    - establish new dedicated roles and engage new members
    - organize succession planning + backups for key roles
    - optimize the Alma WG meetings
    - establish and strengthen relationships with other advisory, focus, and working groups (special focus on nearly related Focus Groups like AAFG & CZMG)
    - strengthen and consolidate the relationship with ExLibris Alma Product Management (continuous effort)
- Enhancement process: running, streamlining and enhancing the Alma NERS process for 2024 (and start preparing/testing for the switch to AHA)
- Documentation and Communication: sharing the Alma PWG activities with the community (transparency)

Organization Alma PWG (general)

The current overview of members of the Alma Working Group can be found on the Alma Working Group [homepage](#) of the IGeLU website. Last year we were happy to welcome two new liaisons or working group representatives to strengthen our relationship with these groups. In September 2023 David Schuster from Binghamton University joined the group as the liaison for the ELUNA Alma Digital Working Group and in January 2024 we welcomed Christina Hennessey (California State University) as the new representative for the ELUNA Alma Consortia Community of Practice. Both groups are closely related to Alma, so we're pleased to have both of them on board.

One of the organizational goals for 2023-24 was to work on 'backup' and succession planning concerning key roles, including the enhancement coordinator role. Within this context, the revision of the IGeLU and ELUNA Joint Working Group [membership terms](#) last year was the first important step. The coming year we will focus on renewing the group (with new member calls) and organizing backup roles. As Mary Grenci, our Alma enhancement coordinator, is rotating off and AHA and Election Buddy will replace NERS, we have the opportunity to leave the NERS era behind and make the switch. But, not without thanking Mary Grenci for all the hard work she has done the last years making sure the Alma NERS enhancement process was every year again a success. Thx a lot Mary!!

Renewing membership however is not a standalone action. This is part of the broader perspective of the terms and goals of the group. In that sense we took the time this year to review the Alma

Working Group [Terms of Reference](#) and renewed it for the coming two years. (Please note the ToR is only accessible via an IGeLU login.)

In addition to this renewed Alma WG ToR and because of the fact that the group becomes larger and larger due to our relationship with other (new) groups, the need emerged to optimize the monthly Alma PWG meetings. In order to get back to actual 'interactive' business meetings, instead of having a series of monologues reporting what has happened in the community, the following actions were taken:
- More focus on engagement with working group/community needs rather than just updates from everyone
- Focus on specific topics: for instance AI, or the Alma roadmap
- Separate meetings between Alma SC liaisons and the Alma coordinators to prepare for Alma Working Group meetings and maintain coordination with the broader IGeLU and ELUNA community.
- Link to minutes of other meetings (all coordinators meeting, joint SC + coordinators meeting, SC meetings, Alma coordinators meeting with ExLibris Alma Product Management) instead of extensively reporting on these meetings.

NERS Enhancement Process (2023-24)

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

2023 NERS enhancements are delivered/implemented by ExLibris in time during the 2024 release cycles. (The last NERS requests will be delivered during the August 2024 release) The status of NERS 2023 enhancements are updated at the [ExLibris Knowledge center.](#)

2024 NERS Enhancement process - Results

The following eight NERS requests will be implemented and developed in 2025 as a result of the Alma 2024 NERS enhancement process:
([High level solutions](#))

Title	ReqID	ComplexityPoints	TotalVotes
Special Characters option in Metadata Editor	8998	40	3362
Automatically suppress bibliographic records- inactive portfolios	8182	25	3309

Enable the ability to make an item missing that has a process type	8918	10	3225
Changing POL type after POL is sent	8861	40	2990
Waive Fines/Fees in Bulk by Set	8734	45	2936
Copies of claim letters sent to sender e-mail and PO line reference and vendor code added to the claim report events	8936	30	2850
New institutional number sequence, or reset Additional ID, to shorten hold shelf pickup number	8777	20	2769
Linking to authority via dropdown menu in MDE	8819	5	2731

Please note that the Alma PWG decided to only dedicate 215 complexity points in 2024 and add the remaining 5 points to next year's allotment.

A special thanks goes out to the subgroups, the subgroup coordinators Leon Krauthausen, Bettina Kann and Joe Ferguson, and especially to Mary Grenci to coordinate the Alma NERS enhancement process.

Approach NERS 2024

This year we were able to benefit from the work done in 2023 (and early 2024). By implementing the document 'Instructions for Alma WG Subgroups', and in addition closely following up on the optimized 'Enhancements Checklist', the 2024 NERS process was very transparent for all members involved. Although there are still some things to improve, for instance the usage and implementation of enhancement stewards and the tuning/timing with Ex Libris, we can say the NERS 2024 procedure was a big success. Also the alignment with the Primo NERS schedule was positively received and contributed to the general transparency of the community enhancement processes.

The big challenge for the coming year will be the alignment of our procedures with the implementation of AHA as an "enhancement collecting tool" and Election Buddy as a voting tool. In preparation of implementing these new tools for the enhancement process of 2025 the Alma Working Group also participated in testing AHA during 2024.

Alma Working Group Action Items (2023-2024)

We would like to Highlight a few topics the Alma Working Group focused on the last year:
(Please note this in not an exhaustive overview)

- Idea Exchange cleanup

The Alma WG provided feedback to Ex Libris on their project to streamline Idea Exchange. In April 2024, ideas older than 2 years from the last comment AND which have less than 30 votes were closed by Ex Libris. The aim is to perform these clean-up actions more regularly to keep Alma idea exchange up to date. At this moments there are still +- 1300 Alma ideas left.
Ex Libris committed to provide more up to date information (timeline + conceptual solution) in idea exchange, prior to each quarterly release, for ideas that are planned to be released in the coming functional release.

- Survey Intermittent Slowness

The Alma WG captured concerns and issues from the Alma community concerning (intermittent) slowness in Alma. In last year's annual report we reported about the deprecation of the Alma Performance Focus Group as a group as such, but we noticed that slowness keeps being a crucial topic/issue. To get a better understanding of the extent these performance issues are happening, we launched a survey and received 53 responses, indicatingthat further investigation and additional actions are necessary. At this moment Ex Libris is analyzing the results. Our aim for 2024-2025 is to identify problematic area's in Alma and work together with Ex Libris to keep on optimizing performance in Alma.

- Alma and AI

During the Alma Working Group Meeting of May 2024 Dana Moshkovits, Senior Director Product Management Clarivate Ex Libris, gave a presentation of Ex Libris plans concerning Alma and AI. The initiative of this presentation fits within the aim to use the Alma WG meetings as business meetings and get feedback from the group on substantive functional topics and be able to weigh on/provide direction to Ex Libris plans starting from the needs/expectations of the community.

Work Alma related Focus Groups

- Community Zone Management Group (Galen Jones, Co-chair; Elizabeth York, Co-chair; Amanda Perez, Deputy Chair; Stacie Traill, Alma WG liaison)

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

  o CZMG has several new members who responded to the 2023 October call – mix of NA and European customers. (See the CZMG webpage for the member overview)
  o CZMG provided additional input on the redesign of the CZ Updates Task List and received clarification that existing functionality would not be removed.
  o Continued discussion of how AI enhancements will be indicated in CZ bib records. We agreed the temporary solution is to use MARC 588 with an indexed indication in 035. Eventually 588 will be indexed and 035 won't be used for this. Additionally, each field with AI-enhanced data will have a subfield $7 Generated by AI .
  o Discussion with ExLibris about proposed cleanup of GMDs in CZ records (245 $h) and ongoing cleanup of 590 fields.
    ▪ Actions taken: When 245$h is removed, appropriate 33X fields will be added if not present. Many of these are CONSER records, which should be cleaned up in OCLC (so they will be removed from CZ records when the CONSER file is processed). Steve Shadle is taking this up through CONSER.
  o CZMG members advocated for corrections to the merge process for electronic collection MARC records in the CZ to avoid overwriting community enhancements. Ex Libris implemented this in July 2024.
  o Discussion of authority control in CZ records. Preferred Term Correction jobs are not in use in the CZ because of performance issues. Manually edited CZ bib records can be linked to authorities (but no PTC job will act on them). In a future release, subjects will be linked and corrected regularly – ExLibris will process batches of 100K records per week
  o Continued discussion about how to educate community members about editing CZ records. CZMG members will present at an Ex Libris webinar on September 19 at noon EST, "Mastering Metadata with CZMG: Navigating the Community Zone." This webinar will help community members learn about the work and activity of the CZMG, get some inside tips and best practices for editing and contributing to the Community Zone, learn about CZ record merge rules, and learn how CZ records are being enhanced with AI-generated bibliographic data.
  o CZMG members advocated for an indication in the metadata editor that one is editing a CZ record. Ex Libris implemented this in May 2024.
  o Discussion of how to more accurately indicate that a CZ resource is Open Access and how to allow customers to prioritize OA portfolios and links. Some CZMG members worked together to create the Idea Exchange requests, Display Open

[Access Indicator based on Setting at the Portfolio Level](), [Add "Prefer Open Access resources" option on the Online Services Order page](), and [Allow Customization of Link Prioritization in the Merged Record to prioritize OA]().

- Discussions to pre-load CONSER records to the CZ regardless of whether inventory exists (enabling orphan records in the CZ) and the availability of pre release records for electronic collections.
- Refinement of the CZ Collections Management Levels and associated workflows

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

The last year the AAFG made a lot of progress! @Eluna Liz Bodian and Lili Daie from ExLibris reported on this progress and presented their future plans. (See [presentation]())

Summarized:

- As of early 2023, the group membership expanded to include the ANZ region
- We sent ExLibris a table to explain how to do partial linking of name headings (1XX, 7XX and 8XX), they have sent us a model and we are waiting for a final description of new functionality
- We started testing the new functionality to prevent linking when the subfield codes in the bib and authority records don't match. Our first tests were successful, but ExLibris found an indexing issue and the release had to be delayed. It should be in the November release for additional testing and available generally in the February release.
- A subgroup is updating the punctuation table and hope to get it updated later this year

- Alma UX (user experience) Focus Group

The main focus of the Alma User Experience Focus group I still related to the design and implementation of the next gen lay-out and UX features across several functional areas. Overview of the different UX tracks from the last year:
- Final sunset next gen POLine list
- Final sunset new UX Alma Analytics
- Final sunset new UX Manage sets
- Circulation desk (early testing in different phases for different groups)
- All titles search (User studies + early testing in different phases for different groups)
- 'Smaller' tracks:
  - Multi Browser's tab support
  - Alma (in) dark mode

Since 2024 the UX Focus Group counts **20** members:

University of Queensland	University of Oslo
OBVSG (Austrian Library Network)	Northwestern University Libraries
LIBISnet (KU Leuven)	Getty Research Institute
Bar Ilan University	Harvard University
Hebrew University of Jerusalem	Union College
National Library of Israel	Princeton University
Reichman University	Freie Universitat Berlin
University of Haifa, Israel	UCLan (University of Central Lancashire)
Tel Aviv University	Murdoch University
University of Pisa (Università di Pisa)	Georgia Institute of Technology

Relationship / contact with ExLibris Alma Product Management

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

- 'NERS' procedure (see supra)
- Idea exchange (see supra)
- Performance (see supra)
- QA: Quality Assurance
    - Bug fixing (dependencies) / backlog
    - Timing/release schedule of fixed bugs/functionality
  We hope our continuous efforts of pushing Ex Libris to deliver a stable environment will result in even more bug fixing and better QA in the future!
- Follow-up on progress (focus) group activities:
    - UX Focus Group
    - Consortia Groups
    - Authority Focus Group
    - Linked data group
    - Analytics focus group
    - Alma digital working group
    - …
- Alma Roadmap (AI etc.)
- Alma Communication, documentation and Release notes

Documentation / Communication

One of the goals for 2024 was/is to create a dedicated "communication" Alma member role to 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 May 2024 a call for a 'Communications/Education Coordinator' (for a two-year term) was send out to the community. The role of this person is to work closely with the Alma WG co-chairs to improve our communications with the community, and they will be the primary liaison for ELUNA conference and program planning.

Currently we're in the phase of evaluating the response concerning this call hoping to have someone in place by Q4 2024.

Goals / Roadmap 2024-2025 (in brief)

(1) Enhancement process 2024-2025

- Scope (1): Complete 2024 NERS Enhancement process
    - Allocate dedicated enhancement stewards to closely follow-up on the full development cycle of the 8 2024 enhancement tracks in Basecamp
- Scope (2): Solicit enhancements and hold voting for 2025 Enhancement process
    - Optimize new processes for shepherding enhancements in terms of AHA and Election Buddy
    - Streamline process with the SC Election Buddy representative

(2) Organization Alma PWG

- Scope (1): Continue progress on coordinating/following up on Alma (and) related sub, focus, advisory, working, CoP groups.
    - (Try) to provide organizational answers to the rapid evolving 'Alma'/ExLibris scattered landscape in terms of new products, premium services and AI (premium?) features. What does this mean for the enhancement process and the community?
    - Continue listening to the community and advocate for the needs of the community @ExLibris
        - Organize interactive 'feedback' sessions at the open Alma working group meetings @ELUNA and IGeLU (& define action items to follow-up)

- Scope (2): Continue progress on implementing/formalizing the revised IGeLU and ELUNA Joint working group ToR + membership terms
  - Follow-up on two yearly terms
  - Organize succession planning + a backup for the enhancement Coordinator role
  - Implement/choose a 'Communications/Education Coordinator'
- 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)'
  - Continuous focus on Alma performance, bug fixing and QA! (Consolidation!)
  - Continuous focus on Alma Roadmap

(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 Focus Groups