

**IGeLU 2024**



**IGeLU CHAIR'S REPORT 2024**

**1<sup>st</sup> August 2024**

# 2024 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 Clarivate 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 around the Clarivate Ex Libris products.

IGeLU is a volunteer organisation and we are always interested in recruiting members who are interested in being part of a working Group (WG) or Community of Practice (CoP). If you are interested, please [chair@igelu.org](mailto:chair@igelu.org) or the relevant Working Group or Community of Practice Coordinators.

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. These changes include

- The Ex Libris and Innovative products now reside in the Academic and Government (A&G) Portfolio within Clarivate.
- Continued absorption of Ex Libris and ProQuest into Clarivate company structure and processes
- Clarivate activities that impact the Ex Libris products and service delivery such as the Clarivate AI Platform development
- Relocation of Ex Libris activities into Clarivate shared services function such as customer support
- Review of IGeLU statutes and Product Development Agreements

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

1. Formation of a Alma-Digital Working Group
2. Formation of a Salesforce Advisory Group
3. New enhancement platform based on the Aha system (<https://www.aha.io/>)
4. New enhancement voting system based on ElectionBuddy (<https://electionbuddy.com/>)
5. CDI (Content Discover Index) enhancement process
6. Achieving not-for-profit recognition by the Italian Authorities
7. Achieving not-for-profit recognition by Google services
8. Formalising the arrangement between IGeLU and Siena University for the continued administration and legal support of IGeLU

I am also pleased to announce that we will not be raising IGeLU membership fees for the 2025 membership period.

**Dave Allen, IGeLU Chair**

## What makes IGeLU unique!

IGeLU has over 550 members which represents over 3,000 institutions. Both IGeLU and ELUNA (Ex Libris Users of North America) are not-for-profit organisations which operate independently of Clarivate. In brief, our aims are to represent the collective voice of the community when dealing with Clarivate to ensure that Ex Libris product development benefits both the customer (you) and Clarivate.

Besides our official Product Development Collaboration Agreement, where Clarivate / 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 guarantee 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.

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 (SC)

The SC's 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 Clarivate Ex Libris Product Managers. 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 ELUNA <https://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, Communities of Practice and Advisory Groups. The IGeLU Chair has regular meetings with the ELUNA Chair and with senior Ex Libris product 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 Exploro, Leganto, Rosetta and National and Regional User Group Liaison Officer
- Knut Bøckman (Denmark) – Alma Liaison Officer and IGeLU Deputy Chair
- Alex Forrest (Scotland) – RapidILL, Rapido, Rialto, Content Liaison Officer and Salesforce Advisory Group Liaison Officer
- Cindy Greenspun (USA) – SFX and Voyager Liaison Officer
- François Renaville (Belgium) – Content and CDI Liaison Office and Lead 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

In addition to the above each SC Member has other duties.

The SC has a strong European, Australian and New Zealand representation, but we need recruit representatives from the Middle East, Africa, South America, and the Asia. I am investigating strategies that we can adopt to increase our regional diversity but also gender diversity on the SC.

## Conference Program Planning Sub-Committee

The Conference Program Planning Sub-Committee is a sub-committee of the IGeLU Steering Committee. Membership is comprised of the IGeLU SC members and coordinators as well as the local hosting institution. The sub-committee's role is to plan and deliver the annual IGeLU conference. The conference sub-committee is led by François Renaville. 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 - <https://igelu.org/archive-of-presentations/2024-copenhagen/igelu-2024-conference-planning-committee/>

## Finance, Legal and Administration

The IGeLU Treasurer, Guido Badalamenti from the University of Siena, takes care of IGeLU's finances, membership administration and all legal affairs. The IGeLU Treasurer position is recognised in the IGeLU Statutes as an ex-officio role. 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.

Katia Medaglini (who many know via email correspondence) has moved on to a different position within the Siena University. As a result, Katia is no longer part of the IGeLU Administration Team. I want to express my sincere thanks to Katia Medaglini, who for many years has been working tirelessly responding to requests from myself and the community.

The IGeLU Administration team is now comprised of the following

- Guido Badalamenti - Treasurer
- Giulia La Versa – IGeLU Secretariat
- Fabrizio Di Fuccia – IGeLU membership system
- Duccio Dio Blasi – IGeLU membership system

## IT-services and infrastructure

Mehmet Celik from LIBIS/KU Leuven, Belgium, has taken on the role of supporting IGeLU ICT services and infrastructure. Mehmet has taken on the role previously held by Mark Dehmlow.

In January 2024, Mark took on a new position within his institution and as a result he has had to relinquish his IGeLU activities.

I would like to thank Mark for his many years of IGeLU service as previous IGeLU Steering Committee Member and IGeLU ICT Technical Officer.

## 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 would like to thank all members of the Working Groups and Communities of Practices 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 co-ordinators and 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

<https://igelu.org/products-and-initiatives/product-working-groups/aleph/>

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

This report has been produced by Tara La Ware, Center for Jewish History, USA. This will be her first report as Coordinator of the Aleph Working Group.

#### Aleph Enhancements:

- The Aleph Working Group will be focusing on reaching out to the Aleph user community to gather requests for enhancements.
- New enhancements requests will be open late 2024. The initial call for requests to the community will be made at the IGeLU conference in the Aleph Working Group joint session and following that, in October 2024, an email will be sent to the Aleph users list serv calling for enhancement requests.
- Aleph Working Group will review requests
- Aleph Enhancements Voting Cycle
  - Aleph WG's work with Ex Libris product managers to clarify requests and pointing
- Selection

- Aleph WG's select the most voted enhancements and send them to Ex Libris product managers

## Aleph Roadmap 2024-2026

- Version 24.1 (Minor Release) – Released
  - Service Pack 24.1.1 is planned for January 2025
- Version 24.2 (Minor Release) – Planned December 2025

## Aleph 24.1 Highlight

- “Purge Acquisitions Data – acq-15”  
Can be accessed through GUI Acquisitions > Services menu > Others > Purge Acquisitions Data (acq-15)  
Description: allows purging acquisition data from the Aleph system by date range and order status.  
This new Service was introduced through the NERS voting process.

## IGeLU Conference

- Presentation: Aleph Working Group Open Meeting and Aleph Product Update Monday, September 9, 2024 at 4:25 PM–4:55 PM CEST
- Joint Session presented by Tara La Ware, Aleph Product Working Group Coordinator and Carmit Marcus, Director of Product Management and Partnerships, Ex Libris
- Update on the activities of the Aleph WG and on the Aleph roadmap. This is an open meeting, and all are welcome to attend and ask questions.

## Alma Working Group

This report has been produced by Gijs Noels, KU Leuven, Belgium

<https://igelu.org/products-and-initiatives/product-working-groups/alma/>

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 Ex Libris 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 – the new enhancement submission platform)



- 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 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 Greci, our Alma enhancement coordinator, is rotating off and AHA and Election Buddy will replace NERS, we can leave the NERS era behind and make the switch. But, not without thanking Mary Greci for all the hard work she has done the last years making sure the Alma NERS enhancement process was every year again a success. Thanks 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](#) (ToR) 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 the group becomes larger and larger due to our relationship with other (new) groups, the need emerged to optimize the monthly Alma PWG meetings. 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 Ex Libris 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

# 2024 Chair's Report

2023 NERS enhancements are delivered/implemented by Ex Libris 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 [Ex Libris 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 Greci 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 is 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 moment 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, indicating that 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 areas 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, 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 (CMZ) representatives are Galen Jones, Co-chair; Elizabeth York, Co-chair; Amanda Perez, Deputy 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:
  - 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. Temporary solution will be to use MARC 588 with an indexed indication in 035. Eventually 588 will be indexed and 035 won't be used for this.
  - o Discussion with Ex Libris 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.
  - Update from Ex Libris on changing the merge process for electronic collection MARC records in the CZ to avoid overwriting community enhancements. This should be coming in June 2024.
  - 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 August 2024 release, subjects will be linked and corrected regularly – Ex Libris will process batches of 100K records per week
  - Continued discussion about how to educate community members about editing CZ records. Proposed a joint presentation at IGeLU between CZMG and Ex Libris on this topic.
- Alma Authority Focus Group (AAFG) representatives are 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 Ex Libris 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 Ex Libris 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 Ex Libris 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 focus of the Alma User Experience Focus group is 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

# 2024 Chair's Report

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 Ex Libris Alma Product Management

The Alma PWG continues 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 (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

## 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 ElectionBuddy 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'/Ex Libris 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

## Alma-Digital Working Group

This report has been produced by Kevin O'Donovan from the London School of Economics and Political Science, UK

<https://igelu.org/products-and-initiatives/product-working-groups/alma/>

The IGELU Alma Digital working group held its first meeting in April 2024. Kevin O'Donovan of the London School of Economics was selected as Chair, with Darya Zvonareva of Nazarbayev University acting as Deputy. The group has 15 members, from institutions spanning from Portugal to New Zealand. The group has met 4 times. The primary focus has been working on identifying and prioritising enhancements for Alma Digital, which are currently buried in amongst other development suggestions for Alma, Primo, etc. Alma Digital does not have its own Ideas Exchange. The group, in conjunction with their newly formed counterparts in ELUNA, have provided the product manager Daniel Greenberg with a joint list of ten enhancement priorities for consideration. The next stage with this will be to ask Ex Libris to assign development points to the suggestions and for the community to vote on it if required.

The working group has proposed that they would like to see a separate Ideas Exchange created for Alma Digital. This will encourage greater focus on the product. Ex Libris have responded and said that this won't be immediate and might take a while, but they will trigger the process. They have also said that this transition will need to take the Specto project into consideration. Over the coming months, the group hopes to work in concert with ELUNA colleagues to create a process to identify the relevant Idea Exchange submissions to be moved into a new forum. This will involve some liaison with Alma, Primo, Leganto and possibly some other working groups, to make decisions on where the best 'home' is for some Ideas.

While interest in Controlled Digital Lending has gone quiet in the US, the recent publication of a Jisc white paper on CDL in the UK has given institutions there the impetus to progress with their own CDL initiatives, with several institutions already doing this. Alma Digital at present has enough out of the box configurations to begin a small CDL programme, but as interest in this grows, further development suggestions may come from IGELU institutions, e.g. a tighter integration with Leganto, user rights and access, and the discoverability of digital representations in the context of UK legal exceptions.

## Analytics Community of Practice

<https://igelu.org/products-and-initiatives/communities-of-practice/analytics/>

This report was produced by Maya Amichal, Weizmann Institute of Science, Israel

### Initiative One: Rialto Analytics - Priority:1

- Additional ELUNA/IGeLU Groups: Rialto Working Group
- Scope Statement: Ex Libris are currently developing Analytics based on Rialto (and not only based on Acquisition, as it was till now)



- Estimated time to delivery: 2024 Q4
- When does work start? The work had started. The Rialto and analytics groups are collecting use cases and putting them on a dedicated basecamp. Ex Libris are currently developing Analytics for Rialto.
- The number of people involved: Two-Three Analytics Team members

## **Initiative Two: MixPanel Focus Group - Priority:1**

- Additional ELUNA/IGeLU Groups: Primo Working groups is working with the Analytics Community of Practice and Ex Libris on this development.
- Scope Statement: MixPanel will replace the current Analytics tool for customers who will move to the new Primo UI.
- Estimated Time Delivery: Development is ongoing. The expected time of completion is 2025.
- Number of people involved: Seven Analytics Team members.

## **Initiative Three: Consortium Portfolio Review - Priority: 1**

- Additional ELUNA/IGeLU Groups: Consortia Working group
- Scope Statement: Consortia around the world do not have enough trusted analytics to perform reliable reports. This joined group was created to surface the problems and to help solutions along.
- Estimated time to delivery: Ongoing. The groups are collecting use cases.
- Number of People Involved: Three Analytic CoP members.

## **Initiative Four: Collecto (Previously Collection Retention Tool)- Priority: 1**

- Additional ELUNA/IGeLU Groups: Alma Working Group/Rialto Working Group.
- Scope Statement: After the initial development of a Collection retention tool, Ex Libris will further develop the concept into an overall Collection Analysis project that will touch multiple products and be tied into a yet-to-be-determined analytic module.
- Estimated time to delivery: Ongoing
- Number of People involved: five Analytics Team members.

## **Initiative Five: Rosetta Plus Analytics – Priority: 2**

- Additional ELUNA/IGeLU Groups: Rosetta Working Group
- Scope Statement: Ex Libris are currently developing Analytics for the new Rosetta plus product.
- Estimated time to delivery: Tentatively Fall of 2024.
- When does work start? The Ex Libris development work had started. The Rosetta and analytics groups had not yet been approached to assist.
- The number of people involved: We currently have no one on the Analytics group who is going to work with the Rosetta Plus product.

## **Accomplishments this year**

Completion of the following initiatives:

- Enhanced documentation work on Fund Expenditures subject area was done.
- Began enhanced documentation work in July with Purchase Request subject area.



- Analytics Review of column header of identifiers in analytics (NERS 7952) initiative had yield better documentation in Alma to reflect which analytic fields were viable when creating sets and a clearer message when creating a set based on an Analytics report.
- Expand roster to include additional members from IGeLU and ELUNA.
- Established Terms of Reference for the Analytics CoP.

#### Ex Libris Unresolved Concerns:

- Many products' Analytics are being re-made/made currently. We are afraid that without the right attention, data inconsistencies will be entered. This is especially true of Project Collecto that touches multiple products and could exacerbate existing unresolved data/product issues.
- Increased issues with lack of communication between Ex Libris on non-Alma products. Rialto has seen some improvements in the last few months, but other products have had little to no input from Analytic product developers.

## CDI – Central Discovery Index

This report was produced by Karin Perols, Karolinska Institute, Sweden

The CDI enhancement process is a joint enhancement process between the CWG and the product working groups for Primo (both IGeLU and ELUNA) and Summon.

Items on the ballot were suggestions already submitted to NERS via the Primo and Summon ballots from 2023 and 2024. There were 10 items in total up for voting.

The voting took place between April 15 and May 3 and 47 810 votes were cast from 343 institutions/consortia.

The results of the vote and the possibility of implementing the suggestions are underway with Ex Libris.

## Consortia Community of Practice

<https://igelu.org/products-and-initiatives/communities-of-practice/consortia/>

This report was produced by Sylvain Courret, Bibliothèque Cantonale et Universitaire, Switzerland.

### Short Overview

Revitalized late 2021, the IGeLU Consortia Community of Practice (CoP) is dedicated to fostering collaboration and communication for consortia. The group meets regularly to discuss issues and address open points. In 2023, Stine Bovbjerg Schultz, from the Royal Danish Library, joined the group.

### Completed tasks

NERS requests with consortia interest were highlighted for members to support them.

Follow-up of EXL included a work to improve central NZ management with a focus on the priority and the scope of the settings to be inherited from NZ to IZs, including e-resources management, in the scope of development of the new One stop shop solution.

Many exchanges took place among members, on various topics, including AFN, dedup and FRBR, application presentation.

## **Testing and Feedback**

3 consortia from the group (Austria, Belgium, Swiss) early tested the new Consortia Dashboard and its different inheritance mechanisms. Some feedback and suggestions were communicated to Ex Libris. This helped the developers to adjust the dashboard to real needs. The dashboard is now live and some more features will be added in the next releases.

## **IGeLU Open Meeting in Leuven**

The group successfully organized and prepared for an Open Meeting at IGeLU in Leuven. This event provided a platform for discussing key issues, getting feedback and present the group to the community. Additionally, the CoP coordinator moderated several sessions at the conference.

## **Ongoing tasks**

### **IGeLU Conference 2024 Preparation**

The CoP is currently preparing for an open meeting at IGeLU 2024 in Copenhagen. This event is designed to engage attendees, promote collaboration, and provide an overview of the group activities to recruit new members.

### **Member Outreach**

The group is engaged in outreach efforts to recruit new CoP members, ensuring that the group remains representative of the broader Consortia community.

### **Coordination Meetings**

The Consortia CoP participates in "All coordinators" meetings with coordinators from ELUNA and IGeLU. These meetings facilitate coordination across groups, fostering a collaborative approach.

### **Regular Exchanges and Feedback**

The Consortia CoP maintains regular communication with the ACAG group and Ex Libris Product Management. These exchanges serve to staying informed about developments, sharing feedback, and addressing any issues that arise.

### **Future prospects**

There will be a quite close follow up of the features added in the next releases to the Consortia Dashboard. Same for the Support Services from central office which should be delivered in 2025.

More widely, Ex Libris has considered the growing number of consortia in the Alma community and will provide tools and services for them. So the CoP group will be happy to provide inputs and feedback for the different developments targeting this community: ACTL, users accounts RT update and network blocks, AFN user groups, NZ Eresources management.

Practices sharing will continue to address different topics as needed by group members. As for now the next topics are pre-payment of services (e.g. Resource sharing delivery), API key security in a consortia environment, and staff user training techniques and tools.

## Content Working Group

<https://igelu.org/products-and-initiatives/product-working-groups/content/>

This report was produced by Karin Perols, Karolinska Institute, Sweden

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. Karin Perols is the coordinator for IGeLU, and Charlie Remy is the coordinator for ELUNA.

### The CDI Enhancement process

The CDI enhancement process is a joint enhancement process between the CWG and the product working groups for Primo (both IGeLU and ELUNA) and Summon. Items on the ballot were suggestions already submitted to NERS via the Primo and Summon ballots from 2023 and 2024. There were 10 items in total up for voting. The voting took place between April 15 and May 3 and 47 810 votes were cast from 343 institutions/consortia. The results of the vote and the possibility of implementing the suggestions are underway with Ex Libris.

### Content NERS Vote

The Content NERS vote was held in late 2023, the voting period was between November 15 and December 4. The suggestions are for new providers that have no resources in the knowledge bases and prioritization this time was on Lithuanian and French language resources. 93 resources were suggested, and 189 libraries/consortia voted, casting a total of 4 629 votes. As of July, the status is the following: out of the 12 new provider requests that were voted by ELUNA and IGeLU members during the NERS 2024 ballot, five are completed (two of which as zero-title databases), five were unsuccessful, and two are in progress.

Detailed information can be found here:

[https://knowledge.exlibrisgroup.com/Content/Webinars%2C\\_Idea\\_Exchange\\_and\\_Newsletters/NERS\\_2024\\_-\\_Content\\_Requests\\_-\\_Status\\_Page](https://knowledge.exlibrisgroup.com/Content/Webinars%2C_Idea_Exchange_and_Newsletters/NERS_2024_-_Content_Requests_-_Status_Page)

Suggestions for new content by existing providers are handled in Idea Exchange.

### Discussions with Ex Libris about the peer review indicator

The discussions were about which content types could be excluded and examples were book reviews, retraction notices, news articles, notes, corrections and letters to the editor. There were also discussions around journals that started before peer review indication was introduced. Work with this is ongoing at Ex Libris.

## **Discussions with Ex Libris about the OA indicator**

The CWG raised concerns about the OA indicator often being incorrect. Ex Libris has had meetings with Unpaywall to improve the accuracy of source data and Salesforce cases about incorrect Unpaywall data are forwarded to Unpaywall without delay. Other topics discussed were Subscribe to Open and how to handle content that moves from closed to open and how Ex Libris can enhance OA information with metadata from Web of Science and ProQuest.

## **Discussions about the autoholdings collections**

The discussions about autoholdings addressed that the autoholdings collections are not handled consistently between different publishers. Some publishers have dedicated autoholdings collections and some transform already existing collections. The naming of autoholdings collections are not always clear making it difficult to locate them. The CWG expressed interest in best practice advice from Ex Libris regarding how to handle acquisition information for different kinds of purchase models for resources in the same autoholding collection. Metadata about missing journal title information for title changes were also discussed, often all coverage is listed on the latest version of the journal title.

## **Ideas Exchange cleanup**

We continued working with Ex Libris with the Ideas Exchange cleanup and agreed to use the same limit as other product working groups, ideas older than 2 years with less than 30 votes can be closed, after communicating this to the person who submitted the idea.

## **Other topics discussed**

- Enrichment of CZ records with AI
- The providers platform
- Metadata enrichment issues, Adam Matthews one example
- Information about upcoming platform migration in Content newsletter
- Turnaround time for adding new collections
- More Quicklinks for non-English content
- Content from predatory publishers in the KB's
- Communication with community about CDI rights update problems/delays

## **Began working with new staff at Ex Libris**

- Noam Fass (Director, Provider Relations)
- Amy Pemble (Product Manager, CDI)

## **Plans for the coming year**

- Provide feedback on content support issues to Support Advisory Group as needed. Continue to advocate for clear and consistent communication from this group.
- Advocate for significantly reduced turnaround times for the creation of new collections in knowledgebases.
- 2023 Content NERS follow up, and 2024 voting round (November), including thinking about providers with zero title databases already in KB's but no portfolios/CDI collections (should they be considered new or existing providers?)

- Autoholdings follow up. Advocate for more consistent functionality development across providers, consistent and clearly marked autoholdings KB collections, 2-3 months of early user testing prior to release and creation of documentation to support libraries implementing autoholdings (especially acquisitions information).
- Continue to advocate for better quality metadata and more accurate open access KB and CDI collections.
- Monitor project for AI enrichment of bibliographic records and provide feedback as needed.
- If necessary, provide additional feedback on the peer review indicator for CDI content.

#### Current membership list:

- Charlie Remy, Dartmouth College, USA, Coordinator ELUNA
- Galen Jones, The Open University, UK, Alma CZMG Liaison
- Linas Salelionis, Kaunas University of Technology, Lithuania, SFX Liaison
- Karin Perols, Karolinska Institutet, Sweden, Coordinator IGeLU
- Molly K Beisler, University of Nevada, Reno, USA
- Noémie Ammann, ETH, Switzerland, IGeLU Primo Liaison
- Selina Wang, Oberlin College, USA
- Xiaotian Chen, Bradley University, USA, Alma WG Liaison
- Cody Hackett, University of Arkansas, USA
- Christopher Thomas, University of California at Los Angeles, USA, Alma Law Library SIG Liaison
- Nancy Babb, University at Buffalo, USA, ELUNA Primo WG Liaison
- Lammy Benedictus, Arctic University of Norway
- Anna Couthures-Idrizi, Sciences Po Bibliothèque, France
- Angela Sidman, Yale University Library, USA, ELUNA Summon/360 WG Liaison
- Maria Kovero, Helsinki University Library, Finland

Steering Committee Liaisons are: François Renaville (IGeLU) and Holli Kubly (ELUNA)

## Esploro Working Group

<https://igelu.org/products-and-initiatives/product-working-groups/esploro/>

This report was submitted by Margie Pembroke, Southern Cross University, Australia

### Challenges

- Small IGeLU customer base and large ELUNA base
- Finding a deputy coordinator, position is currently vacant
- Timing of our first enhancement round has coincided with implementation of new enhancement request and new voting software.

### Accomplishments

The Group continues to:

- meet monthly
- membership expanded to include sites from Italy and Switzerland

- monitor and maintain the Esploro listserv for communication
- provide updates on group's activities at conferences and on the IGeLU website
- 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 the IGeLU and ELUNA Esploro communities conducted their inaugural round of enhancement voting. This activity was undertaken using the new Election Buddy system and our enhancements were also added to the new Enhancement Request system. The ideas exchange was used as a basis for the 18 enhancements put forward for voting. I would like to acknowledge the contributions of Maria De Montserrat Rodriguez-Marquez (IGeLU), Liz Bodian (ELUNA) and Wendy Robertson (ELUNA) in generating the enhancements and adding them to the various systems. Voting will be completed by 20 August 2024.

### Community Discussion Meetings

In coordination with the ELUNA Esploro Working Group, one meeting was held, recorded, and posted for the entire community:

- Researcher profiles (April 2024)

At IGeLU 2024, there will be 2 Esploro-related presentations in addition to the IGeLU Esploro Working Group presentation (vs 4 at IGeLU 2023)

- Seasoning Esploro to our taste: Capturing Scholarship of Learning Teaching (SoLT) – Margaret Pembroke and Maureen Bezanson, Southern Cross University
- Esploro Experience at LIUC University Italy. A case study – Laura Ballestra, LIUC University

### 2024/2025 Goals

1. Continue to work with the community and Ex Libris to improve Esploro functionality, encouraging Ex Libris alignment with community priorities
2. Run a full enhancement request process with community
3. Promote more Esploro-related presentations for 2025 IGeLU conference
4. Report back on functionality of voting process in Election Buddy
5. Find a Deputy Convenor

### Interoperability / Developers Community of Practice

<https://igelu.org/products-and-initiatives/communities-of-practice/interoperability/>

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.

## Leganto Working Group

<https://igelu.org/products-and-initiatives/product-working-groups/leganto/>

This report was produced by Jessie Donaghey, Bond University, Australia

The Leganto Product Working Group (WG) 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 January 2024, we welcomed Katherine O'Brien as a new member to the WG. Katherine is an Application Administrator at The University of Notre Dame Australia and brings with her extensive experience with Leganto, including handling configuration, support, workflow documentation and analytics.

### 2024 enhancement ballot

- Development points increased from 50 to 75.
- Ex Libris agreed to develop the top five enhancements, see the [2024 Leganto Enhancement Results](#) for details.
- Two rounds of voting were conducted:
  - Round one included 61 enhancements voted on by 101 members
  - Round two included 20 enhancements voted on by 102 members

Voting members by Region	Round One	Round Two
Asia Pacific	17	19
Europe	19	22
North America	45	41
United Kingdom	20	20
<b>Grand Total</b>	<b>101</b>	<b>102</b>

Two enhancements were withdrawn from the final ballot and are to be developed outside of the enhancement process. Enhancement '9055 - Recreate clipboard feature in the New UI' was previously available in the classic UI. Voting in the first ballot demonstrated the feature is still important to the community and Ex Libris agreed to develop it for the new UI. Enhancement '8727 - Enhance Course Reserves Analytics to include Electronic Collection Data' was withdrawn from the second ballot as Ex Libris is already planning to enhance the Course Reserve analytics subject area to create a report.

### Leganto New UX/UI

In 2023, the new Leganto User Interface (UI) was officially launched. To support the community with this change, the WG launched a [video showcase](#) featuring short, focused videos that cover various aspects of preparing for the transition to the new Leganto UI. Topics covered in the videos include:

- Key communications for instructors
- Configurations to consider

- Sending list changes
- Choosing Leganto colours
- Tracking and updating labels

Additionally, during meetings with Ex Libris, the WG actively addressed community concerns. The WG tracked known issues, provided feedback on enhancing documentation and configuration management. We collaborated with Ex Libris to improve the overall experience of transitioning to the new UI for the community, including options for extending the deadline for the switch.

### **Idea Exchange review and ongoing cleanup**

In 2023, the Idea Exchange Review concluded with the closure of 91 out of 112 old ideas submitted between 2016 and 2019. This action freed up 543 votes for the community.

Subsequently, the WG engaged in further discussions with Ex Libris product management. They agreed to an annual cleanup process, closing ideas older than 3 years with fewer than 20 votes. Additionally, the discussions covered status assignment criteria and expected intervals for maintaining specific statuses to align with community expectations. Ex Libris also committed to sharing information about scheduled releases for these ideas, along with relevant comments. Encouraging feedback from Ex Libris during the idea's development and recording release dates were also part of the conversation.

### **Leganto-L mail list**

The WG actively engages with the community by regularly sharing summaries of recent Idea Exchange posts. These summaries promote new ideas and encourage discussion among community members. Recently, the WG conducted a short survey via the mailing list. The purpose was to gather information from institutions about their [transition timelines to the new UI](#). The survey aimed to foster collaboration, encourage shared experiences, and provide support within the community.

### **Priorities for the upcoming year**

1. Assist in the establishment of a MixPanel focus group for Leganto.
2. Continue to monitor the progress and community feedback of the new UI.

## **Linked Open Data Community of Practice**

<https://igelu.org/products-and-initiatives/communities-of-practice/linked-open-data/>

This report was produced by Xiaoli Li, University of California – Davis, USA

In 2023, the Linked Open Data Community of Practice Working Group (the “LOD Working Group”) outlined three primary objectives: Enhancing community education, 2) Supporting BIBFRAME in production, and 3) Continuing support for RDA in RDF.



We are pleased to report significant progress on these objectives. Below are summaries of our achievements:

## Education for the Community

### 1) Education front for the community

- Outreach and communications

Subgroup members: Catherine Grove, Greta Heng, Xiaoli Li, and Ken Varnum (convener).

This group planned and organized a well-attended virtual community meeting, titled "Sinopia and BIBFRAME in Alma." The event was held on December 7, 2023. The recording of the meeting is accessible [here](#). More than 200 people attended this event. The group also prepared the following two news stories that were posted on ELUNA site:

- 1) [Report from Linked Open Data Community of Practice Working Group](#), published in January 2024;
- 2) [Linked Open Data at ELUNA 2024](#), published in April 2024.

- Dashboard redesign

Subgroup members: Lihong Zhu (convener), Joanne Rowan, and Laura Akerman.

The group updated the [Dashboard - Linked Data Development in Ex Libris Products](#). In addition, the group proposed that Ex Libris document all information related to linked data features/services in the Ex Libris Knowledge Center. The proposal received a favorable response from the Ex Libris linked data team.

### 2) Support for BIBFRAME in production

Subgroup members: Amanda Xu, Greta Heng (convener), Stefan Schuh, and Xiaoli Li.

- Tested newly released features related to BIBFRAME and Linked Open Data in the Alma and Primo sandbox environment before they were released in the production environment
- Checked the clarity of configuration instructions and provided additional details to the community if needed

### 3) Support for the implementation of RDA in RDF

Subgroup members: Subgroup members: Laura Akerman, Ebe Kartus (convener), Lihong Zhu, and Amanda Xu.

This group drafted a memo to IGeLU and ELUNA Steering Committees regarding the RDA/RDF feature in Alma, requesting Ex Libris to withdraw this outdated service and will be submitting a Salesforce case highlighting the issues with the RDA/RDF published output. In addition, the group contributed to the University of Washington (UW) project to provide a MARC21 to RDA linked data mapping.

## 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.

The working group members have kept abreast of current trends in linked data by conducting research on linked data topics and serving on various linked data groups, including actively organizing and

presenting at a variety of conferences. Below is a list of selective external linked data groups with which the working group members are associated:

- ALA Core Committee on Cataloging, Description and Access
- PCC BIBFRAME Interoperability Group
- PCC Linked Data Advisory Committee
- PCC Task Group for URIs in MARC Implementation and Support
- PCC Task Group for BIBFRAME to Marc Conversion
- 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
- SOS PID Subgroup Working Group

Lastly, we are sad to say goodbye to Margaret Heller and Amanda Perez. Thank you, Margaret and Amanda, for your valuable contributions. On a happy note, we welcomed Joanne Rowan from University of Auckland. Joanne joined the group representing the Community Zone Management Group.

## Looking ahead

The group has identified the following activities for 2024/2025:

- Sponsor community meetings/events or collect information and report it out for the community (coordinate with Ex Libris)
- Work with Ex Libris to improve the discoverability of documentation related to linked data
- Continue to support the implementation of BIBFRAME
- Continue to advocate for Official RDA in RDF in Alma and actively engage in Ex Libris' development of a linked data editor in Alma so that it can carry Library Reference Model compliant data
- Monitor and increase awareness of upcoming linked data integrations in Ex Libris discovery services
- Explore the intersection of linked data, knowledge graphs, and AI

We look forward to continuing working with the community and Ex Libris to advance and promote linked data implementation.

## National/State/Corporate Community of Practice

This report was produced by Paulina Harper, ExxonMobil Technology and Engineering Company, USA

The group restarted as an IGeLU group about a year ago, when I agreed to take on the role of Chair. Our purpose is to serve as a voice to represent the minority of Ex Libris product users whose needs do not always align with those of the majority academic libraries.

## Accomplishments:

- Terms of Reference updated, designating NatStateCorp as a joint ELUNA/IGeLU group with Kirsten Clark as ELUNA SC Liaison and Dave Allen as IGeLU SC Liaison.
- Monitored and maintained the NatStateCorp listserv for communication
- Began a discussion about changes desired in the way vendor management functions in Alma.

## Challenges:

- We are a disparate group and don't necessarily all have the same concerns even among ourselves.
- Finding active members who have the time and interest to participate.

## Primo Working Group

<https://igelu.org/products-and-initiatives/product-working-groups/primo/>

This report was produced by Stacey van Groll, University of Queensland, Australia

### Working Group Members

The IGeLU Primo Working Group (WG) is led by Coordinator Stacey van Groll and works collaboratively with the separate sister group ELUNA Primo WG. The [Terms of Reference](#) were refreshed in January 2024 by Stacey van Groll, and approved by the IGeLU Steering Committee.

#### Member list and roles:

- Stacey van Groll, University of Queensland, Australia – Coordinator, Conference Planning, Enhancements
- 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
- Ulrich Leodolter, Austrian Library Network and Service Ltd, Austria – Developer Community Liaison
- Manuela Schwendener, Universität Basel, Switzerland – Enhancements Team
- Andrea Zech, Free University of Berlin, Germany – Enhancements Team

Additionally, there are close connections to other IGeLU groups with their liaisons attending Primo WG meetings, being Emma Clift as Liaison from the Alma WG and Ebe Kartus as Liaison from the Linked Open Data Community of Practice. The IGeLU Steering Committee Liaison is Asbjørn Risan.

### Member changes

The group has enjoyed stability over an extended period, with the benefit of experienced and engaged members. The only change in the last year was to farewell Jennifer McNally during the last 2023

IGeLU Conference, who acted as the Liaison to the Consortia Community of Practice and as a member of the Enhancements Team.

## **Meetings with Ex Libris Product Management**

Every month the IGeLU Primo WG Coordinator Stacey van Groll, Deputy Coordinator Mark Kluzek, and Enhancements Coordinator Nir Zinger, along with ELUNA Primo WG Chairs, meets with Ex Libris Primo Product Management. This is most commonly Nili Natan, Sima Bloch, and Yisrael Kuchar, and additional Ex Libris staff attend as needed, such as Amy Pemble 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.

## **Annual Enhancements Process**

The IGeLU and ELUNA member Primo community submitted 125 new requests for the 2024 Primo enhancements round. All requests were processed by the joint Enhancements Team, comprised of members of both the IGeLU Primo WG and the ELUNA Primo WG. This team was co-led by Nir Zinger as Enhancements Coordinator for IGeLU, and included WG members: Gaith Bader, Manuela Schwendener, Andrea Zech, and Stacey van Groll.

During the review, some requests were determined to be not votable with 1 merged, 2 Roadmap, 3 defects, and 7 already supported. In consultation with the Alma WG, 2 submissions were transferred from Alma to Primo, and 4 submissions were transferred from Primo to Alma. Additionally, in consultation with Ex Libris CDI Product Management and the Content WG, 9 requests were transferred to CDI for the first year of a two year CDI Trial Enhancements process.

A renewed focus on internal re-organisation and timeline tightening efforts for the review period proved successful, and at the conclusion of this 8 week period 99 enhancements were included in the Primo voting round. The voting period was extended another week from 3 weeks to 4 weeks in response to community feedback, and by collaborative negotiation between the IGeLU Primo WG, the ELUNA Primo WG, and the Alma WG. This continues a longstanding practice of alignment of the Primo and Alma enhancements processes for key dates and voting periods.

The final voting tally was 57,829 votes placed by 391 sites. This was a new record by number of votes and members voting for a Primo enhancements voting round, eclipsing the prior record of 56,033 votes by 379 sites in 2022, and recovering from a dip in 2023 of 51,229 votes by 332 sites.

The scoping and pointing period for the Top 20 ranked requests by Ex Libris Primo Product Management was also an improved experience in 2024 over 2023, with only a short few days overrun of the deadline. Cooperative discussions and a clean alignment of accepted submissions with community voting preference led to a determination by the IGeLU Primo WG and ELUNA Primo WG Coordinators that an additional round of voting was not required.

The outcome of the Primo 2024 enhancements process:

- The successful accepted requests to be developed in the New UI and the Next Discovery Experience UI were No.1 ranked #9021, No.2 ranked #8756, No.3 ranked #8871, No.5 ranked

#8760, and No.9 ranked #8810, for a total of 155 points. This was 5 points above the available 150 points, with these 5 points agreed with Ex Libris Primo Product Management to be borrowed from 2025 if necessary, to be determined pending delivery outcomes of Phase 2 for the Primo 2023 enhancement request #8134, if less than originally scoped.

- Ex Libris Primo Product Management also agreed to deliver an additional 3 submissions without requiring community development points, as part of the Next Discovery Experience UI planned for general release from May 2025, being No.8 ranked #7799, No.18 ranked #8868, and No.19 ranked 8970.
- Additionally, No.7 ranked #9000 was agreed to be taken as a research and consultation item with Roadmap commitment for delivery in 2025, with details to be determined and hence required to be handled outside of the firmly scoped enhancements process for deliverables. This item is closely aligned with the No.1 Feature Capability item highlighted as an outcome of the Primo BO to VE Feature Alignment Project Report.

Details of successful submissions, anticipated release of delivery, and delivery updates are made available on the IGeLU website and kept current by Coordinator Stacey van Groll: [Primo enhancements](#).

We thank Ex Libris Primo Product Management for working with the IGeLU Primo WG and the ELUNA Primo WG productively and collaboratively to ensure this high number of successful submissions and excellent outcome for the Primo community and Primo product development.

## Focus Groups and special projects

It has been an extremely busy year for Primo WG members with a high number of initiatives kicking off and continuing:

### Focus Groups for the Next Discovery Experience (NDE)

- **Next Discovery Experience User Interface Focus Group**, kicked off in July 2023 and ongoing, with monthly meetings, continuous feedback flow via dedicated Basecamp, and active UI testing, with WG members Manuela Schwendener, Paul Harding and Nir Zinger, as well as Ulrich Leodolter for the developer community
- **Primo Engagement Analytics MixPanel Focus Group**, kicked off in March 2024 and ongoing, with monthly meetings, continuous feedback flow via dedicated Teams channel, and active live environment testing, with WG members Paul Harding and Andrea Zech
- **AI-powered Research Assistant – Beta Program Focus Group**, running for an intensive targeted live UI testing period late June 2024 through August 2024, with WG members Mark Kluzek and Gaith Bader

### [Primo BO to VE Feature Alignment Project](#)

This project was initiated May 2023 by collaborative agreement between Ex Libris Primo Product Management, the IGeLU Primo WG and the ELUNA Primo WG, with three key objectives:

1. Identify primary obstacles hindering Primo Back Office sites from transitioning to Primo VE
2. Identify primary challenges encountered by sites already using Primo VE
3. Present a prioritized list of development items to Ex Libris Primo Product Management

The subgroup of IGeLU Primo WG and ELUNA Primo WG members fulfilled this agreement by internal work through the second half of 2024 gathering and curating an issues log, community contributions

were incorporated via a survey open in February and March 2024 with 120 responses by 106 sites in 16 countries, and a final report was submitted to Ex Libris Primo Product Management and the IGeLU and ELUNA Steering Committees in April 2024.

The report highlighted four Feature Capability items, four Infrastructure Concerns, and four Consortium items, as well as flagging a feature alignment item on the 2024 Roadmap and of concern as also on the 2023 Roadmap but not delivered. The report was shared with the Primo community by listserv notice and on the IGeLU website in May 2024. The first dedicated meeting was held with Ex Libris Primo Product Management in July 2024 to discuss the top highlighted items and associated Ex Libris plans for development, with more close collaboration anticipated through the remaining months of 2024 and into expected delivery of items within the 2025 Roadmap.

Project members: Stacey van Groll (Co-Lead with ELUNA Primo WG), Nir Zinger, Andrea Zech, Ulrich Leodolter, and Noémie Ammann

## Aha Implementation

This project has been in an active phase from 2023 and through 2024 and is anticipated to continue as a focus into 2025, with reorganising for the first Primo enhancements process to be managed in the new system in 2025. This project continues to require considerable input, including assessment and updating of migrated Primo data, refinement of the Primo admin environment in-system, and collaboration with other WGs and Steering Committee members on shared system settings and developing user guides.

Project members: Coordinator Stacey van Groll and Enhancements Coordinator Nir Zinger

## CDI Enhancements Trial

This trial is running for two years in 2024 and 2025, taking 50 Primo development points for each year to a separate CDI process, as well as 50 Summon development points. This trial has required an extensive commitment of time and effort supporting the primary group responsible of Content WG, with almost all submissions sourced from Primo enhancements. The trial also added complexity by overlapping with the Primo 2024 Enhancements cycle review period, requiring juggling of commitments and deadlines, and a broadening of scope from initially only including existing Primo 2023 submissions to also including new Primo 2024 submissions.

Project members: Coordinator Stacey van Groll and Enhancements Coordinator Nir Zinger

In acknowledgement of the extensive work being undertaken by the Primo WG currently and over many years, Coordinator Stacey van Groll has sought opportunities to better recognise this considerable volunteer time and effort. The IGeLU Primo WG [Special Projects](#) page has been populated back through 2010 with known details of project work over time, as also a summary reference point resource for the Primo community on these initiatives.

The Primo WG is additionally continuing to enhance community support and communications by:

- **Primo [Community Support](#)** resources page on the IGeLU website:
  - **Primo VE Discovery Import Profile Normalization Rule GitHub Repository** link added, as led by the ELUNA Primo WG with input by the IGeLU Primo WG, out of the November 2023 regional ANZREG Hackathon: Creating XML normalisation rules for external sources within Alma VE



- The **Primo Sites and URLs** spreadsheet continues to grow, increasing by more than 300 entries from 450 when launched in June 2023, to 760 entries as of July 2024
- [Meeting notes](#) covering Primo WG activities and advocacy efforts continue to be made available promptly on a monthly basis by Coordinator Stacey van Groll. This initiative continues from January 2022 with the launch of the IGeLU new website, but with visibility increase in the last year starting in October 2023 after community feedback at the IGeLU Conference, by notice of availability each month to the Primo community listserv
- **IGeLU 2024 Conference:** Primo WG members are presenting sessions at the IGeLU 2024 Conference, sharing their work collaboratively with our community: Paul Harding and Stacey van Groll. Stacey van Groll also serves on the Conference Planning Committee, with responsibilities throughout the year including proposal reviewing, and session moderation supporting presenters during the conference

## Additional advocacy activities

The Primo WG has a constant and continuing focus on leveraging opportunities to advocate on behalf of the Primo community, raising concerns to boost the community voice, sharing feedback and suggestions, and working collaboratively towards beneficial Primo product development.

Some notable items over the last year:

- Rollout consultation with Ex Libris in October and November 2023 for the CDI Quicklinks enablement shift, advocating on behalf of the community to not change abruptly to opt-out in February 2024, but instead support a staged rollout, with an initial change notice in February 2024 and then three months until May 2024, giving the community time and opportunity to review and change configuration settings
- Product development consultation in November 2023, responding to Ex Libris request for input on cataloguing standards for LDR/008 for aligning Magazine and Magazine Article local type with CDI as introduced in August
- Documentation improvements in February 2024, elevating community feedback and achieving greatly enhanced information for display fields in Primo for CDI records, resulting in the [CDI List of Display / PNX Fields](#)
- Roadmap availability timeliness improvement suggestion raised in February 2024, advocating for earlier Roadmap release and webinar, and securing agreement for this to be timed earlier in mid to late January from 2025, instead of mid to late February, supporting community planning
- Idea Exchange engagement push from April 2024, with a cross-group collaboration effort for Ex Libris Product Management to improve consistent handling, leading to a cleanup initiative initially and advised will be ongoing
- Engaging with the Primo community to support additional input on 2023 enhancements request #8134, to ensure delivery meets their needs, with a form available for three weeks in late May through mid June 2024
- Raising prominence of considerable feedback on the new Related Persons Linked Open Data first release in May and June 2024, boosting community discussions by directly highlighting issues of limited configuration and documentation gaps. Deputy Coordinator Mark Kluzek has been particularly active on this item, sharing with Ex Libris actionable feedback on configuration improvement suggestions to increase the value of the feature
- Emphasising CDI Index Update impact on the Primo discovery environment in June 2024, flagging a concern of failures by Ex Libris to update customers on delayed or skipped updates via the dedicated System Status page, and securing agreement for these consistent and expected vendor communication updates to be resumed

Additional items of continual advocacy include standard expectation of autonomy of customer choice by opt-in development; accessibility focus in Primo by new features introduced with accessibility in mind from the outset, as well as transparent information provided on the latest external audits and outcomes; and focus on consistent, current, and comprehensive system documentation as a standard expectation for a vendor to support customers.

## Future focus

In addition to standing items of ongoing advocacy, conference activities, and Primo enhancements cycle, for the remainder of 2024 and ongoing into 2025 the Primo WG will be focusing on several key active projects:

- Continuing engagement with the Primo Next Discovery Experience rollout anticipated for general release in May 2025, including active participation by members in Focus Groups
- Managing the Primo 2025 enhancements process in the new portal, concluding the migration process and re-establishing workflows in the new environment through second half of 2024
- Collaborative efforts with colleagues in the Summon WG and Content WG for the continuing two year CDI Enhancements Trial, begun in 2024 and continuing in 2025
- Ongoing product development discussions for Primo VE with Ex Libris Primo Product Management, for delivery of Primo community prioritised items in the Primo BO to VE Feature Alignment Project and Report

## RapidILL Working Group

<https://igelu.org/rapidill-working-group/>

This report was produced by Kip Darling, Birmingham City University, UK

## Executive Summary

The RapidILL Working Group, established in early 2024, has made significant strides in its inaugural year. Despite not having completed a full 12-month cycle, the group of 7–8 members has together achieved numerous objectives, fostering collaboration, enhancing communication, and driving product development. The group has held 7 monthly meetings, submitted 29.4% RapidILL enhancement ideas, and actively engaged in community support through various channels. The group's efforts span from product development to DEI initiatives, demonstrating a comprehensive approach to improving RapidILL services.

## Key Achievements

### 1. Group Establishment and Organization

- Established the working group with our first meeting on 24 Jan 2024 and assigned key roles
- Conducted monthly meetings (7 to date) with Working Group (WG) and Steering Committee (SC) to discuss work and collaborate on projects
- Established a web presence for the WG on IGeLU.org, regularly publishing minutes and adding news items



## Current Product Working Group Membership:

- Kip A. Darling, Birmingham City University, England, UK: Working Group Coordinator; Leadership Liaison
- Jane King, University of Newcastle, NSW, Australia: Enhancements Coordinator; Rapido Working Group Liaison
- Karen O'Donoghue, La Trobe University, Vic, Australia: Conference Planning
- Dr. Lynne Porat, University of Haifa, Israel: Website Publisher; Idea Exchange Reviewer
- Bronwen Blatchford, Cardiff University & WHELF, Wales, UK: Systems Expert; Minute Taker
- Michael Moore, University of Birmingham, England, UK: Roadmap Reviewer
- Sara Sladwick, University of Auckland, New Zealand: Training Coordinator; RapidILL Discussion List Reviewer

## Former member (Jan-May 2024):

- Amanda Valent, The Australian National University, ACT, Australia: Enhancements Co-ordinator

## Steering Committee | Ex Libris Representative:

- Alex Forrest, University of Edinburgh, Scotland, UK: IGeLU Steering Committee Liaison Officer
- Lori Hilterbrand, Orbis Cascade Alliance, United States: ELUNA Steering Committee Liaison Officer
- Mike Richins, Fort Collins, Colorado, United States: RapidILL Director of Product Management, Ex Libris

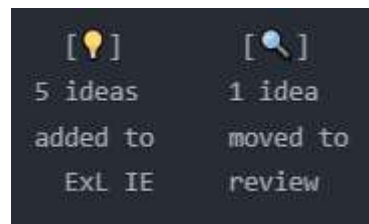
## 2. Collaboration and Liaison

- Actively liaised with the Rapido working group
- Maintained active liaison with ELUNA RapidILL working group and Ex Libris RapidILL director of product management
- Represented the group at IGeLU-wide community meetings and joint cross-product meetings with ELUNA

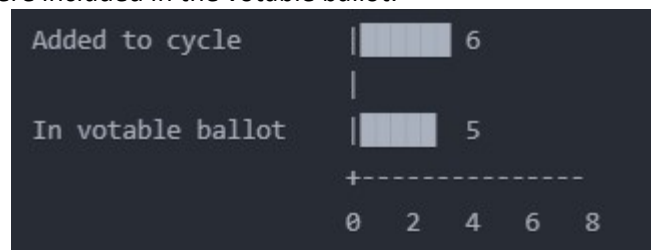
## 3. Product Development and Enhancement

The Working Group has been instrumental in driving forward the development and enhancement of RapidILL. Our efforts have ranged from idea generation to active participation in the enhancement cycle.

- Established a log of Idea Exchange RapidILL ideas and produced an official Ex Libris list, updated on request.
- Actively reviewed Roadmap and release notes to capture forward motion of product development.
- Contributed significantly to the 2024 joint IGeLU/ELUNA Rapido/RapidILL enhancements cycle, including:
  - Promoting and providing user education around the new interface.
  - Generating and reviewing ideas for the ballot, involving a substantial time and effort commitment.
- Engaged in ongoing work to scope ideas and provide case studies to help drive product development.
- Five ideas were added to Ex Libris Idea Exchange (IE). One additional IE idea from the WG was moved to review for future development.



- Working Group members submitted a total of six new ideas to the 2024 enhancements process.
- Of these six ideas:
  - Six were added to the 2024 enhancements cycle.
  - Five were included in the votable ballot.



#### Key Points:

- The working group made a significant contribution, submitting over a quarter (29.4%) of all votable RapidILL ideas.
- This demonstrates the active engagement and valuable input of the working group in the enhancement process.

#### 4. Community Engagement and Support

Fostering a strong, informed user community has been a key focus of our group. We've engaged in various activities to support users and promote collaboration.

- Actively monitored and reviewed the RapidILL Listserv, contributing to list membership approvals and responding to queries
- Communicated WG topics of interest through wider channels including ANZREG and EPUG-UKI mailing lists, and social media posts, gaining upwards of 500 post impressions on key posts.
- Promoted the existence of WG and international collaboration via a Library Journal article and the HE Libtech website.
- Contributed a lightning talk on working group activities at the UK Forum for Interlending, FIL Online, on 26 June 2024. Wider WG member expertise was also shared at this conference in a separate Ex Libris product related session.

#### 5. IGeLU Conference and Event Participation

The Working Group played a pivotal role in shaping and supporting the IGeLU 2024 conference:

Pre-Conference Activities:

- Actively promoted proposal submissions through Listservs and social media channels, encouraging broad participation.
- Participated in conference planning committee meetings, contributing to overall event strategy.

## Abstract Review Process:

One of our members made a substantial contribution to the abstract review process:

- Reviewed a total of 47 submissions (44 presentation abstracts and 3 poster abstracts).
- Conducted reviews between March and June 2024.
- Evaluated each submission based on IGeLU-set criteria, ensuring adherence to quality standards.
- Provided constructive feedback to presenters, fostering improvement and clarity.
- Collaborated with other reviewers to ensure a balanced and diverse program.

This comprehensive review process covered the majority of submissions, with a few additional late submissions and posters handled separately. Our involvement demonstrates the Working Group's commitment to curating a high-quality, diverse conference program that addresses the IGeLU community's needs and interests.

## Conference Preparation:

- Developed the Working Group's open meeting presentation for IGeLU 2024.
- Contributed to the session moderation rota, ensuring smooth operation of various conference tracks.

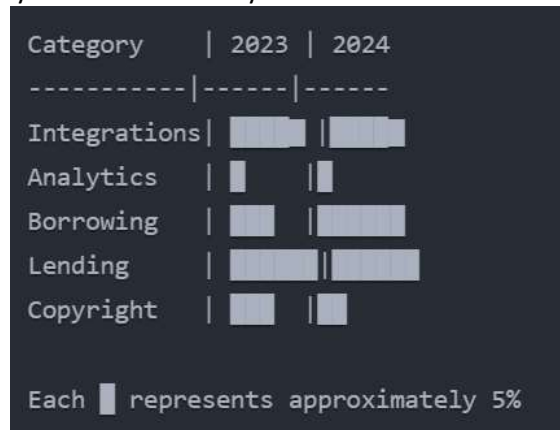
## 6. Diversity, Equity, and Inclusion (DEI) Initiatives

- Initiated discussions with Ex Libris regarding RapidILL and DEI to help drive a fairer and more equitable community-based resource sharing product  
Summary: Explore initiatives to provide better access to RapidILL resources for institutions serving underrepresented minority students or those facing financial constraints. Potential measures include reduced subscription rates, borrowing-only options, charitable donation programs, and voluntary premium contributions from member institutions to support free subscriptions for qualifying institutions. The aim is to address systemic barriers and promote greater equity in access to academic resources.

## 7. Training and Education

Understanding and addressing the educational needs of the RapidILL community has been a priority. We've conducted thorough analysis of user discussions to identify key areas for training and support.

- Methodology:
  - Logged relevant discussions and queries from the RapidILL discussion list, dating back to January 2023.
  - Analysed data to identify common themes and recurring issues



- Key Findings
  - Copyright Issues:
    - Emerged as a prominent topic, with several lengthy discussions.
    - Main concerns: borrowing and lending limits, responsibilities for interpreting and enforcing copyright regulations.
  - Integration Challenges:
    - Primarily affecting RapidILL users also utilizing ILLiad.
    - Noted that Mike Richins frequently handles these queries directly.
- Ongoing Analysis:
  - Plan to cross-reference identified issues with Ideal Exchange (IE) and New Enhancement Request System (NERS) topics.
  - Aim to determine additional commonalities among RapidILL users' concerns.
- Collaboration for Educational Initiatives:
  - Established connection with ELUNA Education Coordinator, Nicola Sikkema.
  - Planning to share experiences and findings as both parties settle into new roles.
  - Goal: Develop targeted training and educational resources based on identified needs.
- Next Steps:
  - Continue monitoring discussions to identify emerging trends.
  - Develop recommendations for focused training sessions or documentation.
  - Collaborate with ELUNA to create comprehensive educational resources.

## Future Plans

- Continue to strengthen collaboration with ELUNA and Ex Libris
- Implement targeted communications using a dedicated IGeLU RapidILL distribution list
- Expand community engagement and educational initiatives
- Further develop DEI initiatives within RapidILL
- Enhance product development through ongoing feedback and enhancement cycles

- Create Job Descriptions for key WG roles to help with continuity.
- Recruit / replace WG members as necessary, with a focus on enhancing the group's capacity and expertise

## Conclusion

The RapidILL Working Group has established a strong foundation in its first year, demonstrating significant impact across various areas of product development, community engagement, and collaboration. As we move forward, we are well-positioned to continue driving improvements and supporting the IGeLU community.

## Rapido Working Group

<https://igelu.org/products-and-initiatives/product-working-groups/rapido/>

This report was produced by Aronne Watkins, Swiss Library Service Platform, Switzerland

## Short Overview

Formed in August 2022, the IGeLU Rapido Working Group (WG) is dedicated to fostering collaboration and communication all around Rapido. The group meets monthly to discuss issues and address open points.

## Completed Tasks

### Enhancement Timeline and Voting Process

In collaboration with the two RapidILL WGs and the ELUNA Rapido WG, the Rapido WG completed the 2023 enhancement cycle, ensuring continuous improvement and development of the product. The following 4 requests have successfully passed the 2023 cycle and were or are being developed by Ex Libris:

Request ID	Title	Number of votes received	Assigned Complexity Points (out of 50 total available)
8558	Add "Conditional" to RapidILL	1741	8
8484	Configuration option for mandatory fields in the Rapido request form	1577	10
8530	Prevent multiple requests from a same borrowing library within a short period of time	1551	20
8487	Ability to query RapidILL lending library from Alma	1446	10

The groups also established the enhancement timeline and voting process for the Rapido/RapidILL 2024 cycle.

## Testing and Updates

Prior to its official use, the Rapido WG tested the new AHA platform for enhancement requests to ensure a smooth transition to the new system.

## Feedback and Assessment

The WG collected feedback and evaluated the possibility of a separate enhancement process for Rapido and RapidILL. This assessment was essential for addressing the specific needs of each product and ensuring targeted improvements.

## Product Developments Report

The Rapido WG prepared a detailed report on count of product developments for the IGeLU Steering Committee. This report provided a comprehensive overview after the completion of the 2023 enhancement cycle.

## Terms of reference

The Rapido WG updated Rapido's Terms of Reference for the IGeLU Steering Committee.

## IGeLU Open Meeting in Leuven

The group successfully organized and prepared for an Open Meeting at IGeLU 2023 in Leuven. This event provided a platform for discussing key issues, sharing insights, and fostering a sense of community among attendees. Additionally, the WG moderated several sessions at the conference.

## Ideas Exchange

The Rapido WG reviewed Ideas Exchange requests, engaging in discussions with Ex Libris about maintenance.

## Launch of Webpage

Last year, the Rapido WG finalized the launch of its new webpage on igelu.org. This page serves as a central hub for information and updates for the Rapido community.

## Open Tasks

### AHA Platform Ballot Preparation

The Rapido WG, together with the ELUNA Rapido/RapidILL and IGeLU RapidILL working groups, is reviewing enhancements and preparing the ballot for the new enhancement process in the AHA platform. This task marks the first use of the AHA system for this purpose, representing a significant milestone.

### IGeLU Conference 2024 Preparation

The WG is currently preparing for an open meeting and a virtual escape game at IGeLU 2024 in Copenhagen. These events are designed to engage attendees, promote collaboration, and provide a fun, interactive experience for participants.

## Ongoing Tasks

### Regular Exchanges and Feedback

The Rapido WG maintains regular communication with the ELUNA Rapido WG and Ex Libris Product Management. These exchanges serve to staying informed about developments, sharing feedback, and addressing any issues that arise.

### Monitoring Enhancement Cycles

The WG closely follows and analyzes the development of winning requests from the previous enhancement cycle. This ongoing monitoring helps ensure that enhancements are implemented effectively and meet the community's needs.

### Member Outreach

The group is engaged in outreach efforts to recruit new WG members, ensuring that the group remains representative of the broader Rapido community.

### Coordination Meetings

The Rapido WG participates in "All coordinators" meetings with coordinators from ELUNA and IGeLU. These meetings facilitate coordination across groups, fostering a collaborative approach.

### Providing Feedback on New Features

Finally, the Rapido WG provides continuous feedback to Ex Libris about new features.

## Rialto Working Group

<https://igelu.org/products-and-initiatives/product-working-groups/rialto-product-working-group/>

This report was produced by Alex Forrest, The University of Edinburgh, UK

The ELUNA/IGeLU Joint Rialto Working Group has spent the 2023/2024 year focusing on launching its first NERS Enhancement voting cycle. This cycle went live for a vote to the public on April 15, 2024, and will end on May 3, 2024. Thus far, it has received 1722 votes from the community, and the Working Group is rather pleased with this first round of enhancement voting.

To accomplish this first enhancement cycle, the Joint Working Group pulled together suggestions from the Idea Exchange to populate the NERS ballot. As a different procedure, Ex Libris provided the pointing for the ballot prior to going live with the enhancements since the working group was trying to determine when might be a good time to launch its first cycle. Because of this, the Working Group is hoping to be able to move quickly on the winning enhancements since the points have already been determined.

Additionally, several group members have been working on some best practices documents that will be showcased on the Rialto IGeLU website for the community. These documents should be completed by this summer. Members of the group are also liaising with the Analytics Community of Practice to develop the nascent Rialto Analytics Dashboards, which will have a great impact on the Rialto community.

## Rialto Planned activities 2024-2025

### May 2024

- ELUNA Conference, meet with SC, liaisons, attend Rialto Sessions, WG updates, and with attending WG members

### June 2024

- Call for proposals for IGeLU
- Best Practices Documents done for Rialto

### July 2024

- Begin discussions about remaining a Joint WG or split into separate WG

### August 2024

- Last call for proposals for IGeLU

### September 2024

- IGeLU Conference Copenhagen

### October 2024

- Have a decision about the group structure (joint or not)

### November 2024

- Call for proposals for ELUNA

### December 2024

- Push for Ex Libris 2026 Roadmap

### January 2025

- Subgroups meeting for NERS/AHA enhancements, 2 groups 1, ELUNA and 1 IGeLU

### February 2025

- Enhancements subgroups reconcile 1st draft suggestions, present to EXL for point adjustments

### March 2025

- Preparing the Enhancement vote for public release

### April 2025

- NERS/AHA Enhancement Voting

## Rosetta Working Group

<https://igelu.org/products-and-initiatives/product-working-groups/rosetta/>

This report was produced by Sam Alloing, The National Library of the Netherlands

### Open Discussion sessions

We organized 3 open discussion sessions and there will be 1 on Webarchiving organized. The Open discussions are intended to share knowledge and experience.

- Technical Workbench
- Digital preservation - recent FL changes
- Discussion of Digital Asset Management Systems and Rosetta
- Preservation Watch Monitoring



The sessions are 1,5 hours with one or more 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.

## **Community activity**

Rosetta Working Group Annual meeting (3-5 June)

The Rosetta User Group Annual meeting was hosted by SMU in Dallas. The meeting was hybrid. There were 81 registered, 27 in-person and 55 remote.

The remote attendees could participate through Zoom. There were also 2 regional meeting during normal working hours for participants outside of the US. There were a few presentations and discussions during the regional meetings.

The in-person meeting had introductions from institutions, reports on the last year from the different working groups and Ex Libris. There were also lighting talks on achievements from customers. The bulk of the sessions were on Rosetta Next Generation.

This year we also had a Hackathon. It was hybrid as well. Users could bring their problematic files with them and they were discussed with experts. The experts also showed how they work on analysing the files.

This year we also had a special guest (Euan Cochrane) who talked about Emulation. This was a thought-provoking presentation on supporting Emulation in Digital Preservation Systems. It gave us and Ex Libris lots to talk about regarding emulation support in the Next-Generation of Rosetta.

## **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. This year it was organized from May 14-15 2024 at the University Library Centre of North Rhine-Westphalia (hbz).

## **Enhancement requests**

Due to the announcement that Rosetta will move to the Ex Libris SaaS platform, the new enhancements are limited.

### **Enhancement request in Rosetta 8.1**

The enhancement requests requested by the Rosetta User group

- DIWG08: Harvesting Multiple Sets in a Single OAI Harvesting Job
- VAL-06: Display Rule ID in Rule List and Rule Details
- SOWG31: Change S3 configuration without impacting METS
- SOWG26: Validate sourceMD on ingest/AIP update
- 

### **Enhancement requests for upcoming release Rosetta 8.2**

The enhancement requests submitted by the Rosetta User Group:

- DIWG09-Enhancements to Thumbnail Creation Job (Submitted)
- SOWG28: Indexing StructMap <div> Attributes
- SOWG30: Fixity Job for IE.xml

- VAL-09 "event outcome detail1" in DNX events indexed/searchable
- VAL-07 Add Reason to Metadata Edit of DNX, METS or Source MD

## Format Library releases

- 7.4112 (October 2023)
- 8.0116 (March 2024)

## Sub-working groups and Steering committee

- Digital Preservation Working Group
- Delivery and Integrations Working Group
- System Operation Working Group

## Topical Groups

The first topical group meeting was held on July 16th 2024. It was organised by Ex Libris and the topics were:

- METS files - JSON vs XML format
- Versioning (time-based METS generation)
- Technical Analysis workbench (title vs SIP, separate SIP vs AIP index, TA actions from other lists)

## Salesforce Advisory Group

<https://igelu.org/support-advisory-group/>

In early 2023, Jed Gilmore, the ELUNA, and the IGeLU Steering Committees met to discuss Project Flash and the next steps towards improving the Ex Libris customer experience. After the ELUNA Annual Meeting, it was decided to convene a group of various customer types to discuss ways to improve the Ex Libris support experience.

Information on the group's activities, meeting notes and decisions can be found on the IGeLU website <https://igelu.org/support-advisory-group/>

## SFX Working Group

<https://igelu.org/products-and-initiatives/product-working-groups/sfx/>

This report was produced by Jiří Pavlík, National Library of Technology, Czech Republic

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 several enhancements, the system documentation

is available at <https://docs.celus.net>. KBART automation is running fine however new providers are not coming. Yisrael Kuchar replaced Christine Stohn as SFX product manager. Advantages of LibKey usage with SFX is monitored closely at Tomas Bata University in Zlin.

## Roadmap

There will be regular monthly meetings SFX WG with SFX product manager. SFX customers representatives will be encouraged to join SFX WG. WG will discuss running new enhancements voting round in AHA. 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. 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

<https://igelu.org/products-and-initiatives/product-working-groups/voyager/>

Under an Agreement with our sister organization (ELUNA) – ELUNA will take primary responsibility for the Voyager Community.

## Mailing Lists

In mid-2022 the IGeLU/ELUNA mailing lists were moved from the USA based service provider to an EU based service provider. The main reasoning for this relocation was to conform to GDPR requirements. The mailing list is one of our main communication tool and currently it is processing in excess of 17,000,000 emails per annum and hosts over 100 email lists. The email list can be accessed via <https://exlibrisusers.org/postorius/lists/?page=1>

## Report on Steering Committee 2023/2024 Activities and Initiatives

The Chair's Report 2023 listed out a series of activities and initiatives that were to be undertaken on the year. Results of these activities are listed below

The list of 2023/2024 planned activities were 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. This involved regular meetings between
  - IGeLU and ELUNA Chairs and Ex Libris product senior management
  - IGeLU Chair and Ex Libris General Manager and Senior VP
  - IGeLU Chair and Clarivate Senior VP, CRO – Academia and Government
2. Advocate for greater IGeLU involvement in Ex Libris product developments around Artificial Intelligence especially with the newly release EU AI Act.

This has been a challenging activity as the AI Platform is a Clarivate initiative and IGeLU involvement in the platform development has been minimal.

- 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. If you are interested in this topic and would like to be actively involved in this area please let me know.
- 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 Africa, Asia and South America

IGeLU membership growth since 2020



- 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.

This has been a challenging task. If you are interested in being part of the IGeLU Summon WG please contact me.

9. National/State/Corporate Libraries Community of Practice reactivation  
This group has been reactivated and the CoP report is included in this report.
10. Recruit IGeLU and ELUNA members to the Aleph Working Group.  
This group has been reactivated and the WG report is included in this report
11. Recruit IGeLU members to the Alma-Digital Working Group.  
This group has been activated and the WG report is included in this report
12. Recruit IGeLU members to the Salesforce Advisory Group.  
This group has been activated and the activities of this group can be found on the IGeLU website at <https://igelu.org/support-advisory-group/>
13. Support the Rosetta Working Group while Rosetta is being redeveloped to run on the Ex Libris cloud platform.  
This is an ongoing activity.
14. Implementation of the NERS replacement system.  
The NERS replacement system is a product from Aha - <https://www.aha.io/>. This service will be used to capture enhancement requests for products. In addition ElectionBuddy - <https://electionbuddy.com/> will be used as the voting platform. The voting platform relies on IGeLU member records being up to date with correct contact emails and licenced Ex Libris products.
15. Rationalize the existing Product Development Collaboration Agreement – Stage 2  
This is a carryover from 2023/2024 and will be concentrating on the addition of Content to the formal agreement.

## Steering Committee 2024/2025 Planned Activities and Initiatives

The list of 2024/2025 planned activities are as follows:

1. Continue advocacy of the importance of the IGeLU User Community with Clarivate
2. Increase IGeLU involvement in Clarivate's AI Strategy
3. Investigate options to create WGs around new products using the AI platform (e.g. Expecto)
4. Improve internal procedures and policies
5. Increase IGeLU membership especially amongst under-represented communities

6. Deliver the 2025 conference
7. Forward planning for the 2026, 2027 and 2028 conferences
8. IGeLU Summon WG reactivation
9. Support the Rosetta Working Group while Rosetta is being redeveloped to run on the Ex Libris cloud platform
10. Complete rollout of the NERS replacement system (Aha)
11. Complete rollout of the NERS voting system (ElectionBuddy)
12. Migrate internal IGeLU services to Google Not-For-Profit platform
13. Investigate options to involve interested IGeLU members in SC activities (e.g. observer status on the SC meetings)
14. Continue the Salesforce Advisory Group
16. Assist in the activation of regional user groups
17. Succession planning

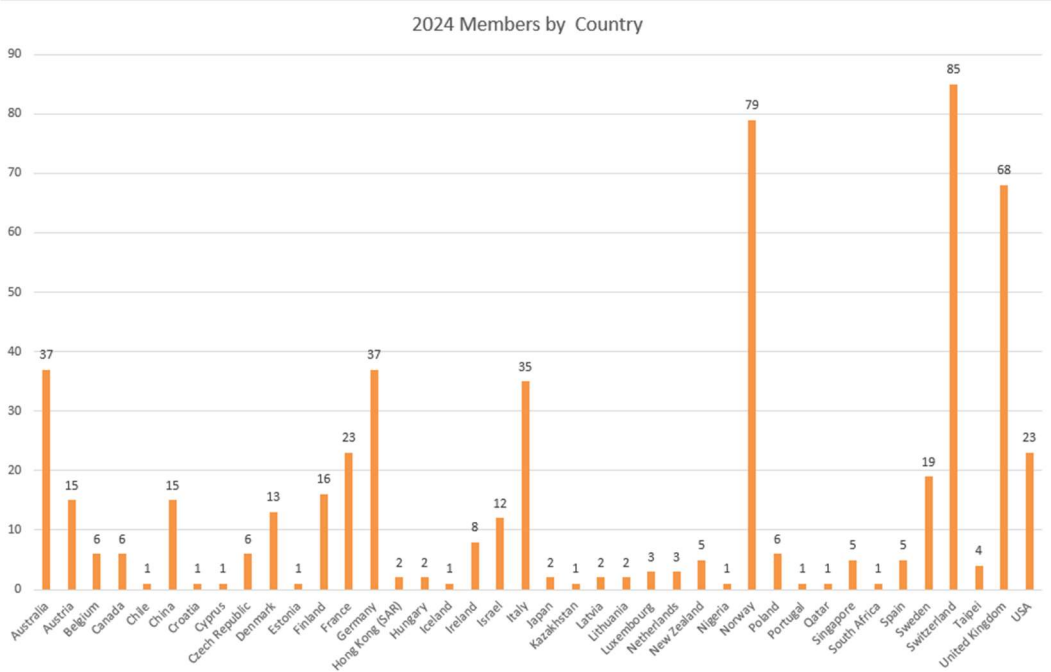
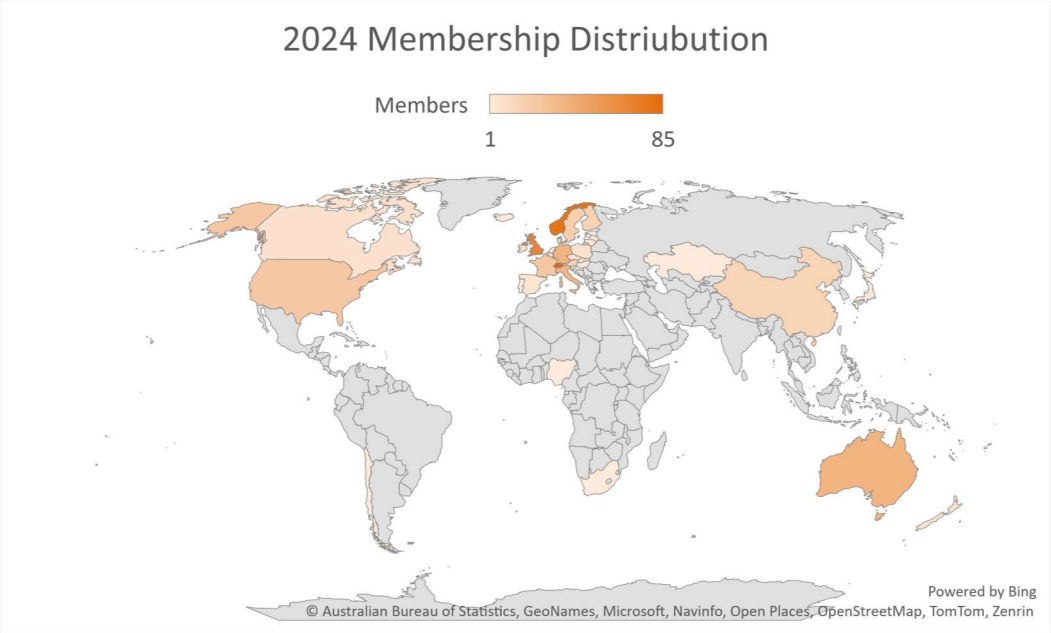
## Membership

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

# 2024 Chair's Report

IGeLU's current membership profile is as follows



## 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>.

The 2024/25 Budget approval by the members will be undertaken using the ElectionBuddy voting system.

### Voting on open positions of the Steering Committee

This year there will be voting for

- Steering Committee positions
- Steering Committee chair

List of candidates has been published on the website. Elections will be undertaken using ElectionBuddy. The successful candidates will be announced at the 2024 Conference during the IGeLU Business meeting.

**Dave Allen, IGeLU Chair**