

## GUIDE - ENHANCEMENTS PORTAL (IGeLU AND ELUNA)

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### 1. WHAT IS THE ENHANCEMENTS PORTAL?

The **Enhancements Portal** is the **IGeLU** and **ELUNA** enhancements platform, supporting active members to submit enhancement requests for their contracted products with Ex Libris, in accordance with the Product Development Collaboration Agreement:

- [Product Development Collaboration Agreement \(IGeLU member login\)](#)
- [Product Development Collaboration Agreement \(ELUNA member login\)](#)

The (**Ex Libris Users**) Enhancements Portal is hosted on the vendor Aha platform and in late 2024 replaces the prior development environment branded as “NERS” (**New Enhancements Request System**).

**Note:** Any Ex Libris customer may submit enhancement requests to the Ex Libris managed [Idea Exchange](#) forum. See [NERS Vs. Idea Exchange](#) for details on the differences between the IGeLU and ELUNA contracted enhancements process with Roadmap commitment, and the Ex Libris Idea Exchange.

## 2. ACCESSING THE ENHANCEMENTS PORTAL

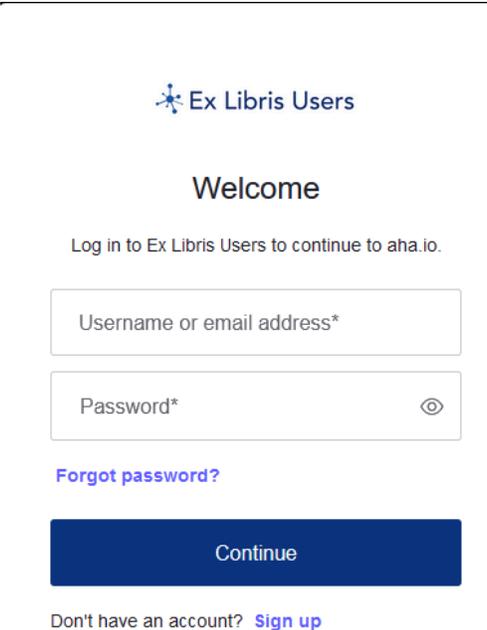
To access the **Enhancements Portal**, follow these steps:

1. Go to the Enhancements Portal [URL](https://enhancements.exlibrisusers.org/) (https://enhancements.exlibrisusers.org/)
2. Log in using your credentials.

### How to Create an Account in the Enhancements Portal?

1. Navigate to <https://enhancements.exlibrisusers.org/>
2. If you do not have an account, click on 'Sign up'

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The screenshot shows the login page for Ex Libris Users. At the top, there is the Ex Libris Users logo. Below it, the word 'Welcome' is displayed. A message reads 'Log in to Ex Libris Users to continue to aha.io.' There are two input fields: 'Username or email address\*' and 'Password\*'. Below the password field is a link for 'Forgot password?'. A blue 'Continue' button is positioned below the input fields. At the bottom, there is a link for 'Don't have an account? Sign up'.

3. Enter a username, email address, and password. **Please note that institutional email addresses should be used for this system, not private email addresses.**

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 Ex Libris Users

**Welcome**

Sign Up to Ex Libris Users to continue to aha.io.



Already have an account? [Log in](#)

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4. Once you have created an account and/or logged in, you are now in the submission portal

### 3. LOGIN ISSUES AND ASSISTANCE

#### **For questions about the enhancement process or enhancement requests:**

- [IGeLU](#) / [ELUNA](#): Contact the relevant product working group

#### **For accounts and login issues to the Enhancements portal:**

- **IGeLU members:** IGeLU Secretariat <[secretariat@igelu.org](mailto:secretariat@igelu.org)>
- **ELUNA members:** John Greer <[john.greer@mso.umt.edu](mailto:john.greer@mso.umt.edu)>

#### **For feedback on the Enhancements Portal ELU environment:**

- **IGeLU members:** IGeLU Secretariat <[secretariat@igelu.org](mailto:secretariat@igelu.org)>
- **ELUNA members:** Ryan Edwards <[edwardre@wla.edu](mailto:edwardre@wla.edu)>

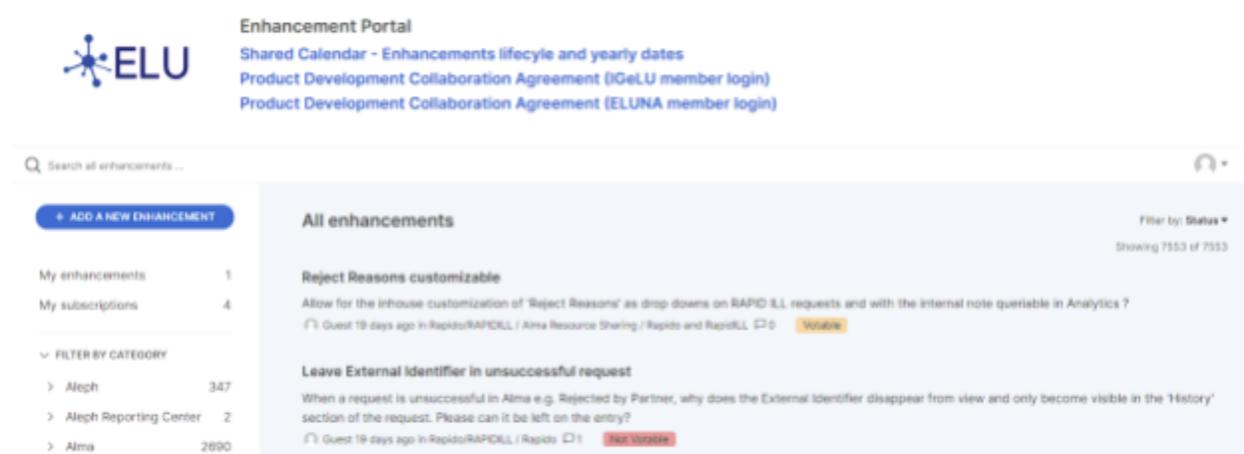
#### **For issues with the Election Buddy voting system:**

For example, if the expected email to submit votes is not received to vote, or you are uncertain of your institution/consortia voting representative

- **Elections Ex Libris Users:** <[elections@exlibrisusers.org](mailto:elections@exlibrisusers.org)>

## 4. NAVIGATING THE ENHANCEMENTS PORTAL

Within the Enhancements Portal you can submit enhancements requests, explore existing enhancements requests and view their status, and subscribe to get updates.



In the **Home** area showing all enhancement requests:

- Use the **Filter by category** to narrow enhancement requests by product and any categories within that product
- Use the **Filter by Status** option to see enhancement requests by a specific Enhancement Request Status
- Use the **Search all enhancements** option to find enhancements by all displayed information

Use the **X** beside active filters to remove them and restore the list to the default view of all enhancement requests.

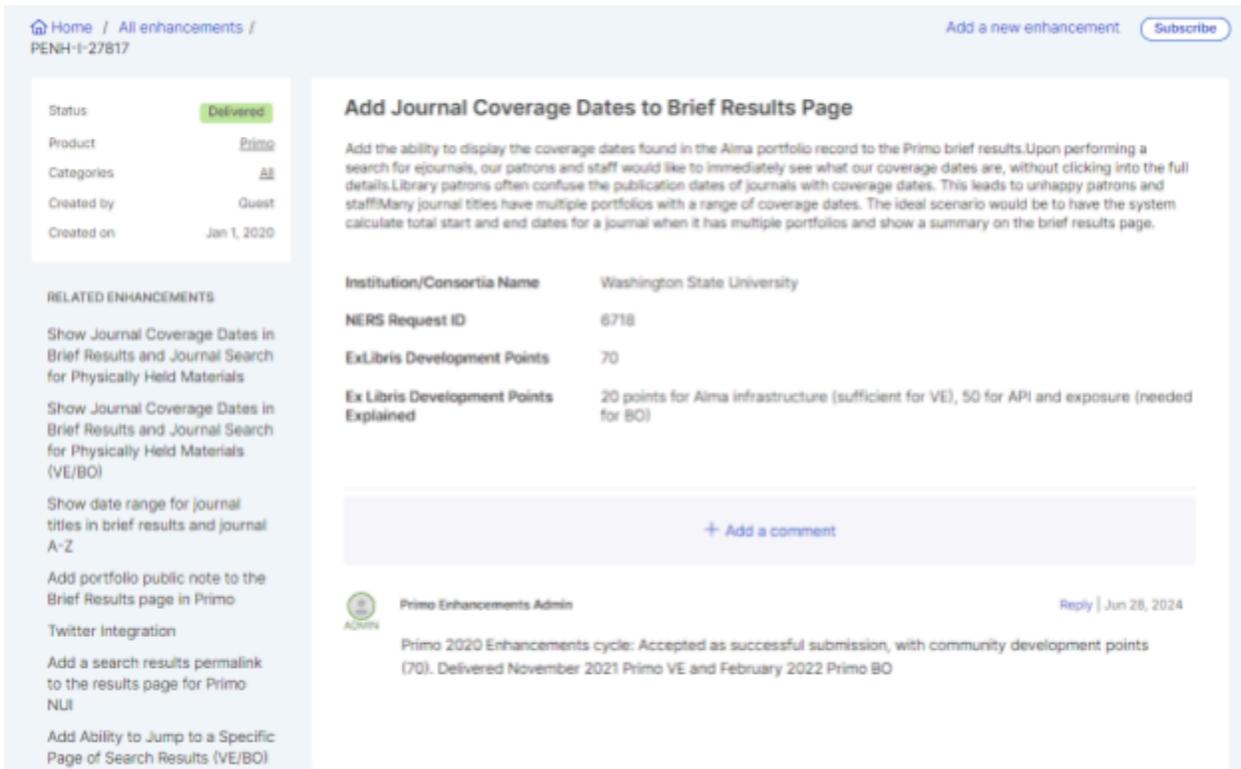
Each enhancement request has its own detailed view, with fields including:

- Request name
- Request description
- Attachments
- Comments
- Ex Libris Development Points
- Ex Libris Development Points Explained
- NERS Request ID

- Institution/Consortia Name
- Status — see *Enhancement Request Status section for definitions*

Fields will display only in an enhancement request if it has information added. For example, NERS Request ID will only display if the enhancement request was migrated from the prior NERS platform.

Coordinators of the corresponding product working group may add Comments to update the enhancement request.



Home / All enhancements / PENH-I-27817 Add a new enhancement [Subscribe](#)

Status **Delivered**

Product [Primo](#)

Categories [All](#)

Created by [Guest](#)

Created on [Jan 1, 2020](#)

**RELATED ENHANCEMENTS**

- Show Journal Coverage Dates in Brief Results and Journal Search for Physically Held Materials
- Show Journal Coverage Dates in Brief Results and Journal Search for Physically Held Materials (VE/BO)
- Show date range for journal titles in brief results and journal A-Z
- Add portfolio public note to the Brief Results page in Primo
- Twitter Integration
- Add a search results permalink to the results page for Primo NUI
- Add Ability to Jump to a Specific Page of Search Results (VE/BO)

**Add Journal Coverage Dates to Brief Results Page**

Add the ability to display the coverage dates found in the Alma portfolio record to the Primo brief results. Upon performing a search for ejournals, our patrons and staff would like to immediately see what our coverage dates are, without clicking into the full details. Library patrons often confuse the publication dates of journals with coverage dates. This leads to unhappy patrons and staff. Many journal titles have multiple portfolios with a range of coverage dates. The ideal scenario would be to have the system calculate total start and end dates for a journal when it has multiple portfolios and show a summary on the brief results page.

<b>Institution/Consortia Name</b>	Washington State University
<b>NERS Request ID</b>	6718
<b>ExLibris Development Points</b>	70
<b>Ex Libris Development Points Explained</b>	20 points for Alma infrastructure (sufficient for VE), 50 for API and exposure (needed for BO)

[+ Add a comment](#)

 **Primo Enhancements Admin** [Reply](#) | Jun 28, 2024

Primo 2020 Enhancements cycle: Accepted as successful submission, with community development points (70). Delivered November 2021 Primo VE and February 2022 Primo BO

The pagination option shows 10 enhancement requests per page, and cannot be changed.

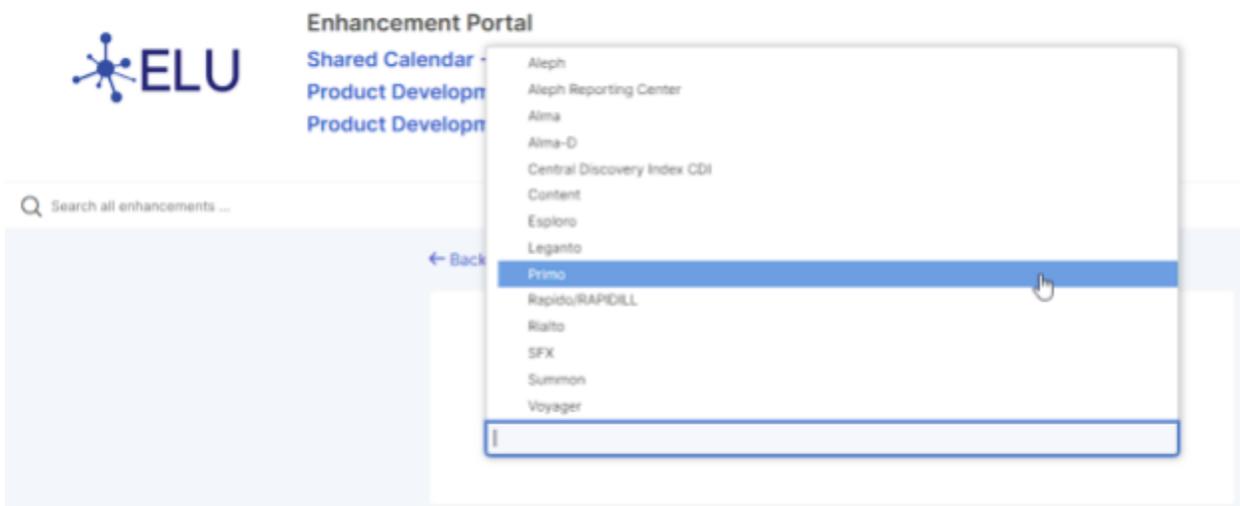
## 5. SUBMITTING ENHANCEMENT REQUESTS

To submit your **New** enhancement request, follow these steps:

1. Click the "Add New Enhancement" button.



2. Choose a product for the enhancement request:



3. Fill out the enhancement request form, providing a Request name and Request description
4. Attach files as needed to support your enhancement request
5. If a Category field is displayed, choose one from the dropdown menu
6. Add your Institution/Consortia Name
7. Click "ADD ENHANCEMENT"

### Add enhancement

Choose a product for this enhancement

Primo

**Request name** Required

One sentence summary of enhancement

  
Any similar enhancements will show here while typing.

**Request description** Required

Paragraph **B** *I* U **A**   + 

Why is it useful, who would benefit from it, how should it work?

 Attach files

Choose a category for this enhancement Required

Institution/Consortia Name Required

**ADD ENHANCEMENT**

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**Editing an enhancement request:** You may edit an enhancement request you have submitted (by the account), but only ever do this when at **New** status

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**Deleting an enhancement request:** There is no option to delete an enhancement request

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**Adding a comment to an enhancement request:** You can add a comment to an enhancement request, with text and attachment options.

If your comment would be directly relevant to your enhancement request, edit the enhancement request to add the information rather than adding a comment. The review process by the product working group and pointing process by product management is by the enhancement request itself (Name, Description, Attachment), and is not guaranteed to incorporate comments by either the submitter or others.

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**After submitting an enhancement request:** You will receive an email notification advising of the **New** enhancement request created, with a link back into the Enhancements Portal:

- Sender: Ex Libris Users Enhancements Portal
- Subject line: Idea received: [name of your enhancement request]

Depending on your subscription settings, you may also receive a notice when the status of your enhancement request changes, such as from **Under Review** to **Votable**.

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**Note:** Submitting an enhancement request may indicate a personal 'Vote' on the request as part of the submission process. This can be ignored

## 6. ENHANCEMENT REQUEST STATUSES

An enhancement request will be updated with different statuses in the Enhancements Portal as it moves through an enhancement cycle.

These are the possible statuses and their definitions:

### **New**

- The default system-assigned status of a newly entered enhancement request, not yet reviewed by the relevant working group (WG) for the next upcoming product ballot

### **Under Review**

- The status of an enhancement request entered by the deadline for the next upcoming product ballot, which is undergoing review by the relevant WG to determine Votable or Not Votable status

### **Votable**

- The status of a previously new enhancement request which has been reviewed by the relevant WG and will be included in the next upcoming product ballot

### **Not Votable**

- The status of a previously new enhancement request which has been reviewed by the relevant WG and will not be included in the next upcoming product ballot

### **Received from another workgroup**

- Anomaly rare status, for any previously new enhancement request which has been reviewed by the relevant originating product WG and decided in collaboration with another WG to be moved to their product ballot instead. This status is a clear sign of a handover in motion by change to this status by the originating WG. The status will be changed by the destination WG to either Votable or Not Votable, after their own review for their next upcoming product ballot

## Archived

- The *final* status of previously Not Votable enhancement requests, and any previously Votable enhancement requests which are not Rejected, Accepted, or Delivered, after the conclusion of the latest product ballot

## Rejected

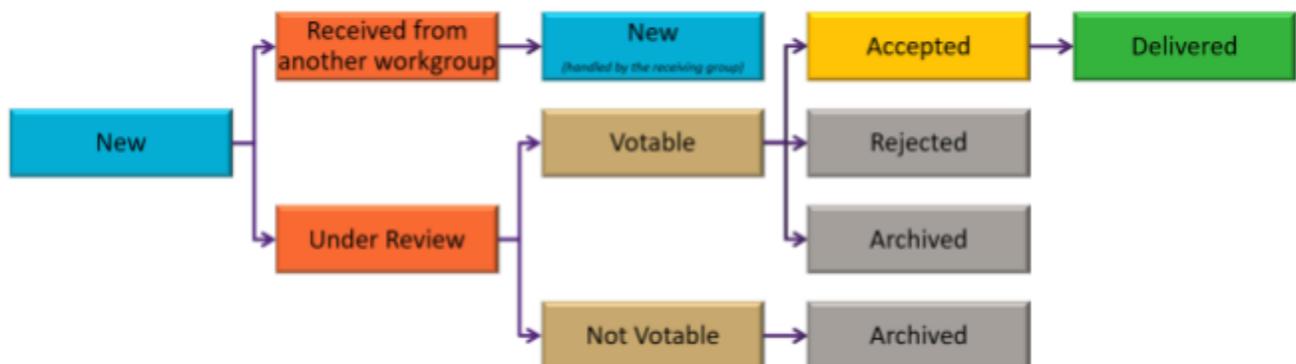
- The *final* status of a previously Votable enhancement request which has been rejected by Ex Libris during the pointing process after the product ballot

## Accepted

- The interim status of a Votable enhancement request which has been successful in any prior product ballot, with expectation of delivery by Ex Libris, at which point it would be updated to Delivered

## Delivered

- The *final* status of a Votable enhancement request which has been successful in any prior product ballot, moving therefore to Accepted status and then Delivered status when the enhancement is in-product per Product Release



## 7. VOTING ON ENHANCEMENT REQUESTS

IGeLU and ELUNA member voting on enhancement requests is managed in a separate system called **ElectionBuddy**.

The designated Institution/Consortia voting representative is emailed directly when a voting cycle is opened, with details on how to vote.

It is the responsibility of the Institution/Consortia to maintain up-to-date profile information for voting representative contacts and contracted products in the relevant IGeLU or ELUNA member organisation directory:

- **IGeLU:** [Membership directory](#), and [help information](#)
- **ELUNA:** [Membership directory](#)

The relevant product working group communicates information on product enhancement cycles on the corresponding Ex Libris Users product listserv. This includes providing an excel spreadsheet to support overall review of Votable enhancement requests for an active voting cycle.

- Subscribe to **IGeLU/ELUNA listservs:** <https://exlibrisusers.org/hyperkitty/>