

# Alma Working Group Update

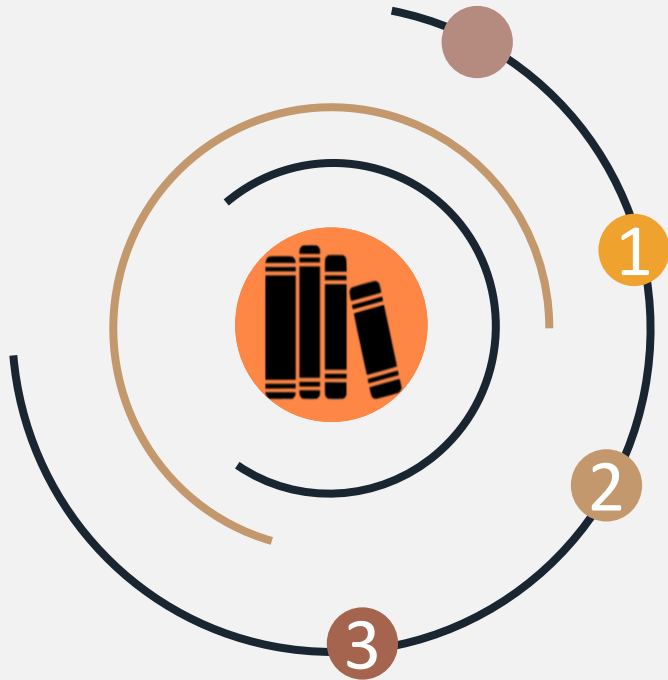
Catherine Grove, ELUNA (Northwestern University)

Gijs Noels, IGeLU (LIBIS, KU Leuven)

Adina Marciano (Clarivate ALMA PM)



# Agenda!



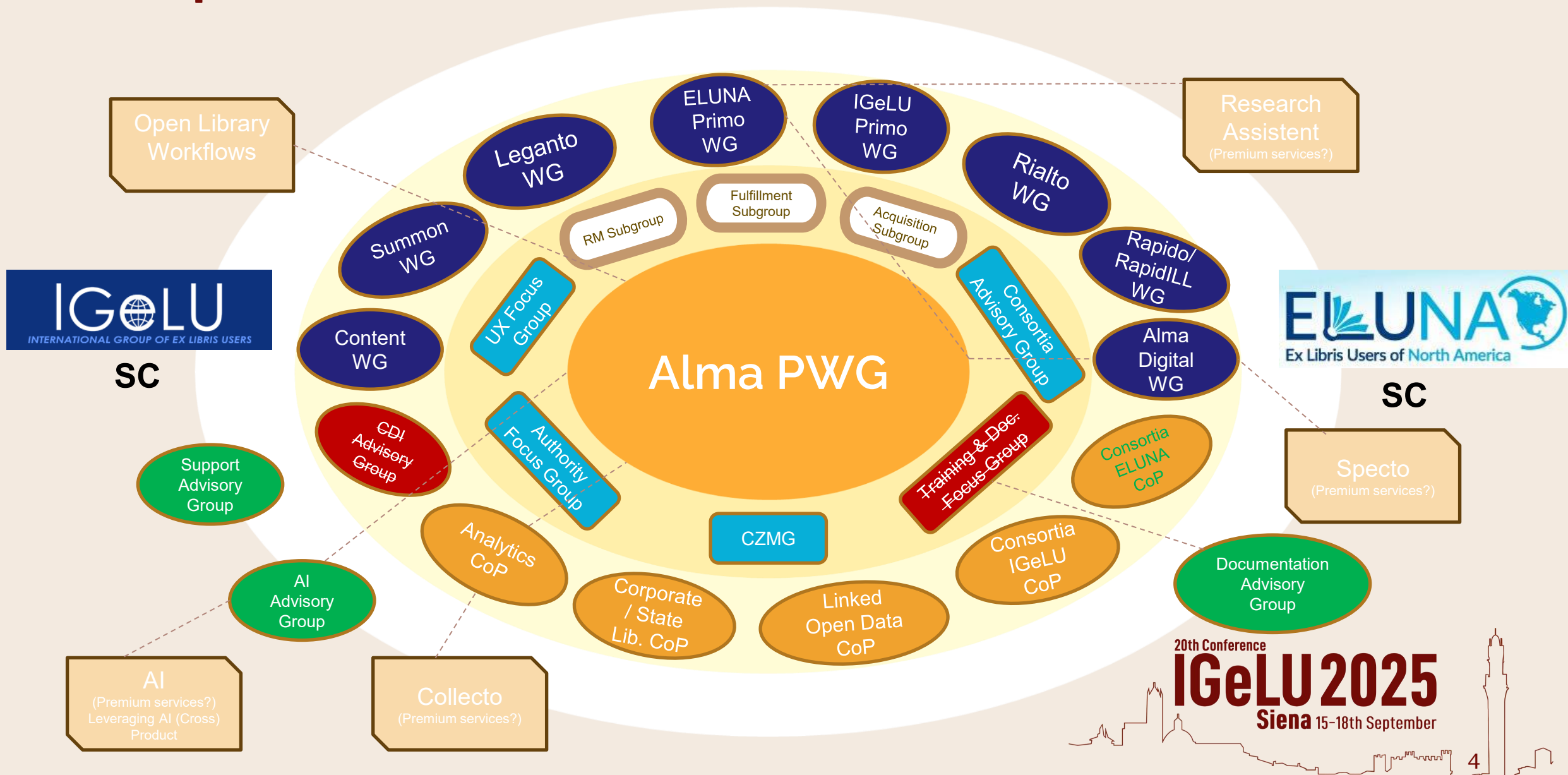
1. General – “The” Alma WG
2. “Looking back”
3. “Challenges”
4. Questions / expectations?

# Mission - (ToR <sub>2024</sub>)

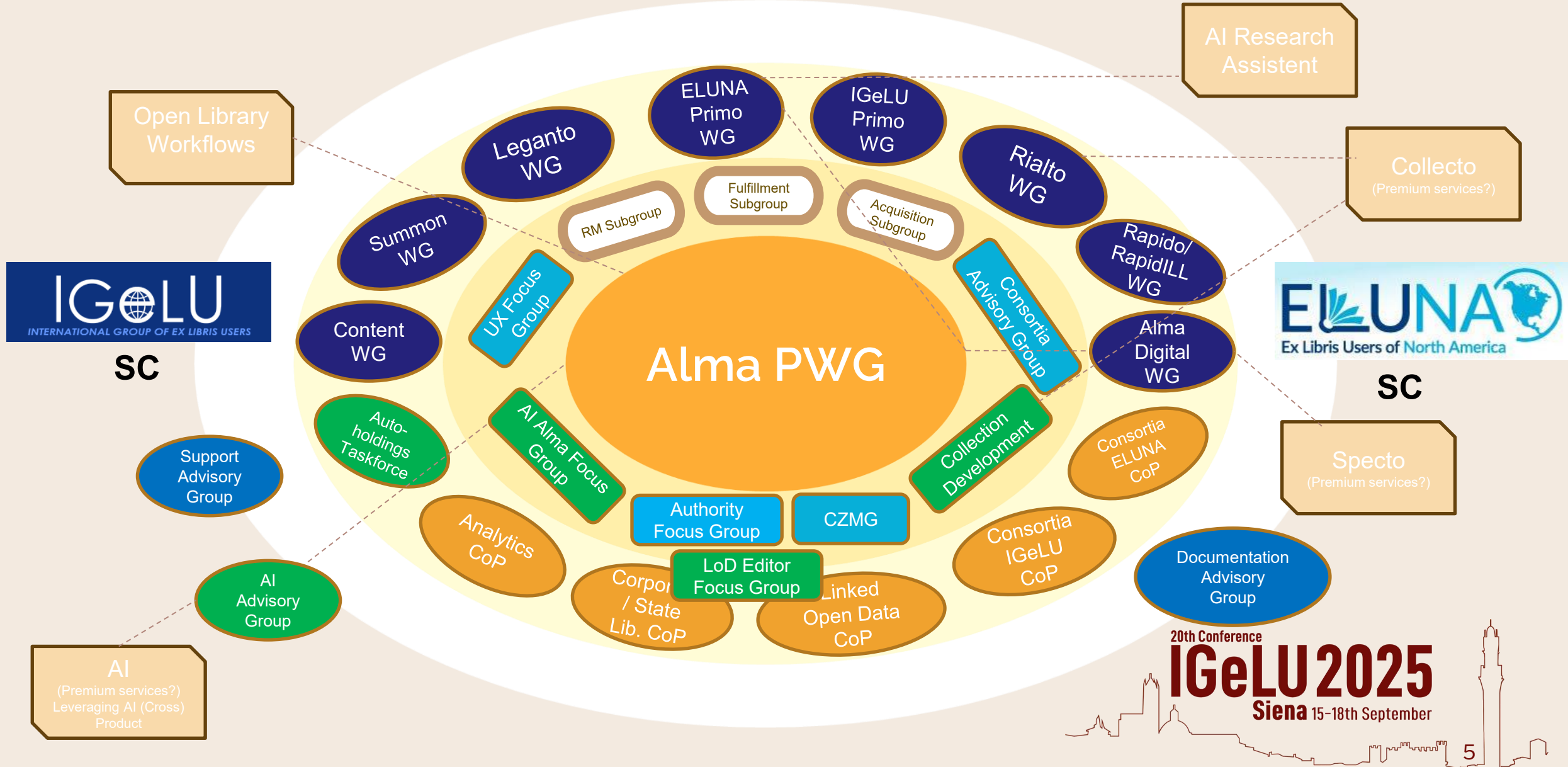


- Joint group between ELUNA and IGeLU
- Represent the Alma User Community to Clarivate
- Advocate for the interests of **all Alma users**, through discussion and negotiation with Clarivate
- **Actively partner with Clarivate** staff to improve Alma functionality
- Be responsible for establishing and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

# Dependencies – ‘The’ Alma network 2024!



# Dependencies – ‘The’ Alma network 2025!



# Alma WG Members

## Core Group Members

- **Catherine Grove**, Northwestern University – co-chair (ELUNA) / Linked Data CoP / UXFG
- **Gijs Noels**, LIBIS KU Leuven – co-chair (IGeLU) / Consortia Coord Group chair / UXFG / Consortia IGeLU CoP
- **Joe Ferguson**, University of Tennessee – Deputy Chair / Fulfillment Subgroup
- **Stacie Traill**, University of Minnesota – Enhancements Coordinator
- **Leon Krauthausen**, Freie Universität Berlin – Enhancements Coordinator / Acquisitions Subgroup / Analytics WG
- **Bettina Kann**, OBVSG Austria – Resource Management Subgroup / UXFG / IGeLU Consortia CoP
- **Emma Clift**, Macquarie University – Primo WG (IGeLU) / member at large
- **Shelly Hypes**, University of North Carolina – Communications and Education Coordinator

## Liaisons & SC representatives

- **Vic Jones**, Florida Gulf Coast University – Alma digital WG
- **Marisa Tolbert**, CARLI – Community Zone Management Group
- **Margaret Corby**, Kansas State University – Alma Authority FG
- **Xiaotian Chen**, Bradley University – Content WG
- **Michelle Eichelberger**, SUNY Library Services –Primo WG (ELUNA)
- **Katie Sanders**, University of Wisconsin – Rapido WG (ELUNA)
- **Joe Montibello**, Dartmouth College – Leganto WG
- **Nick Pavlovic**, Liberty University – Summon WG
- **Carrie Curie**, Minnesota State University – Alma Consortia CoP (ELUNA)
- **Selina Wang**, Oberlin College & Conservatory – Rialto WG
- **Knut Bøckman**, Royal Danish Library – Steering Committee (IGeLU)
- **Allen Jones**, The New School – Steering Committee (ELUNA)



# Looking Back – “Performance” (WRAP-UP)

## How to create a performance related case?

- We advise you to (after checking the [ExLibris status page](#) first):
- read the “[How to report Alma performance issues](#)” knowledge article
- read the “[Our Users are Experiencing Issues with Alma Crashing or Disconnecting. How Should this be Reported](#)” knowledge article
- create a performance [tracking file](#) (if possible)
- use the priority ‘High’
- use the case type: “Performance and Stability”!



Dear Alma Community,

In April of 2024 (see email below), the Alma Working Group launched a survey about intermittent performance issues in Alma to get more information and to get an idea of how widespread the problem is. In total we received 55 responses from various institutions, from Alma environments in the different datacenters and about (intermittent) performance issues spread out over the different functional areas. (30% related to Resource Management)

Datacenter (Environment)	Numbers	Functional Area	Numbers
AP01	2	Acquisitions	5
AP02	3	Acquisitions (browser related)	2
EU00	2	Administration	3
EU01	3	Analytics	1
EU03	15	API	1
EU04	15	Fulfillment	6
NA01	2	General	2
NA03	5	General (Browser related)	1
NA04	1	Jobs	4
NA05	2	Log in	1
NA06	2	Log out	1
NA07	3	Publishing	2
<b>Grand Total</b>	<b>55</b>	Resource Management	17
		Resource Management: E-content	1
		Resource Sharing	2
		Search	4
		Search: E-Content	1
		Sets	1
		Webhooks	1
		(blank)	1
		<b>Grand Total</b>	<b>57</b>

When we look at how many of these issues have been escalated to ExLibris via a salesforce case we notice that only 30% have a case number.

### Analysis

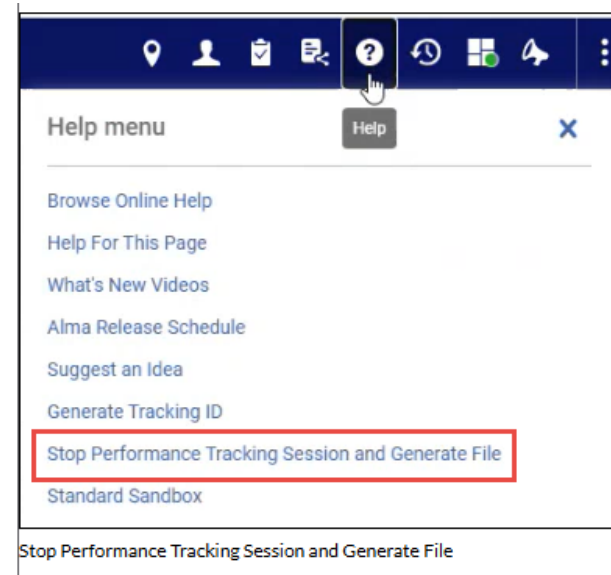
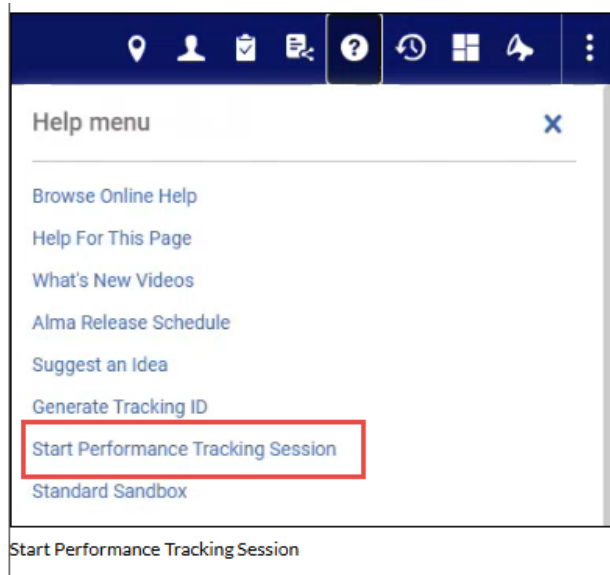
The Alma working group shared the survey feedback with ExLibris and after a thorough analysis, ExLibris (unfortunately) couldn't identify any structural performance issues.

However, the survey indicated that the community is rather reluctant to file performance issues cases. We therefore want to **encourage** institutions to keep on logging



# Performance

- We are committed to delivering high performance and give high priority to any performance issues that arise.
- We have created a tool and guide to help users report support tickets on performance issues.
- "Case Type"= Performance and Stability to flag the ticket.



How to Report Alma Performance Issues - Ex Libris Knowledge Center



# Looking Back – “CERV”

**NERS 2024** (Delivered with the 2025 August Release)  
([High level solutions](#))

- Special Characters option in Metadata Editor
- Automatically suppress bibliographic records-inactive portfolios
- Enable the ability to make an item missing that has a process type
- Changing POL type after POL is sent
- Waive Fines/Fees in Bulk by Set
- Copies of claim letters sent to sender e-mail and PO line reference and vendor code added to the claim report events
- New institutional number sequence, or reset Additional ID, to shorten hold shelf pickup number
- Linking to authority via dropdown menu in MDE

**CERV 2025**

([High level solutions](#))

- Add NOT operator to advanced search
- Add pop up screen to notify Library Staff that a patron physical item hold request is awaiting collection by the user at the hold shelf.
- Record all changes to an Electronic Collection in the History tab with meaningful Old Value and New Value information
- Catalog search
- Improve Alma records with accurate information on staff activity



# Looking Back – CERV 2025 Lessons Learned!?

## Before 1<sup>st</sup> round of voting:

- How to avoid duplicate requests? Maybe an **extra week** would be good; would help with catching more duplication too and just overall check.
- **More time** needed to coordinate with Primo WG would be helpful (during initial review, before 1st round voting)

## After 1<sup>st</sup> round of voting:

- General: we had more issues after the first round of voting. Maybe **more time** to contact submitters in that time between 1st and 2nd round.
  - How to avoid product switches (CDI case)
    - Engage Clarivate sooner in the process!
  - How to avoid withdrawals of Enhancements?
    - Double-check (**MORE eyes** on) accepting enhancements!
  - How to avoid Enhancements being ‘out of scope’?

**INCREASE Community Responsibility/Awareness!!**



# Challenges?

Let's go back in time first!

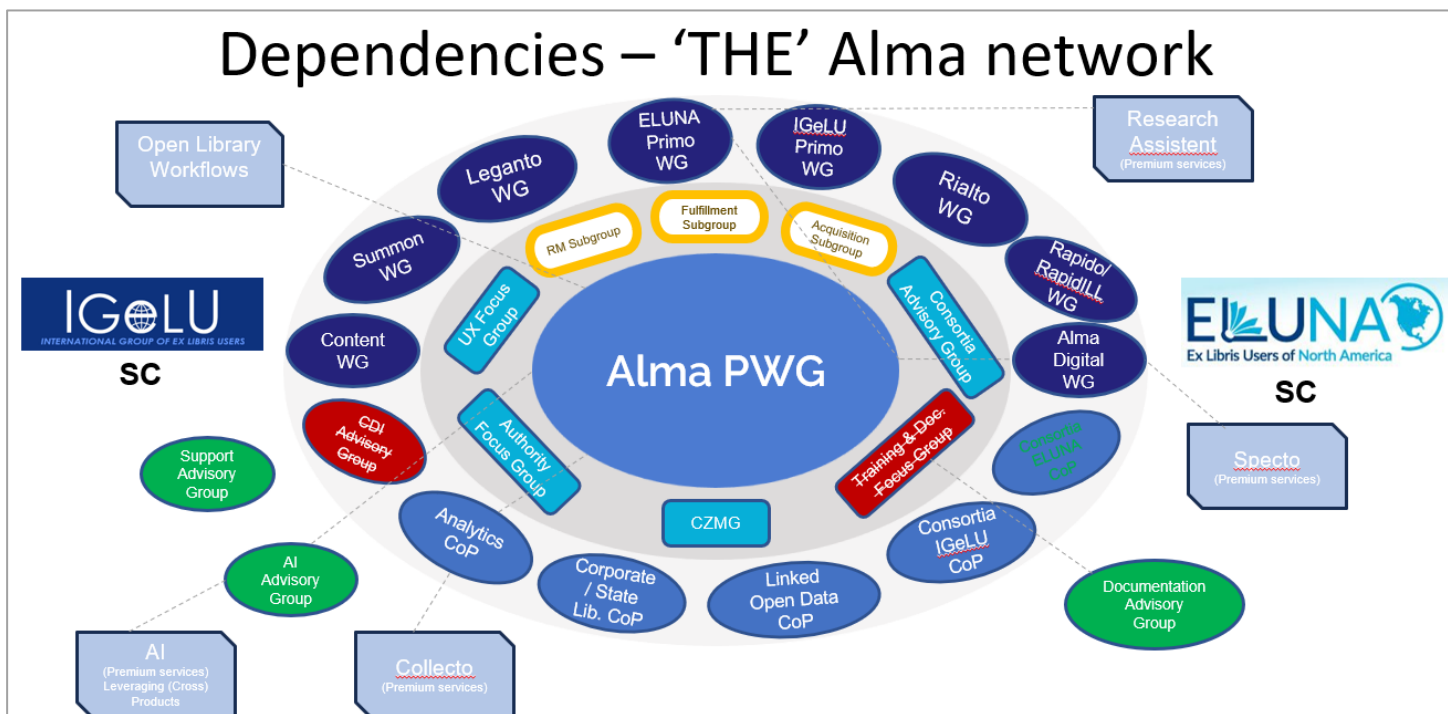


# Looking Ahead!!

(Goals 2024-2025)

How to deal with 'scattered', always evolving, Clarivate Products/services?

## Dependencies – 'THE' Alma network



## Questions to answer?

(how to deal with)

QA: Defect Resolution project!

- New functionality with consolidation?
- Change: embrace with (some) reluctance / resistance?
- Focus with balance? (prioritization)



# How to deal with this? How to get the most out of Alma?



Strategy AND numbers!

To improve feature adoption AND to provide focus and prioritization on the Alma Roadmap!

# Numbers to evaluate and improve Feature adoption and to provide Roadmap direction?

Question: “Why are ‘key’ features NOT (or less) used?”

(Lack of functionality, lack of knowledge (documentation), lack of awareness (communication), lack of scope/potential (niche)?)

- **Consortia Features:** “Proxy settings at NZ level”
- **Auto-holdings** (taskforce): “We suggest defining KPIs to help measure the group’s success. One example could be increasing the adoption of Auto-holdings within the community.”
- **Authorities:** evaluate development of partial subject linking based upon the usage/adoption of partial title/Names linking (Aug 2025 release)
- **CERV** (NERS 2023 features): learn concerning voting and adoption?

Question (2):

HOW does ExLibris deals with this and  
HOW does the community engage?



# Data Driven Insights

- We want to ensure that our enhancements and new features bring added value to our customers.
- We collect usage metrics to evaluate our work and help direct future roadmap plans and see if additional promotion is needed.
- New features are promoted in the release notes and Alma announcements, with the help of the community.

NERS 2023#	Description	# Institutions Using
8197	Ensure email is delivered with DKIM	452
8125	Display the user's loan due date in the borrowing request screen	350 (895 users)
6669	Editing items via Receiving, Save & Receive items	105K clicks
8373	Ability to schedule manual jobs	452
7877	Enable viewing of Requests history in Alma	1958 clicks by 1272 users
8345	Allow auto renewal to restart after blocks removed	39
8338	Make an easy way for items to be removed from 'in transit' status	117

# WRAP-UP!



Room for thought?

How can we create (even more) added value with Alma sessions?

- (Interactive) Workshops on specific topics/features?
- Updates by Subgroups / Focus groups related to Alma!
- ...





20th Conference

**IGeLU 2025**

Siena 15-18th September



# Thank you!

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