Adapting and Advancing with Alma Releases, Regardless of Library Size

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IGELU 2025

Intro: Presenters

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Intro: Why it matters

Avoid surprises

Move forward & make the best use of Alma

Efficiency

California State University Channel Islands - About

Camarillo, CA (100 km north of LA)

4100 FTE, youngest CSU (2002-)

5 TT librarians, 4 temporary librarians, 9 staff, dean

Electronic Resources Management Librarian

CSU Channel Islands - Who is involved

ERM Librarian, Tech Services Librarian, Systems/Programmer, Circulation & Interlibrary loan staff members all involved in keeping tabs on functional area updates, mostly independently

OneSearch Task Force - 6 librarians focusing on continuous improvement in Alma/Primo

CSU Unified Library Management System - Alma network zone

- Subcommittees: ERM, Acquisitions, Resource Management, Resource Sharing, Fulfillment, Discovery, etc. & various task forces such as Linked Data, Inclusive Description, Normalization, etc.
- Some systemwide implementations, committee recommendations & best practices, Slack channel, ERM & CDI weekly update, etc.

CSU Channel Islands - When and How

Disparate information gathering about Alma release content, as relevant and as time allows

Ad hoc decision making, though we are increasingly collaborative & oriented toward wider CSU trends

Decisions variously recorded in: Alma when note fields allow, OneSearch task force running agenda, LibAnswers ticketing system

CSU Channel Islands - What works well about this approach

Strong focus on practical results of immediate use to our students or library staff

Low and flexible time commitment - lean library staff can attend to other duties

CSU central staff & peer network assist with identifying major Alma issues and developments

Channel Islands - Challenges with this approach

Lack of scheduled, methodical review involving all relevant staff

No one location for recording review activity & decisions

CSU info is extremely beneficial overall, but also difficult to keep abreast of information filtering out from many different committees

Often playing catch up, rather than proactively planning for new system changes and functionality

Channel Islands
~oh very young!

And always improving!
This presentation prompted us to reconfigure and better organize our approach, so thank you!

הספרייה הלאומית
المكتبة الوطنية الإسرائيلية
The National Library of Israel

הסיפור של כולנו قصتي وقصتك Your story. Our story.

Jerusalem (Israel)

About 300 staff work with Alma

Metadata & Technical Assistance Librarian

NLI - How we do it, who is involved

- Designated Technical Services Librarian, Heads of Sections, Team Leaders
- Review release notes and sends emails to Heads of Sections and Team Leaders
- Check for necessary implementation (e.g. activation of new features, permissions etc.)
- Testing on sandbox relevant by teams
- Team leaders send updates to their staff
- In house training for major changes (e.g. NG title search)

NLI - How we do it, who is involved (new)

- New approach as of May '25

- Meetings with the team leaders ahead of feature releases lead by designated technical services librarian

- Systems administrator added to the team

- Shared spreadsheet with new features that may be relevant

- Follow up in spreadsheet and by email

NLI - what works well

- Minimizes work load for Heads of Sections and Team Leaders
- Send to additional recipients from other units in library for specific features

NLI - challenges

- Email recipients not always responsive
- Lack of coordination between library units (e.g. when testing changes to features that affect multiple workflows)
- Most of the workload on designated technical services librarian

NLI - improvement new approach

- Better distribution of workload

- Discussion and joint decision making

- Improved coordination between library units in testing

- Spreadsheet as documentation

Ferris State University - About

- Ferris State University in Big Rapids, Michigan USA
    - Division 2 Football Champions 2021, 2022, and 2024
    - Best Sport Logo in Michigan (beating the old English "D")

- <u>Professions-focused Opportunity College</u> ; approx. 10,000 FTE

- 10 faculty librarians ; 3 union staff ; 4 administrative staff

- Metadata and Electronic Resources Management Librarian

Ferris State University - Decentralized System Management

- Backstory
- Alma NTK Outlook Group
    - 6 faculty librarians (archives, art library, collection development, discovery, and outreach)
    - 3 union and 1 administrative staff members (technical services and circulation)

- Our Process
    - Read and summarize release notes
    - Share formatted release note summary to Alma NTK (on Dryfta or at right)
    - Remind colleagues to get in touch if they need something activated
    - Decision log in technical services MS Teams ; processes documented in LibGuides

February

May

Ferris State University - What works well about this approach

- Transparency and knowledge sharing

- Module administrators manage most updates

- Release note summaries for future reference

- "The three-legged bulldog still runs."
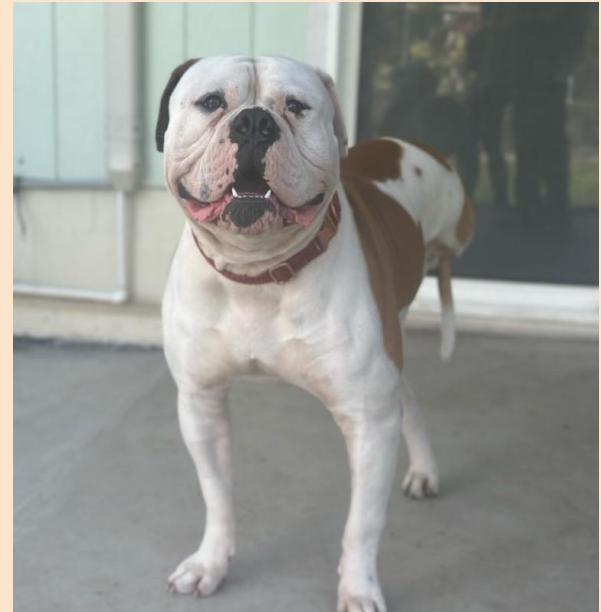
Hooch, from Aloha Ilio Rescue, fell out of the back of a pickup truck
https://www.instagram.com/alohailiorescue/p/C3ywyFSo8Vx/?img_index=1

Ferris State University - Challenges with this approach

- No individual knows how *all* of our systems are connected.

- Cannot control feature rollouts, documentation, etc.

- Union contracts often frustrate flexibility.

Base image generated by Imagen-3-Fast on 4/3/25

Wesleyan University - About

- Middletown, CT, USA

- Small private liberal arts university (~3000 FTE)

- 32 library staff

- Systems Librarian

Wesleyan University - Who

Alma Management Team
- Systems Librarian (chair)
- Head of Access Services
- Head of Acquisitions
- Head of Cataloging
- Eresources Librarian
- AUL for Discovery and Access

Wesleyan University - Agenda Survey

Take the survey!
https://bit.ly/3S5SXpS

Alma management group agenda 25.01.30

lstethers@wesleyan.edu Switch account

Your email will be recorded when you submit this form

Feb 2025 release notes - feature release

https://knowledge.exlibrisgroup.com/Alma/Release_Notes/2025/Alma_2025_Release_Notes?mon=202502

Main Features

- [ ] Upcoming issues: AI Metadata Assistant Update
- [ ] New UX: Fulfillment: New Manage Patron Services UX - Opt Out
- [ ] New UX: Fulfillment: Sound Alerts in New Manage Patron Services UX
- [ ] New UX: Metadata Management: Updates to the Holdings Search User Experience
- [ ] New UX: Metadata Management: New Titles Search UX - Opt Out
- [ ] New UX: Metadata Management: Viewing Cataloger Notes in the Title Searches
- [ ] New UX: Metadata Management: Repository Search Labels

Wesleyan University - Meeting Agenda

25.01.29 Agenda [abridged]

Release Notes

[Dec 2025 (resolved issues)](#)
 Resolved known issues for the new manage patron services UI (EJL)
Improvements to Physical Item Loan Fields (TN, RM)

[Jan (resolved issues)](#)
Resolved Known Issues for the New Manage Patron Service UI (EJL)
New Physical Books Titles Network View Dashboard Now Available (TN, RM)

[Feb (feature release)](#) - gets released this weekend
Upcoming issues: AI Metadata Assistant Update (RM, AF)
New UX: Fulfillment: New Manage Patron Services UX - Opt Out (EJL)

…

Other topics

- **Question: daily Alma metadata import job errors – is this expected? (5 mins)**
- **Discuss: Lost and missing procedures (10 mins)**

Check in on past TO DOs

Wesleyan University - What works well about this approach

Increased engagement with the release notes

Team members are prepared for meetings

Department heads drive the conversation

We all know what each other are doing (to an extent)

We only discuss features that people care about, need to be shared out to other staff, or require a configuration decision

Mouse, the sweet and easy one

Wesleyan University - Challenges with this approach

Time consuming for
Systems Librarian

Everyone on the team has
to at least skim the release
notes

Midnight, the "challenging" one

OCUL - About us

- Ontario Council of University Libraries, based in Ontario, Canada

- Omni Consortium of 19 member universities, 550,000+ FTE

- 8 staff, two dedicated to Omni work

- Omni Technology Specialist

Omni - Some background for context

- 19 member universities

- 8 central staff

- Member driven direction and governance

OCUL - How we do it, who is involved

- Quarterly feature releases
    - I do a pass
    - Systems and Analytics subcommittee does a pass
    - Output posted on internal wiki
    - Open forum hosted before general release

- Maintenance releases
    - If anything of import, same process, but no forum

- IZ feature implementation decided locally
    - Unless consortial effect, then central

Ex Libris puts out monthly maintenance releases for both Al

Highlights of each feature release (and maintenance release

Beginning with the August 2024 release, on the Monday bet committee will be hosting a drop-in to discuss any new char drop-ins for each year.

Full Release and Maintenance Schedule⧉ (Alma and Prim

- 📄 2024-02 Feature Release notes
- 📄 2024-05 Feature Release notes
- 📄 2024-06 Maintenance Release notes
- 📄 2024-08 Feature Release notes
- 📄 2024-09 Maintenance Release notes
- 📄 2024-11 Feature Release notes

OCUL - what works well?

- Aids smaller institutions who may not have capacity

- Historical tracking of notes and decisions

- Open discussion:
  - Leads to similar understanding
  - Helps form consensus

This page contains highlights from the May 2025 Alma and PrimoVE release notes notes a read whenever possible.

Alma May 2025 Release Highlights

Ex Libris full release notes: https://knowledge.exlibrisgroup.com/Alma/Release_Not

- The Manage Patron UI is now the only one available. Hopefully the renewal UI will sunset in August.

- The Title and Holdings search has been expanded to support Cataloguer No portfolio information, and add navigation to the Title Export functionality.

- There will be a visible indicator for AI enriched CZ records.

- The Search Query design has an improved UI and better for assistive techno

- For the record views, labels are now consistently in bold with the content in r

- For resource sharing requests, there is a configuration to handle when a due affected by the 'Closed Library Lending Requests Due Date Management' po

OCUL - challenges?

- I'm just one person

- There is a LOT to go through, and consensus is tough

Questions?

✨

Discussion: what strategies have worked for you?

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