

# Adapting and Advancing with Alma Releases, Regardless of Library Size

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# Intro: Presenters

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OCUL (Ontario Council Of University Libraries)

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 قصة وقصتك  
Your story. Our story. قصتي وقصتك

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

E20					
	A	B	C	D	Notes
1	Module	Enhancement	To do	Who	
2	Metadata Management	Enhanced Saved Facets in Title and Holdings Searches	na		
3	Metadata Management	Navigation Links Added to the Title Searches Export	na		
4	Metadata Management	Delete Portfolios Directly from the Metadata Editor		עדן - תחומי קי-אילר, רותם	ת.א. צוותים
5	Fulfillment and Resource Sharing	Closed Library Management TOU for Resource Sharing Request	na		
6	Fulfillment and Resource Sharing	Resolved Issues			
7	Artificial Intelligence	AI Indication for Community Zone Enriched Records			
8	Artificial Intelligence	AI Metadata Assistant: Request Specific Metadata			
9	Artificial Intelligence	Administrator Control: Manage Requested Metadata from			
10	Artificial Intelligence	Searching for Titles with AI Generated Metadata			
11	Artificial Intelligence	Upload Resource Descriptions in PDF and Word Docum			
12	Linked Data	View Work Action for BIBFRAME Instances in All Titles			
13	Physical Resource Management	Persistent Sorting Routine for Physical Items List			
14	Electronic Resource Management	Flexibility in the Definition of Community Zone Updates			
15	Acquisitions	Resolved Issues			
16	User Experience, Accessibility and Infrastructure	Removal of Gender Information (August I)			
17					

	A	B	C	D	Notes
1	Module	Enhancement	To do	Who	
2	Admin & Systems	DigiCert SAML Certificate Expiration			
3	Fulfillment and Resource Sharing	Several enhancements that may be relevant to CIR or mostly ILL		Rami	
4	Fulfillment and Resource Sharing	Grace period		Rami	
5	Fulfillment and Resource Sharing	Bulk fine waiving		Rami	
6	Metadata Management	Extended Date Time Format (EDTF) Validation for Date/Time MARC Fields			
7	Metadata Management	New Search Indexes for Holdings and Authorities			
8	Metadata Management	New View Items Option in the Metadata Editor			
9	Metadata Management	Virtual Keyboard for Inserting Special Characters and Diacritics			
10	Metadata Management	New Partial Linking for Name/Title Headings			
11	Metadata Management	Support for Flipping MARC 21 Headings with Cross-References in Different Fields and Alternate Graphic Representations			
12	Metadata Management	Enhanced Handing of Bibliographic Records in the Withdraw Physical Items Job and when Withdrawning Items in the New UX			
13	Metadata Management	Use Overlap Analysis Tool with Multiple Matching Identifiers in One Comparison			
14	Metadata Management	linking_identical_headings			
15	Metadata Management	Publishing to Primo job took a very long time. This was fixed.			
16	Linked Open Data	Works' Search Index - New Search Indexes, Facets and Relocation of the 'Works' Index			
17	Physical Resource Management	Binding Items Marked as Committed to Retain			

# 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”)
- Professions-focused Opportunity College ; 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

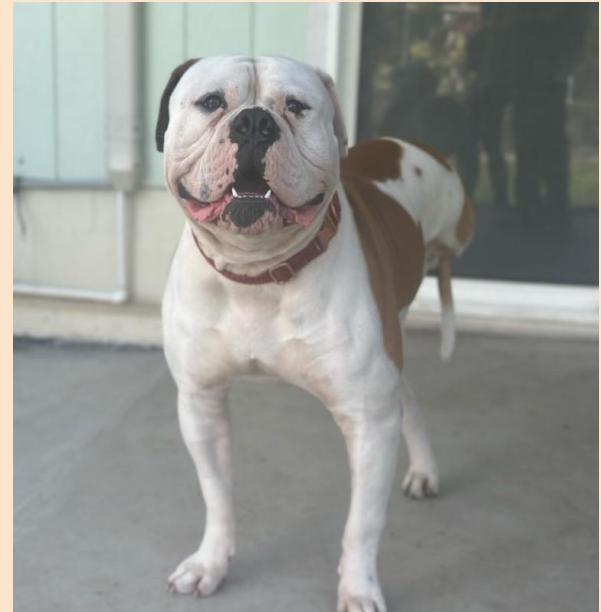


May



# 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/C3ywyFS08Vx/?img\\_index=1](https://www.instagram.com/alohailiorescue/p/C3ywyFS08Vx/?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](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

# 25.01.29 Agenda [abridged]

## Wesleyan University - Meeting Agenda

### 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
  - o I do a pass
  - o Systems and Analytics subcommittee does a pass
  - o Output posted on internal wiki
  - o Open forum hosted before general release
- Maintenance releases
  - o If anything of import, same process, but no forum
- IZ feature implementation decided locally
  - o Unless consortial effect, then central

Ex Libris puts out monthly maintenance releases for both Alma and Primo.

Highlights of each feature release (and maintenance release) are posted on the OCUL Wiki.

Beginning with the August 2024 release, on the Monday before the release, the Systems and Analytics subcommittee will be hosting a drop-in to discuss any new changes and answer questions. [See the OCUL Wiki for drop-ins for each year.](#)

[Full Release and Maintenance Schedule](#) (Alma and Primo)

- [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\\_Notes\\_May\\_2025](https://knowledge.exlibrisgroup.com/Alma/Release_Notes_May_2025)

- 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 Notes, 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 technologies.
- For the record views, labels are now consistently in bold with the content in regular text.
- For resource sharing requests, there is a configuration to handle when a due date is affected by the 'Closed Library Lending Requests Due Date Management' policy.

## 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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