

IGeLU 2026 – Taipei

19th to 22nd October 2026



IGeLU CHAIR'S REPORT 2026

September 2026

2026 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|ExLibris 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|ExLibris products.

IGeLU is a not-for-profit 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 email chair@igelu.org or the relevant Working Group or Community of Practice Coordinator.

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

- Impact of Clarivate commercial decisions to rationalise some of its activities
- The commercial decision to move from a one-off capital-based revenue model to a recurring transactional-based revenue model
- Continued absorption of Ex Libris into the Clarivate company structure and processes
- Clarivate activities that impact the Ex Libris branded products and service delivery such as the Clarivate AI Platform development

I am also pleased to announce that we will not be raising IGeLU membership fees for the 2026 membership period. This will mean that IGeLU Membership will remain at €300 per annum.



Dave Allen, IGeLU Chair

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|ExLibris Senior Management Team.

IGeLU also uses a broad set of facilities such

- ZOOM meeting and webinar subscriptions;
- WordPress website;
- Google collaboration document infrastructure;
- Instagram;
- Twitter; and
- the joint IGeLU and ELUNA <https://exlibrisusers.org> email list platform.

The Steering Committee's main responsibilities include

- Ensuring the long-term financial stability of the organisation
- Responsibility for the Initiation and / or approval of new Working Groups (WG), Communities of Practice (CoP), Advisory Groups (AG) and Task Forces (TF)
- Coordinating the work carried out by the various IGeLU groups
- Act as an escalation point between the various groups and the SC

The IGeLU Chair's additional responsibilities include

- Regular meetings with the ELUNA Chair and with senior Clarivate|ExLibris senior management to streamline work and discuss new developments
- Act as an escalation point for the various IGeLU National and Regional Users Groups
- Setup of the ballots for voting

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
 - Aleph Liaison Officer
 - Alma-Digital/Specto Liaison Officer
 - Rosetta Liaison Officer
 - SFX Liaison Officer
 - Summon Liaison Officer
 - National and Regional User Group Liaison Officer
- Knut Bøckman (Denmark)
 - IGeLU Deputy Chair
 - Rialto Liaison Officer
 - Support Advisory Group Liaison Officer
- Paolo Buoso (Italy)
 - Esploro Liaison Officer
 - Leganto Liaison Officer
 - Deputy Conference Lead

- Social Media Officer
- James Dodd (United Kingdom)
 - Alma Liaison Officer
- Birgit Hallerberg
 - RapidILL Liaison Officer
 - Rapido Liaison Officer
 - Linked Open Data Liaison Officer
- François Renaville (Belgium)
 - Content Liaison Officer
 - Documentation Advisory Group Liaison Officer
 - Lead Conference Planning
- Asbjørn Risan (Norway)
 - Primo Liaison Officer
 - Consortia Liaison Officer
 - Accessibility Advisory Group Liaison Officer
- Wei Xuan (Canada)
 - Content Liaison Officer
 - Analytics Liaison Officer
 - Linked Open Data Liaison Officer

The SC has a strong European representation, but we need diversify and we need representatives from the other regions such as the Middle East, Africa, South America and Asia. We are investigating strategies that we can adopt to increase our regional and gender diversity on the SC such as holding annual conferences in the APAC region

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 or their delegates 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/2026-taipei/igelu-2026-planning-committee/>

Finance, Legal and Administration

The IGeLU Treasurer, Giulia La Versa 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 Giulia and her team undertake for IGeLU is much appreciated.

The 2026 IGeLU Administration team is comprised of the following

- Giulia La Versa – IGeLU Treasurer
- 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. In 2026, Mehmet has been working on

- Migrating the IGeLU websites to a more stable environment
- Reviewing and upgrading the IGeLU email services
- Creating new websites for National and Regional members
- Upgrading the IGeLU infrastructure to meet current cyber security requirements
- Working with his ELUNA counterpart on the CERV Enhancement System

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 while 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 Calrivate|ExLibris' product management
- organizing Show & Tell sessions for members on topics
- conference program planning, inviting presenters and managing the product specific Q&A sessions at the conference

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

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.

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

The Aleph Product Working Group's focus this year has been:

- Retain existing members and welcome new members to the Working Group
- Gather enhancement proposals from the Aleph user community
- Gather feedback and understanding from the Aleph user community regarding product versions
- Receive confirmation regarding product support for Aleph from Clarivate

Call for New Members

There is a continuous open call for members to join the Aleph Product Working Group. We are always looking for individuals to join the Working Group so that the product continues to meet the current and future requirements for users.

Confirmation of Aleph Enhancement Development Points

Per the Product Development Agreement with Clarivate, Aleph has 45 development points.

Approach to Enhancements

With the lack of submissions for Aleph enhancements on AHA from individual institutions/submitters this past year's cycle, the Aleph Working Group submitted 5 proposals on AHA on behalf of users. These 5 proposals were gathered from conversations the Working Group members had with Aleph users. (After logging into AHA, these 5 proposal submissions can be found on the CERV Enhancements Portal, in the Aleph section: <https://enhancements.exlibrisusers.org/ideas?project=ALENH>.)

To ensure the community's voice is heard and that enhancement requests for Aleph are continued, the Aleph Working Group proposes piloting a revised approach to AHA submissions. With AHA submissions adhering to a fixed timeline with scheduled submission dates, the Working Group would like to try a new approach of accepting AHA submissions on a rolling, ongoing basis and sending quarterly reminder emails to the Aleph Listserv to encourage users to submit proposals.

Product Version Survey

Of all the global Aleph customers, only a small percentage (roughly 12.5%) are on Version 24. With the understanding that both current and future developments, i.e. enhancements, for Aleph may be restricted due to the version of Aleph customers are using, the Aleph Working Group put together a survey to be shared with the Aleph community of users to gain more insight on where users are currently and to envision a path forward.

The Aleph Working Group put together a survey in English and coordinated translation into Simplified Chinese. The Working Group notified the community and distributed the surveys on the Aleph Listserv. Additionally, Clarivate was helpful in distributing the survey to institutions that are not served by the Listserv.

The survey received 13 responses in English, and 5 responses in Simplified Chinese.

Of these 18 respondents, half of the respondents are currently on Version 24. Nine institutions responded that they are on earlier versions of Aleph- of which 4 are using Version 23, and 5 are using Version 22 or earlier.

Of these responses, only 2 of the 9 respondents were willing to upgrade to Version 24. For those that answered “no” to a willingness to upgrade to Version 24, they indicated the following reasons:

- Lacks relevant new features, upgrades, or fixes
- Local / custom development
- Hardware or staffing limitations

The responses to the survey also informed us that there are a variety of security concerns using older or unsupported software related to Aleph; RHEL (Red Hat Enterprise Linux); Oracle; and other 3rd party software. A third of respondents are authenticating against third-party products. Half of all respondents will continue using Aleph for the foreseeable future.

Aleph Support

The Aleph Working Group would like to get confirmation and transparency from Clarivate regarding product support. With the small percentage of Aleph users on Version 24, and the survey respondents making clear their intention to stay on Aleph in the coming years, it is important that product support remains, including users on earlier versions of Aleph. The Aleph Working Group will be advocating for and working with Clarivate Aleph Product Management on transparency regarding support for Aleph users.

Goals for 2026/2027

1. Continued Aleph enhancement proposal submissions on AHA from the Aleph user community
2. Confirmation and transparency regarding Aleph product support from Clarivate
3. Retain existing membership in the Aleph Working Group, and grow the membership

Alma Working Group

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

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

Executive Focus

In 2025-2026 the Alma Working Group continued to function as a joint ELUNA/IGeLU forum for enhancement coordination, advocacy with Ex Libris / Clarivate, liaison work across related groups, and practical communication with the Alma community. The year was shaped by the

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continued efforts of enhancing the CERV (AHA/ElectionBuddy) enhancement process, by the planned reorganization (split) of the joint Alma WG structure, and by recurring community concerns around performance, communication, metadata quality, AI, analytics, and UX.

In 2025-2026, the Alma Working Group focused on:

- Running and refining the CERV enhancement process in AHA and ElectionBuddy, including coordination with other Working Groups, Steering Committees and ExLibris (Clarivate).
- Monitoring the 2025 enhancement development cycle and preparing the 2026 enhancement cycle, including community voting, Ex Libris (Clarivate) pointing and submitter follow-up.
- Preparing the future organizational model of the Alma Working Group, including Terms of Reference, membership renewal, volunteer recruitment related to the planned transition to separate ELUNA and IGeLU Alma Working Groups.
- Advocating for the Alma community on performance, support communication, service status transparency, bug fixing, quality assurance and clearer product communication.
- Maintaining liaison channels with Alma-related focus groups, communities of practice and working groups, including CZMG, Alma UX Focus Group, Alma AI Focus Group, Analytics, Alma Digital / Specto Starter, Consortia, Content, Rapido, Primo and others.
- Following emerging strategic topics such as AI assistants, MCP/Nexus integrations, accessibility, open workflows, the Knowledge Assistant, analytics data retention and Community Zone metadata quality.

Enhancements

2025 enhancement development cycle

The Working Group continued to monitor the five Alma CERV 2025 enhancements through Basecamp/AHA and through steward follow-up with submitters and Ex Libris. During the year, several items reached specification or design-review milestones, while others required additional submitter contact or clarification.

Request	Request name	Round 2 votes	Development points	Status / note
AENH-I-36492	Add NOT operator to advanced search	8216	50	Deferred from the August 2026 Release (planned for Nov Release)
AENH-I-36294	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.	6435	20	Released Feb 2026
AENH-I-36487	Record all changes to an Electronic Collection in the History tab with	5743	45	Released Feb 2026

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Request	Request name	Round 2 votes	Development points	Status / note
	meaningful Old Value and New Value information			
AENH-I-36332	Catalog search	5389	30	Released Aug 2026
AENH-I-36485	Improve Alma records with accurate information on staff activity	4771	90	Released Feb 2026

(High Level Solutions and status)

2026 CERV process

2026 was the second year under the CERV process and the first full cycle in which the group could build on lessons learned from the new AHA enhancement portal and ElectionBuddy voting setup. The group strongly focused on process discipline, documentation, handover between products, and communication with the community.

A special thanks goes out to the subgroups, the subgroup coordinators Leon Krauthausen, Bettina Kann and Joe Ferguson, and above all to Leon Krauthausen and Stacie Traill to coordinate the Alma CERV enhancement process.

- The 2026 CERV timeline was finalized in late 2025, with submission deadline on 11 January, Working Group review in January-March, first-round voting in March-April, Ex Libris pointing in April-June, and second-round voting planned for 23 June-7 July.

CERV 2026 action	Dates in agreed timeline
Submission deadline	11 January
WG review	12 January - 9 March
ElectionBuddy setup/testing by SC	10 March - 15 March
Member voting - Round 1	17 March - 14 April
Ex Libris pointing	19 April - 14 June
WG review	15 June - 18 June
ElectionBuddy setup/testing by SC	19 June - 22 June
Member voting - Round 2	23 June - 7 July
Final results announced	13 July

The CERV 2026 timeline was jointly established through close collaboration with the Primo Working Groups, incorporating their valuable feedback and perspectives.

- 213 requests were listed as under review, 211 were considered as 'votable' for the first round.
- The group worked on a new or refreshed enhancements checklist, with emphasis on using AHA as the central place for documentation, lessons learned, duplicate detection, product transfers and to-do tracking.

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- The first voting round closed in April with 67% turnout: 529 members voted out of 786 eligible members, with one abstention.
- The group discussed AHA configuration, including field types, admin responses, private notes, themes, reports/lists, APIs, archiving/deleting old ideas and how email notifications work in AHA.
- In June the Alma Enhancement Coordinators (Leon and Stacie) hosted an AHA workshop for IGeLU and ELUNA Coordinators and Enhancement Coordinators to share experiences and discuss various aspects of AHA configuration and administration, including workflows, reporting capabilities, API integration, idea lifecycle management, and notification settings.
- The second voting round was scheduled for 23 June-7 July and had a voter turnout of 65%. 522 out of 805 eligible institutions voted. There were 4 abstentions.

Final Results:

Proposed enhancements	Votes	Percentage
PENH-I-28472: Improve Link Resolver matching to prevent false matches (50 dev. points)	8843	12,59
AENH-I-36703: Improve reorder functionality for ordered configuration tables (22 dev. points)	7223	10,29
AENH-I-36601: Add ability to sort by due date to Alma Resource Sharing (10 dev. points)	6196	8,82
AENH-I-36691: Provide a live reporting method for current loans which includes patron data (110 dev. points)	5835	8,31
AENH-I-36509: MDE: Select multiple records to release (20 dev. points)	5440	7,75

These top five requests account for a total of 212 development points, leaving us with 28 unused development points for this year (240 development points).

In close consultation and collaboration with ExLibris (Clarivate) Alma product management, we decided to incorporate enhancement number 6 in the CERV development roadmap for 2027, so this year's limit would be exceeded by 22 dev points and taken from next year.

AENH-I-36656: Add options for better vendor management (50 dev. points)	5166	7,36
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Enhancement process lessons learned

The Alma WG used the year to identify practical improvements in the CERV/AHA process:

- Share flows and documentation with other Working Groups to make the process clearer for the community.
- Coordinate more explicitly with Primo and other product Working Groups during the initial review period to detect duplicates and transfers earlier.
- Provide adequate time between voting rounds for back-and-forth with Ex Libris and submitters.

- Clarify use of AHA themes, categories, tags, reports and private comments so they support transparency without creating inconsistent practice across product groups.
- Persist lessons learned in AHA and keep enhancement checklists up to date so the process can be reused by future coordinators and stewards.

Alma advocacy with Ex Libris / Clarivate

- **Performance, service communication and quality assurance**

Performance and service communication remained important advocacy areas. The Working Group documented multiple EU0x performance and outage issues, concerns about inconsistent or insufficient status-page communication, and the need for more detailed, real-time information when Alma, Primo VE, APIs or related services are affected.

- The group escalated questions and remarks about EU0x performance/outage issues to Clarivate via the Support Advisory Group.
- The Working Group asked for clearer criteria concerning when an incident is classified as system down versus performance issue.
- Members emphasized the need for transparent and immediate status-page updates, more detailed communication during incidents, and better RCA reporting.
- The group continued to link performance questions with broader concerns about bug fixing, QA, release quality, backlog management and functional reliability.

- **Product management, roadmap and emerging functionality**

The Alma WG maintained regular contact with Alma Product Management and used the monthly meetings to discuss practical community concerns and new roadmap areas. Topics discussed included MCP/Nexus integrations, AI assistants, AI Metadata Assistant capabilities, AI metadata import, optional OCR, Knowledge Assistant, Open Workflows, accessibility and adoption of new features.

- AI-related discussions included the Alma AI Assistant, funds/ledgers documentation, AI Metadata Assistant language support and optional OCR, AI metadata import, Knowledge Assistant and area-specific agentic AI assistants.
- The group explored whether feature adoption should become a Working Group topic: why features are not adopted when relevant, how healthy adoption could be benchmarked, and how short feature-highlight communications might support uptake.
- Other agenda topics discussed included the Known Issues Platform, Library Open Workflows, Knowledge Assistant in Alma, etc.
- During the July meeting the group briefly discussed Nexus/MCP as an integration-oriented development area and its potential related to library backend workflows.

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Alma-related focus groups and liaison work

As in previous years, a significant part of the Alma WG activity consisted of liaison work with focus groups, communities of practice and related Working Groups.

Group / liaison area	Main topics followed in 2025-2026
Community Zone Management Group (CZMG)	Worked with Ex Libris on Community Zone metadata quality, electronic collection records, selected full-text services, merge rules, CZ ISBN normalization, CONSER loading, CZ Update Task List redesign and metadata enrichment.
Alma UX Focus Group	Continued to follow new Alma UX tracks and design studies, including Physical items Search, linked open data/BIBFRAME-related UX, tree design view, record/split view arrangements and broader UX design goals.
Analytics	Discussed deleted bibliographic records in Analytics, count measures for returns, consortial reporting of bibliographic fields, Link Resolver Usage subject area normalization and data visualization workbooks / external data-set storage.
Alma Digital / Specto	Followed Alma Digital and Specto-related developments, including early adopter activity, Specto Essentials rollout and questions about where UX testing and Alma-Digital responsibilities should sit.
Alma Authority Focus Group	The AAFG was being 'retired' as a Focus group and the WG discussed how to preserve expertise, community feedback and authority-related input after formal retirement by potentially forming a 'other' kind of formal Community group. However, at this point no formal decisions have been made.
Consortia groups	Consortia-related topics included themes in AHA, consortial enhancement tagging, local extensions, support for network members reporting bibliographic fields, and liaison with IGeLU/ELUNA consortia groups.
Content / Autoholdings	The group followed Content WG and Autoholdings Taskforce activity, including survey results, communication about autoholdings and coordination of action planning with Ex Libris.
Primo, Rapido, Leganto, Summon, Rialto and other liaisons	The WG maintained liaison channels with adjacent product groups; included new liaisons, coordination points, feature-highlight examples, and product-transfer considerations during CERV review.

Community Zone Management Group highlights

The CZMG liaison updates were especially substantial. Key CZMG activities in 2025-2026 included:

- Co-authored with Ex Libris a [Knowledge Article on Merge Rules in the Alma Community Zone](#), which provides greater detail about how Ex Libris merges different providers' metadata and helps community members understand when edits to CZ records may be overwritten.
- Providing feedback to Ex Libris at multiple points in development of the CZ Update Task List redesign, including discussion of urgency tags, facets, notes, review sections, row

actions, and collection-level “Report a problem” links. Some CZMG members will serve as Early Access testers of the redesigned Task List later in 2026.

- Provided feedback to Ex Libris during the development of the Upcoming Collections capability, which was released in June 2026
- Provided guidance to Ex Libris on an improved CONSER record loading procedure and retrospective load of CONSER records for electronic serials missing from the CZ. Both were implemented successfully by Ex Libris. Over 500 missing CONSER MARC records were loaded, and the improved load procedure now adds all newly created CONSER records to the CZ, even if they do not have a CZ portfolio yet.
- Approved of change of “Single Journals” CZ collection (Collection ID: 61378000000001486) management level to “Community Managed” and discussed potential merging of Miscellaneous E-Journals and Single Journals collection and the need to evaluate overlap.
- Confirmed with Ex Libris that adding 035 as a local extension is a supported feature of Alma.
- Discussed possible generative AI enrichment of electronic collection/database bibliographic records and evaluated and provided feedback on Ex Libris’s test of the enrichment process.
- Discussed metadata quality and normalization issues, including ISBN-10/ISBN-13 normalization in 020 and 776 fields, authority/preferred-term corrections, and provider metadata quality.
- Discussed policies for adding 0-title databases and the need for better collection-level MARC records where title lists cannot be processed as regular CZ collections.
- Discussed the presence of selected full-text services in the CZ and whether older SFX-style service patterns should continue in Alma or be consolidated.

Communication & organization

Future structure of the Alma Working Group

A central organizational topic in 2025-2026 was the future structure of the joint ELUNA/IGeLU Alma Working Group. The ELUNA SC decided that the Alma WG will transition toward two separate Working Groups, an ELUNA Alma WG and an IGeLU Alma WG, similar to the way Primo Working Groups function. The details discussed included Terms of Reference, communication to the broader community, the status of subgroups and CZMG, shared responsibility for CERV, membership recruitment, selection policy and the need to preserve effective liaison channels.

- Draft Terms of Reference and future-outline documents were discussed in early 2026, with comments requested from members.
- The group planned community communication, recruitment and volunteer follow-up, including a call for volunteers and a separate follow-up with IGeLU-side members.
- The WG discussed what should be retained from the current joint structure and what could improve in a split structure, including meeting times, subgroups engagement, enhancement workflows and broader liaison coordination, etc.
- The last joint meeting was held in July 2026!

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From September 2026, the ELUNA and IGeLU Alma Working Groups will commence their new term with a strong focus on collaboration, ensuring that activities, priorities, and initiatives continue to be coordinated across both groups whenever possible.

A sincere thank you to all members of the Joint Alma Working Group 2025–2026. We are proud of what we have achieved together as one integrated working group, transcending regional differences and fostering a strong spirit of collaboration. It has been a genuine privilege to work with all of you, and we deeply appreciate your dedication, enthusiasm, and contributions throughout this term.

Members	Role
Gijs Noels (LIBIS KU Leuven)	Co-Chair / Coordinator
Catherine Grove (Northwestern University)	Co-Chair / Coordinator
Leon Krauthausen (FU Berlin) / Stacie Traill (University of Minnesota)	Enhancements Coordinator / Deputy Enhancements Coordinator
Bettina Kann (OBVSG, Austria)	Functional Group Chair: Resource Management
Leon Krauthausen (FU Berlin)	Functional Group Chair: Acquisitions (incl Licensing)
Joe Ferguson (University of Tennessee, Knoxville)	Functional Group Chair: Fulfillment & Resource Sharing
Shelly Hypes (University of North Carolina – Charlotte)	Communications/Education (ELUNA) Coordinator
Gijs Noels (LIBIS KU Leuven) / Catherine Grove (Northwestern University)	WG representative: Alma UX
Bettina Kann (OBVSG, Austria) / Gijs Noels (LIBIS KU Leuven)	WG representative: IGeLU Consortia CoP
Vic Jones (Florida Gulf Coast University)	WG representative: ELUNA Alma Digital
Leon Krauthausen (FU Berlin)	WG representative: Analytics
Michelle Eichelberger (SUNY Library Services, US)	WG representative: ELUNA Primo
Emma Clift (Macquarie University)	WG representative: IGeLU Primo
Alec Munhall (DePaul University, US)	WG representative: Leganto
Catherine Grove (Northwestern University)	WG representative: Linked Data CoP
Nick Pavlovic (Liberty University Virginia)	WG representative: Summon
Selina Wang (Oberlin College & Conservatory)	WG representative: Rialto
Marisa Tolbert (CARLI, Consortium of Academic and Research Libraries in Illinois)	WG representative: CZMG
Margaret Corby (Kansas State University)	WG representative: Alma Authority FG

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Members	Role
Xiaotian Chen (Bradley University)	WG representative: Content
Carrie Curie (Minnesota State University – PALS)	WG representative: ELUNA Alma Consortia CoP
Shannon Meaney (Saint Mary's College of California, US)	WG representative: Rapido

Communication with the community

The Working Group continued to treat community communication and transparency as core responsibilities. Some concrete communication-related items listed:

- Communicating CERV status, voting timelines, outcome steps and process changes clearly to the community.
- Maintaining and improving Working Group web presence, including member affiliation / regional location metadata on the IGeLU website.
- Considering short Alma feature highlight communications inspired by Summon weekly feature-highlight emails.
- Providing clearer guidance to the community on the different routes for functional improvement in Alma: CERV, focus groups, support cases, roadmap discussions and product-management escalation.
- Using open sessions, conference presentations and community calls to gather feedback on Alma priorities, AI, UX, accessibility, performance and support communication.

Potential goals for 2026-2027

Organization

1. Implement the new ELUNA Alma WG and IGeLU Alma WG structure with clear Terms of Reference, membership terms, selection procedures and communication channels.
2. Clarify how shared responsibilities will be handled after the split, especially CERV, subgroups, CZMG, Alma UX, Alma AI and cross-product liaison work.
3. Strengthen succession planning and backup roles for key coordination functions, including enhancements coordination, communications and focus-group liaison roles.
4. Use the transition as an opportunity to make meetings more interactive, topic-driven and community-oriented rather than purely update-based.
5. Reinvigorate subgroup memberships and define when short-term taskforces are more effective than permanent structures.

Shared Goals for both the ELUNA as IGeLU Alma Working Group (In close collaboration)

Enhancements

1. Complete the 2026 CERV cycle, document its lessons learned, and ensure final results, Ex Libris pointing outcomes and steward responsibilities are communicated clearly.
2. Monitor accepted 2026 enhancement requests through development, with named stewards, transparent Basecamp/AHA follow-up and regular status checks with Ex Libris.

3. Refine the CERV/AHA/ElectionBuddy workflow, especially product-transfer handling, duplicate detection, AHA field configuration, email notifications, use of private/public comments and timing between voting rounds.
4. Coordinate CERV schedules and procedures with Primo and other product Working Groups to reduce friction for submitters and voters.
5. Maintain reusable checklists, decision logs and lessons learned in AHA or another stable shared location.

Alma topics and advocacy

Continue advocacy on Alma performance, transparent status-page communication, RCA reporting, bug fixing, QA and better communication during incidents.

1. Follow AI and agentic assistant developments in Alma, including AI Metadata Assistant, AI metadata import, Knowledge Assistant, MCP/Nexus integrations and area-specific assistants.
2. Monitor UX and accessibility topics, including next-generation Alma UX tracks.
3. Identify one or more functional topics for open Alma WG sessions or conference sessions at ELUNA/IGeLU 2027.

Transparency & communication

1. Make sure the new Working Group structure remains understandable for the Alma community and for Ex Libris / Clarivate contacts.
2. Keep Working Group webpages current with meeting notes, membership/liaison information, focus-group links and process documentation.
3. Publish concise community updates at key points in the CERV lifecycle and after major product-management discussions.

Alma-Digital /Specto Working Group

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

This report was produced by Kevin O'Donovan, London School of Economics and Political Science, UK

A significant portion of the group's work centred on the rollout of Specto Starter and the broader Specto platform. In late 2025, the group worked closely with Clarivate and colleagues in the ELUNA working group to understand the migration path from Alma Digital to Specto Starter, seeking clearer documentation and timelines, and explanations of dependencies on the New Discovery Experience (NDE). Members repeatedly highlighted that many of Specto's benefits depend on NDE adoption, creating some challenges (or lack of tangible benefits) for institutions unable to migrate immediately.

The group actively participated in the Specto Starter Early Adopters Programme, with Kevin O'Donovan from LSE and Alison Harvey from Cardiff serving as representatives. Throughout early 2026 they tested new Specto functionality in premium sandboxes, reviewed new viewer

technologies and OCR capabilities, gathered feedback from the Early Adopters Basecamp (sharing this with the working group), and identified issues around metadata extraction, PDF processing, accessibility, AV support, and viewer functionality. The group also tracked implementation progress across member institutions, with Cardiff, Bond University, KU Leuven, SLSP, Hong Kong, and other universities sharing migration plans, testing experiences and production deployments.

NDE became one of the year's most frequently discussed topics. The working group consistently reported that adoption remained uneven, with concerns about functionality gaps and user experience. Several members delayed deployments to avoid disruption during academic terms. By mid-2026 the group were of the opinion that customer confusion was often not about the difference between Specto Starter and Full Specto, but rather whether Specto was being used with traditional Primo/Primo VE or with NDE.

One of the group's most significant achievements was successfully establishing and delivering the first formal Alma Digital enhancement voting process, in conjunction with colleagues from the ELUNA working group and with support from other product working groups, who had been through the process before. The group coordinated submission of 25 enhancement requests, with clarification meetings with Clarivate reviewing the development point allocations. We also hosted a public "enhancement pitch" online session where submitters were able to sell their ideas to the community for their votes.

The first voting round opened in June following publication of development point estimates. Several requested enhancements were removed from voting because Clarivate committed to developing them separately, including increased upload limits, representation sorting improvements, cover thumbnails, and display logic improvements. The top two priorities selected by the community were a Bulk Metadata Edit Job, and Additional Entity Types for Alma Digital Representations. The group subsequently negotiated with Clarivate to maximise delivery within an increased available annual development points allocation (from 50 points up to 65, with the additional points permanently coming from SFX).

The working group continued to provide a valuable forum for consortial and community discussions. Topics included discovery-layer challenges, shared digital collections, storage allocation models, DOI management, preservation workflows, and consortial governance and voting processes. The Swiss Library Service Platform (SLSP) provided particularly detailed feedback, highlighting generally low Alma Digital adoption across the consortium and identifying barriers to wider use. Although most discussions focused on Specto Starter, the group also tracked the development of Full Specto. Nick Dennis from Bond University and Ernest Yik from Hong Kong shared early adopter experiences covering AI-assisted metadata extraction, facial and handwriting recognition, and Specto's exhibition functionality.

The group organised and supported multiple community engagement activities, which were joint IGELU/ELUNA open meeting / webinars, enhancement awareness sessions, conference presentations, and mailing listserv discussions. The group also maintained close collaboration with Clarivate product managers throughout the year, with a meeting every month.

Looking forward to 2026/27, the working group (liaising with ELUNA colleagues) will continue

1. its engagement with Clarivate during a period of significant change for the product,
2. influencing product developments including metadata editing, the new CDL workflows, the deposit-form redesign, and viewer enhancements.

The first CERV process undertaken this year was not without its challenges, especially given the product's overlap / embeddedness with Alma and Primo. But the lessons learned from this can be taken into the next CERV round, and the working group is confident that the next CERV process will be much smoother.

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

About Our Community

The Analytics Community of Practice brings together members from both IGeLU and ELUNA, meeting almost every month on the third Tuesday. What makes us unique is that we don't receive development points—instead, we leverage direct communication with Clarivate/Ex Libris to turn your requests into real improvements. When you share challenges through meetings, our mailing list, or conferences, we work to ensure your voice reaches the right people who can implement real solutions.

What We Accomplished in 2025–2026

Major Community Advocacy

One of the year's most significant achievements was our advocacy regarding Analytics data retention. After Clarivate announced plans to remove deleted bibliographic records from Analytics, the Community of Practice collected and documented more than 55 use cases from institutions worldwide demonstrating why all deleted records are essential for assessment, accreditation, collection management, and long-term reporting. The consolidated evidence was presented to Clarivate and successfully influenced the discussion around preserving historical reporting capabilities.

Mixpanel Community Launch

As more institutions adopt the NDE, we established a dedicated Mixpanel sub-group and mailing list to support the growing community. The new forum provides a focused space for discussing Mixpanel reports, exchanging best practices, troubleshooting implementation challenges, and sharing discoveries specific to the Next Discovery Experience analytics platform.

Flexible Definition of Local Parameters Being Sent to Analytics

The Analytics CoP helped with the initial high-level design for incorporating MARC indicators into Analytics bibliographic and holdings metadata. This work helped a later development that supports configuring which parts of a MARC field (indicators and subfields) are sent to Analytics

via local parameters. It now provides richer metadata for institutions to support advanced reporting and analysis.

Network Zone Analytics Improvements

The Analytics CoP collaborated with consortia members and the consortia CoPs to prioritize Network Zone metadata to be made available within Institutional Zone Analytics. A comprehensive requirements document was delivered to Clarivate, identifying the highest-priority fields needed to provide local institutions with full reporting visibility into network-managed bibliographic records.

Consortia Analytics Synchronization

Working closely with Clarivate, we advocated for grouping Analytics updates by consortium during monthly refreshes. This improvement reduces temporary inconsistencies between consortium members and provides more reliable reporting across shared environments.

Continued Analytics Documentation Improvements

We asked Clarivate to update and clarify documentation for numerous Analytics tables, making it easier for you to work with date fields and understand data relationships. Key updates include:

Core Library Operations

- Analytics Objects with creation and modification dates
- Course Reserves with current course start and end dates
- Fulfillment with loan, due, return, renewal, and last renewal dates
- Borrowing and Lending Requests with expanded date information
- Fines and Fees with transaction and creation dates

Electronic Resource Management

- E-Inventory with portfolio and electronic collection creation and modification dates
- Portfolio purchase order and license information
- Electronic collection purchase order information
- Funds Expenditure transaction dates

Digital Services

- Digital Inventory with file creation and modification dates
- Digital Usage with request dates
- Digital Waitlist with registration and session dates

These documentation improvements continue to make Analytics more transparent and significantly reduce the learning curve for both new and experienced report developers.

Data Visualization Community Growth

Data Visualization continued to evolve into an active community within the Analytics CoP under Emily Nilson's leadership.

The initiative began with a community survey that received 54 responses, providing valuable insight into users' technical skills, preferred learning formats, and desired collaboration opportunities.

Based on this feedback, a dedicated Data Visualization Basecamp was launched to facilitate ongoing knowledge sharing, troubleshooting, and resource exchange. In addition, monthly Data Visualization meetings were established, providing a regular forum for demonstrations, technical discussions, community updates, and collaborative problem-solving.

These activities have significantly strengthened collaboration among institutions interested in extending Analytics through modern visualization tools.

Current Initiatives and Future Roadmap

Community Engagement

The Community of Practice continues to pursue several initiatives that will improve Analytics for all users.

Current priorities include:

- Conducting a comprehensive Analytics Community Survey to better understand the reporting challenges faced by institutions and guide future advocacy efforts.
- Launching monthly Analytics Office Hours with rotating time zones and a collaborative "hackathon" format where members can work together to solve reporting challenges.
- Expanding the Data Visualization community through monthly meetings on Zoom, conference meetups at ELUNA conferences, and a hands-on workshop at the IGeLU 2026 Conference.

Collaboration with Clarivate

We continue working closely with Clarivate on several product enhancements, including:

- Establishing a controlled vocabulary for the Link Resolver "Normalized Source" field through collaboration with Clarivate and NISO.
- Supporting an Esploro enhancement that will allow Analytics reports to generate Alma-compatible sets without requiring users to manually modify exported column headers.

Looking Ahead

The Analytics Community of Practice continues to serve as a bridge between the user community and Clarivate, ensuring that libraries' reporting requirements are reflected in future product development.

Our priorities for the coming year remain clear:

1. strengthen community collaboration
2. improve documentation
3. advocate for high-impact Analytics enhancements
4. support emerging technologies such as Mixpanel and Data Visualization
5. continue working with Clarivate to make Analytics more powerful, transparent, and easier to use for libraries worldwide.

We thank all community members who contribute ideas, participate in meetings, and advocate for improvements. Your engagement continues to shape the future of Analytics for the entire Ex Libris/Clarivate community.

CDI – Central Discovery Index

The IGeLU and ELUNA Steering Committees are working with Clarivate|ExLibris on a strategy to handle CDI software enhancements

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.

Overview

The group met roughly monthly throughout the year to coordinate consortial positions vis-à-vis Ex Libris (Alma, Primo/NDE, Rapido) and share experience across member consortia. A closer alignment with the ELUNA group developed over the year, with the explicit goal of "speaking with one voice" to Ex Libris — a joint ELUNA/IGeLU meeting on NDE was held on December 10, and closer collaboration between the two groups is expected going forward.

Group membership changes

- Nov 2025: Aronne replaced Jeanette in the communication/coordination role until spring.
- Jan 2026: Possible step-down of Alex as ELUNA co-chair discussed, in the context of the ELUNA/Consortia CoP alignment.
- Ongoing: Active, recurring participation from Sylvain (coordinator), Maud, Jeanette, Josep (CSUC), Christelle, Stine, Bettina, Johanna, Asbjørn, and Louise, among others, across the year's meetings.

Key actions and follow-ups

NDE / Primo migration

- Ex Libris confirmed January 2028 as the VE sunset date; mandatory migration expected before 2027.
- The group consolidated member "showstoppers" into a joint document with ELUNA, submitted to Ex Libris.
- Most consortia are planning migration for 2027, with approaches varying between phased and all-at-once go-lives to preserve a consistent patron experience.
- Concerns raised and escalated: Rapido request tile too prominent, request-options/full-record sorting inconsistencies, tight fallback timing.

Alma/Primo enhancement voting

- The group ran the 2026 enhancements survey (15 responses, results shared with Ex Libris via Basecamp).
- Prepared and coordinated the 2027 prioritization vote.
- Pushed for a "theme"/consortia filter column on the official Alma (211 items) and Primo (79 items) enhancement ballots to make consortial priorities easier to identify in AHA.

Technical issues escalated to Ex Libris

- NZ→IZ synchronization/indexing regressions: multiple cases identified and escalated by Sylvain to Maud via the consortia fast lane (recurring issue flagged in Nov 2025, Mar 2026, and May 2026).
- Physical Item UX: new interface tested in sandboxes by members (Jeanette, Josep); no major issues found as of mid-2026.
- Fulfilment rules: following advocacy from group coordinator, Ex Libris added date of birth as a fulfilment-unit parameter to its roadmap. Should be released in H2 27.

New tools and features

- Consortial Analytics: four new OOTB reports released (Nov 2025); group compared this with Rialto, following a decision-tree published by Maud and a successful 1.1M-record merge test in Denmark, though some duplicate-detection gaps were flagged.
- Consortial Communication Tool (IZ↔NZ): development followed closely; no native Jira/Zendesk integration planned, Excel export confirmed; members pushed for API/MCP support, analytics, and IZ-to-IZ (not just IZ-NZ) communication; tool released in the August 2026 release.
- Bird's Eye View (single-screen comparison of member configurations): planned for H1 2027; display-logic use case tentatively approved; view-only vs. editable access and AI integration raised as open questions.
- AI/MCP: Ex Libris previewed several AI assistants and MCP/Nexus Connect, potentially allowing institutional AI agents to interact with Alma/Primo data; cost, privacy, and institutional restrictions flagged as key concerns. A proof of concept demonstrated AI automating Primo View configuration.

Community engagement

- Coordinated group input with ELUNA Consortia CoP and organizing efforts for IGeLU 2026.
- Contributed to feedback surveys for Ex Libris/partners (e.g., CARLI's Rapido-for-consortia survey).
- Shared resources across members (e.g., a NotebookLM tool built by a member to browse IGeLU presentations).

Outlook for the coming year

1. **NDE migration** will dominate 2027 planning across nearly all member consortia; continued coordination needed on go-live sequencing, Rapido tile configuration, and localization/translation quality (AI-assisted translation under consideration).
2. **Bird's Eye View** and expanded **consortial analytics/API key management** are expected to mature through 2027 and will require member input on design and access levels.
3. Deepening **collaboration with ELUNA** is likely to continue, potentially reshaping how the group organizes and represents consortial interests to Ex Libris : speaking one voice.
4. **AI/MCP integration** with Alma/Primo is an emerging topic the group will need to track closely, balancing opportunity against cost, privacy, and governance concerns.

The **October 2026 Open Meeting (Taiwan)** will be a key venue for raising unresolved issues, AI use cases, and localization challenges collected throughout the year. Moreover, it will be a moment for recruiting new members for the Consortia CoP group.

Consortia Roadmap and core released features will be followed closely by the group, including the Alma MCP server, new service provider tools and NDE customization.

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.

Key activities in 2025-2026 has been the following:

Issues discussed with Clarivate:

- Functional requirements for CDI lookup functionality enhancement from the 2024 CDI vote
- Known Issues Platform and content support
- CDI OER document attribute
- CZ Updates Task list redesign
 - Advocated for configuration to keep CZ removed localized portfolios active
- Accessibility metadata
- Complexities with Clarivate managing updates from large provider
- Some members early tested and provided feedback on Oxford autoholdings (now live)

Advocacy to Clarivate:

- Need higher quality CZ collection bibliographic records
- Open Access KB collections should NOT be annual collections
- Add more vendor-specific linking parameters for CDI links in record (Intel, Statista, etc.)
- More accurate labelling of book reviews in CDI records
- Shared use cases for Alma Analytics deleted record data with Analytics Community of Practice
- Clear and consistent definition of Open Access to use with providers, etc.

Content CERV Vote

The Content NERS vote was held in late 2025. The requests in the Content CERV are for new providers that have no resources in the knowledge bases. Suggestions for new content by existing providers are handled in Idea Exchange and do not need voting.

57 providers were on the ballot. 40% of eligible members of IGeLU and ELUNA voted. This year four non-English or multilingual providers were prioritized, instead of picking specific languages or regions as we have done in previous years.

Detailed information can be found here:

[https://knowledge.exlibrisgroup.com/Content/New and Upcoming Collections/CERV 2026 - Content Requests - Status Page](https://knowledge.exlibrisgroup.com/Content/New_and_Upcoming_Collections/CERV_2026_-_Content_Requests_-_Status_Page)

Autoholdings Task Force

The Autoholdings Task Force started as the result of the CWG's advocacy. It consists of members from both IGeLU and ELUNA using different Ex Libris systems and members from the CWG. It is chaired by Laurel Baker and Carrie Curie, both from ELUNA.

The aim of the Task Force is to:

- Work with Ex Libris to improve and streamline autoholdings functionality across existing and forthcoming providers
- Use best practices and standards to align functionality with customer needs in a consistent way
- Improve documentation and support

A community survey was held in March/April. The purpose was to gather community feedback (likes, dislikes, reasons why it's not used, etc.) to inform task force priorities. 303 responses were gathered where 88% were using autoholdings and 12% did not.

A high level overview of the survey was presented by the co-chairs at a Content Updates webinar in June: https://youtu.be/EF_wCt80Ccl?si=l8RRv_C_WaoK_6dD

Plans for the coming year

1. Identifying books written or edited by AI
2. Accessibility metadata
3. Open access metadata improvements
4. Newspaper metadata improvements for enhanced discoverability
5. Monitor and provide feedback on content documentation on new platform
6. Support autoholdings taskforce as needed
7. 2027 CERV new provider vote

Current membership list:

- Karin Perols, Karolinska Institutet, Sweden, Coordinator for IGeLU
- Charlie Remy, Dartmouth College, USA, Coordinator for ELUNA
- Noémie Ammann, ETH, Switzerland, IGeLU Primo WG Liaison
- Molly K. Beisler, University of Nevada, Reno, USA
- Xiaotian Chen, Bradley University, USA, Alma WG Liaison
- Cody Hackett, University of Arkansas, USA, Deputy ELUNA coordinator, Rialto Liaison
- Christopher Thomas, University of California at Los Angeles, USA, Alma Law Library SIG Liaison
- Michelle Eichelberger, State University of New York, USA, ELUNA Primo WG Liaison
- Xiaocan Lucy Wang, Brown University, USA, Alma CZMG Liaison
- Lammy Benedictus, UiT The Arctic University of Norway, Deputy IGeLU coordinator
- Anna Couthures-Idrizi, Sciences Po Bibliothèque, France
- Selina Wang, Oberlin College, USA
- Angela Sidman, Yale University Library, USA
- Maria Kovero, Helsinki University Library, Finland
- Marcus Jun, University of California/California Digital Library, USA, ELUNA Consortial CoP Liaison
- Mohammad AlHamad, Texas A&M-Corpus Christi, USA, ELUNA Summon/360 WG Liaison

Steering Committee Liaisons:

- Wei Xuan, IGeLU
- Allen Joines, ELUNA

Customer Support Advisory Group (CSAG)

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

This report was produced by Knut Bøckman, Royal Danish Library , Denmark and Brandon Dudley, Yale University, USA

Known Issues Portal (KIP)

Moved from launch into steady-state operation. Clarivate requested dedicated CSAG points of contact for KIP feedback (Ana K. and Emily H., appointed October 2025). A new KIP Basecamp was established for ongoing feedback management, and a task force (led by Anne-Louise) delivered a substantive package of proposed improvements: splitting the FAQ, an archive policy for resolved issues, aligning KIP statuses with Salesforce, surfacing original report dates, and cutting down notification spam. CSAG also pushed back on regressions being excluded from KIP and proposed a weekly digest of new/closed issues.

Community Survey

The executive summary of the 2025 community support survey was drafted (Wendy) but stalled — Clarivate declined to circulate it while requesting removal of the most candid customer quotes, an ongoing tension CSAG continued to resist.

Support Communication & Documentation

A three-part regional webinar series launched in March 2026 with strong feedback, alongside partial rollout of a new Documentation Center and a new Clarivate-branded support portal. CSAG also flagged inconsistent Clarivate guidance on hijacked/predatory journal handling.

Infrastructure & Incident Management

A cluster of North American outages in late February–March 2026 exposed weaknesses in RCA discoverability and Status Page responsiveness; CSAG proposed concrete fixes (linking RCA to the Status Page, reordering by outage date) and continued pressing for better communication between Clarivate's dev and support teams.

Governance

Under new co-chairs Brandon Dudley and Jessica Hartwigsen, CSAG opened a formal discussion on converting from a time-limited advisory group into a permanent body. After discussions with ELUNA and IGeLU leadership this change will be reflected in the upcoming Terms of Reference review.

Support Self-Service

Over the past few months, the CSAG group has been providing input and concerns regarding Clarivate's upcoming launch of an AI Agent based self-service line of support. The group has also helped Clarivate find candidates for the early testing phase, which is set to conclude by the IGeLU conference this year.

Documentation Advisory Group

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

This report was submitted by François Renaville, Université de Liège, Belgium

At ELUNA 2024, the IGeLU and ELUNA Steering Committees discussed the creation of a Documentation Advisory Group (DAG) in collaboration with Clarivate. A call for members of an advisory board to lead the group was issued in January 2025, and the joint [ELUNA/IGeLU Documentation Advisory Group](#) was officially established in spring 2025.

The group began its activities in fall 2025, with a series of meetings primarily focused on Clarivate's major project to develop a new documentation portal. While the DAG was not directly and deeply involved in the design and implementation of the new portal, which remained a Clarivate-led initiative, the group was able to provide feedback and raise a number of issues related to the new platform and the migration from the previous portal. These discussions included, in particular, the limitations around redirects from existing documentation pages and the future of contributions made through the Community Knowledge initiative.

From spring 2026, the DAG also monitored the community's reactions to this significant change. The group seeks to ensure that feedback from users and institutions is heard, and that community input could help inform future improvements to the new documentation portal. The few meetings during this period were largely driven by Clarivate, which was considered appropriate given the scale and importance of the portal project and the substantial effort invested by Clarivate in its development and rollout.

Looking ahead to 2026-2027, the DAG hopes to establish a more regular meeting schedule and broaden the range of topics discussed, beyond the new documentation portal itself. The group currently has no dedicated coordinator, following Tracy Farmer (Arkansas State University, USA) stepping back from the coordination role. In the meantime, the IGeLU and ELUNA Steering Committee liaisons are jointly taking on the coordination responsibilities.

During summer 2026, the DAG also worked on an international survey aimed at understanding how Clarivate library software customers use and interact with Clarivate documentation. The survey is expected to be launched in September 2026, with initial findings to be shared at the IGeLU 2026 Conference. The survey will provide a better understanding of the community's needs and expectations regarding documentation and will help identify opportunities for Clarivate to further improve its documentation offering.

Although the group is well represented on the ELUNA side, it unfortunately remains underrepresented in terms of participation from outside North America. A call for participation will therefore be shared with the IGeLU community, with the aim of broadening the geographical and institutional representation of this joint group and ensuring that a wider range of perspectives is reflected in its work. A new coordinator will also need to be appointed to support the group's activities going forward.

Documentation Advisory Group Members

- Alison Nordgren (Virginia Polytechnic, USA)
- Margaret Heller (DePaul University, USA)
- Nadine Cormerais-Vernay (Université Grenoble Alpes, France)
- Sofia Slutskaya (Emory University, USA)
- Tracy Farmer (Arkansas State University, USA)
- Ying Xian (Monash University, Australia)
- François Renaville (IGeLU SC Liaison)
- Jason Griffith (ELUNA SC Liaison)
- Melissa Hilbert (Clarivate, VP Professional Services)
- Tali Aviv (Clarivate, Director Customer Education)

Esploro Working Group

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

This report was submitted by Rebecca Cooke, University of the Sunshine Coast, Australia

The Esploro Product Working Group (PWG) represents the interests of the global Esploro user community within IGeLU. The group facilitates engagement with Clarivate Product Management, coordinates participation in the Community Enhancement Request Voting (CERV) process, and promotes collaboration and knowledge sharing among Esploro users worldwide.

Membership

The Esploro PWG currently comprises the following members:

- Rebecca Cooke, University of the Sunshine Coast, Australia – Coordinator; Website Editor
- Maureen Bezanson, Southern Cross University, Australia - Deputy Coordinator; Conference Planning Committee
- Montserrat Rodriguez-Marquez, University of Surrey, United Kingdom – Enhancements Coordinator
- Indira Bermudez Aguilar, International Labour Organisation, Switzerland
- Laura Ballestra, Biblioteca Mario Rostoni, Italy
- Chiara Pincioli, Biblioteca Mario Rostoni, Italy
- Joan Kolarik, Drexel University, United States
- Kaitlyn Houston, Murdoch University, Australia
- Andrew Marsden, University of Greater Manchester, United Kingdom
- Maria Kolt Pederson, Royal Danish Defence College, Denmark
- Jonas Bjerregaard, Royal Danish Defence College, Denmark
- Paolo Buoso, Free University of Bozen-Bolzano, Italy – Steering Committee Liaison

Membership updates

- In 2025, **Hala El-Gohary** stepped down as Deputy Coordinator and withdrew from the working group. We thank Hala for her valuable contributions and commitment to the Esploro community.
- Following Hala's departure, **Maureen Bezanson** was elected Deputy Coordinator and assumed responsibility for representing the PWG on the Conference Planning Committee.
- We also thanked **Susana Cardoso** for her contributions to the working group.
- During the year, we welcomed two new members from the Royal Danish Defence College: **Maria Kolt Pederson** and **Jonas Bjerregaard**.

Engagement with Ex Libris Product Management

The IGeLU Esploro PWG Coordinator, Deputy Coordinator and Steering Committee Liaison, together with their ELUNA counterparts, now meet monthly with Clarivate Esploro Product Management, an increase from meetings previously held every two months.

2026 Chair's Report

These meetings, typically involving **Naomi Conforti** and **Tami Ezra** from Clarivate, focus on:

- Addressing community concerns with current and future functionality
- Advocating for product improvements
- Reviewing roadmap developments
- Collaborating on the CERV enhancement process.

Enhancements Process

Through the 2025 CERV process, the Esploro community selected four enhancement requests for development. All four enhancements were subsequently delivered as part of the 2025-2026 development cycle.

Enhancement Request	Dev Points	Release Delivered
More asset types	5	December 2025-March 2026
Researcher submission of Media Mentions	20	April 2026
Improved management of additional keywords/subjects, both in research hub and research portal input	10	November 2025-May 2026
Ability to harvest OA full text files or links	15	March 2026

In 2026, 25 enhancement requests were submitted for the first round of voting, with 18 progressing to the second round. The final voting round resulted in nine enhancement requests being selected for development by the community and Clarivate:

Enhancement Request	Dev Points
Ability to add new organisation on the fly when adding researchers to an asset (specifically new non-affiliated researcher)	5
Manage Grants: improve on the fly updates to Funder records and Researcher affiliation	5
Display ORCID in asset details	2
Standardise author affiliations across multiple assets (asset level, not researcher level)	10
Esploro – SWORD – Deposits – Integrate a Normalization Process based on a Normalization rule	5
Add Asset Approval status, Asset Approval date, Grant Note, and Comment fields to the search options available in the Advanced Search (Research assets) in the Research Hub	10

2026 Chair's Report

Enhancement Request	Dev Points
Request additional bulk update functionality in Manage Creators/Manage Contributors page of an asset	10
Display ORCID on the Manage Researchers screen in the Research Hub to facilitate merging researcher records and move assets	2
Add closed captions display functionality to file viewer	5

Special thanks to **Montserrat Rodriguez-Marquez** (IGeLU) and **Wendy Robertson** (ELUNA) for their leadership and coordination of the CERV process.

Community Engagement

In collaboration with the ELUNA Esploro Working Group, two community discussion series were held, recorded and made available to the wider Esploro community:

- **Ask Me Anything** (two sessions): an informal forum where community members could raise questions, share experiences and draw upon collective expertise.
- **SDGs in Esploro** (two sessions): discussions exploring Sustainable Development Goal workflows, reporting and implementation within Esploro.

These sessions continue to provide valuable opportunities for community members to exchange ideas and learn from one another's experiences.

IGeLU Conference 2026

Maureen Bezanson will represent the Esploro PWG at the IGeLU 2026 Conference.

This year, four Esploro-related presentations will be featured, matching the number presented in 2025, in addition to the annual PWG update session:

- **Montserrat Rodriguez-Marquez**: Making Accessible a Restricted "Pearl of Wisdom": A Case Study of Esploro's Request Access Functionality
- **Rebecca Cooke**: NTROs in Esploro: Metadata, Workflows and the Messy Reality of Creative Research
- **SUNY College**: Leveraging Local Fields for Title II Compliance in Esploro
- **Maureen Bezanson** (Developers Day): Letters Demystified: Two Approaches to XSL Customisations for Your Alma and Esploro Letters

Additional Activities

During the year, the PWG also:

- Updated and expanded Esploro-related content on the IGeLU website.
- Collaborated with ELUNA to review and clean up Esploro Ideas Exchange entries from 2020-2022.
- Presented at the Hong Kong Web of Science User Group Meeting and the Taiwan Web of Science User Group Meeting, highlighting the benefits of Esploro for research discoverability and impact.

- Participated in a Clarivate-led session on the use of local subject areas within Esploro Analytics.
- Introduced a monthly Esploro Ideas Exchange update, providing the community with summaries of newly submitted enhancement requests via the Esploro email list.

Priorities for 2026/2027

The PWG's priorities for the coming year are to:

1. Maintain monthly working group meetings.
2. Continue monthly engagement with Clarivate Product Management.
3. Provide regular updates through conferences, community events and the IGeLU website.
4. Advance the implementation of the 2026 CERV cycle.
5. Initiate and support the 2027 CERV cycle.
6. Work with Clarivate to align product development with community priorities.
7. Organise additional community discussion sessions in partnership with ELUNA.
8. Continue strengthening communication and collaboration across the global Esploro community.

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 Leganto Product Management. Working Group minutes can be accessed on the [IGeLU website](#) (membership login required).

Working Group membership changes

In April, Eva Reblin (TU Berlin) concluded a four-year term on the Working Group. Eva's extensive experience managing her institution's reading list service provided practical expertise throughout her time with the group.

Her contributions included suggestions during the rollout of the new Leganto user interface, particularly the enhancement of configuration mapping tables to indicate whether parameters were specific to the new or classic interface. This small but significant improvement helped reduce confusion for institutions when both interfaces were available in parallel.

The Working Group plans to issue a call for two new members in October 2026.

2026 enhancement ballot

Ex Libris agreed to develop the top six enhancement requests, allocating the full 100 development points available under the Product Development Collaboration Agreement. The total available development points increased from 75 to 100 this year.

Community participation continued to grow throughout the enhancement process. Round one voting saw 138 members vote on 86 enhancements, while 148 members participated in round two, voting on 21 enhancements. This represents increases of 17% and 27% respectively compared to 2025.

Growth in participation has coincided with the introduction of new enhancement submission, voting platforms and timeline alignment with Alma and Primo in 2025. Submitted enhancement requests increased from 68 in 2024 to 88 in 2025 and 96 in 2026. While a range of factors may have contributed to this growth, the data suggests the new platforms and timeline alignment have supported greater community engagement in both enhancement submission and voting.

The enhancement 'Automated Accessibility Status Detection and Visibility for Uploaded Files' (LENH-I-6145) was split into three separate requests for the second round of voting. LENH-I-6145 ultimately ranked sixth and was approved for development after its scope was revised from 50 to 23 development points. The revised scope was agreed by the Leganto Working Group, Ex Libris and the enhancement submitter, allowing the enhancement to be delivered within the available allocation. Development will focus on the following requirement:

Automated Checks (where possible)

** Basic automated analysis for uploaded PDFs (e.g., presence of text layer, tags, OCR, reading order).*

** File-type awareness (PDF, Word, image-only scans, media).*

Ex Libris Development Points Comment: We would build a file checker that would scan PDFs and create some sort of report. Likely along the lines of "Presence of text layer = yes, OCR = yes, reading order = no" etc. We would store the result of the report alongside the file.

The "Manual Override and Review" and "Reporting and Analytics" components of LENH-I-6145 are not included in the approved scope. However, functionality introduced in the April and May 2026 releases, which allows accessibility statuses and comments to be recorded and reported on through Analytics, may partially address some of the requirements originally proposed in those areas.

Leganto-L mailing list

In collaboration with the ELUNA WG, summaries of recent Idea Exchange posts are shared via the Leganto-L mailing list. These summaries promote new ideas and encourage discussion among community members.

In addition, the WG monitors ongoing discussions on the Leganto-L list to identify key points of interest and emerging concerns within the community. A standing item in each WG meeting is dedicated to reviewing these issues, which are then raised with Ex Libris for further discussion.

IGeLU conference session

At the 2025 IGeLU Conference, the Working Group hosted an interactive workshop that provided attendees with an opportunity to exchange experiences, discuss challenges, and share ideas for using Leganto.

Based on positive community engagement, the Working Group intends to continue offering networking and discussion opportunities at future conferences.

Priorities for the upcoming year

1. Support the development of approved enhancements and facilitate ongoing community input throughout the process.
2. Explore opportunities for focus groups and community engagement on roadmap items, including the new Alma UX for course reserves and citations.
3. Monitor developments in cross-product integrations with Leganto.
4. Recruit new Working Group members for 2027.

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

Overview

During the 2025–2026 cycle, the Linked Open Data Community of Practice Working Group (LOD Working Group) focused on five strategic areas:

1. Supporting education, training, and community engagement
2. Advancing BIBFRAME implementation
3. Monitoring linked data features in Ex Libris discovery services
4. Advocating for Official RDA in RDF in Alma
5. Exploring the integration of linked data, knowledge graphs, and AI

The following is a summary of the group's progress and accomplishments in each of these areas.

Education, Training, and Community Engagement

Subgroup members: Esther Guggenheim, Ken Varnum (convener), Xiaoli Li

The subgroup developed a [survey](#) to gather the community's feedback on how well the available training and documentation for the Alma Linked Open Data Editor for BIBFRAME have met cataloging needs, as well as to identify what additional training or documentation would be most helpful. Initial survey results, based on 14 responses, were reported at the ELUNA 2026 Conference (see Appendix A). The results will also be reported at the IGeLU 2026 Conference to solicit additional feedback from attendees.

Supporting BIBFRAME Implementation

Subgroup members: Amanda Xu, Eke Miedaner, Greta Heng (convener), Heather Pretty, Stefan Schuh, Veronica Parsiale

Guidance for the Linked Open Data Editor for BIBFRAME," which documents additional use cases and examples to address practical cataloging needs. The document is intended to complement Ex Libris's guide, *Navigating the New Linked Open Data Editor for BIBFRAME*.

The subgroup tested the features of the Alma Linked Open Data Editor for BIBFRAME. In addition to reporting issues with exported BIBFRAME data to Alma, the subgroup provided feedback on the [knowledge center documentation](#) to help clarify and improve the documentation. The subgroup also developed, "[Supplemental Guidance for the Linked Open Data Editor for](#)

[BIBFRAME](#),” which documents additional use cases and examples to address practical cataloging needs. The document is intended to complement Ex Libris’s guide, [Navigating the New Linked Open Data Editor for BIBFRAME](#).

Monitoring linked data features in Ex Libris discovery services

Subgroup members: Catherine Grove, Mark Kluzek, Vickie Kline (until June 2026)

The subgroup monitors linked data features incorporated into Ex Libris discovery services. This year, it facilitated the LOD Working Group’s discussion of Ex Libris’s responses to seven questions submitted by a member of the IGeLU Discovery Working Group regarding “impacts and changes to Primo VE with BIBFRAME.”

The discussion resulted in a list of the Group’s perspectives on issues relevant to its area of expertise. As a next step, the group plans to recommend forming a focus group to further investigate and address these issues.

Advocating Support for Official RDA in RDF in Alma

Subgroup members: Ahava Cohen, Joanne Rowan, Laura Akerman, Xiaoli Li (convener)

This year, the subgroup continued its participation in the University of Washington’s [MARC to RDA mapping project](#) and developed a curated [resource list](#) to support learning about and working with RDA/RDF in a linked data environment.

Exploring Linked Data, Knowledge Graphs & AI

Subgroup members: Amanda Xu, Laura Akerman (convener), Jim Hahn (until Dec. 2025)
Lihong Zhu

In addition to examining the intersection of linked data, knowledge graphs, and AI, the subgroup began developing potential partnerships with experts in library linked data and AI. A key highlight was a three-hour presentation at ELUNA Learns 2025, “Linked Data, Knowledge Graphs, and Agentic AI for Library Innovation,” in December 2025.

Other Activities

The working group continued to maintain its communication channels, including the user story form, dashboard, mailing list, and Slack workspace.

Membership

We had several changes in group membership this year. We were sorry to say goodbye to the following colleagues:

- Corinna Baksik (Harvard Library) - ELUNA Primo Liaison
- Hans Schürmann (Swiss Library Service Platform)
- Jim Hahn (University of Pennsylvania)
- Kirsten Clark (University of Minnesota Libraries) - ELUNA Steering Liaison
- Vickie Kline (York College of Pennsylvania) - Summon Liaison
- Wei Xuan (University of Manitoba Libraries) - IGeLU Steering Liaison

We sincerely thank them for their dedicated service and valuable contributions to the Group.

We are also pleased to welcome the following colleagues who joined the group:

- Ahava Cohen (National Library of Israel)
- Birgit Hallerberg (Sciences Po) - IGeLU Steering Liaison
- Eke Miedaner (Swiss Library Service Platform)
- Esther Guggenheim (National Library of Israel)
- Mark Kluzek (University College London) - IGeLU Primo Liaison
- Paul Butler (Dartmouth) - ELUNA Primo Liaison
- Tabitha Ochtera (Brooklyn College library) - ELUNA Steering Liaison

Looking Ahead for 2026-2027

The group will continue to advance the five strategic areas identified for 2025–2026. Given the rapid development of linked data and AI, as well as the adoption of official RDA within the library communities, we anticipate continued and expanding work across all these areas.

We look forward to continued collaboration with other working groups, the broader community, and Ex Libris to advance linked data initiatives and support the evolving needs of our community.

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

Primo Working Group Members

The IGeLU Primo Working Group (WG) is led by Coordinator *Stacey van Groll*, and has a close collaborative relationship with the separate ELUNA Primo WG.

- 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*

Liaisons: From the Alma Working Group Emma Clift and IGeLU Steering Committee Liaison Asbjørn Risan

Engagement with Primo Product Management

Monthly meetings between IGeLU and ELUNA WG leads and Primo Product Management (Nili Natan, Sima Bloch-Winkler, and Ira Kugelman from Jan 2026) provide a forum for raising community concerns, discussing roadmap developments, collaborating on enhancements, and providing feedback on consultation items.

2026 Primo Enhancements cycle

This year again saw strong and growing member participation:

- **97 requests** submitted by the January deadline, undergoing an 8 week review by the Enhancements Team
- **1st voting:** 67,975 votes by 505 members on 71 requests (2025: 66,790 votes, 494 members, 89 requests)
- **2nd voting:** 67,329 votes by 496 members on 15 requests (2025: 59,087 votes, 417 members, 13 requests)

Top accepted enhancements from the second voting round, with scoped development points:

1. **PENH-I-28417:** Add a persistent top banner controlled via the Discovery menu (25)
2. **PENH-I-28428:** Add Dark Mode to NDE UI (70)
3. **PENH-I-28483:** Include Holdings library, location, and call number for physical items in Excel/CSV Export (35)
4. **PENH-I-28445:** More options for the Quick Filters (60)

Note: The Primo allocation for 2026 was 200. The above tallied to 190, with 10 held in reserve for 2027 (210 total).

Notable mention

A new dedicated Product Management review process was introduced prior to voting, as a lesson learned from prior cycles. This process sought confirmation from Product Management of requests placed in the right product cycle for CERV for scoping, pointing, and subsequent development if successful, given increasing overlaps across products and disruption caused by movements after voting rounds.

There were subsequently a high number of movements: 10 Primo submissions moved to Alma, 3 Primo moved to Alma-Digital (aka Specto Starter), and 2 moved from Alma to Primo.

This review process will be repeated in 2027, while noting that Product Management acknowledged the high workload involved and requested that the WG/s highlight likely requests to target in future cycles.

2025 Primo Enhancements delivery

Delivery of successful and additional requests in 2025 and 2026 for the 2025 cycle:

- Jul-Dec 2025 (additional): **PENH-I-28314** Automated SSL certificate management by supporting ACME-like services
- Nov 2025 (additional for NDE UI only): **PENH-I-28385** Remove incremental lazy load for Primo VE brief results when the Number of Results is set to 25 and 50, **PENH-I-28355** Ability to search across sub-collections within a collection, and **PENH-I-28294** Book cover images for generic FRBR results

- Mar 2026: **PENH-I-28330** Need efficient way to test discovery norm rules
- May 2026: **AENH-I-36385** Allow Online Services Order to sort by current access and **PENH-I-28360** Primo VE home page: edit box
- Aug 2026: **PENH-I-28298** Support the use of wildcards in phrase searching with quotation marks
- Nov 2026: **PENH-I-28362** Research Assistant and local records

Special projects

Next Discovery Experience

The IGeLU Primo WG has continued its active involvement in the rollout of the **NDE UI**, with the topic as a standing item on all monthly Product Management meetings for regular updates, raising community feedback, and UI change development advocacy.

Direct community support included a content expansion and revitalisation for [Community Support](#) resources on the IGeLU Primo WG web pages, more NDE UI [bookmarklets](#) added, ongoing logging of [Primo sites URLs](#) switched to the NDE UI (300+ as of Aug 2026), and active listserv monitoring and responses engagement.

IGeLU Primo WG Members are also participating in a dedicated new community-driven **Mixpanel** subgroup under the Analytics Community of Practice, as the sole Analytics platform for the NDE UI.

Primo BO to VE Feature Alignment Project

Advocacy continues for the key highlighted items on the report submitted by the IGeLU Primo WG and ELUNA Primo WG joint project group in April 2024, for the Primo BO to VE Feature Alignment Project, while noting that there continues to be disappointing outcomes of minimal development despite earlier assurances.

The No.1 item for “Ability to edit OTB search, facet, adddata, browse rules” will be delivered in November 2026, with Product Management ultimately only willing to develop a limited scope for search and facet rules, for Date, Creator/Contributor, and Subject field, and for ability to edit and remove rules but not to add rules.

The No.3 and No.4 highlighted items are anticipated will be similarly limited at least as is known thus far for No.3, and were both advised again pushed off the 2026 Roadmap, to the H1 2027 Roadmap.

Advocacy highlights

Advocacy efforts in 2026 included:

- Raising the importance of ongoing availability of all Primo Release Notes with the shift to the new Knowledge Portal, in recognition of key timeline snapshot and often the only place where Primo features are documented
- Pushing for comprehensive NDE UI documentation including deprecated features and planned item timelines
- Advocacy for Ex Libris hosting of NDE UI community addons, as championed also by the ELUNA Primo WG

- Transparency of cross-product developments also in Primo Release Notes as impacting the system of expression
- Identifying a Citation generator issue for 710 \$e relator, with fix anticipated in coming months
- Encouraging support, documentation, training, and development of BIBFRAME for Primo, with concentrated effort only in Alma, and ongoing gaps for Primo with both BIBFRAME and LOD feature management granularity. Ongoing pressure for supporting GND VIAF and external data sources in Linked Open Data, and associated Primo features with enabling search indexing of \$0 and \$1
- Monitoring and raising a QA concern with an uptick in recurring regressions across several 2026 releases
- Consultation on impacts of bot traffic, with enforced feature changes to email features and search limits
- Data and analysis sharing of extensive testing and concerns raised for quality of outcomes for Research Assistant and Natural Language Search, and embedded AI search assistive features to come in 2027, pushed from H2 2026
- Ongoing feature and functionality development which naturally encourages customer enablement, with clear and comprehensive documentation, no defects, and sophisticated development beyond the minimum viable

Looking Ahead

Priorities for the remainder of 2026 and into 2027:

1. Continued involvement in the rollout and feedback cycle for significant Primo developments including the NDE UI, MixPanel Analytics, AI assistive search features, and accessibility focus areas
2. Ongoing advocacy for delivery of highlighted items from the Primo BO to VE Feature Alignment Project
3. Managing the 2027 Primo enhancements cycle, continuing improvements on CERV
4. Supporting the IGeLU Conference, including planning for Primo sessions and WG meetings

RapidILL Working Group

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

This report was produced by Dr. Lynne Porat, University of Haifa, Israel

Objectives of the Working Group

- Foster collaboration and communication between the community and Clarivate
- Accelerate product development
- Assist and identify user needs
- Provide training and support for the community
- Monitor and contribute to the RapidILL Listserv

2026 Chair's Report

Working Group Members

- Dr. Lynne Porat (RapidILL WG Coordinator, Website C Listserv) University of Haifa, Israel
- Sara Sladwick (Enhancements, Roadmap) University of Auckland, New Zealand
- Jane King (Enhancements) Newcastle University, NSW Australia
- Karen O'Donoghue (Conference Planning Committee) La Trobe University, Melbourne, Australia
- Anne Lefevre Université Libre de Bruxelles, Belgium
- Josep Sanmartí Besora (Analytics C Website) Consorci de Serveis Universitaris de Catalunya (CSUC), Spain

IGeLU Steering Committee Liaison

- Birgit Hallerberg (IGeLU SC RapidILL Liaison) Sciences Po, Paris

Previous members

- In October 2025, Kip Darling stepped down as Coordinator and Lynne was chosen to replace him.
- In November 2025, Bronwen Blatchford left and became a member of the Rapido WG.
- In January 2026 Sarah Hornby left the WG and in April 2026 Siobhan McCormack also left.
- In September 2026 Sara Sladwick will be leaving and will be a member of the Alma WG. Hopefully as the Resource Sharing liaison for the Rapid WG.

Collaboration and Liaison

- Lynne Porat continued to liaise with the IGeLU and ELUNA Steering Committee RapidILL liaisons (Birgit Hallerberg and Lori Hilterbrand), the ELUNA RapidILL WG Coordinators (Amanda Rudd and Patrick Martin) and the Clarivate RapidILL Product Director, Mike Richins at the monthly leadership meetings.
- Jane King continued to liaise with the IGeLU Rapido working group.
- Josep Sanmartí Besora began liaising with the Analytics CoP in November 2026 (this is a new role).

Product Development and Enhancements

- Jane King and Sara Sladwick once again contributed to the 2026 RapidILL-Rapido enhancement cycle, evaluating and providing valuable feedback on the 77 ideas. The IGeLU RapidILL working group submitted five ideas, one of which was voted as number two in the final list of 21 ideas that were accepted in the first round. The second round of voting began on 1.9.2026.

Number	Details	WG Member	Votes	% of vote
RAENH-I-1342	Blocking whole Ebook requests in RapidILL	Lynne	1750	6.71%
RAENH-I-1344	Reducing RapidILL turnaround times from 72 hours to 48	Lynne	892	3.42%

2026 Chair's Report

Number	Details	WG Member	Votes	% of vote
RAENH-I-1345	Additional RapidILL fields in Analytics – Reject / Cancellation Reasons	Lynne	597	2.28%
RAENH-I-1323	Increase the Resend time to 12 days	Karen	581	2.23%
RAENH-I-1343	Note to Partner for RapidILL Lending requests	Lynne	406	1.56%

IGeLU 2026 Conference Planning and Participation

- Karen O'Donoghue continued to represent the working group on the Conference Planning Committee reviewing 50 proposals for the main conference and six proposals for the Developers' Day, as well as assisting with the overall planning of the conference.
- Lynne and Sara will participate in the conference in Taiwan.
 - Lynne will present an update about our activities at the "RapidILL Working Group Open Meeting" and moderate all the Rapido / Resource Sharing sessions.
 - Sara will present "The Interloans Glow Up: University of Auckland's Journey with Rapido" together with Mike Richins.
- We hope to meet Asian customers and build stronger relationships with them, as well as working towards recruiting new members to the WG.

Community Engagement and Support

1. Listservs

- We monitor and contribute to discussions on the RapidILL, Rapido, Analytics and Alma listservs, as well as approving membership of the RapidILL listserv.
- We monitor and contribute to discussions on the RapidILL, Rapido, Analytics and Alma listservs, as well as approving membership of the RapidILL listserv.

2. Website

- We maintain the IGeLU RapidILL website, adding the minutes of our meetings, the annual reports, news and details of the Enhancement process.

3. Training

- We planned two webinars on "New Releases and Best Practices" which will be held on 15.9.26 and 16.9.26. (The previous webinar on best practices was initiated by Clarivate and held in April 2022 during Covid). The first one for the Americas and EMEA regions, will be moderated by Dr Lynne Porat and the second one for the APAC region, will be moderated by Sara Slatwick, University of Auckland, IGeLU RapidILL WG.
- We also created new Out of the Box reports of "Mediated vs. Unmediated Borrowing and Lending Requests" with the help of Clarivate's Yoel Kortick. They will be released in October 2026, in addition to the reports we created last year.

4. Monitoring Documentation and Developments

- We closely monitor the RapidILL Roadmap and Clarivate's "Knowledge Portal", especially regarding discrepancies between the information re: using RapidILL via Alma as opposed to via the native RapidILL interface. Last year Clarivate

updated the documentation on Bad Citations and Uploading Holdings after we alerted them of the issues.

- We monitor the Alma and Rapido sections of the “Known Issues” portal for issues relevant to RapidILL (as there is still no RapidILL section).
- We successfully advocated for the improvement of two recent releases which were incomplete: "Additional Information" and "Receive Digitally / Upload File" developments
- We continued to push for an archive of previous years' Roadmaps and the ability to “Define the Work Week” in different time zones, both of which were promised to be taken care of in 2026.

5. Copyright

- We worked with Clarivate on finding a technical solution to the new Chinese and Hong Kong libraries’ requirement for signed declaration forms for every scan request from their print collections.

Next year, the working group will continue to

1. contribute to the enhancement process and conference planning
2. advocating for improvements to the product and assisting users.

The group’s success is due to the dedication, professionalism and talent of ILL and systems’ librarians from all over the world who devote their time and energy to improving the product for the benefit of the 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

This year, the Rapido Working Group continued to support the community by coordinating the enhancement process, bringing user feedback and operational concerns to Clarivate, following ongoing product developments, and maintaining exchange among Rapido libraries.

CERV enhancement process

A major part of the Working Group’s activity was the Rapido/RapidILL CERV enhancement cycle. The group completed the 2025 cycle, followed the implementation discussions for successful enhancement requests, and worked closely with Clarivate on solution designs. Feedback was provided on several developments, including request forms, API functionality and usability improvements.

Lessons learned from previous cycles were collected and used to improve the process for 2026. The Working Group also coordinated with the other product Working Groups to establish a common tracker document and supported the review, clarification, deduplication and preparation of enhancement requests throughout the cycle.

Regular exchange with Clarivate

The Working Group maintained regular meetings with Rapido Product Management to discuss current issues and future developments. Topics included load balancing between borrowing and lending libraries, recall workflows, and NDE readiness.

European Rapido community and POD discussions

The Working Group began exploring interest in establishing a European Rapido POD. Discussions highlighted potential benefits for European libraries as well as challenges such as international shipping, differing service conditions and local resource-sharing practices.

The group prepared outreach and a survey involving libraries in Switzerland, the United Kingdom, Belgium, Italy and Spain in order to gain a clearer picture of current needs and interest in closer European resource-sharing collaboration.

Community communication and outreach

Improving communication with the Rapido community was another priority. Rapido was added to Clarivate's Known Issues Portal, and the Working Group promoted the portal through community channels to increase awareness and encourage reporting.

A dedicated Working Group email address was established to provide the community with a clear contact point. The group also welcomed new members and proactively reached out to institutions joining the Rapido community, including newly announced customers, to introduce the Working Group and encourage participation in IGeLU activities.

Cross-product collaboration

The Working Group continued collaborating with other IGeLU and ELUNA groups on issues extending beyond Rapido itself. This included discussions around CERV coordination, Analytics data retention, accessibility, Alma Resource Sharing dependencies and future changes to the enhancement platforms.

Rialto Working Group

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

This report was produced by Samantha Seah, Singapore Management University, Singapore

Rialto WG Roadmap 2026-2027

April

- Finalising ToR for working group members

May

- CERV Round 1 votes sent to Ex Libris for voting
- Last call for proposals for IGeLU

2026 Chair's Report

June

- ELUNA Conference, meet with SC, liaisons, attend Rialto Sessions, WG updates, and with attending WG members
- CERV votes with Ex Libris for pointing

July

- CERV enhancements finalised without need for Round 2 voting
- Discussion on splitting the WG into ELUNA and IGeLU
- Development of previous CERV enhancements to be completed by July with a final part in August

August

- CERV enhancement begins Aug 1

September

- Call for new working group members for both ELUNA and IGeLU
- Split of ELUNA and IGeLU working groups

October

- IGeLU Conference in Taipei, meet with SC, liaisons, attend Rialto Sessions, WG updates, and with attending WG members
- Finalize groups for 2027 Enhancement Cycle

November

- Call for proposals for ELUNA
- Rialto Focus Group close out

December

- Push for Ex Libris 2028 Roadmap

January 2027

- Sub groups meeting for CERV enhancements, 2 groups 1, ELUNA and 1 IGeLU

February 2027

- Enhancements subgroups reconcile 1st draft suggestions
- Announce to community that voting cycle will commence no later than Feb. 28th
- First call for proposals for IGeLU

March 2027

- Preparing the Enhancement vote for public release

April 2027

- CERV Enhancement Voting @ 15th of the month (requires at least 3 days of review by SCs)
- Last call for proposals for IGeLU

2026 Chair's Report

May 2027

- CERV Round 1 votes sent to Ex Libris for voting
- ELUNA Conference, meet with SC, liaisons, attend Rialto Sessions, WG updates, and with attending WG members

SC Support: CERV Enhancement support April timing for 2027 cycle.

Summary

The ELUNA/IGeLU Joint Rialto Working Group has spent the 2025/2026 year focused on responding to Ex Libris requests for feedback as they overhauled the Rialto product in light of ongoing changes to print ordering, the cessation of ProQuest firm order sales, the withdrawal of EBSCO titles, the development of the new referral model, and the enhancement of Collection Development features. In addition to providing feedback directly to product managers, some members of the working group also joined the focus group specifically created to help provide feedback on proposed changes.

The CERV enhancement cycle began with the closing of submissions on February 22, 2026. The working group put out the first ballot to the community on April 14, and voting closed May 6. After a brief review, the enhancements were sent to Ex Libris for pointing on May 12.

The working group worked on revising its Terms of Reference (ToR) throughout the early winter and spring of 2026. The previous terms did not clearly define member and leadership roles, term limits, recruitment processes, or responsibilities of members. Using the Content Working Group's charter as a guide, the Rialto Working Group revised its existing ToR to incorporate all of these missing elements. As of June 2026, the revised terms are ready for feedback from the Rialto community and will be officially submitted to the steering committee this month.

The current joint group understands that ELUNA would like to see separate working groups for the two organizations. As of July, the joint working group has started discussions to split into ELUNA and IGeLU working groups with plans to start having separate meetings in September.

Rosetta Working Group

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

This report was produced by James Williamson, Southern Methodist University, Dallas, Texas, USA

The Rosetta Working Group (RWG) continues its active engagement in digital preservation and system development through collaborative efforts with Clarivate, the broader IGeLU and ELUNA communities, and specialized sub-working groups. This year, the RWG undertook the effort to refocus the work of the user community following the cancellation of the Rosetta migration. The group reevaluated development priorities, sought to reestablish its enhancement cycle process, and continued its efforts to engage the Rosetta user base in meaningful ways.

Community Activity (2025/2026)

Open Discussions

The RUG continued its open discussion series, holding six sessions in 2025/2026:

- Reversibly fixing invalid files
- Writing Enhancement Requests
- Improvements to the Technical Analyst Workbench
- Reducing the size of Rosetta METS
- Getty's first large-scale storage migration
- Web Archives Metadata Generation with GPT-4

Group Coordination

Collaboration with Ex Libris/Clarivate continued through the participation of group representatives in various related groups, including the Analytics Working Group and the Alma-D Working Group (both IGeLU and ELUNA).

New Leadership

James Williamson (Southern Methodist University) has now filled the coordinator role and will assume a three-year term. Richard Ligtenberg (National Library of the Netherlands) has assumed the lead of the Deliver and Integrations Sub-Working Group.

Nestor Profile

Nestor is a German competence network dedicated to long-term digital preservation and is hosted by the German National Library. The organization develops and maintains community profiles for preservation-related groups and initiatives. This year, both the German-speaking Rosetta User Group (DRAG) and the Rosetta Working Group (RWG) updated their community profiles.

Events

Rosetta Users Group Annual Meeting (2025)

The Rosetta User Group (RUG) held its 2025 annual meeting from October 29-31 in Wellington, New Zealand. Co-hosted by Archives New Zealand and the National Library of New Zealand, the hybrid event was strategically scheduled for the week preceding iPRES 2025, which was also held in Wellington. The meeting brought together 22 participants in person and 33 participants remotely. A major focus of the meeting was shaping the future direction of Rosetta's on-premises roadmap. Participants evaluated development priorities and gathered community feedback on how the Rosetta Working Group (RWG) could better serve the user community and strengthen its activities.

Prioritized enhancement areas:

- Ability to kill processes/Internal process monitoring
- Improvements to the TAW/Expanding the functionality of the TAW
- Better handling of large IEs
- Access rights in consortium
- Structural IE Viewer
- Custom viewers/out-of-the-box viewer

Rosetta Users Group Annual Meeting (2026)

The Rosetta User Group (RUG) held the RUG 2026 meeting from June 8-10 at the Bavarian State Library in Munich, Germany. The hybrid event brought together 38 in-person attendees and 22 remote participants for three days of presentations, discussions, and collaborative planning. The primary goals of the 2026 meeting were to address the priorities identified by the user community at the 2025 meeting in Wellington, evaluate proposals designed to address those priorities, and discuss Clarivate's commitment to Rosetta and its continued development following the launch of Specto and the Specto Preservation component.

DRAG (2026)

The Rosetta community also convened at the 15th Annual German-Speaking Rosetta Users Regional Meeting, held May 11–12, 2026, at the German National Library of Science and Technology (TIB) in Hannover. The event brought together 39 participants to discuss institutional initiatives as well as a discussion on consortia services.

Enhancement Requests

Enhancement Request 9.0

- VAL-04: splitting validation and metadata extraction – updates
- FL-10: assign multiple classifications to metadata extractor
- DI07:Thumbnail Generation
- SOWG30: Fixity job for AIP METS

Enhancement Request 9.1

- SOWG 40: Verify files in CSV deposit package
- DPWG-08: Allow property driven risk with empty parameter
- SOWG32: Configure path and permissions for preservation plan export
- DI07: Thumbnail Generation - File Level

Format Library Releases

- 8.2120 (06/29/2025)
- 8.3120 (09/08/2025)
- 8.3122 (04/14/2026)

Planned activities for 2026/2027

- Host the in-person RUG 2027 meeting (location to be determined).
- Launch a new series of open discussions and quarterly open houses, providing opportunities for users to engage with leadership on Rosetta-related issues and seek assistance with technical questions.
- Publish a bi-monthly newsletter from the coordinator that shares sub-working group minutes, documentation updates, enhancement request progress, and other relevant information.

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.

Due to the current status of the Voyager product, this working group has been placed into 'maintenance mode'.

Mailing Lists

The mailing list is one of our main communication tools and currently has

1. Over 36,000 unique subscribers
2. 177 email lists

The email list can be accessed via <https://exlibrisusers.org/postorius/lists/?page=1>

Report on Steering Committee 2025/2026 Activities and Initiatives

The list of 2025/2026 planned activities were as follows:

- 1. Continue advocacy of the importance of the IGeLU User Community with Clarivate**
This is an on-going activity by the Steering Committee. We have seen success in the various task forces that have been created. In addition, the Working Groups and Communities of Practice continue to effectively represent the community through their advocacy work.
- 2. Increase IGeLU involvement in Clarivate's AI Strategy**
We have had some mixed success here. While the community has not been directly involved in the Clarivate AI Strategy we have had more success at the Product Working Group level.
- 3. Improve internal procedures and policies**
This is an ongoing activity.
- 4. Investigate options to increase IGeLU membership especially amongst under-represented communities**
This is an ongoing activity. We are seeing memberships from countries previously not represented by IGeLU. We are using the IGeLU 2026 conference to increase IGeLU's profile in the Asian community.

5. Deliver the 2026 conference

This is underway.

6. Forward planning for the 2027, 2028 and 2029 conferences

The 2027 and 2028 conferences have been locked in.

7. Investigate options to involve interested IGeLU members in SC activities (e.g. observer status on the SC meetings)

There has been no activity in this area

8. Assist in the activation of regional user groups

Assistance has been provided to the Singapore community and the Hong Kong and Macau Community. In addition the option to host communities on the IGeLU platform is gaining traction.

9. Succession planning

This is an ongoing activity.

Steering Committee 2026/2027 Planned Activities and Initiatives

The list of 2026/2027 planned activities are:

1. Continue advocacy of the importance of the IGeLU User Community with Clarivate
2. Continue advocacy of issues of importance of the IGeLU User Community with Clarivate
3. Increase IGeLU involvement in Clarivate's AI Strategy
4. Improve internal procedures and policies
5. Continue investigating options to increase IGeLU membership especially amongst under-represented communities
6. Deliver the 2027 conference
7. Forward planning for the 2028, 2029 and 2030 conferences
8. Assist and support the activation of national / regional user groups
9. Succession planning

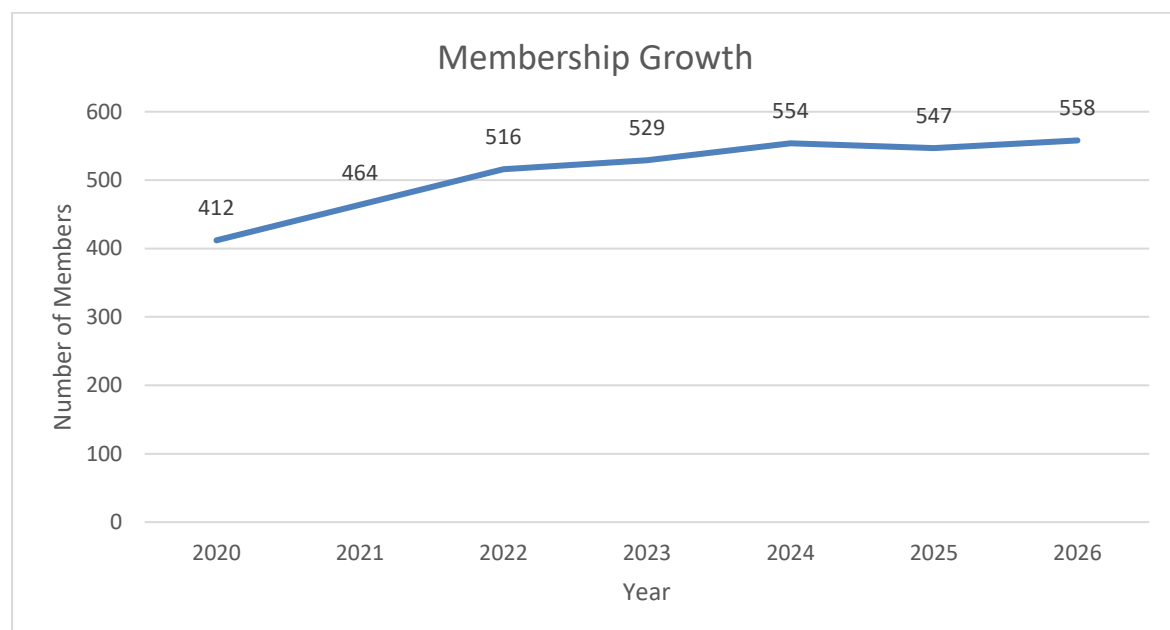
10. Monitor and advocate community input for new Clarivate developments such as SkyRiver, OnCourse and Library Value Dashboard
11. Develop a strategy to handle CDI software enhancements
12. Develop a strategy on how to assign Alma-D / Specto enhancement development points
13. Review the current allocation of enhancement development points to better reflect the requirements of the community

Membership

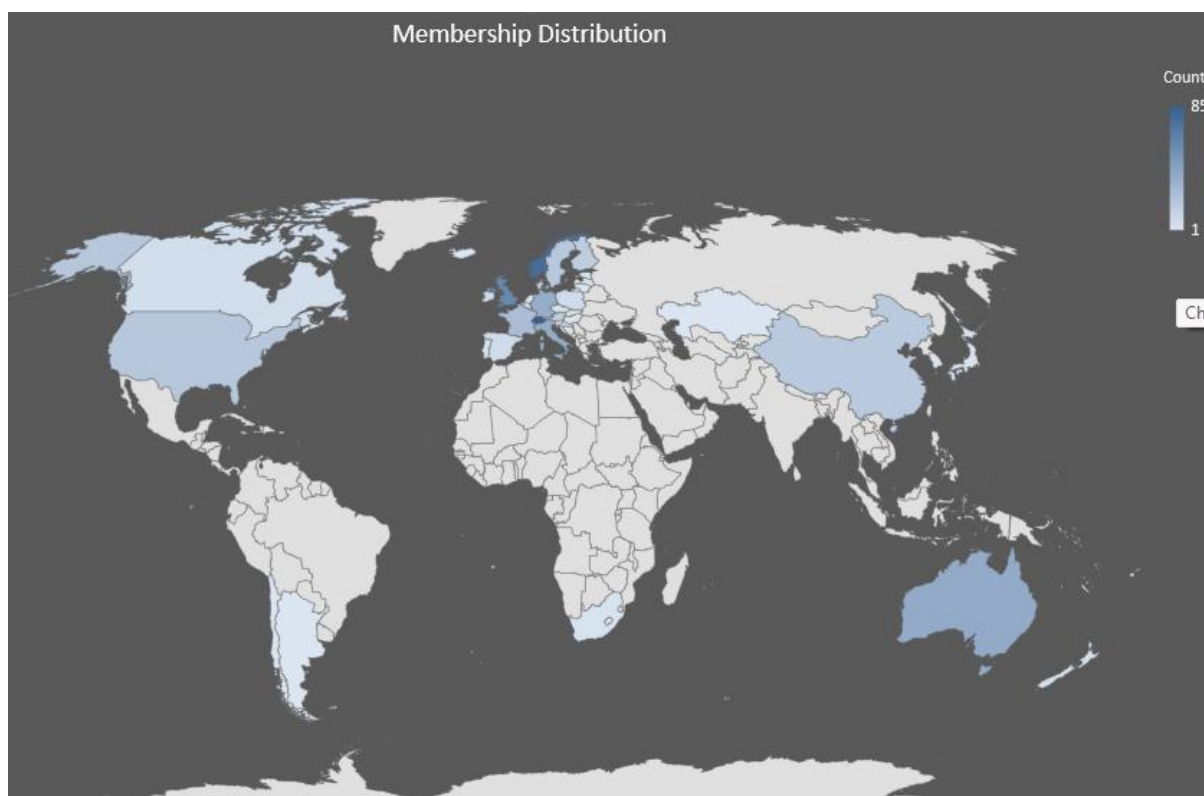
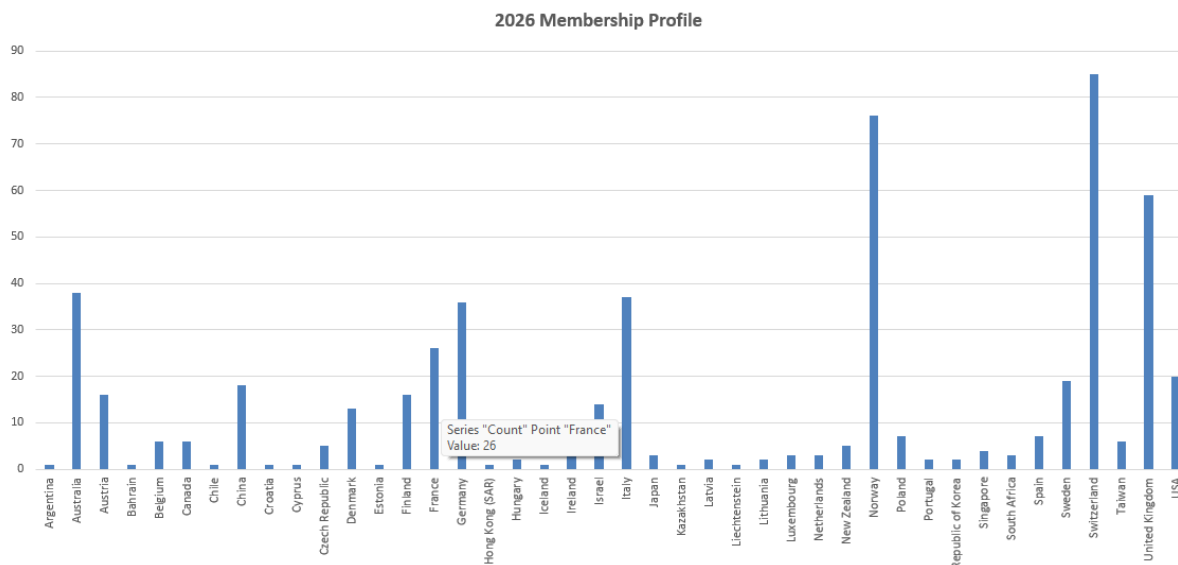
The main benefits of IGeLU membership remain unchanged. These include

- 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 Clarivate|ExLibris 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 and the various working and community of practice groups
- Web and email list hosting for National and Regional Groups
- Discounted conference registration fees

IGeLU's current membership profile is as follows



2026 Chair's Report



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 2026/27 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

List of candidates has been published on the website -

<https://igelu.org/about/organisation/elections/>.

Elections will be undertaken using CERV Election Platform. The successful candidates will be announced at the 2026 Conference during the IGeLU Assembly of Members meeting.