Alma Product Working group Update

Gijs Noels (LIBIS KULeuven) – Catherine Grove (Northwestern), co-chairs

Cardiff September 14, 2022

Who we are

- ELUNA co-chair / Linked Data WG / UX Focus Group – Catherine Grove, Northwestern University

- IGeLU co-chair / Consortia Coord Group chair / UX Focus Group – Gijs Noels, LIBIS KU Leuven

- Deputy Chair / Fulfillment Subgroup / CDL Advisory Group / Rialto WG / UX Focus Group – Joe Ferguson, University of Tennessee

- Acquisitions Subgroup / Analytics CoP – Leon Krauthausen, Freie Universität Berlin

- Resource Management Subgroup / UX Focus Group / IGELU Consortia CoP – Bettina Kann, OBVSG Austria

- Enhancements Coordinator – Mary Grenci, University of Oregon

- ELUNA Steering Committee – Emily Tuck, Texas Medical Center

- IGeLU Steering Committee – Knut Bøckman, Copenhagen University

- Alma Authority Focus Group – Margaret Corby, Kansas State University

- Alma Consortia Focus Group – Brandon Dudley, California State University

- Community Zone Management Group / CDI Advisory Group - Stacie Traill, University of Minnesota

- Content WG – Xiaotian Chen, Bradley University

- Leganto WG – Joe Montibello, Dartmouth College

- Summon WG – Nick Pavlovic, Liberty University

- Primo WG (ELUNA) – Daniel Naas, University of Kentucky

- Primo WG (IGELU) - **??**
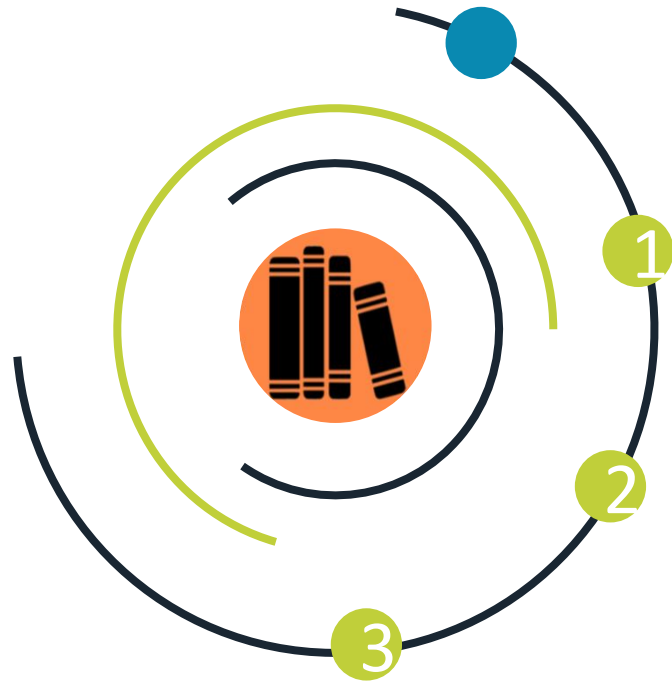
- **NEW Member at Large!!!!???**

Our Work – Serve the Community

(Alma Product Working Group ELUNA/IGeLU Report 2021-2022)

Enhancement Proces

✔ NERS 2022 results
✔ Enhancement procedure Improvements

Alma Related 'Groups'

✔ Functional Subgroups
✔ Focus Groups
✔ Collaboration with 'Other' groups

Collaboration / coordination

✔ Efficiency - streamlining
✔ Direct contact with ExLibris

(more) Transparency

✔ New Website
✔ Communication / Documentation

2022 Enhancements - Results

(High level solutions)

ReqID	Title	ComplexityPoints	TotalVotes
7948	Revised title: Add "Not contains" or "Not equals" to Alma titles and inventory search indexes where "contains" or "equals" currently exist. (Original title: Adding "Does not contain"and "not" search option in Alma)	50	6785
7876	Improve letter editing functionality	120	5075
7705	Make it possible to customize the cancellation reasons	10	4987
7934	Borrowing request with status Ready to be sent - should appear in task list	5	4791
7880	Add support for dynamic collections that are automatically updated using logical sets	80	4748

Enhancement Improvements

- Lessons learned?

    - Make sure to have **detailed** "solutions proposed" from ExLibris prior to the 2nd round of voting
        - Discussed via basecamp together with the submitter – the entire scope should be clear!
        - Detailed plans will help to avoid a change of plans when going to the development phase!

    - Make sure if plans change, during development, that this is being talked through asap with the submitter AND the Alma PWG in a **thorough** way.

    - Every NERS request should have active guidance from the PWG (via functional subgroups)

- Evaluation still ongoing

- Question: cross product enhancement procedures?

- AHA implementation ~~(NERS 2.0)~~

Alma Related 'Groups'

(The many faces of Alma)

Functional Subgroups
- Acquisitions
  - Overlap Analysis Tool released in March
- Fulfillment
- Resource Management
- ~~Alma digital~~

Alma Related 'Groups'

(The many faces of Alma)

- Focus groups
  - UX Focus Group
    - Holdings search
    - MDE priorities / sunset
    - Resource Sharing task list
    - Acquisitions PO Lines
    - Fulfillment Circulation desk
    - …

- Documentation Focus Group (new!)
  - Membership formed
  - Meeting in May

- Alma Authority Focus Group
  - Authority priorities submitted to Ex Libris in 2021
  - Basecamp discussions on non-filing characters and punctuation

Alma Related 'Groups'

(The many faces of Alma)

- Community Zone Management Group
  - CZ bib record editing survey
  - CONSER record ingest process
  - Analysis of local information in CZ records
  - Welcomed 9 new members

- Consortia Groups
  - ELUNA Alma Consortia Focus Group (NA consortia)
  - IGeLU Consortia CoP
  - ELUNA/IGeLU Consortia Coordinator/Advisory Group

- Participation in:
  - CDI advisory Group
  - Analytics CoP
  - Corporate / state libraries CoP

Collaboration / Coordination

(**Too?** many faces of Alma)

- Coordinate groups

    - Work together / not next to each other!
        - Identify 'overlap'
        - Identify and clarify priorities (Efficiency)
        - Serv the entire Community
            - but… be aware of 'local' / specific needs!

    ⇒ Challenge!

- Direct communication with Exlibris

    - Translate/follow-up on the needs of the Community
        - Quarterly release cycle
        - Performance & Quality Assurance
        - Premium Sandbox refresh (Community survey)
        - Follow-up on the Enhancement process – NERS
        - Align with other 'groups'
        - Alma Announcements (thoughts?)
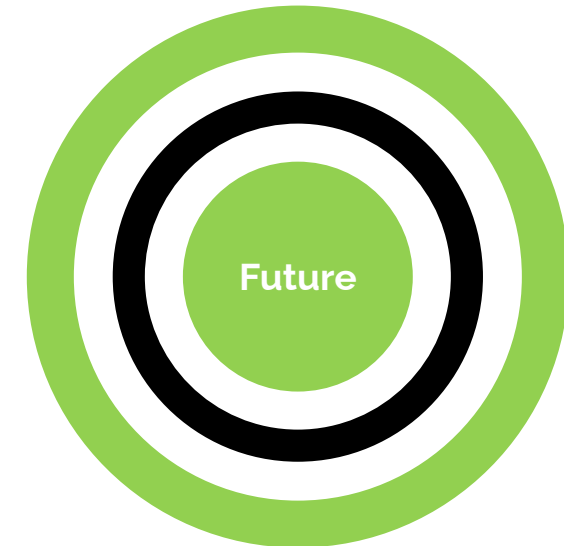   - …

Looking ahead

(Continuity and more Transparency)

- Communication
  - [New website](#)
    - Reports
    - Minutes Alma PWG meetings
    - …
  - Channels
    - Alma announcements?
    - Mailinglist
    - Basecamp environments
    - …

Future

Q&A

- If needed

Questions?

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