



Alma PWG Report

February 2014

Alma PWG – Membership

- Joint PWG for IGeLU and ELUNA
- Membership representative of many library specialist areas
- Members from all regions
- 4 Australians: Megan Lee, Ebe Kartus, Helen Loosli, Dave Allen (IGeLU steering committee)
- Monthly PWG meetings + Monthly Executive meetings with the Ex Libris Alma Developers

Enhancement Process

- Yay! We have one at last !!!
- The IGeLU and ELUNA steering committees have an agreement with Ex Libris for an enhancement process to begin in 2015
- 200 points of complexity have been assigned to the Alma enhancement process
- NERs platform will be used.

Enhancement Process

- Probably the top 20-25 enhancements will be submitted to Ex Libris as a result of user enhancement proposals and a first round voting process
- **Enhancement proposals and voting can only be carried out by IGeLU and ELUNA member institutions**
- Should the total number of complexity points that Ex Libris allocates to the entire list of enhancements then a second round ballot will be held.

Licencing Focus Group May – Sept 2014

April 2014: PWG determined that it's first area of focus would be to convene a licencing focus.

Focus Group Objective: To look in all areas of licencing workflow & management in Alma with a view to making recommendations to Ex Libris for refinement and further development of the related Alma functionality.

Report Period: May to September 2014

Licencing Focus Group

PWG selected the convener and called for volunteer membership via Alma-I:

Convenor:

Janet Morrow - Northeastern University (USA)

Members:

Sunshine Carter - University of Minnesota (USA)

Marilyn Fordyce - University of Otago (NZ)

Heidi Nance - University of Washington (USA)

Saskia Van Elburg - Plymouth University (UK)

Focus Group Recommendations

Recommendations fell within 5 areas and the highest priority recommendations in each are:

Licencing: Record Structure

- “Signed by” field should not have to be populated from the user database as this fields needs to be stable.
- Linking to PO Lines needs to be more robust including the ability to link to closed/cancelled orders; the ability to link to multiple orders and the display of linked orders in its own tab in the license display.
- There should be the ability to locally define statuses to support local naming conventions and workflows.
- The license summary tab needs another field for the second party’s signature information.
- We should be able to add extra, locally-defined fields, as needed, to the summary tab.

Licencing: Workflow

- Alma needs workflows for licensing that will allow the tracking of the entire life cycle of the license.
- License start date should not be a required field.
- Licenses need to be part of the physical resources workflow
- Alma should be able to distinguish between different license types.
- Alma should make license records interoperable with Group Settings for electronic inventory.

Licencing: Terms

- Ex Libris needs to continue to add DLF/ERMI terms to Alma with the goal of offering the entire data set
- There must be support for the addition of locally defined terms both to cover license terms that have come to the fore since DLF/ERMI was written and to allow for local and international issues not covered by DLF/ERMI
- More flexibility and control is needed in license terms' discoverability including more control over the mapping table and the Primo display.
- License term display needs to be developed to work with other information delivery systems than Primo.

Licencing: Functionality

- The ability to add terms and reorder terms using configuration should be more stable and easier to update. It should NOT be based on numbers that can easily be duplicated.
- The authorized user functionality in Acquisitions/Configuration should be linked to licenses to allow us to consistently populate an authorized user field with information that corresponds to other authorized user information related to a specific license allowance.
- There must be a read-only role for licenses to allow for the broad sharing of license information but also allowing for the protection of the integrity of the license as a “document of record”.
- It should be possible to create locally controlled lists of vocabulary to populate the various terms fields, allowing for consistency in display and accuracy of data retrieval.
- To support future migration and/or repurposing of license data. Alma should continue to support relevant standards that allow for mark-up and structuring of license data.

Licencing: Analytics & Reporting

- Licenses should be supported in Analytics allowing the reporting out of license information as well as reports that link license information to payment and inventory information
- We must be able to query licenses using set functionality to allow us to pull out licenses that meet certain criteria or which contain certain licensing terms.
- We should be able to export any of the license tabs using the “Tools” function.

Licencing

- Finally, the group recommends that licensing development be agile and flexible and that users be actively involved in testing throughout the design and implementation process.
- As the industry changes, so does licensing and Alma must keep up, if not be ahead, of the industry direction.

Licencing

- November 2014: Report submitted to Ex Libris
- January 2015: Ex Libris reported that many of the recommendations are in the Roadmap but would not say which ones
- New Roadmap is due soon
- Full report will be circulated via Alma-I next week

Usability

- Ex Libris has acknowledged that it is looking at making changes to the Alma interface.
- Usability is a very highly ranked customer concern with Alma.
- Developers asked the PWG to identify 3-5 institutions to help with the development of future interface developments and testing.
- PWG submitted 5 sites from which Ex Libris will select their development partners shortly.

Roles and Privileges

- Another common customer common area of consternation with Alma
- The January release saw the removal of the Roles and Privileges report thus removing what little definition of what user roles were assigned to an institution's staff users
- The PWG petitioned Ex Libris
- The reports will be reinstated in the April release.