



Working in Partnership: Collaboration Approaches

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We Depend on Customer Involvement and Input



Idea
Exchange

NERS

Focus Groups and
Working Groups

UX • Analytics • Authority
Consortia • Special Focused Group

Your Ideas..

Idea Exchange

- 484 Idea Exchange items have the status completed
- 53 Ideas were completed in 2022
- 124 Ideas planned or accepted
- 28 Ideas are tentatively planned for 2023

NERS

NERS2020 Cycle -6 enhancements
NERS2021 cycle – 6 enhancements planned
NERS2022 cycle – in progress





NERS

NERS

- ELUNA & IGeLU have a contractual agreement with Ex Libris for the enhancement of defined Ex Libris products.
- NERS (the New Enhancements Request System) is used to support voting by ELUNA/IGeLU members.
- NERS is the channel for “road-map commitment,” in accordance with the Product Development Collaboration Agreement signed by Ex Libris, IGeLU, and ELUNA.
- Alma agreement 200 points

NERS cycle

- **2023 Alma Enhancement Timeline:**

- Jan. 22-Feb. 4-- New Enhancements to NERS (2 weeks)
- Feb. 5-Mar. 18 -- Enhancement Team reviews, dedups, scopes, verifies and sets up vote in NERS (6 weeks)
- Mar. 19-Apr. 8 -- First round of voting (3 weeks)
- Apr. 9-11 -- Enhancement Team reviews results, prepares to send to Ex Libris for pointing
- Apr. 12 -- Enhancements to point to Ex Libris
- Apr. 13-June 8 -- Ex Libris pointing work (8 weeks)
- June 12-25 -- Second round of voting on pointed enhancements (2 weeks)

Processing NERS enhancements

- TOP 25 enhancements requests are reviewed
- For each enhancement request
 - Open a basecamp discussion with NERS representative
 - verify that our understanding of the requirement are aligned
 - outline high level solution
 - receiving confirmation for high level solution
 - Work with R&D to receive a baseline estimation
 - Assign complexity points – it is not necessarily the baseline effort
- Complexity points are communicated to PWG for second round of voting
- Final votes communicated to Ex Libris
- List of NERS enhancements for the cycle are finalized according to priority and complexity points

Processing NERS enhancement

- Create Jira for the NERS enhancement
 - Commitment =Contractual
 - Commitment Note = NERS<year>
 - Commitment by = <year> August Release
- Add High level solution to [NERS article](#)
- Share FSD with NERS representative
- Make sure to have a KPI measure
- Once released highlight in Release Notes
- Track KPI measure

Example: Usage of NERS 2020 Features

- **NERS 6962 - Allow fulfillment renew before RS renew**

Patrons can renew a Resource Sharing loan in advance of getting a lender's approval. The loan due date is updated as per the library's loan terms of use before getting the lender's approval. The loan can later be updated if the lender eventually responds with a different renew due date

Total Votes: 3433

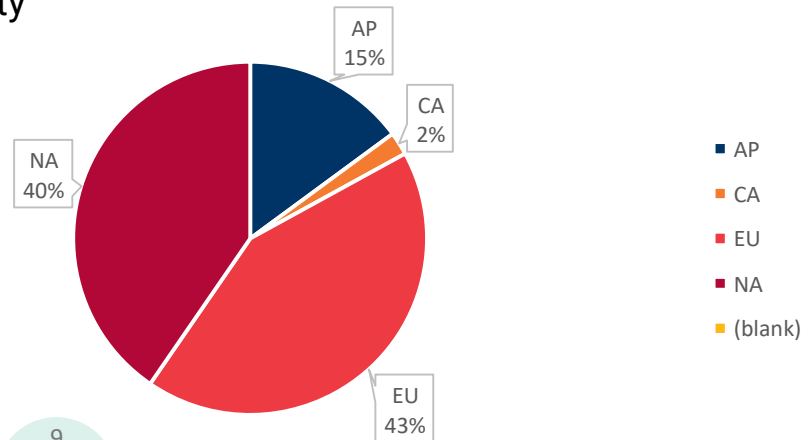
Usage: 11 institutions enabled the functionality

- **NERS # 6676 Enable customer-defined order of locations in the Get It menu**

The institution can define list of libraries, in a prioritized order, and list of locations within a library

Total Votes: 2583

Usage: 47 institutions enabled the functionality





Idea Exchange

Idea Exchange

- The purpose of the Ex Libris Idea Exchange website is to facilitate communication directly between the user and the Ex Libris product management team, to help the team set development priorities.
- The Ex Libris Idea Exchange website is completely open, enabling anyone to submit and review ideas. Each one has 25 votes
- We review the most popular ideas (those that receive more than a certain number of points), and we will respond to them or perhaps ask for more information.

Idea Exchange Statuses

- **Under Review:** When an idea has received a certain number of points, Ex Libris initiates a review of the idea.
- **Accepted:** Accepted Ideas are ideas that Ex Libris acknowledges their importance and is planning to add them to the product roadmap, however there aren't yet specific plans for adding them. When there will be such plans, the idea status will change to Planned. All points associated with the idea are returned to the users who supported it.
- **Planned:** If an idea has already been planned for the product road map or added to the road map on the basis of the user community's support, the idea's status changes to Planned. All points associated with the idea are returned to the users who supported it.
- **Completed:** When an idea whose status is Planned is incorporated in a release, the idea's status changes to Completed and all points associated with the idea are returned to the users who supported it.
- **Already Supported:** From time to time, an idea is submitted for a feature that the product already supports. The status of such an idea appears as Already Supported, and all the points associated with the idea are returned to the users.
- **Closed:** In certain rare cases, an idea is not aligned with our product vision or is not technically feasible. All the points associated with the idea are returned to the users who supported it.

Customer's View

Alma

Your feedback matters to us. Help us improve Alma by telling us what you'd like to see using the message areas below. You can also support something already posted.

We would love to be able to respond to every idea that is submitted, but this is not feasible. We are, however, committed to responding to the most popular ideas—those that have received the most points.

For more information please review our [FAQ](#) and [guidelines](#). Thank you.

How can we improve Alma?

Hot

Top ideas

New

Category

Status

My feedback

366

votes

Vote

Change physical items job -- adding notes

The Change physical items job allows you to add Internal notes 1-3 or Statistical notes 1-3 by REPLACING any notes that already exist in that field, but not by adding the note IN ADDITION TO already existing text. This option needs to be added. Also, the current job allows you to skip records that already contain notes in your selected field but a "successful" run does not report out which records were SKIPPED as a result.



Dana Moshkovits

[Settings](#) - [Admin Console](#) - [Sign out](#)

Alma

[Post a new idea...](#)

All ideas

My feedback

[APIs and Integrations](#) 79

[Acquisition - Funds](#) 14

[Acquisition - Invoices](#) 43

[Acquisition - PO & POLine](#) 95

[Acquisition - Purchase Requests](#) 29

[Acquisition - Receiving](#) 32

[Acquisition - Vendors](#) 17

[Acquisitions - General](#) 174

[Analytics](#) 166

[DARA - Data Analysis Recommendation Assistant](#) 4

[Fulfillment - Fines & Fees](#) 39

[Fulfillment - General](#) 298

[Fulfillment - Loans](#) 82

[Fulfillment - Requests](#) 130

[Link Resolver](#) 34

[Linked Data](#) 2

Admin View

← Ideas Create View

All Time | Forum & category (29) | Internal Status | Public Status (2) | Label | Inactivity

Ideas | Related activity & moderation

1-20 of 2,587 ideas Search

IDEA DETAILS	INTERNAL STATUS	PUBLIC STATUS	ACTIVITY
<input type="checkbox"/> Idea	Internal Status	Jira Issues	Public Status
<input type="checkbox"/> Improve Alma Job Reports for Failed Record Alma / Resource Management - General	—	—	358
<input type="checkbox"/> Change physical items job -- adding notes Alma / Resource Management - General	—	—	366
<input type="checkbox"/> More order type options for Additional Orders Alma / Acquisition - PO & POLine	—	URM-161568 OPEN	● Under Review 340
<input type="checkbox"/> Change due date when patron account expiration date reduced Alma / Fulfillment - Loans	—	URM-97328 OPEN	— 328
<input type="checkbox"/> Physical Item Editor Templates	—	URM-19495 OPEN	— 311

Admin View

- Link to Jira
- Change status
- Merge Ideas
- Communicate with customers
- Reports

Communication & More

- Consistent review of Idea Exchange items
 - Focus on highly voted ideas.
- Keep it live! comment ,ask questions update
- Idea Exchange Update email for selected items
 - Once in quarter
- Upon completion report via Release Notes

Thank you!

