



MetaDoor, Alma, CDL, and ELUNA Closing Session Q & A

Besides being on the working group, are there other ways for interested members to become involved?

Catherine Grove: I'd encourage people to keep an eye out for calls for participation in the variety of focus groups, as well as to join webinars and town halls held by various ELUNA and IGeLU groups (such as the Linked Data Community of Practice), along with those webinars held by Ex Libris.

Will we be able to vote from the Alma working group page on the ELUNA website?

Catherine Grove: Links for enhancement voting for both ELUNA and IGeLU take people to the right place to cast their vote.

How can we sign up for NERS?

Catherine Grove: NERS is the enhancement system/process (to be replaced this upcoming year). If your institution is a member of ELUNA or IGeLU, you can vote for enhancements. You can view the ELUNA membership directory here <https://eluna40.wildapricot.org/>

How does the CZ Working Group interface with MetaDoor?

Catherine Grove: There is no formal relationship between the Community Zone Management Group and Metadoor development, although some members of the CZMG are incidentally at institutions that are development partners for Metadoor.

Is the UX Focus Group a part of the Alma Working Group?

Catherine Grove: The UX Focus Group is not a part of the Alma WG. The UX Focus Group was created by Ex Libris to get input from customers on Alma UX design, and membership includes the chair(s) of the Alma WG.

Could you tell me more about the status of the "alma sandbox premium configuration" cloud app, what might be implemented and when?

Catherine Grove: Ex Libris has developed a cloud app to help with the premium sandbox refresh configuration. It supports saving and restoring user records; and saving integration profiles (and not restoring). Ex Libris has plans for further development of it to backup and restore allowed emails and allowed FTP servers. The app and more information are available here <https://developers.exlibrisgroup.com/appcenter/sandbox-backup-for-refresh/>

Could you provide the URL of your new website?

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

Where can we get more information about the Alma Authority Focus Group?

Catherine Grove: Liz Bodian (lizbodian@brandeis.edu) coordinates the Alma Authority Focus Group for the ELUNA/IGeLU users; and Lili Daie is the Ex Libris representative. We hope to have more public information on this group, and others, available by the end of the calendar year.

During NERS voting there was a suggested enhancement for Alma interface accessibility. Unfortunately, that enhancement didn't make it to the next round. It's one thing to have preferences or desires about the system but when it's something like accessibility, it seems like it shouldn't be something we have to "vote" on. Are there any thoughts on this?

Catherine Grove: I agree that accessibility is important, and it should not be an "enhancement" -- it should be a core part of the software. I appreciate that Ex Libris released a new VPAT in January 2022 (<https://knowledge.exlibrisgroup.com/Cross-Product/Security/Policies/Accessibility>), and as that document and Alma users have indicated, there are still gaps in the accessibility of Alma that Ex Libris should address.

Is there a list of all focus groups?

There is not a current public, comprehensive list of all the focus groups but that is something we want to make sure gets added on to the website!

In regard to Alma Digital Representations, we have the ability to add the full text of a file. It is searchable in Primo (which is awesome) but there doesn't seem to be a way to have the search result to go directly to that file rather than the bib level result.

Catherine Grove: Please submit this as a case to Ex Libris, and if their functionality that does not exist that you'd like to see, as an enhancement for next year.

You spoke about a staff search in Alma. What exactly is that and what type of information will be found there?

Staff search also referred to as Repository search includes search for all titles, Physical Titles, Electronic Titles, Digital Titles, Collections, Items, Portfolios, Files etc.. New UX will replace existing user interface.

With the quarterly functional releases, will there be additional testing done before release to prevent regressions? If there are issues with a release, will we have to wait until the next quarter to get a fix?

We will be continuing with the monthly release for resolving issues, bug fixes - the monthly release will not include new functionality. New functionality will only be included in the quarterly release.

How do DEI issues get included in the review of features, for example inclusion of thesauri in the CZ, etc.? is there a formal process?

One of the aims of our DEI educational programs is to bring awareness to DEI in all of our processes to our designers, programmers, product owners and more. Our aim is to make sure that our teams are aware and understand how algorithms/systems/functionality can always be potentially biased and DEI should be taken into account in the design and coding process. This together with a diverse task force in terms of our teams.

Given the quarterly releases are larger, have you considered releasing to the sandboxes with more time to test than the normal 2 weeks?

Quarterly release will continue to be available on Sandbox env 2 weeks prior to the official release date on production. We do not have plans to change his.

What was the answer to the questions about more than the 2 weeks for larger releases?

Allen Jones: The review period is still 2 weeks.

Can you configure the disability user group feature to be triggered by a statistical category in put parameter instead of a user group parameter? Individuals who have a disability are not typically identified by a user group, as they are across multiple user groups.

Daniel Greenberg: Not currently, we provided an example based on current capabilities in Ama access rights parameters. I'll be more than happy if you can either open an ideas exchange describing how individuals with print disabilities can be recognized by the system or send me an email (daniel.greenberg@clarivate.com)

How does ExLibris' CDL delivery method work with end user's accessibility software? Or more generally, do CDL interface restrictions which prevent saving/copying then lead to lack of access?

Daniel Greenberg: Delivery in Alma includes the wrapper of the content (thumbnails + actions + metadata) and the file / content itself. The accessibility of the Alma viewer has been certified against WCAG A+AA, while other OTB viewer such as the Universal Viewer and Internet Archive Book Reader have their own accessibility declarations however Ex Libris is not accountable for those 3rd party solutions. Regarding the actual content / files, the Alma Viewer uses browser HTML5 rendering engine or tools such as pdf.js or OpenSeadragon which should not impact accessibility; however, the accessibility of the actual content is under the institutions' responsibility.

Are all of the patron features you pointed out also available in Primo Classic?

Daniel Greenberg: Yes, the flow is triggered from the link to the resource so it's agnostic to the source system, e.g. Leganto, Primo or any other source system. Primo and Leganto to provide added value by displaying the various denied notes configured in Alma, in case user is denied access.

Is there an additional fee for Alma Digital?

Yes, however if you are interested in Alma Digital for the sole purpose of CDL then please point this out to your account manager as there is a special fee for CDL.

If you choose to freeze the waitlist after a certain point, can the patron still choose to access it and then it moves on to the next person in the list, or is it truly frozen until the freeze period is over?

Yes, the patron can access the content during the inactivity hours and will be removed from the queue. Once the queue will be reactivated, the next in line will receive a notification.

This demo used Alma Digital. If we want to do this for physical items, does this require any product besides Alma?

What would you like to do for physical items? You shouldn't require an additional system, but feel free to write to me directly to receive further details, at Daniel.greenberg@clarivate.com.

Is it possible to set rules so that if multiple copies are available you can choose to lend EITHER the physical OR the digital copy depending on patron preference?

Currently what you can do is remove selected items from the shelf, so the CDL copy represents only some of the items. This way users will have both options without exceeding own-to-loan ratio. We decided together with the CDL advisory group not to support concurrent lending of digital and physical

for the same copy (eg CDL will be available only if physical is not currently on loan) however this will be discussed for a later phase.