Guide - Enhancements Portal (IGeLU and ELUNA)

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1. What is the Enhancements Portal?

The **Enhancements Portal** is the **IGeLU** and **ELUNA** enhancements platform, supporting active members to submit enhancement requests for their contracted products with Ex Libris, in accordance with the Product Development Collaboration Agreement:

- Product Development Collaboration Agreement (IGeLU member login)
- Product Development Collaboration Agreement (ELUNA member login)

The (**E**x **L**ibris **U**sers) Enhancements Portal is hosted on the vendor Aha platform and in October 2024 replaced the prior development environment branded as "NERS" (**N**ew **E**nhancements **R**equest **S**ystem).

With this transition, the enhancement process was rebranded to **CERV** (pronounced "curve") for **C**ommunity **E**nhancement **R**equests and **V**oting. The platforms used to manage the process are the Enhancements Portal (Aha) and the Voting Portal (ElectionBuddy).

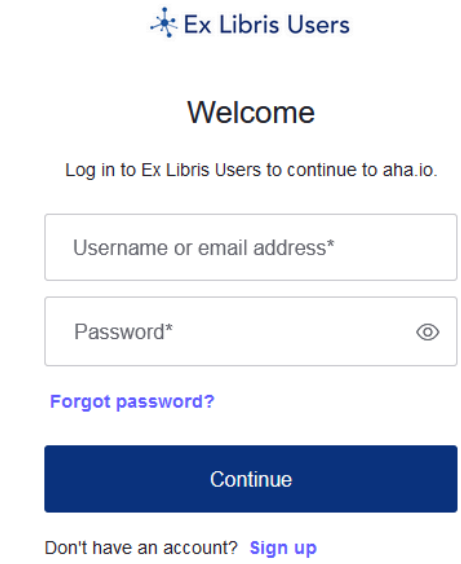
2. Accessing the Enhancements Portal

To access the Enhancements Portal, follow these steps:

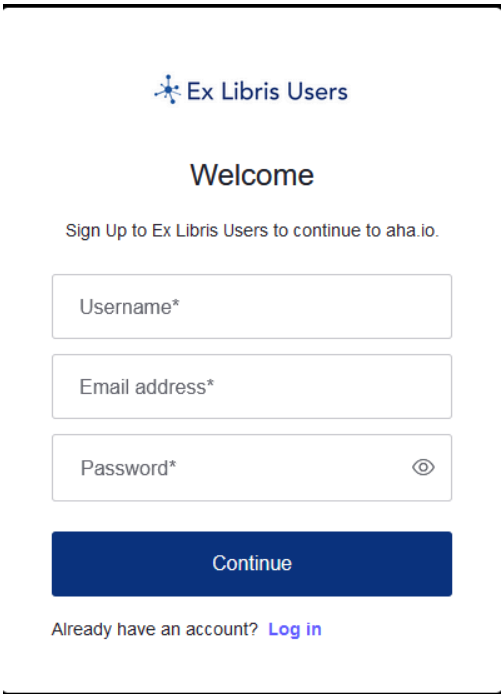
1. Go to the Enhancements Portal URL (https://enhancements.exlibrisusers.org/)
2. Log in using your credentials.

How to Create an Account in the Enhancements Portal?

1. Navigate to https://enhancements.exlibrisusers.org/
2. If you do not have an account, click on 'Sign up"



3. Enter a username, email address, and password. **Please note that institutional email addresses should be used for this system, not private email addresses.**



4. Once you have created an account and/or logged in, you are now in the Enhancements Portal.

3. Login issues and assistance

For questions about the enhancement process or enhancement requests:

- **IGeLU / ELUNA:** Contact the relevant product working group

For accounts and login issues to the Enhancements portal:

- **IGeLU members**: IGeLU Secretariat <secretariat@igelu.org>
- **ELUNA members**: John Greer <john.greer@mso.umt.edu>

For feedback on the Enhancements Portal ELU environment:

- **IGeLU members**: IGeLU Secretariat <secretariat@igelu.org>
- **ELUNA members**: Ryan Edwards <edwardre@wlac.edu>

For issues with the Election Buddy voting system:

For example, if the expected email to submit votes is not received to vote, or you are uncertain of your institution/consortia voting representative

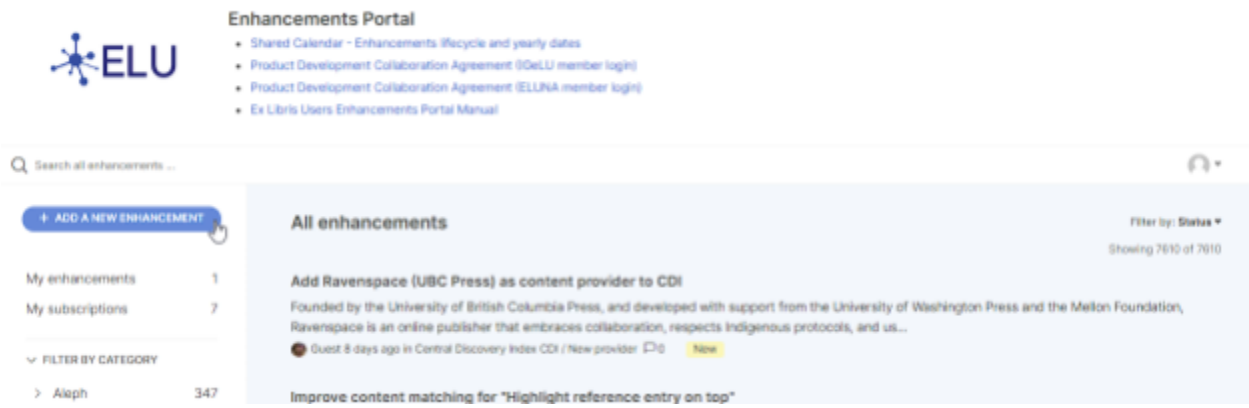
- **Elections Ex Libris Users**: <elections@exlibrisusers.org>

4. Navigating the Enhancements Portal

Within the Enhancements Portal you can submit enhancements requests, explore existing enhancements requests and view their status, and subscribe to get updates.

You can also access **helpful links** at the top of the page:

- Shared Calendar - Enhancements lifecycle and yearly dates
- Product Development Collaboration Agreement (IGeLU member login)
- Product Development Collaboration Agreement (ELUNA member login)
- Ex Libris Users Enhancements Portal Manual
- Export all enhancement requests (current as of 10am UTC)



In the **Home** area showing all enhancement requests:

- Use the **Filter by category** to narrow enhancement requests by product and any categories within that product
- Use the **Filter by Status** option to see enhancement requests by a specific Enhancement Request Status
- Use the **Search all enhancements** option to find enhancements by all displayed information

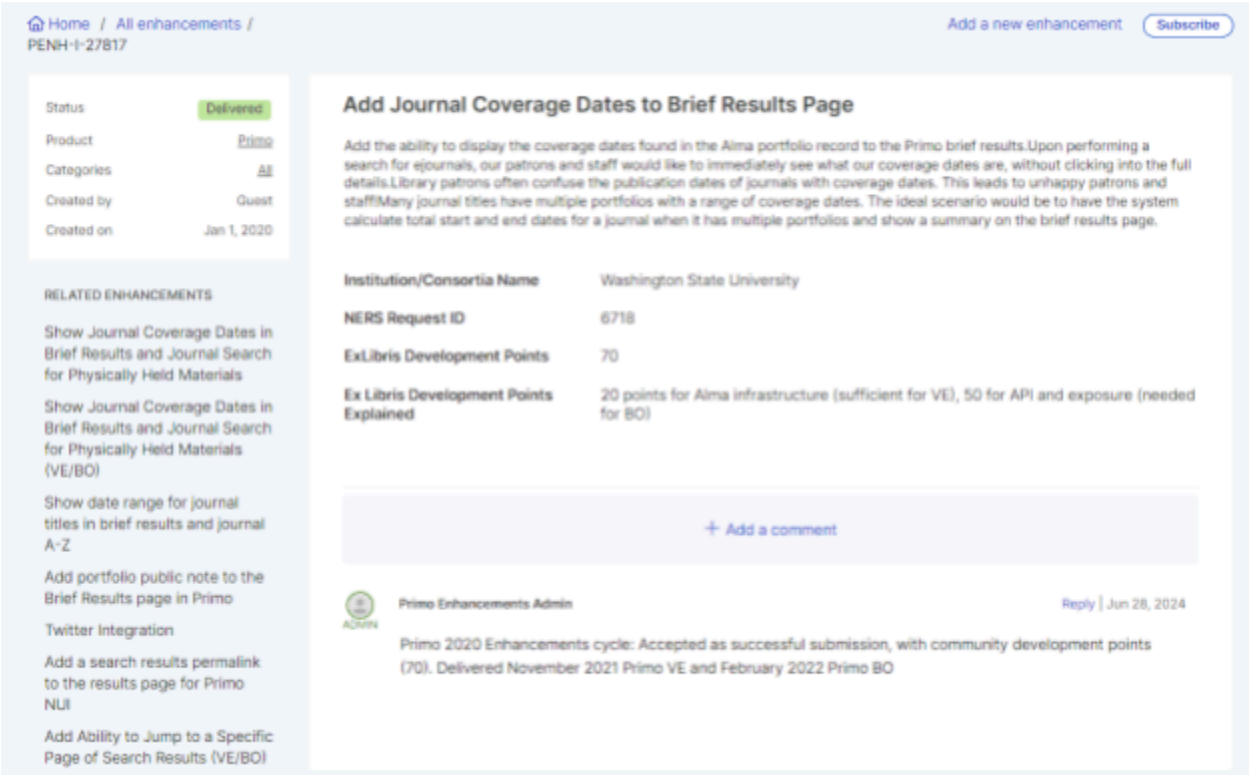
Use the **X** beside active filters to remove them and restore the list to the default view of all enhancement requests.

Each enhancement request has its own detailed view, with fields including:

- Request reference — *example PENH-I-26985*
- Request name
- Request description
- Attachments
- Comments
- Ex Libris Development Points
- Ex Libris Development Points Explained
- NERS Request ID — *legacy information for migrated requests*
- Institution/Consortia Name
- Status — *see the Enhancement Request Status section for definitions*

Fields will only display in an enhancement request if it has information added. For example, NERS Request ID will only display if the enhancement request was migrated from the prior NERS platform.

Coordinators of the corresponding product working group may add Comments to update the enhancement request. Subscribers will receive an email notification when comments are added. Submitters are automatically subscribed to their own submissions, unless they are manually unsubscribed

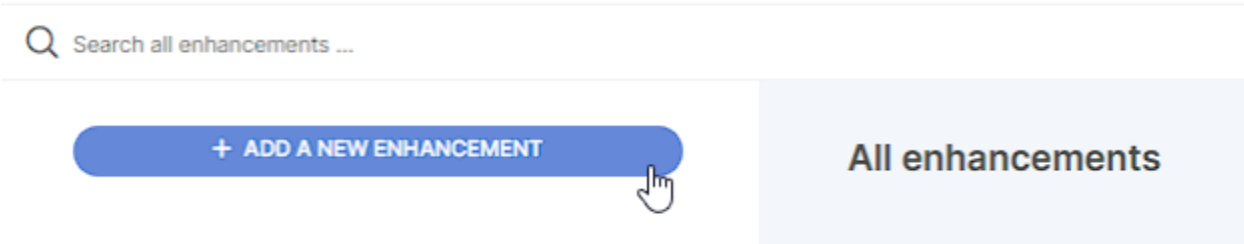


The pagination option shows 10 enhancement requests per page, and cannot be changed.

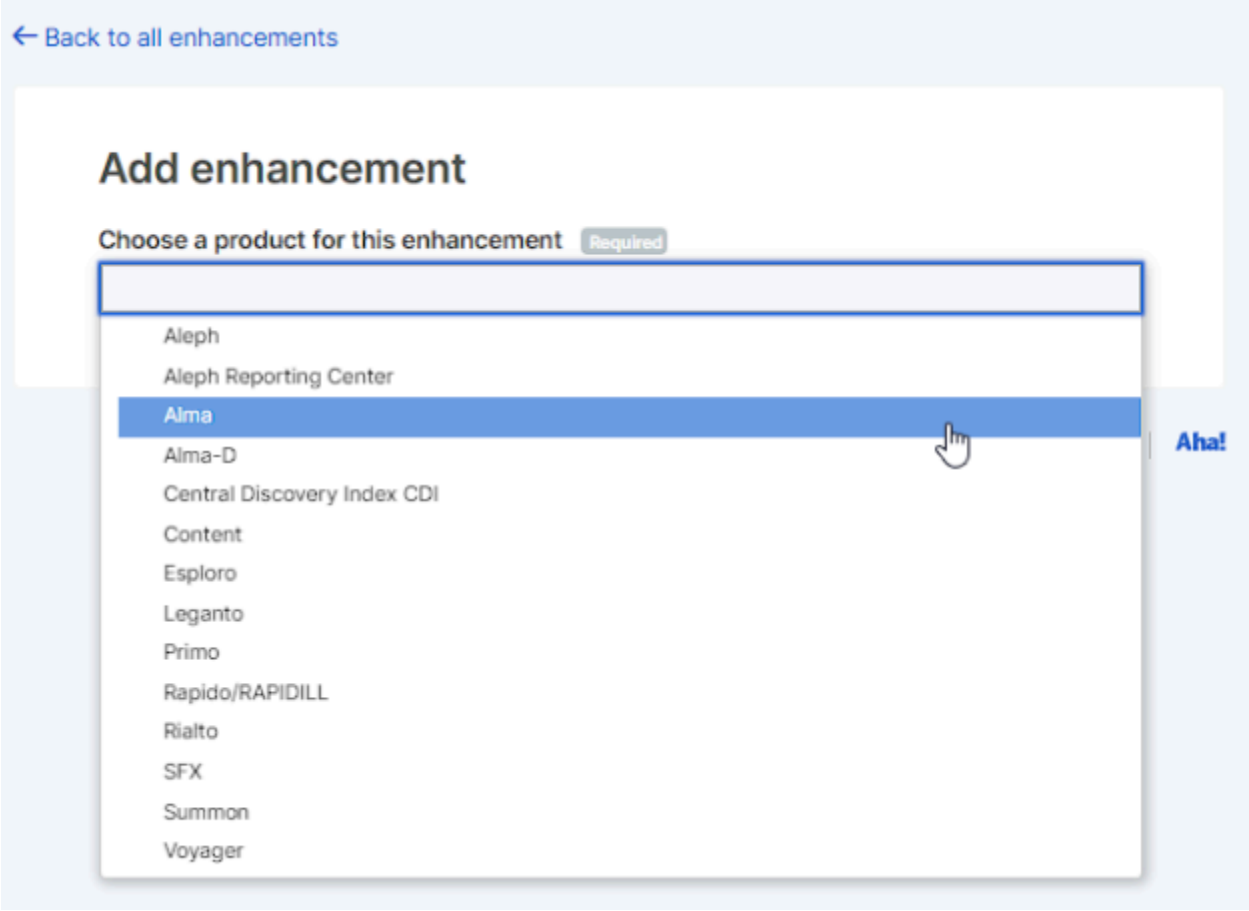
5. Submitting Enhancement Requests

To submit your **New** enhancement request, follow these steps:

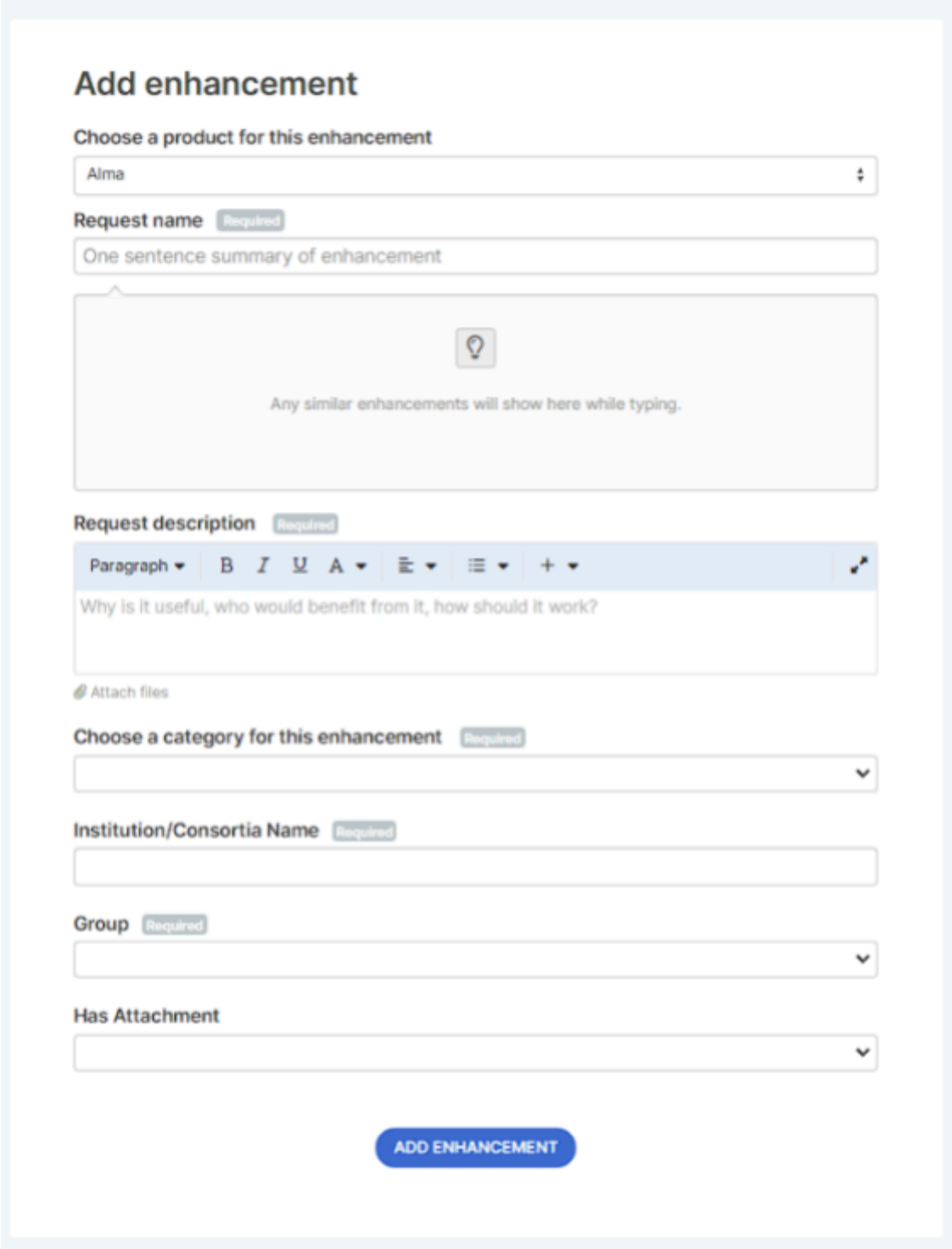
1. Click the "ADD A NEW ENHANCEMENT" button.



2. Choose a product for the enhancement request:



3. Fill out the enhancement request form, providing clear and detailed information in the **Request name** and **Request description**
4. **Attach files** as needed to support your enhancement request
5. If a **Category** field is displayed, choose one from the dropdown menu
6. Add your **Institution/Consortia Name**
7. In the **Group** field, choose ELUNA or IGeLU from the dropdown menu
8. Indicate by Yes or No in the **Has Attachment** field, if you have attached files *(this is required in order to include the information in exports)*
9. Click "**ADD ENHANCEMENT**"



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Editing an enhancement request: You may edit an enhancement request you have submitted (by the account), but only ever do this when at **New** status

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Deleting an enhancement request: There is no option to delete an enhancement request

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Adding a comment to an enhancement request: You can add a comment to an enhancement request, with text and attachment options.

If your comment would be directly relevant to your enhancement request, edit the enhancement request to add the information rather than adding a comment. The review process by the product working group and pointing process by product management is by the enhancement request itself (Name, Description, Attachment), and is not guaranteed to incorporate comments by either the submitter or others.

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After submitting an enhancement request: You will receive an email notification advising of the **New** enhancement request created, with a link back into the Enhancements Portal:

- Sender: Ex Libris Users Enhancements Portal
- Subject line: Idea received: [name of your enhancement request]

Depending on your subscription settings, you may also receive a notice when the status of your enhancement request changes, such as from **Under Review** to **Votable**.

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Note: Submitting an enhancement request may indicate a personal ‘Vote’ on the request as part of the submission process. This can be ignored.

6. Enhancement Request Statuses

An enhancement request will be updated with different statuses in the Enhancements Portal as it moves through an annual enhancement cycle.

Note: If wanting to submit the same enhancement request in the next upcoming cycle which was previously unsuccessful in a prior cycle, please submit a New request. Submitting New requests gives the opportunity to review for any product changes which may have occurred, improve the submission to increase chance of success in the next cycle, and ensures accurate records of an annual enhancement cycle and the lifecycle of submissions within.

These are the possible statuses and their definitions:

New

- The default system-assigned status of a newly entered enhancement request, not yet reviewed by the relevant working group (WG) for the next upcoming product ballot

Under Review

- The status of an enhancement request entered by the deadline for the next upcoming product ballot, which is undergoing review by the relevant WG to determine Votable or Not Votable status

Votable

- The status of a previously new enhancement request which has been reviewed by the relevant WG and will be included in the next upcoming product ballot

Not Votable

- The status of a previously new enhancement request which has been reviewed by the relevant WG and will not be included in the next upcoming product ballot

Received from another workgroup

- Anomaly rare status, for any previously new enhancement request which has been reviewed by the relevant originating product WG and decided in collaboration with another WG to be moved to their product ballot instead. This status is a clear sign of a handover in motion by change to this status by the originating WG. The status will be changed by the destination WG to either Votable or Not Votable, after their own review for their next upcoming product ballot

Archived

- The *final* status of previously Not Votable enhancement requests, and any previously Votable enhancement requests which are not Rejected, Accepted, or Delivered, after the conclusion of the latest product ballot

Rejected

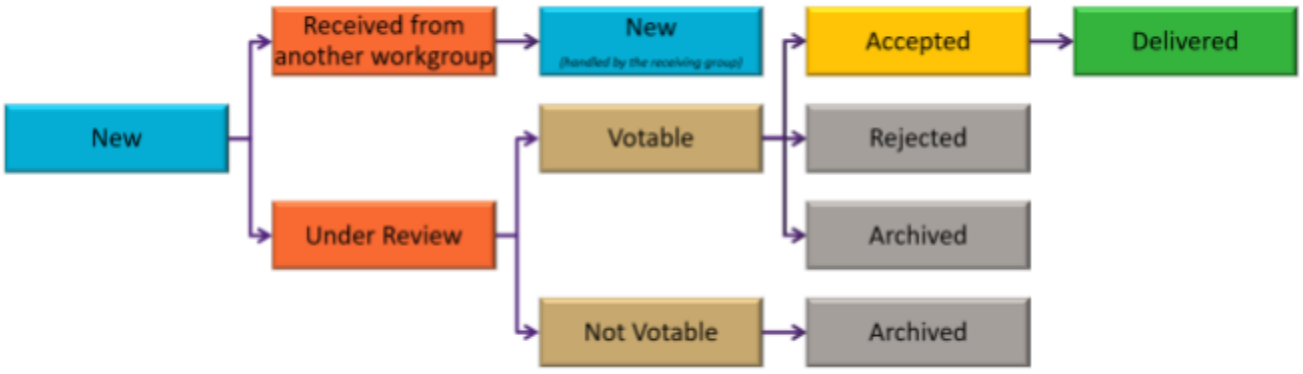
- The *final* status of a previously Votable enhancement request which has been rejected by Ex Libris during the pointing process after the product ballot

Accepted

- The interim status of a Votable enhancement request which has been successful in any prior product ballot, with expectation of delivery by Ex Libris, at which point it would be updated to Delivered

Delivered

- The *final* status of a Votable enhancement request which has been successful in any prior product ballot, moving therefore to Accepted status and then Delivered status when the enhancement is in-product per Product Release



7. Voting on Enhancement Requests

IGeLU and ELUNA member voting on enhancement requests is managed in a separate system Voting Portal called **ElectionBuddy**.

The designated Institution/Consortia voting representative is emailed directly when a voting cycle is opened, with details on how to vote.

It is the responsibility of the Institution/Consortia to maintain up-to-date profile information for voting representative contacts and contracted products in the relevant IGeLU or ELUNA member organisation directory:

- **IGeLU**: Membership directory, and help information
- **ELUNA**: Membership directory, and help information

The relevant product working group communicates information on product enhancement cycles on the corresponding Ex Libris Users product listserv. This includes providing an excel spreadsheet to support overall review of Votable enhancement requests for an active voting cycle.

- Subscribe to **IGeLU/ELUNA listservs**: https://exlibrisusers.org/hyperkitty/