

CSU TS Monthly Release Testing Group

9th Meeting, December 2, 2019 from 2 PM - 3 PM

Attendees: Pam Anan, Jessica Hartwigsen, Christina Hennessey, Luiz Mendes, Kim Valenzuela

Apologies: None

Location: Zoom

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Agenda:

I. Previous Release Results, November and December 2019 Testing Results, and Feedback

- Releases:
 - Merge Patrons: The Merge Patrons feature has returned after it was pulled from Production back in August 2019. The Group will wait to hear back from users if the feature is working properly or not. NOTE: In order for this feature to work in Alma, each campus will need to contact Ex Libris again to have it turned on in their individual Alma instances, even if the function was turned on in August 2019.
 - PO Lines Reclaims: Alma now has a field in the PO Line Details and Vendor Account Details page to set an interval of days before Alma sends a reclaim letter after the initial letter is sent. Some members of the Group stated that they do not do claims in Alma or using Alma's functionalities. See notes below about this in the Goals for 2020.
- Next functional release is January 2020, starting December 15, 2019.
- A new spreadsheet for 2020 was created and posted at Confluence. The link is as follows:
<https://docs.google.com/spreadsheets/d/1CVKIETOxWtKdrVLhMOpVGAIIPPJtqRGcHfpxxxMPic/edit#gid=1871966255>

II. Ex Libris Early Release New Functionalities

- Audrey Ho from Ex Libris contacted David Walker asking if the CSUs would be interested in a "sneak preview of some new functionality that [they're] planning to roll out on the Alma platform. [They've] implemented "WalkMe" (in-app guided walkthroughs) for

several Alma workflows on an internal environment, and these are planned to go-live in the December Alma release.”

- Jessica sent an email to me asking if our Group would be interested in assisting with Ex Libris’s project. I passed our Group interest along to David Walker who passed them along to Ex Libris.
- Rae Cheney from Ex Libris sent out an email about testing this new Alma feature on Monday, 11/25. As an aside, the Release Notes and the email call the new feature “GuideMe” and “GuideMe Step-by-Step Walk-Thrus” instead of “WalkMe.”
 - WalkMe is the vendor that provides the GuideMe platform.
- The GuideMe was tested in the Sandbox following this link:
<https://www.surveymonkey.com/r/5D98C5T>
 - NOTE: The link above may be expired. Please click with caution.
- Those who tested within the Group found the functionality to be useful or helpful to users, but a concern was raised about the GuideMe’s use for those who lacked proper roles to complete the tasks illustrated in the GuideMe and how helpful the GuideMe would be then.
- The Group will check to see if there are more GuideMe procedures each month with the idea of testing them if there are. GuideMe was seen as Ex Libris’s “how-tos,” but it would also have to work at the consortium level as well. The Group will monitor the GuideMes released to see if they conflict with current CSU best practices and policies.
- Pam will announce the GuideMe’s existence at the TS Open Forum scheduled for Thursday, December 12, 2019.

III. Top Trending Book Dashboard Widget

- Israel Yanez, Chair of the Resource Management Functional Committee, inquired with the Resource Management Functional Committee about the Top Trending Book Dashboard Widget that was announced in the December 2019 release notes. He asked if the option should be turned on.
 - There’s a feature in Alma called the Selection and Collection Development Tool in the Data Sharing Profile that is in the Alma Configuration > General > General Configuration > Data Sharing Profile. According to Ex Libris, this tool anonymizes inventory information to share it among other Alma institutions.
 - Currently, the default is set to No and to not anonymize the information.
- Members of the Group expressed concerns with the feature, including:
 - Trusting Ex Libris with the information
 - The data that is shared, i.e., if it’ll eventually lead to spending/monetary data
 - If turning it on sets a precedence for sharing even more
 - Who holds the responsibility of asking CSU libraries to turn the feature on? Will it be CSU policy or individual campus decisions?
- The concerns were expressed to Israel anonymously. Israel mentioned he would consult with Brandon about turning the feature on, if it will be on a voluntary basis or not.

- The Group also recommended to consult with CSU Collection Development about the usefulness of the feature for its members.

IV. Goals for 2020

- Long-term plans for 2020
 - Suggest to the Resource Management Functional Committee to focus on acquisitions-related tasks, especially for serials management (e.g., LHRs, prediction patterns, claiming, etc.)
- Membership
 - Current membership will continue until the end of the fiscal year in June 2020
 - New members will need to be recruited to fulfill testing roles in Resource Management and Electronic Resources.
- A Report to the Resource Management Functional Committee will be submitted in June 2020 as was the previous fiscal-year end report in June 2019.

V. New Items

- Pam will also send out a Doodle poll for the next meeting in March 2020.