Support Assistance

This section is for:

- How to request assistance from the WRLC or ExLibris
- How you can submit an Alma or Primo enhancement idea (and vote) to the ExLibris Idea Exchange
- Information on how the WRLC's Alma Primo Advisory Committee (APAC) partners with fellow organizations, through ExLibris Users of North America (ELUNA), to use the New Enhancements Request System (NERS) to vote advocate and for ExLibris enhancements

- WRLC Service Desk (Request Tracker)
    - Reporting an Issue
- ExLibris Support Portal (Sales Force)
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- ExLibris Idea Exchange
    - Ex Libris Idea Exchange FAQ
    - Ex Libris Idea Exchange Guidelines
- NERS Alma and Primo Enhancement Requests
    - The NERS Process
    - NERS 2024 Suggested Enhancements and Vote Results

WRLC Service Desk (Request Tracker)

WRLC HQ uses a software called Request Tracker or RT to manage help desk service.

Reporting an Issue

To contact the WRLC regarding an issue with one of our services, please use the WRLC Service Desk

Service Desk requests can be submitted:

- Via email to ServiceDesk@wrlc.org
- Using the website found at https://servicedesk.wrlc.org
- By phone at 301-390-2000

Official service hours for coverage are 8:00am to 5:00pm ET during normal business days (Mon-Fri, excluding days the WRLC is closed due to holidays or adverse weather). Outside of service hours, the service desk telephone and request tracking system are monitored for critical issues.

ExLibris Support Portal (Sales Force)

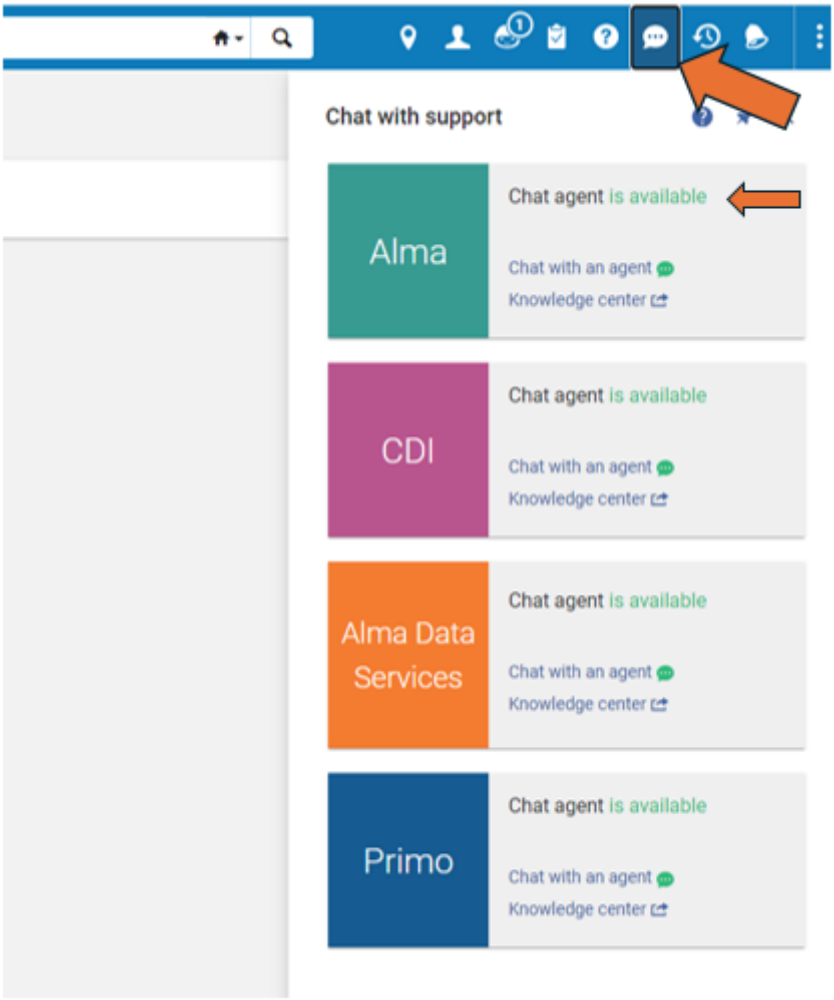
Clarivate (the Ex Libris parent company) uses a software called Sales Force to manage help desk service.

ExLibris Support Portal (Sales Force)

Reporting an Issue

If you cannot find the answer to your Alma or Primo question/issue, in the provided **ExLibris Knowledge Center**, the **ExLibris Support Portal** is available. Learn more about how to submit a case in the **Support Portal User Guide:**

- **If you have an account, please log in before submitting the form**. Logging in allows you to set preferences and view your cases and case history.
- Don't have an account, but would like one? **Register for an account** before your system coordinator can **Grant Permissions** for you to open cases on behalf of your institution.
- You can also use the "Chat with support" functionality available in the top menu ribbon of your Alma Dashboard:



ExLibris Idea Exchange

Have an idea for ExLibris?

Use the ExLibris Idea Exchange to:

- Share your ideas
- Support your favorite ideas
- Get feedback on popular ideas

Ex Libris Idea Exchange FAQ

Ex Libris Idea Exchange FAQs

Q: Can anyone submit an idea?

A: Yes! The Ex Libris Idea Exchange website is completely open, enabling anyone to submit and review ideas. We strongly believe in openness and transparency and apply these principles in all areas of our activity.

Suggesting an idea is simple: you just need to provide your name and email address, and then you are free to submit your idea to the Idea Exchange site. We highly recommend using the institutional email addresses.

Q: How do I show support for ideas I like?

A: You support an idea by clicking the Vote button next to the idea's title and description. The total number of votes that an idea has earned appears just above the Vote button.

Q: Is the Ex Libris Idea Exchange initiative related to the IGeLU and ELUNA enhancement voting process?

A: No. 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 IGeLU and ELUNA enhancement request process (“NERS”) is the only channel for “road-map commitment,” in accordance with the Product Development Collaboration Agreement signed by Ex Libris, IGeLU, and ELUNA.

Popular ideas suggested on the Idea Exchange site can influence the Ex Libris road map but do not have the force of a roadmap commitment. To help drive roadmap commitments for functionality that you or others propose, please participate in the IGeLU and ELUNA enhancement request process.

Q: How many ideas am I allowed to submit?

A: You can potentially submit 25 ideas per login user per forum/product. Here’s why: You are given 25 points to use as desired (see How many ideas may I support?); whenever you submit a new idea, you must give it at least one point.

If an idea that you submitted is then implemented, closed, or found to already exist in the product, your point is returned to you. You can then use it to submit a new idea.

In content forum, you have 50 points to make sure content needs are supported extensively.

Q: How many ideas may I support?

A: You start out with 25 points available for your use per forum (50 points for content). This limitation helps us understand which ideas are the most important to our users.

If you support an idea that is then implemented, closed, or found to already exist in the product, your points for the idea are returned to you.

If you need more points, you can get your points back by removing them from ideas that you have supported. To change your points for an idea, just click My feedback, find the idea, and click the Vote button.

Q: Can I delete an idea that I have submitted?

A: When viewing an idea you've created, you'll see “Delete" link. Click that to delete the idea. However, this is only possible if the idea has no activity and an admin hasn't updated the status. If an idea has activity, it's not possible to delete it.

Q: May I comment on any idea?

A: Absolutely! We encourage you to comment on ideas, and Ex Libris will sometimes comment as well. You do not use up points when you comment on an idea.

Q: What will Ex Libris do with all these ideas?

A: We are eager to receive ideas from anyone who uses our solutions. Such ideas are an invaluable source for helping us understand your needs and priorities. Naturally, we will not be able to respond to every idea that is submitted. We will, however, 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.

Q: How can I find out what the status of an idea is?

A: Just beneath the title of an idea, you can see the idea’s status. Note that no status is assigned to an idea until it has received a certain number of points. The following status types are available:

- Under Review: When an idea has received a certain number of points, Ex Libris initiates a review of the idea, and its status changes to Under Review. You can still support and comment on the idea.
- Accepted: If an idea has already been added to the product backlog or is added to the backlog on the basis of the user community’s support, the idea’s status changes to 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. When feasible, Ex Libris also adds release dates to ideas whose status is 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. In such cases, Ex Libris updates the status of the idea to Closed and provides an explanation. All the points associated with the idea are returned to the users who supported it.

Q: I submitted an idea, but I haven't seen a response from Ex Libris. Why is that?

A: 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. Our ongoing experience since the launch of the Idea Exchange site has led us to adopt an approach where we continually look at the top ideas for analysis and possible adoption into our products' roadmap on a monthly basis.

Q: What are the rules for the Idea Exchange website?

A: Please check out the **Idea Exchange guidelines**.

Q: What's the difference between hot ideas and top ideas?

A: Hot ideas are those that received the most points in the past week. Top ideas are those with the greatest number of points in their category, regardless of the time frame. For example, a new idea that received 30 points in the past week is "hotter" than a 500-vote idea that's been around for some time and received fewer than 30 points in the past week.

Q: Is it possible to 'opt out from providing a link to the Idea Exchange site from the Ex Libris product I use?

A: Yes. Currently Ex Libris Alma supports a link from the Help menu to the Idea Exchange site. This link can be turned on or off by your administrator. Similar capabilities will be developed for the other Ex Libris products participating in the Idea Exchange site.

Q: How do I login to Idea Exchange?

A: Previously login to Ideas Exchange used an email address. Users were be required to click a link in their email to complete the authentication process. There is now a change in the authentication

method. If you previously authenticated with your email, you will be required to set a new password before providing feedback.

Authentication is also possible through social accounts such as Google or Facebook. We highly encourage our customers to login using your business email.

Q: What happens to old ideas with very few votes?

A: In order for ideas to be properly addressed in a timely manner, Alma ideas with fewer than 20 votes two years after being submitted will be set to "Closed". This releases votes for more desirable ideas to be promoted. This cleanup procedure is conducted annually with a different criteria for each product.

Ex Libris Idea Exchange Guidelines

Ex Libris Idea Exchange Guidelines

Keep these tips in mind when submitting an idea:

- **Start by searching your product forum for the feature that you'd like to suggest**. A search will help you avoid wasting time on writing up an idea that has already been submitted.

- **Write a clear title**. Make your title and description as specific as possible so that other users and the Ex Libris team will understand them easily.

- **Limit each submission to one idea**. Don't worry—you can submit multiple ideas. One idea per submission makes subsequent communications easier to follow.

- **Phrase your idea as a user story**. Try to write your idea in this form: "As a <role>, I would like <proposed feature> so that <feature's benefit>.

  - **Role**: Who (what type of user) is the feature for?

  - **Proposed feature**: What does the user want to accomplish?

  - **Feature's benefit**: How will the feature help users? What value will users derive from the feature?

- **If possible, assign a category to your idea**. Select the category from the list provided on the site. By assigning a category to your idea, you help other users and the Ex Libris team find your idea when they search the product forum.

- **Remember that you must give at least one point to an idea that you submit.**

For Road-Map Commitments, Use NERS

The IGeLU and ELUNA enhancement voting process (**"NERS"**) is the only channel for "road-map commitment," in accordance with the **Product Development Collaboration Agreement signed by Ex Libris, IGeLU, and ELUNA.**

The purpose of the Ex Libris Idea Exchange website is to facilitate communication between the user community and the Ex Libris product management team, to help the team set development priorities.

Popular ideas suggested on the Idea Exchange site can influence the Ex Libris road map but do not have the force of a road-map commitment. To help drive road-map commitments for functionality that you or others propose, please participate in the IGeLU and ELUNA enhancement request process (NERS).

Do not use the Idea Exchange site for support

The Ex Libris support team does not monitor the Idea Exchange website. If you require support, please use the official support channels such as Salesforce.

Help maintain a supportive environment

Thank you for contributing to this community. Please be considerate of other forum participants, and do not criticize their ideas or comments. We encourage healthy dialog and a courteous exchange of ideas between Ex Libris users. Keep it positive. Keep it constructive.

Don’t spam

Forums are not the place to promote other sites or services. Avoid engaging in fraudulent behavior.

Avoid copyright infringement, and protect your own intellectual property

Please do not submit any copyrighted materials. Do not submit innovative or patentable ideas, samples, or demos for which you do not want to grant a license to Ex Libris. See the Terms of Use for more information.

NERS Alma and Primo Enhancement Requests

Each year, voting for enhancement requests for ExLibris products occurs in a process known as **NERS (the New Enhancements Request System)** and is used to support voting by **ELUNA** members, the ExLibris User Group community- of which the WRLC is a member!

The NERS Process

The NERS Process:

- The User Group conducts round one voting for enhancement requests. **The WRLC's Alma/Primo Advisory Committee (APAC)** coordinates the voting, on behalf of the partnering institutions and has 100 votes that can be cast toward enhancements.
- The top 20-25 enhancements from round one voting are sent to ExLibris, where they assign a point value based on level of difficulty for development.
- The User Group conducts round two voting. WRLC's Alma/Primo Advisory Committee, again, has 100 votes that can be cast toward enhancements.
- The top enhancements from round two voting are determined. ELUNA has 200 development points each year for enhancements, and the top enhancements that are within 200 point threshold and are sent to ExLibris for development.
- APAC rarely splits its votes across more than one enhancement. During the first round of each voting cycle, the committee culls through all enhancements to get a list of those that explicitly mention keywords like "automated fulfillment", "consortia", "network zone", or that seem generally beneficial to the interests of the consortia. They then select one. If their choice doesn't make the final round, the committee repeats this process while also paying attention to the complexity points assigned to enhancements in that final round.
- Per the **WRLC's FY 2025 Strategic Planning Process**, APAC will be on pause for FY 2025. However, the committee will continue to coordinate voting.
- If you want to suggest voting for an enhancement, contact your institution's APAC representative.
- If you want to *create* an enhancement, use the **ExLibris Idea Exchange**, find more details **here.**

Below is the shared timeline for both Alma and Primo enhancements:

- January 13 – Deadline to submit New Enhancements to NERS
- January 14 - March 3 -- Enhancement Team reviews, dedups, scopes, verifies and sets up vote in NERS
- March 4 – March 29 -- First round of voting
- April 2 – April 5 -- Enhancement Team reviews results, prepares to send to Ex Libris for pointing
- April 8 – May 31 -- Ex Libris pointing work
- June 10 - 21 -- Second round of voting on pointed enhancements

Learn more and review previous year's enhancements on the **ExLibris Knowledge Center: NERS Cycles**

NERS 2024 Suggested Enhancements and Vote Results

2024 Final Vote Results

- **Primo Enhancements - 2024 Final Vote Results (docx - 152.5 KB)**
- **Alma Enhancements - 2024 Final Vote Results (docx - 101.17 KB)**

2024 Enhancements - Round 2

- **Final Vote Spreadsheet for 2024 v.xlsx (xlsx - 25.54 KB)**
- **NERS 6907 solution.docx (docx - 15.56 KB)**
- **NERS 7785 solution.docx (docx - 16.14 KB)**
- **NERS 8734 solution.docx (docx - 16.46 KB)**
- **NERS 8817 solution.docx (docx - 14.29 KB)**
- **Attachment for 8883_0.pdf (pdf - 180.75 KB)**
- **Attachment for 8914.docx (docx - 46.59 KB)**
- **2024 Enhancements not moving to final vote.xlsx (xlsx - 14 KB)**

2024 Enhancements - Round 1

- **2024 ALMA Enhancements - Round 1 (xlsx - 75.74 KB)**
- **Alma Round 1 attachments (zip - 4.24 MB)**
- **2024 PRIMO Enhancements - Round 1 (xlsx - 54.85 KB)**
- **2024 ALMA Enhancements - Round 1 RESULTS (xlsx - 69.08 KB)**
- **2024 PRIMO Enhancements - Round 1 RESULTS (xlsx - 108.68 KB)**
- **2024 CDI Enhancement Vote RESULTS - cdi_ners_results_community.xlsx (xlsx - 15.63 KB)**