

Current Workflow for Alliance Primo Normalization Rule Development

Note: this workflow will flex based on critical deadlines and needs to coordinate any changes in the Alma Centralized Publishing environment with Ex Libris, especially for renormalization/reindexing processes.

1. The Norm Rules Standing Group (NRSRG) collects NR change requests via the [Google form for NR change requests](#), as well as feedback and questions from the Alliance's various discussion communities and Group chairs.
2. NRSRG reviews and prioritizes all change requests via the [NRWG Trello board](#).
3. For each accepted change, the NRSRG determines NR logic and updates the change's status on the Trello board. For declined changes, the NRSRG communicates the rationale to the requester.
4. NRSRG builds and tests proposed NRs on the Alliance standard sandbox, with rebuild/re-test cycles conducted as needed.
5. NRSRG "batches" changes for testing on the Alliance Premium sandbox. NRSRG schedules testing in consultation with the DUX, Systems, and SC/TS Teams and the Alliance IT Manager.
6. NRSRG announces Premium sandbox testing dates to stakeholders via the DUX-discussion, TS-discussion, and SYS-discussion lists. This announcement contains:
 - a. A list of the changes being tested
 - b. A link to a detailed testing guide
 - c. A link to a testing feedback form.
7. NRSRG moves the NR changes to the premium sandbox.
8. Alliance-wide testing takes place. Institutions have 1-2 weeks to submit feedback, which the NRSRG collects via a feedback form.
9. NRSRG finalizes go/no-go recommendations for each rule change based on feedback from testing.
10. NRSRG receives final approval for rule changes from Shared Content/Technical Services Team. If the changes are approved, the NRSRG determines the production implementation date in consultation with the SC/TS Team and Alliance IT Manager. This implementation date is scheduled in accordance with the "renorm/reindex windows" identified by institutions during the yearly renorm/reindex survey.
11. NRSRG announces implementation date to stakeholders via the DISC-discussion, TS-discussion, and SYS-discussion lists. The announcement is also sent to individuals whose change requests are being implemented. This announcement contains:
 - a. A list of the changes being implemented
 - b. A link to documentation showing any PBO changes related to implementation.
12. NRSRG moves the NR changes to the production environment and deploys the norm rule set.
13. NRSRG hands off the production environment to Alliance central staff and Ex Libris, in accordance with [this checklist](#).
14. NRSRG monitors communication channels for post-implementation problem reports and works as needed to resolve any issues raised.
15. After successful implementation of changes to the production rule set, NRSRG synchronizes the ALLIANCE_ALMA_CP rule set on both sandbox environments (premium and standard) to match the production rule set. This is done using the [import/export process documented here](#).