Norwegian National User Group Annual report 2020 – Unit

Unit is a public administrative agency that provides common systems and services for higher education and research throughout Norway. Unit delivers Primo and Alma to the BIBSYS Consortium and Leganto to the Reading list consortium.

The national groups for Alma, Primo and Leganto is administrated by Unit. Unit is a consortium member of IGELU. There are about 80 institutions in the consortium.

The BIBSYS Consortium / Alma

Background

The BIBSYS Consortium consists of around 80 institutions from the higher education and research sectors in Norway, including all universities, university colleges, the National Library of Norway, as well as research and health institutes. All the institutions in the BIBSYS consortium use Alma and Primo. Around 20 institutions use Leganto.

Living with Alma

The BIBSYS consortium has been live with Alma since 2016 and has become experienced with the new system. Alma is a large and complex system, and with monthly releases there are perpetual ongoing changes to assess. In general, the system largely covers the consortium's current needs, but there are still some challenging areas, like Inter-Library-Loan (ILL) functionality, integrations with external systems and the performance of parts of the system, including the API's.

We have also experienced that the latest releases have resulted in errors and broken core functionality (there was issues with the July-release and the September-release 2020). We hope that this is not a trend and that Ex Libris addresses this to ensure that the QA-process catches this before it goes into production.

NERS, Ideas Exchange and support

In general, we are overall satisfied with the support given by Ex Libris. The resolution times are still longer that we ideally would like. This also includes cases that do not require development (and that should be easy to solve/answer).

NERS is designed to be a queue and a way to park cases. That's OK for pure enhancements request, but it seems also to be used as a fallback solution for bugs that will not be handled. We also miss some ways or channels to report the general experience with the products as a whole. E.g. topics as GDPR, information security and the general performance.

Ideas Exchange is an alternative route that might lead to a quicker result as Ex Libris adapt Ideas throughout the year instead of the yearly NERS-process that in design is a lengthy

process (1 year +). However, we would like to know more about the process and the criteria for an Idea to be accepted/planned.

For some specific use-cases there has been dedicated meetings between Ex Libris experts and Unit personnel to discuss possible solutions. We see that such meetings have a good effect in understanding the problems/solutions and the delivered functionality gets higher quality.

Unfortunately, we see examples of when the customer is not involved in the process of designing a new functionality or a fix of something that is not working the new awaited feature or service does not live up to our expectations when it is released. We would encourage Ex Libris to involve the customer more in the process of designing the solution/ensure that it meets the needs. Instead of just give the feedback that it will be fixed in release X and the customer does not know what the cause of the error was or what will be fixed.

Primo

As of June 2019, all institutions within the consortia are moved to the new user interface for Primo.

The core functionality of Primo is about Discovery and Delivery. To get the correct results and to retrieve updated information about access to the documents are the most important for the end user. We see examples that bugs and errors in this functionality takes a long time to get fixed. Examples are errors in the publishing of holdings information from Alma to Primo, content updates in PCI etc. Missing elements in the detailed view (Primo sections and alma-mashup), errors in the RTA and links that are not displayed in the link-resolver. We have received fixes for most of this the last year (the latest as an extraordinary fix in September 2020)

There is a concern that new functionality is prioritized instead of fixing errors in the core functionality. This was also raised as a concern in the 2018 report and 2019 report, and we do not see any improvements in this regard for 2020. Important fixes get a scheduled release data long into the future and there is no guarantee that the fix will not be postponed or solve the issue.

There is also a concern about the two different flavours of Primo (Primo BO and Primo VE). We are also concerned about the possible lock-in of Alma/Primo customers with Primo VE as it would be difficult to exchange either of the systems with other solutions. Eg. Using a different discovery solution together with Alma or using Primo with a different ILS than Alma. This concern has not been reduced in 2020.

In June 2020, the consortium was switched to CDI. After the summer there has been an increase in reports about articles shown as available online, but with no links to full-text, and articles that should be retrieved, but are not searchable despite the fact that they are activated in Alma. This is critical and are our main focus as of now.

There is an ongoing discussion about the link preference in Primo and that link in record are preferred by the system over the link from the link resolver. We hope that Ex Libris prioritize these issues and listens to the user community. If possible, we believe that both link-types should be displayed to the end-user.

There has been an increase in cases that ends up with the suggestion to register it in NERS or Ideas Exchange. These are also cases that are bugs/errors and not pure enhancement requests.

The Reading list Consortium

The Reading list consortium consists of 19 members and was established in 2017. The consortium is growing and Leganto has proven to be a success.

The core functionality in Leganto works as expected, but there is a potential for improvement in the documentation and examples.

We also see the same challenges with lock-in between Alma and Leganto as with Primo VE.

We experience that suggestions and enhancement request are considered, but there has been an increase in cases that get sent to NERS, that in our opinion should have been fixed as a bug and not enhancement request.

Topics for the INUG-meeting

- Ongoing discussion about linking in CDI – what are the next steps from Ex Libris?
- Update of holdings-files after CDI – does other have issues with records with no fulltext/records not searchable?
- Possibility to involve the customers more in design of functionality/bug-fixing to ensure the best possible outcome
- Bug-fixing core functionality vs new functionality
- Timeframe for bug-handling, change requirements, critical functionality
- QA-process for releases