

2022 ANZREG Chair's Report to INUG

Introduction

The Australian and New Zealand Regional Ex Libris Group (ANZREG) is a recognised regional user group for the International Group of Ex Libris Users (IGeLU). The group, led by a member community Committee, strives to promote communication, knowledge sharing, and collaboration among users of Ex Libris products across Australia and New Zealand. ANZREG provides feedback regionally and internationally to IGeLU and Ex Libris. Membership is free to Australian and New Zealand libraries for sites using one or more Ex Libris products. ANZREG has 80 institutional members across Australia and New Zealand, and 380 subscriptions to the ANZREG-L mailing list (hosted by the State Library of Queensland).

Committee

ANZREG has had a number of Committee changes in 2022, farewelling members stepping down, and welcoming several new ones. It was a sign of the strength and engagement of our community that we received so many applications for members to join the Committee, which is now again at full strength with ten members. The Committee has in recent years distributed responsibilities and workloads across a number of shared roles, lowering the burden of volunteer duties across the Committee, and this practice continues in 2022.

The current ANZREG Committee:

- Chair: Stacey van Groll, University of Queensland
- Deputy Chair/Chair Elect: Amelia Rowe, RMIT University
- Financial Officer: Patricia Farnan, University of Notre Dame (*new member*)
- Product Development Advocate: Yelena Kopilov, University of Adelaide (*new member*)
- Co-Secretary: Lynne Billington, State Library New South Wales
- Co-Secretary: Brenda Norton, Victoria University of Wellington (*new member*)
- Co-Web Manager: Deborah Fitchett, Lincoln University
- Co-Web Manager: Romana Challans, Flinders University (*new member*)
- Co-Programme Coordinator / Communications Officer: Ella Rohde-Condon, La Trobe University (*new member*)
- Co-Programme Coordinator / Communications Officer: Claire Brocklehurst, Ara Institute of Canterbury (*new member*)

The Committee said a fond farewell to:

- Cate Bardwell, Otago University - most recently serving as outgoing Chair and a longstanding member of the ANZREG Committee 2016-2022
- Peta Hopkins, Bond University - serving as Co-Conference Coordinator, and ANZREG Committee member 2018-2022
- Rachel Salby, RMIT University (previously La Trobe University), serving as Co-Conference Coordinator, and ANZREG Committee member 2020-2022
- Roshan Thapa, Charles Sturt University, serving as Financial Officer, and ANZREG Committee member 2020-2022

We thank Cate, Peta, Rachel, and Roshan for their service to our ANZREG community.

Many members of our community are also very active in the IGeLU community internationally, as members and Coordinators of Working Groups and Communities of Practice. We recognise all our active and engaged regional representatives on our ANZREG website:

<https://anzreg.igelu.org/working-groups/>

Activities

The ANZREG webinar and conference program for our member community continues to be impacted by COVID-19, with the decision made again for 2022 to not host a physical multi-day Conference. The ANZREG annual conference, held last physically in 2019 and then virtually in 2020, is a popular event which showcases customer adoption of Ex Libris products and provides members of our community with the opportunity for knowledge sharing and dedicated time to consider both common and novel technical requirements and options. While the event is missed, the Committee recognises the ongoing hardships of the current global situation, as well as regional impacts such as tightened budgets for conference expenses and personal desire to distance to maintain health. As such, the Committee has again hosted targeted webinars to suit current community needs in 2022, including shifting responsively to meet new challenges.

In March, the ANZREG Committee hosted a *Working with Digital Resources* session, recognising this growing area of interest in our community ranging across a wide and often confusing variety of possible implementation and product choices. We welcomed presenters from member institutions of RMIT, Bond University, and the State Library of Queensland, and also worked collaboratively with Ex Libris for a session presented by Daniel Greenberg.

From March through early August, the ANZREG Committee shifted from planned product-specific sessions to targeted sessions for a Data Centre migration for most Australian and New Zealand sites from AP01 in Singapore to AP02 in Sydney. The Committee supported the community in this significant work by hosting many virtual sessions, including an initial discussion in March, a Leganto-specific session in April, and a series of 13 weekly drop-in meetings from April through July. These sessions allowed community members to raise issues, share concerns, obtain help, and benefit from a vital collaborative connection point which supplemented active discussions on our regional ANZREG listserv. The Committee successfully advocated for Ex Libris to host an additional targeted session for Leganto customers, as well as a Cutover session in June prior to the July 3rd switchover. Additionally, the Committee secured both improvements to known system behaviour during and after migration, and enhancements to Ex Libris documentation, ensuring better support for staff and end users during the transition. The Committee provided a community-driven forum for written collaboration by hosting reference point documents of known issues, key dates, and local testing checklists, as well as gathering together questions from members for Ex Libris webinar preparation. The Committee hosted a final debrief community session one month after the migration in August, sharing summary results of an Ex Libris survey, and also reporting back community comments from the session to Ex Libris.

Further planned sessions in the webinar program for the final months of 2022 include a report back from members physically attending the IGeLU Conference (being held in hybrid mode for the first time since 2019), as well as the required ANZREG Annual General Meeting per the Committee By-Laws. The last planned event of 2022 is anticipated to be an end-of-year wrap up session, which was a popular event held also in 2021, as a more informal community connection point in times when we must be physically distant.

In addition to focusing on Australian and New Zealand members, the ANZREG Committee takes advantage of outreach opportunities as they arise more broadly in the international community. In 2022, this included accepting an invitation to present at the Taiwan User Group Annual Meeting on 29th June. Stacey van Groll (Chair) and Amelia Rowe (Deputy Chair/Chair Elect) presented a session titled *Experiences of ANZREG*, sharing organisational, management, and financial structures, as well as activities and advocacy efforts on behalf of our member community.

Advocacy

The ANZREG Committee meets quarterly with Katelin Grammer, Vice President Sales, Oceania | ProQuest, and other representatives from Ex Libris as topics arise. Agenda items are distributed beforehand, for response preparation. These meetings are a continuing excellent exchange of

information and a valued avenue for highlighting and resolving issues arising from the ANZREG member community. The Committee shares a summary of topics raised on the ANZREG website, for enhanced visibility of our advocacy work with Ex Libris on behalf of our community:

<https://anzreg.igelu.org/about-this-site/advocacy/>

Items discussed within the last year include:

- Longstanding greatly delayed central index updates for content of regional importance, such as Informit
- Worsening performance issues in the AP01 Data Centre, with impact such as very slow Alma job running, regular Analytics ETL delays, and service disruption events
- Data Centre migration from AP01 to AP02 for many members, including raising of concern points with communication strategies chosen by Ex Libris, documentation, and timelines
- Ongoing issues with Ex Libris support and case handling, including unsatisfactory response times and low quality of responses
- Continuing feedback on the use of exclusionary language in Ex Libris communications, documentation, and branding including “Higher Education Platform” for members of sites such as State and National Libraries, and references such as “Fall 2021” disregarding members in the Southern Hemisphere
- Expectation of equity of support, documentation, communication, and Roadmap development for all Primo customers, for both deployment models of Primo (using Back Office) or Primo VE
- Development of a Maori language translation for library staff in Alma and patron-facing in Primo, in collaboration between Ex Libris and the University of Auckland, New Zealand <https://exlibrisgroup.com/blog/ex-libris-launches-maori-user-interface-for-alma-and-primo/>
- Collaboration between Ex Libris and members for regional Rapido pod specifications, including advocating for a community survey and results follow-up

The ANZREG Committee also seizes additional opportunities as they arise to raise issues of concern for our members, as an IGeLU INUG. A notable example this year was via a visit by the IGeLU Steering Committee to Ex Libris Headquarters in late April, for several days of meetings with Ex Libris Senior Management. The ANZREG Committee responded to a call by the IGeLU Steering Committee for high level agenda items with three overall topics, and reported back updates to members on the ANZREG listserv and the ANZREG website:

<https://anzreg.igelu.org/2022/07/28/anzreg-update-from-igelu/>:

- Salesforce responsiveness and quality of support
- Performance issues, service disruptions, and ETL delays
- Reasonable and realistic lead times and support for significant projects (e.g., DC migration and VE+)

Highlighted Issues

The ANZREG Committee would like to take this opportunity to highlight with our international colleagues in the IGeLU community and with Ex Libris the significant and ongoing issues with Support via cases, and supportive services including documentation and communication.

The issues are broad across Salesforce Support with

- Common experiences of extensive delays throughout all tiers, including regular instances of cases in Tier 1 with no action for several months, in addition to the time awaiting corrective work, leading to a large backlog of ‘aging’ cases
- No documentation on Key Performance Indicators (KPIs) for expected case handling and response times, other than initial gatekeeper new case submission acknowledgement

- Time-consuming and unnecessary correspondence when case submissions are not reviewed carefully and responses are not relevant, including advised Resolved Issues which are subsequently found to not correct the actual reported issue
- Cases set to Awaiting Customer Confirmation, triggering subsequent closure, when it is clear that the issue and fix has not first be reviewed and checked internally
- Concerns over absence of open and transparent communication with Salesforce with edits made to case comments at a later time, including adjusting the information advised originally in comments, hiding comments, and deleting comments completely
- Loss of visibility and collaborative knowledge-sharing opportunities via published cases by sites who willingly chose to opt-in to share this information, with this option removed in the transition to the new portal in November 2021
- Ongoing problematic case handover from Ex Libris to ProQuest support, regardless of the merged Salesforce environment which promised resolution of this issue
- Selective closure surveys, with some cases not triggering this valuable opportunity to provide feedback
- Many acknowledged defects which Ex Libris decides never to resolve i.e. Pending Work Plan status

The issue extends also to additional supportive services of Documentation, which could alleviate a great deal of the Support issues above in reducing the need for members to submit cases, with

- Incomplete and inconsistent Release Notes, with insufficient embedded detail of aspects such as configuration pathways nor links to more detailed documentation, which is often found to not yet exist, or with documentation loops that fail to lead to the required content
- Lack of documentation for Resolved Issues in Release Notes, with known issues from cases failing to be included on a regular basis until prompted in cases, or with descriptions which are incorrect and unclear
- Missing, incomplete, and inaccurate documentation as a broad product level issue, with Feedback submissions required constantly, which often have delays of several months for updates of required information and corrections. This includes also failure to document all configuration possibilities and outcomes available to members, in favour of singular Ex Libris preferred options

And finally, in terms of communications, there are concerns with

- Impression of a 'need to know' approach, with key information not willingly presented without prompting and sometimes refused even when requested, as opposed to working openly and transparently with a collaborative mindset. This includes not promptly communicating to members known issues at a Data Centre level, requiring many members to individually take an unnecessary burden of reporting and follow-up
- Delays with providing sufficient notice and necessary technical details for significant projects, with apparent insufficient respect for the workload on members. A particular example this year included the first notice of the Data Centre migration from AP01 to AP02 on 22nd December 2021, when many Australian and New Zealand sites were already closed for holidays. There was then a delay of more than six weeks before the first Technical Requirements documentation was made available, with the loss of opportunity across the entire quiet January period during which members could have been making preparatory changes prior to the start of the academic teaching year, including working through backlogs of established link changes before known migration breakages and coordinating with central IT departments to submit prioritised work requests

- Failure to use established communication channels effectively and consistently, including System Status notices not issued promptly or at all for performance issues and service disruptions, and improper use of the IGeLU / ELUNA hosted listservs for notice of Salesforce maintenance rather than using the dedicated Salesforce accounts designed for this purpose

The ANZREG Committee would greatly welcome a commitment by Ex Libris to make improvements in these areas on behalf of our member community, which would significantly improve our collective experience both for Library staff and flowing through to the patrons we support.

Stacey van Groll - Chair

Submitted on behalf of the ANZREG Committee

August 2022