

National Report from the ExLibris User Group of United Kingdom and Ireland (EPUG-UKI) IGeLU2022.

The whole user group was invited to send in their top three issues and top three improvement suggestions for ExLibris products or services.

Page one is a summary of the main issues followed by more specific responses.

Culture – the community are very worried about the acquisitions process which has been happening with ExLibris. This is becoming more worrying with the **Clarivate** acquisition.

- We are worried that dedicated knowledge/relationships will be lost.
- We are worried that Development will be reduced for some systems we run e.g. joining fulfilment development between research/university and public libraries.
- We are worried that the User Groups will be joined together and be much less useful.
- We are worried that the expert knowledge which ExLibris teams have may be lost by taking on too many responsibilities and diluting product focus.
- We are worried by rising costs/value for money

Content

- We have been discussing content for a long time. We know the content team work hard but we still see the same problems. Most of our open/outstanding support tickets are relating to missing or inaccurate content listings. **ExLibris/Proquest/Clarivate** are uniquely placed to positively impact the metadata supply chain and the listings in the CDI really ought to be an accurate reflection of the content.
- We pay a fortune for our E-Resources and to wait over a year for them to be made available via CZ is unacceptable. If CZ is to fully work we need **Clarivate** to get behind resource to provide full metadata in a consistent, correct and timely way.

Quality Assurance

- Bugs with releases. It would be incredibly useful for ExLibris to report to listservs to save time. Known issues should be available to all customers. The community needs a commitment to fix within an SLA. If you have a bug which no-one else has you are unlikely to get it fixed quickly.

Support

- Escalation for serious problems. We seem to rely on the listservs to escalate a problem.
- Support interface - Proquest interface is a much worse user experience than the ExLibris Support interface – please confirm that we won't go through another 'migration/regression' if moving to a Clarivate interface

Documentation

- **Searching** - Still takes a lot of time trying to find an answer. Finding the right page or pages. Currently we hop about using Google search for different pages that may or may not include the information we need. It takes a long time. We have less time and less staff.
- **Dependencies** – we need these documented more consistently – what change affects what.
- **Usefulness** - Often the documentation only describes content of tables – not the implications of making changes to those tables. **We spend a lot of time on trial and error setup.**
- **Inconsistent language** between products, and even in the same product between Configuration and UI.

Improvements to workflows within the clients/integrations with other systems

- We'd like to see more customer consultation on changes to UI which impact workflows.
- Review of some of the older functionality e.g. Fulfilment (Rapid/RapidILL is being built on top of Alma fulfilment but we need a holistic approach)

Specific responses – suggestions for improvement.

1. Improvements - Documentation –

- a. **Needs to be written from a user perspective** – with use cases and steps – and output/consequences for changes. The documentation tells us WHAT to change but not WHY and no idea of impact across products. Have a checklist:
 - i. What am I trying to set up
 - ii. Use case (example of workflow once setup)
 - iii. Dependencies/Impact on other products/modules e.g. if I change this on Alma will it affect Primo etc.
- b. **Checklist for configuration** - there really needs to be checklists of steps to take when configuring something so that steps are taken in the right order and dependencies are clearer; also better explanations/examples rather than just listing what to do; too much jumping around within the documentation; make the searching within documentation better – shouldn't have to use google to find the important bits needed

2. Improvements - General –

- a. **More consistent use of language across products** e.g. in Leganto it's called Library Discussion but in Alma it's the Library/Instructor Note.
- b. **Consistent language between documentation and analytics subject areas.** When a new subject area is created there should be a checklist for all information which is available via client interface.

3. Improvements - Support –

- a. **Support portal process** – make it easier for people to view case details ; make it easier to be able to raise a case that isn't obvious which product – it's not easy to work out in many cases whether it is an Alma/Primo/CDI/Leganto/Rialto problem but you have to select the product as the first step – cases can get stuck for ages as they get transferred to and from different analysts
- b. **Escalation** – I would like to see the Escalate button and the escalation processes built in to the interface itself as it turns out that the Escalate button within a Salesforce case is a use-once only button!

4. Improvements – Integration –

- a. **Institutional data** - In terms of improvement, I personally would like to see better (more automated and real-time) integration for course updates between VLE (blackboard, moodle) and Alma/Leganto. It's still a very manual process for us at the moment. Whilst APIs are available, it still requires local set up and resources.
- b. **EDI** - EL has a list of the vendors they have enabled EDI for. The list only includes 3 vendors we use for serials orders (Ebsco; Harrassowitz; Casalini). It would be helpful if EL could work with more vendors to enable EDI invoicing in Alma.
- c. **Cross product** - things never flow properly between products, particularly if you can't use the workflow that ExLibris think you ought to use. We can't use the purchase request workflow for ordering between Leganto and Alma because it's not possible to change the material type
- d. **Cross product** – especially key when adding/buying new products – they seem to be 'bolted' on to existing products without a discussion on impact/training/documentation updates

5. Improvement - Analytics –

- a. **output to a webpage/institutional dashboard.** We need to raise the profile of the library to make sure we continue to receive resource and be able to buy Clarivate products. We would like to show the 'invisible' work the library does on a public webpage. We have all the analytics available to us but it would be great to have a Power-BI output to public dashboards.

- b. **combining sets/information.** Very frustrating not being able to combine subject areas which means that we often can't create the reports that we need. Also, not being able to get from analytics a true representative of items in reading lists – due to related records and e and print inventory not combining.

6. Improvements – Configuration

a. Fulfillment –

- i. more development effort into effective handling of print collections more generally - specifically look at long term "planned" items in the Ideas Exchange. Also a need to aim for greater customer engagement when developing features.
- ii. is horribly complicated – especially when you include Resource Sharing into the mix. Can we please ask when a re-write might happen.

- b. **Configuration – generally - Seeing what you have changed** - It would be good to be able to see easily where we have made local config changes. Much of the system menus are irrelevant. It would save us so much time! E.g. change colour of menu item if we have local config.

7. Improvements – Patron –

a. Purge patron – compliance –

- i. GDPR/ Info Security/Retention management - would like to see more work on longstanding idea on set based.
- ii. the job is very clunky and could run so much better. Can we please ask for a revision for patron data management. We have compliance issues here. E.g. log file of deletions; run based on a set; run in report mode.

- b. **Patron comms – more granularity for general Patron comms** - One of our biggest issues and something we are still struggling with is the ability to select sets of users and include their account/loan details in communication as the general user notification letter does not allow you to include this kind of information and the fulfilment job for sending patron activity letters is either all or nothing. There does appear to be a very long-winded way to send this kind of information but involves turning off notification for all users then enabling it again for the specific set before re-enabling it again. The ability to send what we called 'courtesy letters' in Aleph where we had the ability to customise the wording/include borrower activity information and select users based on a whole variety of criteria e.g. user group/expiry dates and have these letters automated is something we would like to see. We can't be the only customers who want to send members their current loans/fines etc based on when they expire or any other criteria.

8. Improvement - UI/Workflow –

- a. **Alma** - We would like to see a 'Recent history' option so you can return to the previous search or record without having to re-run the search in Alma.
- b. **Primo (Back Office and VE)** - improvement to handling Citation search (parsing of copy and pasted references) - as per list discussion (and SvG examples)
- c. **Alma – Metadata management**
 - i. Poor navigation between bib, holding and item: when we've finished editing bib record, we need to edit the holding to add classmark and location code so go to View related data -> View inventory-> Edit holding to add classmark. Then when finished editing holding record we need to edit item record to add Item policy, so we go to go to View related data -> View inventory -> Edit -> View items -> ... -> edit.
 - ii. When a xreference goes between authority file indexes – so, for example, an 830 series should actually be an 800 – the heading is not replaced with the authorised heading when clicking Select. If you recall, another good example of this is the heading for Brexit. – it is apparently on the Ex Libris roadmap
 - iii. \$q does not display in Browse Bibliographic Headings list.
- d. **AlmaD** - AlmaD Collection Discovery – The inability to fully search across sub collections continues to be an issue for us as we use nested sub-collections within our digital collections. We would like to request full searching across all collections and sub-collections. We would also like to see some enhancements to the search results page like sort options on the search results, option to filter by

collection/sub collection and indication of which collection/sub collection the results belong to. These would also greatly improve the user experience in terms of discoverability of the collections. This is not only useful for users of PrimoVE but also for local data scopes as we require them to accurately include collections and sub collections in search profiles.

Ideas exchange issues

<https://ideas.exlibrisgroup.com/forums/308176-primo/suggestions/44803108-collection-discovery-sub-collection-searches-> and

<https://ideas.exlibrisgroup.com/forums/308176-primo/suggestions/44804263-collection-discovery-search-results-enhancements>

<https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/34452043-ability-to-run-user-purge-on-a-set>

Specific responses - issues raised by the community

1. Issues - CZ/Content and metadata

- a. most of our open/outstanding support tickets are relating to missing or inaccurate content listings. ExLibris are uniquely placed to positively impact the metadata supply chain and the listings in the CDI really ought to be an accurate reflection of the content.
- b. Similarly, the Community Zone is a mess – there are 4 electronic collections with exactly the same name but a variation in number of portfolios so it's impossible to know which one to activate: for one ProQuest product there are 13 collections we have access to (according to PQ) and they are covered by some combination of 23 collections in the CZ that need to be chosen with no information to go on other than collection name. The number of portfolios in each CZ collection variation isn't helpful because that information doesn't relate to anything provided by PQ.

2. Issues - Integration

- a. **Esploro** - Lots of issues with Esploro and in particular the OAI-PMH integrations with third parties – eg. Ethos, Altmetric, Unpaywall, CORE, and also the Esploro Smart Harvesting framework (with Bibtext in particular)
- b. **Leganto to Rialto** purchasing workflows – so much work getting to where we are currently – it was very labour intensive to achieve what we have, but we are frustrated by the need to use purchase requests to enable automated linking of new stock to lists. (we are pleased to hear there is an upcoming development in this area). Also with Leganto the problem of not being able to link physical and electronic inventory easily on one citation

3. Issues - Analytics

- a. no ability to report consistently on e-resource and physical usage together e.g. for Leganto
- b. Inconsistent data between analytics and UI/Alma search.

4. Issues - CZ/Content –

- a. **CZ** records not displaying correctly or links not working as they should. All been reported to and dealt with by ExLibris, but thought worth mentioning as have been seeing quite a few of these in the past few months.
- b. **CZ/Content**-Improvement in the quality of Community Zone records
- c. **CZ/Content** - Timely ingestion of collections in to the CZ, particularly KB+ ones. The new Elsevier agreement still isn't available to activate, despite appearing in KB+ in March. ExLibris have advised that this will be resolved no later than November 2022. ExLibris said that they can query KB+ for new collections on a daily basis to ingest new ones in to the CZ so March-November seems an awfully long time to make this appear.

- d. **CZ/Content and metadata** – most of our open/outstanding support tickets are relating to missing or inaccurate content listings. ExLibris are uniquely placed to positively impact the metadata supply chain and the listings in the CDI really ought to be an accurate reflection of the content.
 - e. **CZ** - Similarly, the Community Zone is a mess – there are 4 electronic collections with exactly the same name but a variation in number of portfolios so it's impossible to know which one to activate: for one ProQuest product there are 13 collections we have access to (according to PQ) and they are covered by some combination of 23 collections in the CZ that need to be chosen with no information to go on other than collection name. The number of portfolios in each CZ collection variation isn't helpful because that information doesn't relate to anything provided by PQ.
5. **Issues - QA/Bugs** –
- a. **QA** – General – can we please ask that a list of known bugs is compiled so that Support AND customers can see how widespread an issue is.
 - b. **QA – Alma** - This one is more of an ongoing issue that's been going on for quite a number of months - we've seen a bug where certain titles have a faulty portfolio link on Alma, and its only recently found out it was caused by how we were combining records using MD editor via its Portfolio. There's been a little bit back and forth as ExLibris don't see it as a bug (a 'gap in the design' as they called it), but it's still pending on how they're going to deal with
 - c. **QA - Primo (Back Office)** - performance - slow page load (up to 4 seconds) in desktop-mobile due to multiple translation code tables (from other institutions!) being loaded for MTE instance (see: 06478309).
 - d. **QA - Alma Analytics** out of memory issue (just started seeing this this week!)
 - e. **QA – Alma UI** – out of memory messages becoming unworkable
6. **Documentation**
- a. **Primo (Back Office)** - documentation on expected search behaviour could be improved (e.g. with new CDI fulltext options) expected outcomes not always clear, also further details after exclusion of NERS 7693 - Add ability to prevent CDI expansion of results (VE/BO).
7. **Support** –
- a. Timely response to support calls. Twice now we have had ebooks that are on reading lists not appearing in Primo for longer than an academic semester because the response/understanding of our support call was so poor. Despite a lot of nudging on our part, there was no urgency on the part of ExL to get the issue resolved quickly.
 - b. **The Ex Libris mailing lists** are invaluable for the users as a way/means to share information and also seems to be the best place to report/query any issues affecting the wider 'community' and usually gets a response back so this is great and Ex Libris respond...but Ex Libris should be more pro-active in making 'known' issues/system status updates available on their general status page too and also link cases and take appropriate action.
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