

INUG Report from the ExLibris Users of UK and Ireland (EPUG-UKI) for IGeLU 2023 (version 4.0 Final)

News from EPUG-UKI

EPUG-UKI has 95 member institutions currently. We hold two conferences a year. We plan to continue to make these hybrid and cost free while we can sustain the cost from Membership fees. We run a monthly Zoom call where EPUG-UKI members meet to share experience and offer solutions/help with applications and workflows. For 2023, we will be running additional themed days on Kiosks and E-Resource management for different types of Library Visitors.

EPUG-UKI committee posts (Chair, Secretary and Treasurer/Memberships) are all reaching end of term. We hope to have new appointees in place by end of October with a handover period running for up to six months.

Members' feedback for IGeLU/Ex Libris Report

EPUG-UKI members were asked to comment on what is working well and areas where they would like to see improvements made.

The responses have been collated below.

Roadmap and service management

- **Clarivate** - We acknowledge that the corporate relationships between Ex Libris, ProQuest, and lately Clarivate have had synergies which benefitted customers greatly (e.g. Rialto). Nevertheless, we'd like to see that these branches of the business remain distinct from each other, ensuring the transparency we value and require (e.g. for procurement processes). A number of sites are concerned about the problems affecting all aspects of support and development since the move to Clarivate. In general we have noticed a difference in service since the move.
- **Listening to customers** - On the whole we're very happy with our Ex Libris products. In particular, we're pleased that Ex Libris seeks customer feedback (e.g. the annual business review meeting, Ideas Exchange) actively and responds to development initiatives from the community (e.g. Cloudapps). Facilitating community activities that are independent of Ex Libris is a great strength of the company.
- **Software as a Service (SaaS) - system performance** - Alma is stable and very rarely unavailable. The alerts are useful for us to share downtime number with our users and SLA reports. Performance has improved in most areas.
- **Communication and Development Roadmaps** – Quarterly release is more manageable for local QA testing. Communication about changes is clear and useful. We would value a targeted list of what features are new and need to be enabled.
- **Development of more integrations** with external systems and services – Finance Systems; Institutional Reporting tools (Business Intelligence); integration between Leganto and the DCS – all integrations still need work.
- **Moving from Primo Back Office/Classic to Primo VE** - some sites are unwilling to move, as it would mean a loss of functionality for users. If these issues are not being addressed, can Ex Libris please advise on whether there will be further development for Classic or in the new Discovery Tool being developed? Specific issues with VE include:
 - the loss of A-Z Journal and A-Z Database pages
 - ability to work with a large amount of holdings (around 100 libraries)

- increasing the number of Local Search and Facet Fields to more than 10.
- **Cross product integration and standardisation.** – we notice this through documentation, support and functionality. E.g. Analytics – missing reporting tools for new processes, new subject areas being added without any information. Lack of documentation covering cross product functionality in general.
- **New functionality** - there have been some great improvements in functionality and consequently some of our workflows and work processes have improved for our users. There are plenty of examples in all products. We would like to highlight the automatic upload of E-Holdings. We like the automatic upload of electronic holdings options being developed and scoped. We are particularly interested in ProQuest Ebook Central and Wiley but would be keen to see others. We hope this will improve both the eResources and Acquisitions processes.

Main concerns, questions and service improvement suggestions

Content

- **CZ** - Key concern is still the Community Zone accuracy, speed of updates, quality of metadata and response times when content issues are submitted to Salesforce. Updating had seemed to improve somewhat or at least our understanding of it had, but the poor communication around JISC KB+ and time taken to resolve this highlight there are still issues around Ex Libris's handling of content updates, support and communication around these.
- **CDI** is difficult to understand and it is not always clear why content is deactivated. We would like to see it more reflective of transformative agreements and Open Publishing. We feel Ex Libris is lagging way behind supporting these things.
- **CZ**- Communication between some suppliers and Ex Libris is poor when it comes to the CZ. Taylor and Francis are an example of a publisher who are very difficult to pin down in terms of access dates and what is included in our subscription. On a more general point, when reporting an error with something in the CZ, it is not uncommon to be bounced between the publisher and Ex Libris, with both claiming that responsibility is on the other side.
- **SUSHI/COUNTER** - The SUSHI error reports are quite often vague and one message covers a few different meanings. If an error is occurring, it can be hard to get either side to take responsibility. This is something else that might be improved by better communication between Ex Libris and suppliers.

Analytics and standard National reporting tools for UK and Ireland

UK and Ireland College and University libraries are tasked to send yearly reports on a standard set of statistics via SCONUL.

This includes transactional data and collections data.

We do not currently have means of comparing physical usage with electronic usage for our stock.

SUGGESTION - We would ask that the analytics subject areas are reviewed to allow greater reporting on collections and usage. This would allow us to manage our collections in a much better way, and provide usage reports to back up collection management. This comes up often during discussions at National level. We would like cross product reporting for our collections (Alma, Leganto, Resource Sharing)

Documentation and training

- Finding the correct information and being able to search the portal/KB for the correct information is frustrating and leads to dead ends. Quite often, the Ex Libris documentation is not detailed enough or up to date with the current release, or key information is missing.
 - Documentation (all products) – a request for checklist of steps to take during configuration or significant processes. Too much cross-referring within the documentation; make the searching or indexing within documentation better.
 - Chat has become a great way to top up gaps in documentation. We have used it more for questions recently than for issues. It seems to suit ‘How do I do this?’ type requests. It is less well suited for issues that are defects and are likely to need passing to Tier 2.
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Support

- *The work of the Support Center has definitely improved, although unexpected delays still happen, and Support agents are less clear about when a case should be cloned, new case be opened, or when a case is passed on. This leaves us unclear about which case to pursue.*
- **Chat support** has been a great addition but there is still frustration around response times and needing to escalate cases to get resolutions. We are aware this point has been raised before, but we would really benefit from being able to see cases from other libraries.

Escalation

- **Response times** - In some cases, the length of time it takes to resolve matters has increased and escalation has become less effective since it changed from contacting an email address to an inbuilt function within the portal. This has resulted in us escalating issues to our Customer Success Manager instead.
- **Known issues** - Ex Libris should be more pro-active in making ‘known’ issues/system status updates available on their general status page, and also link cases and take appropriate action.
- **Escalation** for serious problems. There is no clear route for how to escalate a serious problem.
 - Where an issue is of high impact and affecting a large number of customers, often this issue is not escalated until a customer posts to a mailing list.
 - Where an issue is a known defect, it would be very useful to have a list of known issues.
 - Where an issue is local, often it does not get resolved quickly.
- **SUGGESTION** - Known issues - Can we please ask that a list of known issues/bugs is compiled (and kept up to date) so that Support AND customers can see how widespread an issue is.

END OF INUG SUMMARY REPORT
