

# **IGeLU international User Groups (INUG) report for 2024**

## **The Ex Libris Products User Group, UK and Ireland (EPUG-UKI)**

### **Introduction**

EPUG-UKI currently comprises of 93 member institutions and has hundreds of people subscribed to its various Ex Libris product mailing lists.

We hold 2 major meetings per year and aim to provide free-to-register focused meetings and training events where we share good practice.

EPUG also runs a monthly Microsoft Teams meeting on the last Thursday of every month, offering the opportunity to raise any Ex Libris related topic for discussion. The meeting operates with an open and running agenda that anyone can add items to at any time and each agenda item for the month is discussed or rolled over if time runs short. Each meeting is attended by 2 members of the committee, who alternately chair and take minutes of the meeting on a rota basis.

### **Committee**

Alex Forrest (University of Edinburgh – Chair), Stephen Harding (Newcastle University – Secretary) and Ian Haydock (Keele University – Treasurer) all came to the end of their fixed terms of office at the end of 2023, meaning that the committee now comprises of:

- Chair – Lee Houghton (Nottingham Trent University)
- Secretary – Amanda Swann (The University of Law)
- Treasurer & Membership Secretary – Laurence Lockton (University of Bath)
- Ordinary Member – Sally Smith (University of Surrey)
- Ordinary Member – Scott Bradley (Newcastle University)

### **Activities**

#### Events

The first of EPUG-UKI's main events was the conference, which took place at the British Library on 16<sup>th</sup> October 2023. Members had the option to attend in person or join on Zoom. The new committee members were voted in and then introduced at the conference.

This was followed up in April 2024 by the AGM which took place entirely remotely via Zoom. There was a good spread of sessions covering topics such as advanced use of Alma analytics and PowerBI, the Primo Next Discovery Experience and Primo purchase request and resource sharing request forms. Ex Libris also provided a Rapido product update and a support and content update, with Alan Oliver attending the whole event which was much appreciated.

Just a week before this year's IGeLU conference, the University of Leicester is hosting an in person event about electronic resources workflows. The event takes place on 4<sup>th</sup> September and the plan for the day will be to create lots of opportunities for knowledge sharing and group discussion as libraries talk about their experiences of managing e-resources in Alma and capture areas of best practice.

### Community initiatives

The EPUG community is vibrant and active, with events and online meetings always very well attended. This year some initiatives have emerged, instigated by members of the community, and supported as much as possible by the EPUG committee.

The 'Acquisitions in Alma exchange of experience' Teams calls are led by Leah Emary from the University of Sunderland and were set up by her to specifically discuss acquisitions-related issues, ask questions, and share experiences. The calls take place every other month and often include guest speakers. Recordings of each call are added to the EPUG-UKI website.

In March 2024 Sarah Pumfrey from Liverpool John Moores University set up a joint online workshop with Kevin Browne and Paula Fitzpatrick from Ex Libris to gain a greater understanding of functionality and workflows in Alma to support the operation of Leganto reading lists. Questions from the community were put to the Ex Libris representatives, the session was well attended, and it highlighted common areas of Leganto configuration and behaviour that libraries find challenging.

Another initiative, started by the previous committee and launched in 2024 by the new committee, is the EPUG-UKI national support portal account which all member institutions can request access to via a Google form managed by the committee.

The account has been set up to act as a mechanism to raise issues that are affecting the entire UKI user group or a significant number of institutions within the group. Cases raised via the EPUG-UKI account are by default given higher internal priority by Ex Libris.

Laura MacNeil from the University of Edinburgh has set up and is leading a group that is focused on revisiting the industry standard reports that generate the annual statistical return to SCONUL (the professional association for academic and research libraries in the UK and Ireland). Included in the remit of the group is an update to the out-of-the-box analytics reports provided by Ex Libris in this area, and an ambition to make the data generated by each library for the annual return as consistent and accurate as possible.

### **Community comments and feedback to Ex Libris**

Opinions and feedback from the community have been canvassed about Ex Libris systems and customer support and are shared here.

Areas of the Ex Libris systems that are working well, and areas that are more problematic or require improvement.

“Really liking the drive for improvement in Primo around linked data, research assistant coming for NDE, the recognition of the Primo analytics needing improvement, and the things on the horizon with Mixpanel.”

“On the systems themselves, the recent Alma UI developments have been an improvement and we find Alma / Primo to be reliable overall. The team find using the Community Zone quite confusing at times, and when changes are made to portfolios it would be helpful if these could be clearer: the CZ Updates Task List is cumbersome for a small team to keep on top of and most of the time these have no major impact but occasionally updates result in linking or access issues. We also find the integration of Leganto with the purchase requests in acquisitions to be clunky especially when using CZ records (we have raised this with Ex Libris before).”

“It feels like many people are looking at the purchase request workflows at the moment and all are mentioning how limited they are. However, as it’s an area not needed and only just being looked at, it feels like there isn’t much support to vote on these and the response from support on these all end in them pointing us to Ideas Exchange or NERS.”

“Having recently moved to Ex Libris, we have found Alma/Primo VE to work extremely well it brings together a number of platforms which were independent for us, having everything in one place really helps with making decisions on how to grow the services we offer. Being relatively new we are still finding our feet but I would say community zone and content updates, mismatch collections are our biggest concern and seem to take up a lot of staff time, i.e. you buy a collection of 50 titles yet the Alma record only has 48, we are checking these to work out the difference and reporting to Ex Libris and the supplier where necessary.”

"RapidILL and Leganto appear to work well although from our own side of things we are still trying to work through some of the workflows in particular for Leganto and Sarah from Liverpool John Moore's has been instrumental in trying to get some of these issues raised with Ex Libris and has had some success I think in getting these discussed."

"Fulfilment – new patron services UI which looks to have improvements to the navigation within patron records so this looks promising."

"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."

"The recent global CrowdStrike issue was communicated in the Ex Libris status pages as affecting all services across all regions. There was no detail as to what aspect of the systems/services were being affected so it was not clear what we should/could do in terms of continuing to work as normal. The various Ex Libris mailing lists were being used again for communication between sites and it was just a case of keeping working but unsure if services would remain. Ex Libris Support could have communicated a bit better on this."

#### Feedback on handling of support tickets from members.

"Generally support has been good for us, really like the chat feature for quick questions."

"On the handling of support tickets, reporting problems to Ex Libris is generally good. We find it easier to log issues within Alma via the chat function if someone is available. There are times when they can't help, usually with indexing issues, and there have also been times when they haven't understood the query or close the ticket without explaining why. It can also take time to get a response if the case is passed to tier 2 support. Overall though we're satisfied and the service has improved a lot over the last few years."

"We've had a couple of instances where they have failed to read the support ticket properly OR not noted a key piece of information in the original ticket, leading to mis-direction of the call or repeated communications and testing and time before confirming it's not possible to do something as we had expressly stated we were trying in the original call (in Sandbox and not in Production). We've also had a couple of instances where they initially requested access to a user account for testing, on one they just did it themselves once I'd set one up and another couple where it wasn't necessary as the function was available without login and felt like it wasted time."

"Some still take far too long, and often misunderstanding between us and the analysts. Would like better updates on long cases and when delays in expected developments."

"This has improved but still frustrated when a default response is generated and the Support ticket gets closed automatically. Chat is very good for quick things so is a good addition but a lot of our queries end up getting passed to second line so a case is generated but still a good feature. We have been pretty frustrated of late in trying to get our calls for requesting a local backup of our data dealt with in a standard manner as depending on which Ex Libris support team lands up with the case it is done differently each time resulting in us having to Escalate cases unnecessarily."

"The recent introduction of the EPUG single support account is I think a good addition and although it is early days but may make a difference. Interesting that it was not used with the CrowdStrike issue which might have been useful from UK customers and from Ex Libris support themselves to communicate directly with customers on the issue - in particular the 'local' login aspect being the major affected part as far as we could tell."

#### Comments on working with Ex Libris and Clarivate as a company.

"Ex Libris have been excellent, communicating lots of changes and developments, though sometimes there is too much communication and it's easy to miss an update."

#### Any other questions, concerns and service improvement suggestions.

"Improve documentation - Documentation always difficult - information jumps from one place to another, very little included about knock on effects in other places when making changes in one place - e.g. Autoholdings - understanding the impact on previously set up import profiles when activating autoholdings collections. Nothing has been straightforward."

"Interested to know about the future direction of RapidILL. This still has a dashboard outside of Alma - are there plans to fully integrate RapidILL? If so, how are Ex Libris going to align Resource Sharing (with RapidILL, Rapido, ISO etc)?"

"Current issues with managing subscriptions - Alma doesn't capture everything needed in one place - considering not doing subscriptions via Alma, but using spreadsheets instead as they can have everything needed, e.g. Post cancellation access, sushi stats, need for better visual information in one place."

"Customer success initiative – creates a lot of extra work for not sure what benefit."

"Recent issues with Leganto new UI implementation - "forced" to implement when still too many unknowns. Want to be certain this doesn't happen with new Primo."

"The Best Practice information made available by Ex Libris Support covering Covid-19 have been invaluable and this kind of detailed information/guidance presentations is something we would like to see more of in terms of other functionality/workflows of the various Ex Libris products. CDI improvements welcome and increasing the updates is good step but it is still confusing on how/why things get deactivated."

"Finding the correct information and being able to search the portal/KB for the correct information is frustrating and leads to dead ends and quite often the Ex Libris documentation is not detailed enough or up to date with the current release."

What are Ex Libris/Clarivate doing particularly well? What areas would we like them to focus on to most effectively serve their customers?

"The webinar series being run and made available are excellent in terms of introducing various aspects/workflows around both existing and new functionality. More workflow documentation/ scenarios would be welcome as we are trying as best we can to automate processes and make the systems work better together."

"I would say the continuous development of their product suite is an area they are doing well in, our staff really like Leganto, it was a major factor in our migration to Ex Libris, and within the couple of years we've been with Ex Libris we are already seeing a new UI. An area of focus for us, and I'm sure a lot of other universities, is value for money, developing and improving on any existing analytics reports that help show value for money from not only our content but also the Ex Libris product range would be good to see."

"Happy with their focus on developing but I feel that they could look at what individual developers are doing more and integrate it into the main for those without developers, e.g. what we've found with adding pre-after-search-bar elements. Lots of places have used this but Ex Libris haven't made it user friendly to add for those without those skills."