

IGeLU international User Groups (INUG) report for 2025

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

Introduction

EPUG-UKI continues to operate a set of community mailing lists for core Ex Libris products as well as Basecamp sites to discuss resource sharing and Leganto.

The monthly community meetings on Teams are very well attended, as are the bi-monthly 'Acquisitions in Alma Exchange of Experience calls', chaired by Leah Emary from the University of Sunderland.

The EPUG-UKI committee 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)

Amanda Swann and Sally Smith are stepping down from the committee in September 2025, with the 2 new members replacing them due to be announced at the Autumn Conference at the beginning of October.

Events and activities

In **September 2024** the University of Leicester hosted an in person day dedicated to electronic resource management that generated wide ranging discussions on how e-resources are purchased and made discoverable, maintained and updated and withdrawn – the whole lifecycle.

That was followed in **October 2025** by the Autumn Conference, which ran as a hybrid event both in person at the British Library Knowledge Centre and online via Zoom. At the conference the Open University presented on digital accessibility, the University of Leeds talked about testing the Ex Libris AI Metadata Assistant and the University of York gave an update on the Primo VE Next Discovery Experience and new Mixpanel analytics platform. Nottingham Trent University finished the day by sharing their experiences of a year spent using Rapido and RapidILL. The second main meeting of the year, the **May 2025** AGM and Spring Conference, took place entirely remotely on Zoom and was split over 2 half-days for the first time – a change that has received very positive feedback from the community.

In **January 2025** EPUG ran a special edition of the monthly Teams community call on the theme of web accessibility. Frances Machell spoke about the University of

Birmingham's experience of being audited by the UK government, sharing advice on how to respond effectively and going into detail about the impact it had on her and her colleagues.

In **May 2025** a second in person day dedicated to electronic resource management took place at the University of Salford. This time, Tamar Ganor (Content Product Manager at Clarivate) attended to facilitate the day, and she was joined remotely by her colleague Liza Voloshin from the Alma Product Team. Tamar spent a whole week in the UK and took the opportunity to pay a site visit to the University of Oxford, the University of Manchester, the University of Salford, the University of Nottingham and Nottingham Trent University.

Another significant event this year was the decision taken by members of the European Innovative Users Group to disband their organisation and join EPUG-UKI. This has led to the creation of a new mailing list to support the Innovative user community.

Community comments and feedback to Ex Libris

The EPUG community was asked to provide feedback on Ex Libris systems and on Ex Libris/Clarivate as a company. The following questions were asked and each individual response is directly quoted.

Which new Alma features and functionality have been positively received in 2024/25? What aspects of Alma work well for your institution?

Known Issues Portal has been a helpful development for us. Chat functionality is an improvement.

Some updates to Resource Sharing Alma Rapid ILL functionality have helped to add multiple files, large megabyte files of different formats.

The New Title Search UI and the new Manage Patron Services UI have been positively received by our teams. We really like how interlinked everything is now and how quickly we can access the different areas (bib records, orders, items etc.) The ability to search for a specific range of dates within Advanced Search for users is also a great feature. It has really improved our deactivate and purge users workflows. We also like that there are now more local fields in Analytics. We would like to highlight Analytics as working particularly well for our institution - we have found ourselves making better use Analytics and Data Visualisation because we can do a lot of the data manipulation/presentation within Analytics.

The introduction of All Titles search has been useful for staff in terms of time saving, Chat Support within Alma for various products and specifically for cdi/data services is very good and much improved response, set management creation of new ones

"Configurable session timeout' and 'Additional Holdings Local Parameters Now Available in the May feature release were welcomed. 'Marking In-process Items as Missing' and 'Automatic Upload Electronic Holdings from Sage' from January 2025 was received positively, too. More generally, staff were positive about the cutover availability of new interfaces (e.g. New Manage Patron Services UI), enabling people who are keen to try the new look and feel, followed by a phase when the new UI is default but we can switch back if necessary, and then switching over for good. Various improvements to the Overlap Collection Analysis functionality were seen as useful and timely.

All aspects of Alma work well for us, for the most part. We have been Alma users for 10 years now so it is quite established as a system here. Alma Digital made a positive addition a few years ago and we would welcome further development of its features by Ex Libris, e.g. improving the deposit forms. We would like to see Alma-D have its own dedicated enhancements process in a similar way to the other add-on products, such as RapidILL and Rialto. With Alma-D being part of Alma CERV currently, we suspect there are not really enough customers who subscribe to it for there to be enough interest in any enhancement requests."

What aspects of Alma still require improvement? Are there any features or functions that your institution has found problematic or difficult to use?

CDI is a complete mystery. Difficult to troubleshoot and almost impossible to fix in-house without raising a case with ExL. Chat functionality can be hit and miss depending on who answers the chat.

Resource Sharing Alma Rapid ILL features still require improvement. for the "Download Electronic Resource" and "Ship item digitally", to merge and enhance both of these together.

Fulfillment functionality (albeit decreasing physical activity); integrations and basic acquisitions functionality.

The purge users workflow still requires improvement. It would be so much better (and safer) if we could purge users using sets. The Purchase request workflow in Alma also leaves much to be desired. I believe there are some improvements in the roadmap, but we are still desperate for the ability to link purchase requests to non-Rialto orders, DDA orders and CZ records. It would also be hugely beneficial to us if the Purchase Request UI was upgraded.

New Patron UI slow and reverting to the old interface at times, we continue to have performance blips where Alma times out but we are unable to get a pattern on this and staff do not report these issues as they are 'blips' so therefore a refresh clears it.

"Resource Sharing seems to require a lot of ongoing effort, particularly the adoption of ISO given that we have more than one resource sharing library. Support from the EPUG user community has been instrumental in this work.

Getting the Browns ordering process set up properly has been difficult, with records from them matching with existing records in the wrong content type (i.e. physical matching with electronic). These require manual intervention by our Metadata Team to fix. Our uncertainty about how to configure Alma import profiles and the New Order API properly for this is due to poor guidance from Browns in relation to Alma, and the lack of provider-specific guidance from Ex Libris.

We recognise that collaboration between systems suppliers and content providers can be challenging for both parties, but customers require this!"

Licences - we want to upload XML to Alma

Which new Primo features and functionality have been positively received in 2024/25? What aspects of Primo work well for your institution?

We feel that there have not been as many new Primo VE release features this past year, likely because of the focus on NDE. One of the new features that has a lot of potential is the ability to add external records to collections. However, the need to do this via normalization rules is not ideal. We switched from BO to VE earlier in the year and have found that VE is a vastly better product. VE has been very positively received in our institutions. Managing the discovery configuration in Alma is much more straightforward, and we like that updates in VE are much more timely and the config changes are generally instant.

The reintroduction of the A-Z list in journal/database. We have enabled Primo Research Assistant but are still working through this in terms of staff/student education so evaluating it as AI is a topic that is still being reviewed in terms of institutional policy. We have signed up for Primo NDE so have access to it but are not planning to move until June 2026 as after an initial look there was too much functionality that was missing as too early in the implementation process.

Linked data author cards

What aspects of Primo still require improvement? Are there any features or functions that your institution has found problematic or difficult to use?

We have been unable to implement the Purchase Request form in Primo VE as the modification we wished to make to the form were not possible.

Article download links in Primo still require improvement. Obtaining search results and Resource Sharing menu functions in Primo still require improvement.

Focus on NDE seems to limit willingness to address issues in VE (even); inconsistent implementation of some features.

We think the most significant area in Primo that requires improvement is the Research Assistant, particularly the recently identified issues with content moderation. We require more transparency and more control before we will consider going live with the Assistant. It would also be nice for the Display Logic Rules to be more flexible. For example, being able to easily prevent the Purchase Request form appearing on journal records. Additionally, we would still really like a fix for the longstanding issue where a link the Resource sharing form doesn't show for electronic articles if we hold any print holdings (regardless of coverage).

Digital collections sub searching which may get resolved with Specto essentials or with Primo NDE will be a huge improvement to discoverability

Patron Default Sort - should be optional. we have concerns about users not being aware that this is happening and it affecting their search experience.

Which new Leganto features and functionality have been positively received in 2024/25? What aspects of Leganto work well for your institution?

New UI, Librarian View, bulk options, Course/faculty field in course data

We are testing the Syllabus AI tool to see if this will make list creation easier as Reading lists are created and maintained by Instructors/Lecturers through Blackboard VLE which seems to work well with Leganto.

What aspects of Leganto still require improvement? Are there any features or functions that your institution has found problematic or difficult to use?

integration for acquisitions and bulk management could be better in Alma and in Leganto Librarian view (list level workflows but item level checking done in a mixture of Alma and Leganto; would be useful to have additional Leganto filters and Alma filters in Citations and lists to pick out 'new' content for attention.)

We are looking at best practice on our side for managing the rollover and preventing older lists from getting updated as we keep 2 previous years and current year as active within Leganto so instructors sometimes update the wrong lists. Reporting analytics from the library staff on course usage etc - librarian dashboard - not sure if that is going to be available again or not as this would be useful to have available. Citeit can be problematic depending on browser and other variations so this causes problems.

Are there any comments you would like to make about your institution's experience of using the content Knowledge Bases (Alma CZ, SFX KB, 360 KB)?

CZ is better but quality and timeliness remains an issue.

Improved updates and good comms in a challenging area. Our usage has not really changed.

Despite issues with metadata (which are generally supplier-related, rather than Ex Libris), we think the Community Zone is great. We really appreciate the continuous improvement to the CZ and the work of the Ex Libris Content Team. I have no idea what we would do without the CZ!

Overall, very happy with the CZ and make extensive use of it. We engage actively with Ex Libris on the CZMG to improve metadata for ourselves and the wider community and appreciate the efforts being made to deliver electronic collections and portfolios in a more timely fashion.

Are there any comments you would like to make about other Ex Libris/Clarivate systems (e.g., Innovative systems, Summon, Rapido, RapidILL, Rialto etc.)?

We have implemented Rapido / RapidILL this year and are very pleased with how it works for our patrons and library staff.

RapidILL is working very well and with some additional enhancements and tweaks to system functionality, RapidILL can be excellent.

RapidILL performs a vital function for us and does it very well, Rialto is losing value due to Content decisions whilst seeming to have had some excellent workflow development and interface work which is better than general Alma developments.

We have very positive experiences with Rialto, but are concerned by the changes that will occur next year. How the referral model will work is unclear - especially how order info, bib records and invoices will be ingested by Alma. We are keen to have Browns and GOBI content available via Rialto. We also have very positive experiences of RapidILL - it remains good value for money.

We would like to find out a bit more about the upcoming Specto essentials migration - in relation to existing AlmaD customers as there does not seem to be much information about it.

How well have your support tickets been handled in 2024/25? Are there any service improvement suggestions you would like to make?

Generally they have been handled well. In some cases, analysts have misunderstood our requests and there has been some toing and froing.

Further service improvement suggestions to make relate to Resource Sharing Alma Rapid ILL features requiring improvement. For the "Download Electronic Resource" and "Ship item digitally" options in Alma, to merge together and enhance both of these.

"Perception of a slight slow-down in some High priority case responses, and also drop in quality in mid 2025. Still some excellent support, and Leganto support (in general) far better than any other product in terms of response, analysis and resolution.

Poor responses on Alma fulfillment oddities, which by their nature are rare and odd to even get reported. Content cases responses improvements (just the unpaywall support portal and where to raise issues oddities in mid 2025). The Chat support is welcome and appreciated."

On the whole, tickets have been handled well, and we only escalated a few tickets last year. We really like the chat facility and use this a lot. We appreciate the ability to talk through an issue with 1st line support using the chat. Being given additional time for customer testing on tickets has also been very useful.

There has been a much better/faster response from Support and the introduction of the known issues database may help customers going forward. Think Chat has been a good addition for specific types of query. The Online Form in Salesforce has too many options for selecting the correct area when trying to submit a problem. We would like to be able to copy/paste and/or attach screenshots directly in to the call as it is not easy to do at the moment. Online Documentation still needs looking at in terms of descriptions and would like to see more best practice/workflow/scenario type information for aspects of Acquisitions/Leganto etc.

From my own experience, I would say they have been responded to well. I have almost always been able to get a timely answer. A couple of colleagues have reported that Ex Libris misunderstand their query and it takes too long for the Support staff to acknowledge that a problem exists and actually start investigating it, but this is in a minority of cases.

One or two tickets closed prematurely caused some frustration for staff. Overall I think we have seen big improvements.

Do you have any other feedback about your institution's experience of working with Ex Libris/Clarivate as a company in 2024/25?

Sadly, we will not be able to continue utilising Rialto. We had this working seamlessly and had especially welcomed the integration between Rapid and Rialto. However, with ProQuest failing to make the newly released Books framework we have had to switch supplier to EBSCO.

Big wobble in confidence in the corporate narrative and workflow around Content (Ebooks). Still unclear how much customer voice seriously in plans. Fewer customer focus groups this year seemingly for new work; some of this due to other dev priorities.

A general over-focus on AI per se than on unified workflows in Alma - as a Unified Resource Management/ Library Services Platform there are still silos and unusable acquisitions workflows.

Alma, apart from metadata enhancements, seems less clearly managed as a single solution outside of Content issues - the UX group seems to have done a lot a few years ago, but unclear what further work happening and timescales - opportunities to improve key task lists for things like reading lists in Courses Reserves if being new UI-d should not be missed (even if they have been postponed).

The Alma D offer is not very clear due to Specto work, and likewise still unclear how Collection Dev as Rialto (free) is working in terms of development effort vs paid-for products - odd outcomes where better integrations done for Rialto than exist in paid for Alma when multi-year NERS/CERV items go nowhere."

ProQuest's absence from the SUPC Framework will likely have procurement implications for us if we choose to continue ordering via Rialto from June 2026. If we use Rialto to order from suppliers directly, we would potentially have to seek procurement exemptions for each supplier, which would be a significant administrative burden. We are actively looking at other suppliers for perpetual monograph orders. Looking at the APUC framework, we also feel that Clarivate are pricing themselves out of the systems market. In both purchasing and systems, it feels like Clarivate are either unaware of or ignoring the current situation in the sector.

We have recently started having quarterly meetings with Customer Care support which I think will help us going forward. Think Chat has been a good addition for specific types of query. We have also just started a new Customer Success plan with Support which looks at strategic level so working with senior management in terms of identifying institutional objectives and planning how to get these implemented.

Although our account manager and other Clarivate contacts were extremely professional and circumspect about it, it was evident there had been quite a lot of tumultuous change within the company and we know some longstanding, experienced members of staff had been made redundant. We felt this was unfortunate because our long-term, trusted contacts are extremely knowledgeable about libraries and we hope Clarivate isn't shedding expertise it needs.

We've found Ex Libris/Clarivate staff to be helpful and approachable and value collaborating with them.