

IGeLU international User Groups (INUG) report for 2026

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, who is also the EPUG secretary.

The EPUG-UKI committee has changed this year, with Amanda Swann and Sally Smith having stepped down as Secretary and Ordinary Member respectively. The new committee is as follows:

- Chair – Lee Houghton (Nottingham Trent University)
- Secretary – Leah Emary (University of Sunderland)
- Treasurer & Membership Secretary – Laurence Lockton (University of Bath)
- Ordinary Member – Laura MacNeil (University of Edinburgh)
- Ordinary Member – Scott Bradley (Newcastle University)

Events and activities

The EPUG-UKI community has started to co-ordinate voting and engage more proactively with the CERV enhancements process. In **June 2025** Tom Kistell from Sheffield Hallam University first suggested that EPUG members have a standalone discussion about how institutions were going to vote in the second round of CERV for Alma. Kevin O'Donovan from the London School of Economics and Political Science has since co-ordinated further voting rounds by setting up a shared spreadsheet where libraries could indicate their voting intentions to help others who were undecided and give the most popular enhancements the best chance of success.

In September 2025 Adam Robinson from the University of Derby gave a talk to EPUG-UKI about developing an integration between Oracle and Alma to link the Library Management System with the University finance system and save innumerable hours of staff time and effort.

EPUG-UKI's annual Autumn conference took place on Zoom and was split across two half days in early **October 2025**. The new split format has proved popular with the community and as always, the programme was varied and interesting, with presentations on RapidILL, Alma implementation at the British Library, integrating Alma with laptop lockers, preparation for the Primo NDE and using Alma APIs for requesting. We also welcomed update sessions from Clarivate colleagues Alan Oliver and Martin

Buescher, and we appreciate the support they both always give to our community events.

Periods of system instability and downtime at the start of the 2025/26 academic year led to Chris Jones from the University of Sheffield and Trudy Gamblin from the London School of Economics and Political Science setting up a spreadsheet in **November 2025** to collate feedback from multiple institutions. This led directly to Clarivate colleagues joining the EPUG-UKI monthly community meeting in **January 2026** to respond to the feedback and go into detail about how the company's cloud environments are managed and what steps are being taken to improve resilience.

In **March 2026** Tamar Fuches from Clarivate presented to the EPUG-UKI community about the Alma AI Assistant for Acquisitions Funds and Ledgers, and in **September** she and her colleague Shoshana de la Fuente provided a demo of the Collection Development functionality in Alma.

In between, the hybrid Spring conference took place in **May 2026** at the British Library, with good levels of attendance both in person and online. Michelle Halpin and colleagues at the University of Sunderland followed up a presentation at the conference with an in-person workshop in **July 2026** focused on creating and connecting datasets to visualise cost, use and cost-per-use in an Alma DV Dashboard.

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 2025/26? What aspects of Alma work well for your institution?

ISO-ILL linkage from ALMA to ALMA with The British Library following their ALMA implementation last year.

Alma generally works very well for our institution, and we feel there were a lot of useful developments in 25/26 that have been positively received.

We found the improvements around managing electronic inventory from the CZ particularly helpful (additional information about CZ collections pending deletion, new settings for CZ-linked electronic services to keep portfolios active when removed from the CZ, and upcoming electronic collections).

The various updates to resource sharing and document delivery during 25/26 were also well received by our teams, and they have improved some of our workflows.

We also found the following useful:

- Ability to purge users based on set (this has made a big difference to our ability to safely purge users)

- Prioritising online services in discovery based on current year access

Using the AI knowledge assistant can be very useful for trying to find relevant documentation (although it isn't always correct)

The following enhancements have been particularly well received:

Advanced Physical Title Search by Permanent Call Number (without needing to specify Call Number Type), which simplifies searching and saves staff time.

Improved visibility of temporary locations, making it easier to identify location information.

Renaming of Normalization, Indication and Merge Rules, helping reduce confusion and making metadata workflows more intuitive.

Improved visibility of unsaved changes in the Metadata Editor, which is particularly useful when splitting bibliographic records and managing complex cataloguing workflows.

Bulk updating of records with identical metadata, which has the potential to remove the need for export-edit-import workflows using external tools such as MarcEdit.

BIBFRAME Works and Instances Tree View, which provides additional ways to visualise and navigate bibliographic data.

Relative Date Searches in Repository Search, which support the creation of rolling-date logical sets and other dynamic workflows, although our experience has highlighted some implementation limitations.

Alma's metadata management functionality continues to support efficient cataloguing and resource management workflows. We particularly value:

Ongoing improvements to metadata searching and record management.

Time-saving enhancements that reduce the number of steps required for common cataloguing tasks.

Improved visibility and navigation within the Metadata Editor.

Additional data visualisation options through BIBFRAME views.

Greater flexibility in managing records in bulk.

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

Improve the following part of the Resource Sharing Workflow: In ALMA there are two separate ways to upload a .PDF file to a Rapid ILL lending request. The 'Ship item digitally' (Document Delivery) way allows upload and visual content preview of the actual .PDF file (underneath 'Files'). The other way is via 'Download Electronic Resource' which is better because citation information is displayed. But the 'Download Electronic Resource' way does not have visual content preview of the .PDF file. The improvement idea is to add the .PDF file visual preview window, to the 'Download Electronic Resource' option. This will improve accuracy and efficiency in our workflow.

We find real time acquisitions (via the New Order API) for suppliers that are not GOBI or ProQuest quite clunky. It is a shame that the automation present in the GOBI/ProQuest workflow for ebooks cannot seem to be replicated with other suppliers, for example. We have also had various issues with using the API for DDA and upgrade orders with other suppliers.

The task list is not always useful (not everything it shows is a task, e.g. in reading lists it includes completed lists, and any workflow statuses we have created ourselves for incomplete lists/citations do not appear). It would be preferable if we could define what appears in this list as needing attention, and not be limited to these out-of-the-box 'tasks'.

The new UI isn't very intuitive – it seems to take a lot more clicks to do anything now and the navigation seems a lot more difficult to get from relevant screens. The new Physical Items really slows down the speed of carrying out straight forward tasks, and the information isn't easily seen as previously – e.g. Notes in an item record – the tabs easily indicated that there was a note in an Item record. This isn't visible in the new look.

The physical items ui is currently being used in Production (as this is really the only way to try and test this kind of interface change - use it real situations. Staff are struggling with navigation to find details of e.g. ISBN (as it is not on the item to select or view), and some issues raised and am trying to get some reported. Staff have watched the initial training session but that did not cover certain aspects e.g. purchase order history or where to find things. Another example is the inability to select the item barcode which staff used often but is now navigated in a different way. Staff will get used to working with it but it does add a lot of time to staff trying to work out where things have gone or moved to. All staff work in different ways so not clear what the issues are or will be - maybe having a feedback option specifically on the new UX features would be useful - in Chat?

Several areas could be improved:

The Virtual Keyboard / Insert Unicode Characters functionality can be difficult to navigate. For example, locating commonly used symbols such as the copyright symbol requires considerable trial and error. The terminology could also be clearer, as "Virtual Keyboard" may better describe the feature than "Insert Unicode Characters".

Knowledge Centre AI Assistant responses have occasionally been inaccurate, reducing confidence in the advice provided.

We have encountered a persistent issue when editing portfolios via the Metadata Editor, where attempts to attach portfolios to eBooks may generate a "cannot parse null string" error. Staff currently rely on a workaround outside the MDE.

We would welcome improved support for BIBFRAME Hubs.

Continued annual Alma and Primo performance issues at the start of the academic year remain a significant concern. The recurrence of these issues impacts service reliability and user confidence.

Which new Primo features and functionality have been positively received in 2025/26? What aspects of Primo work well for your institution?

We feel that a lot of the Primo enhancements released in 25/26 were focused on adding existing features to NDE, and they were significantly less impactful than the Alma improvements. One of the new enhancements we did really like was the Enhanced DEI Controls, but we were a little disappointed that the feature didn't work entirely in the way we had hoped (not being able to use 'part of phrase' with the replace function means changes are not applied to strings).

The implementation of NDE seems to have been well received.

Have just started to use the Logical collections feature for specific collections. Having enabled Primo research assistant in 2025 we are still working out ways to evaluate usage/benefit of it in terms of users experience.

The NDE landing page and other out-of-the-box functionality, which reduces reliance on IT and web development teams.

Easier integration with third-party services such as LibKey.

Mixpanel analytics, providing more detailed reporting than previously available.

The NDE interface, which has generally been well received by library users.

Improved discovery collection faceting, supporting easier resource navigation

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

We would really like greater ability to customise components of the Primo NDE interface without needing to have a developer or significant technical skills. The move to NDE has meant we are actually less able to customise our Primo interface. We have seen some fantastic customisations being developed by other universities, but we will not be able to take advantage these because we don't have the technical skills needed to use the Advanced Customisation Module. It would be nice if something similar to CloudApps could be developed for Primo.

We would like to see better integration of AI in Primo (without losing control). We are finding that students are often bypassing Primo completely in favour of Gen-AI chatbots or specialist AI research tools. The current AI equivalents in Primo are not a suitable solution (from our point of view). There are too many issues with the Primo Research Assistant in its current form, and we are still testing Ask Anything. We have noted the plans in the roadmap to address better integration of AI, so we look forward to seeing more developments going forward.

We have noticed a significant increase in bot traffic during 2026, which is skewing our Primo statistics. Placing Primo behind authentication isn't the answer for us, so we would like to know whether Clarivate can do more to at least identify bot activity (or whether Mixpanel helps with this?).

The FRBR tool is a bit clunky.

We haven't adopted the AI Research Assistant or the Natural language search, or Resource recommender

Searching sub-collections within digital collections had been initially part of the move to Specto from AlmaD but that changed and is now only available with PrimoNDE which was disappointing. Our move to NDE has been delayed so we are still not making best use of this but hopefully once we move to NDE that will be a big improvement.

Better documentation and training resources for Mixpanel.

The training burden associated with Angular.

The loss of functionality previously available through Community Boards, particularly around Community Zone reporting and sharing.

Greater flexibility around administrative permissions, including support for multiple administrators.

Improvements to the VE to NDE migration process, as some locally configured display fields did not transfer correctly.

Resolution of recurring annual Alma/Primo performance issues, such as those experienced on 5-6 October 2026. The repeated occurrence of similar issues year after year raises concerns about whether the underlying causes have been fully addressed. While we appreciate the complexity of operating services at scale, the continued disruption impacts user confidence, institutional reputation and creates the perception that insufficient progress has been made in delivering a sustainable long-term solution.

Which new Leganto features and functionality have been positively received in 2025/26? What aspects of Leganto work well for your institution?

The indicators in Rialto of items on reading lists is good

Filtering by item format ('availability') is useful

We like the Open Access/OER indicators, they help us indicate how much material on a reading list is openly available and work towards targets.

The 'Citations with portfolio removed from repository' is useful to catch things we might have missed

We use Blackboard Ultra CMS and this seems to work well where reading list material for courses have been created.

Instructors Can Set "No List Expected" from the LMS makes it easier for the Library to identify modules without reading lists.

Ongoing accessibility and usability improvements that support a broader range of users.

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

Things which are either meant to be developed as part of this year's roadmap but not there yet (such as the UX improvements to the Course Materials areas of Alma to allow better filtering in real time – basecamp created months ago for initial discussion then went completely quiet) or that have been accepted for next year's CERVs (will we finally be able to see the electronic collection information of a citation? Or be able to view a list from a module leader's perspective?)

Often a new feature will have potential but not feel fully realised – for example you can't add/remove Open Access indicators in a bulk citation update job; 'citations removed from repository' would be more useful if Alma clearly indicated what portfolio had been removed and what alternative holdings/formats we may have

We have had some problems with the inventory type filters in Leganto – the processing to categorise these only having been done for citations created in 2025/6, leading to a lot of misleading 'None' indicators on older lists; the need to scroll through/refresh a list to see these categories update for certain link resolvers

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 - still to identify useful reporting. We had been testing with the Syllabus Assistant for reading list creation but ran in to problems as we do not have a standard template for courses at our institution but will continue to see if we can use this as it could be time saving.

Resolution of recurring annual Alma/Primo, which now affects Leganto, performance issues, such as those experienced on 5-6 October 2026. The repeated occurrence of similar issues year after year raises concerns about whether the underlying causes have been fully addressed. While we appreciate the complexity of operating services at scale, the continued disruption impacts user confidence, institutional reputation and creates the perception that insufficient progress has been made in delivering a sustainable long-term solution.

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)?

We use the CZ regularly for electronic journals, databases and ebook collections (where possible), and continue to find it very useful. We have found that when we report issues with CZ collections these are mostly solved quickly.

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 look forward to hearing and seeing more about Nexus, and we are very interested in it's potential to reconnect patrons with library resources.

As always, RapidILL works extremely well for us.

Clarivate's decision to withdraw from the perpetual purchasing book market has meant we have moved away from using Rialto, so we are no longer benefiting from the streamlined processes associated with it. We are seeing around a 50% loss in efficiency, which has had a significant impact on a small team.

It would be good to have 2027 roadmaps for Ex Libris product, including Esploro, by the end of the current year so libraries can plan what features will be implemented rather than to wait for releases to discuss what it is appropriate.

The loss of Proquest ebooks and print books has caused disruption as we had built our ordering workflows around Rialto. We now have to carry out more manual work and update our procedures and internal guides at an already busy time of year. Whilst certain vendors can be integrated into Rialto, Rialto is not (yet?) set up to fully reflect the prices and licences available at the vendor website.

Rapido needs to improve the method of creating sets for Lending items – in particular being able to exclude books that are linked to Active courses/Reading lists

How well have your support tickets been handled in 2025/26? Are there any service improvement suggestions you would like to make?

We have noticed no significant improvements, but we feel our support tickets have been generally handled well.

Ex Libris staff seem to have recently become very keen to close tickets quickly, in some cases suggesting this when they've informed us something is planned rather than leaving it as 'in development' or 'pending release'. I also find I often have to repeat myself in comments, having already explained the issue and uploaded screenshots/casts.

I don't think it is good practice for the support team to make changes to our configuration in production sites unless checked with us first. Eg. We ask how to make a change because we can't find the information in the documentation – they should tell us how to make the change but not make the change on our behalf as we might want to do testing in a sandbox or other test environment first.

Support response and handling has been much improved this past year and we make frequent use of the Chat feature within Alma. The new Knowledge Portal is quite difficult to navigate but hopefully if all the various online documentation for all products gets migrated to the one place then it will be easier to find up to date documentation. We do need to be able to search within each product within the Portal which does not seem to be there now - not sure if this is being developed? The Online Form in Salesforce has too many options for categorising calls 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

Do you have any other feedback about your institution's experience of working with Ex Libris/Clarivate as a company in 2025/26?

We appreciate having a Customer Success Manager, but we have unfortunately not been able to take full advantage of their assistance due to lack of resources/time. We hope to take better advantage of this service in the future.

Our quarterly in person meetings with Customer Care support is very good and we appreciate this. Ongoing Customer Success contact works with our senior management team to identify and assist with strategic objectives

While we value the engagement opportunities provided through user groups and appreciate the ongoing pace of product development, recurring service performance issues continue to affect our experience as a customer. In particular, the repeated occurrence of Alma/Primo/Leganto disruptions during peak periods, including those

experienced on 5-6 October 2026, raises concerns about whether underlying issues are being addressed effectively and sustainably. When similar incidents recur year after year, it can undermine confidence that lessons from previous events have been fully translated into lasting improvements. We would welcome greater transparency around root causes, mitigation measures, and long-term plans to improve platform resilience and reliability. As Alma and Primo are mission-critical services, reliability remains one of the most important factors influencing our experience of working with Ex Libris/Clarivate.