



ITALIAN EX LIBRIS USERS ASSOCIATION – ITALE

National and Regional User Group Meeting 2026

Taipei, October 18th, 2026

ITALE proposal of topics for discussion

1. Technical support performance: efficiency versus effectiveness

It appears that the current **performance assessment** of the technical support service relies primarily on the time elapsed between the opening and closure of a case. While closure time is an useful efficiency indicator, it does not show whether the reported issue has actually been solved. Service quality should be assessed above all in terms of effectiveness and successful problem resolution.

Furthermore, the technical support portal is increasingly being used for matters related to project implementation, new developments, and product enhancements. This partly alters the original purpose of a support service, because these activities require ongoing dialogue, shared planning, and direct access to appropriate product or project contacts rather than the conventional lifecycle of a support case.

This hybrid use of the support platform creates several distortions. **A case may be recorded as closed even though the underlying problem remains unsolved** — for example, when a fix is deferred to a future release or when the customer is invited to submit an enhancement through the Idea Exchange. ITALE members have also encountered cases that had to be reopened because closure did not correspond to an effective solution.

ITALE proposes that user groups first discuss whether this model provides a reliable measure of support quality. Average closure time should not take precedence over the effectiveness of the intervention: the decisive outcome is whether the reported issue has been resolved in a sustainable and satisfactory way.

Proposals

1. Implementation projects, new developments, and major product changes should be managed outside the support-case system. Direct engagement with designated product or project contacts, supported where appropriate by collaborative environments such as Basecamp or similar platforms, is more effective for these activities.
2. Support performance statistics should be based primarily on the number and proportion of problems **effectively solved**, regardless of the time required. Closure time may remain a complementary efficiency indicator, but it should not be treated as evidence of a successful outcome when underlying issues remain open.

2. Transition to the New Discovery Experience (NDE)

Over the past year and a half, the ITALE Discovery Tool Working Group has coordinated the



transition to NDE through a dedicated “Go NDE” focus group involving 19 Italian institutions. A survey among the whole ITALE Community, conducted in May 2026, received 23 responses: most institutions were testing NDE, only three were already in production, and the majority expected to go live by 2027.

The main concerns included **product maturity**, AI result quality, missing Primo VE features, limited documentation and communication, long support-case resolution times, the Angular learning curve, and insufficient attention to Italian language and metadata standards. The slow progression of the development of **Specto** and Specto Starter is also an issue, since Alma-Digital is not compatible with NDE. This issue is addressed in greater detail in the following section.

From the Summer of 2026, communication has improved through the Italian Customer Success Manager and a dedicated Basecamp space to dialogue with Ex Libris.

ITALE asks Clarivate to prioritize significant open Salesforce cases, keep the roadmap reliable and transparent, and provide customized technical sessions on NDE and Mixpanel. Timely support, training, documentation, and shared communication channels are essential for a sustainable transition to NDE.

Based on the experience with NDE, and previously with Primo VE, ITALE considers the **model** used to introduce major new products inadequate.

NDE was made available before the product had reached sufficient maturity and could still be regarded as a beta version. Only the successive releases delivered over the past year — also as a result of extensive testing and feedback from users — have recently brought it to a level at which institutions can reasonably plan a go-live without significant defects or operational problems.

Technical support, training, and documentation were also not adequately prepared to accompany the implementation; for example, essential training on Angular was not available when institutions needed it. This implementation model places a disproportionate workload on customers, who must devote substantial time and specialist resources to testing, identifying defects, following up support cases, and developing local workarounds.

For example, recently Support advised clients to fix NDE display bugs, also notated in Primo international list, by modifying the local CSS, although the issues concerned every institution. These local interventions can be difficult since the NDE CSS documentation is particularly lacking.

Coordination and knowledge sharing within the user community can mitigate this burden only in part and cannot replace the vendor’s responsibility to release mature products supported by timely documentation, appropriate training, and fully prepared technical staff.

ITALE therefore **asks Clarivate to reconsider the implementation model** for major new product versions. Future releases should undergo more extensive internal testing and a clearly defined beta phase, with general availability only when core functionality is stable. Documentation, training, and support readiness should be available in advance and evolve in step with the product, enabling institutions to focus on implementation rather than on product debugging and stabilization.



3. Specto & NDE: Controlled Digital Lending workflow

The main concern regarding Specto and NDE is the management of Controlled Digital Lending (CDL). At present, the workflows for both Long-Term Digital Loans (LTDL) and Short-Term Digital Loans (STDL) continue to rely on Primo VE for access.

This configuration creates an inconsistent and potentially confusing user experience. Users rely on NDE to search for and access physical and electronic resources, but they are redirected to Primo VE when requesting access to digital representations governed by CDL policies.

This situation creates several problems. Not only are users required to authenticate a second time, but the redirection to the Primo VE environment also allows them to continue searching outside NDE, thereby creating two parallel discovery environments.

The current limitations of the CDL workflow represent a significant obstacle to the full adoption of NDE. A seamless and consistent experience across discovery and resource access is essential, particularly for libraries investing in the transition to the new environment.

To avoid exposing our users to a fragmented and discontinuous experience, some Italian institutions are currently postponing the adoption of NDE.

At the end of the summer, the coordinator of the Italian Specto Working Group was offered the opportunity to participate in the CDL Early Adopter Program. We would appreciate an update on the current development status of the dedicated CDL workflow and confirmation of whether a timeline has already been defined for testing activities and the involvement of early adopters.

A screen recording documenting this behaviour is also attached, should it be useful: [Registrazione schermo log-in NDE private.mov](#).

4. Products' compliance with UNIMARC standard

Most Italian institutions use **UNIMARC** as their primary cataloguing format. Although Ex Libris identifies Alma as a multi-format library services platform supporting MARC 21, UNIMARC, KORMARC, CNMARC, Dublin Core, and other metadata standards, new developments and enhancements are frequently delivered initially, and sometimes exclusively, for MARC 21.

As a result, libraries using other formats often need to invest significant effort in defining requirements, preparing detailed specifications, and advocating for product developments through the Idea Exchange, NERS, and CERV processes.

For smaller user communities, however, obtaining sufficient visibility and support for these requests remains a challenge.

Several examples illustrate this situation. The **Journal Categories functionality**, for instance, is automatically generated through a job only for MARC 21 records. Requests to extend this capability to UNIMARC have remained unresolved for several years despite repeated enhancement proposals.

Similarly, the lack of a direct **Dublin Core-to-UNIMARC** conversion table in Alma requires metadata to be converted through MARC 21, potentially resulting in the loss of valuable information during the conversion process.

Furthermore, the recent development of AI assisted cataloguing is available to MARC21 users only.



ITALE devoted particular attention to two strategic developments that are especially important for institutions using UNIMARC.

The first concerns the implementation of **Linked Open Data (LOD)** enrichment services. Currently, these services are available only for MARC 21-based catalogues. To address this limitation, ITALE, together with **ACEF** (Association des Clients d'Ex Libris en France), has established an ongoing collaboration with Ex Libris aimed at extending LOD capabilities to UNIMARC catalogues. This joint initiative seeks to improve the visibility, discoverability, and interoperability of bibliographic data, ensuring that institutions working with UNIMARC can benefit from the same advanced enrichment services available to MARC 21 libraries.

The second area of development concerns the **integration of UNIMARC authority records** in Primo VE. The Bibliographic Standards and Italian National Union Catalogue (SBN) Integration with Alma Working Group is collaborating with Ex Libris to enable the indexing, display, and searching of UNIMARC authority records within the discovery environment. Since authority record searching is currently available only for MARC 21, extending this functionality to UNIMARC would significantly enhance authority control, improve navigation between related entities, and provide a richer and more consistent discovery experience for end users.

These initiatives demonstrate the importance of stronger support for formats other than MARC 21 and highlight the value of international cooperation among user groups. ITALE encourages Ex Libris to ensure that enhancements developed for MARC 21 are planned and delivered for UNIMARC and other supported formats within a reasonable timeframe, thereby guaranteeing a more consistent and equitable experience across the global user community.

5. Consortia requirements for Primo VE and NDE

In a **consortia environment**, some configurations need to be managed centrally and consistently, while others remain under the responsibility of individual institutions. One of the main current limitations is that not all Primo VE configurations can be managed centrally and distributed from the Network Zone. As a result, the same settings sometimes have to be replicated and maintained manually across multiple institutions.

Clarivate has acknowledged this requirement in the Primo VE roadmap by announcing the "View-level parameter distribution" functionality for the November 2026 release. This development should significantly improve configuration management in consortia environments. ITALE hopes that, over time, Network Zone distribution will be extended to as many configurations as possible.

Release planning also requires greater attention to the complexity of consortia environments. Features and configuration options designed primarily for a single institution can be considerably more difficult to implement across a consortium with numerous Institution Zones and views.

ITALE therefore calls for greater consideration of consortia requirements in the development of Primo VE and NDE. New features should include consistent management mechanisms at Network, Institution, and View levels and, where appropriate, enable configurations to be distributed centrally from the Network Zone.