ULMS Survey Responses – Oct/Nov 2020

# Introduction

Over the fall, we conducted a set of surveys to assess current satisfaction with Ex Libris as a vendor and Alma and Primo products currently in use systemwide. Survey responses were collected from CSU library staff and chairs of the CSU Unified Library Management System (ULMS) committees. Comments from both surveys are contained in the document in their entirety. We have shared these results with both the Council of Library Deans and Ex Libris to detail our concerns and share a sense of our general satisfaction with Alma and Primo, with a goal of informing our contract renewal discussions in mid-2021.

In last year’s report, we observed that CSU satisfaction with Alma and Primo was past its peak due to lower reported satisfaction with Ex Libris and its products compared to the first years in production. This year, CSU staff report higher satisfaction with Alma, Primo and Support, while those scores reported by our committee chairs stayed relatively even with last year’s results. Collectively and individually, CSU library staff and faculty currently express neutral-to-positive satisfaction with the system.

While satisfaction with Ex Libris currently appears acceptable, issues described through this survey as well as less formal channels show expressed concern that Ex Libris is not responding to reported issues as well as they could, particularly with rollout of new releases and new functionality in Alma and Primo. For example, the CDI rollout was universally problematic for the CSU, and while many see the promise of the product the continual fighting of fires caused by CDI changes is dimming enthusiasm about Ex Libris’ end goal. COUNTER 5 functionality was delivered as promised, but is missing support for important reports and, critically, for reporting both COUNTER 4 and 5 as is necessary for ACRL reporting.

Ongoing issues with analytics outages and continued difficulty with escalating content support issues continue to give Ex Libris a black eye with many of our staff. As a product, Primo continues to receive negative comments around quality of search, performance and UI/design. We need to continue to share with Ex Libris the impact these issues have on our workflows and ability to serve our patrons.

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| --- | --- | --- | --- |
| Chairs Survey Satisfaction Scores (n=7) | | | |
|  | Alma | Primo | Support |
| 2019-2020 | **7.3** | **6.7** | **6.4** |
| 2020-2021 | **7.0** | **6.9** | **6.4** |
| 𝚫 | **-0.3** | **0.2** | **0.0** |

The ULMS working group chairs give Alma and Primo decent marks overall, with Primo pulling alongside Alma in terms of satisfaction compared to last year. There is little change between scores overall compared to last year. Ex Libris support also receives a fair score from the chairs.

Over the past year, Support has made strides towards reducing our backlog of cases and providing training to bolster weaker areas of understanding with Alma and Primo. However, any improvements in these areas are counterbalanced by longer case resolution times and continued dissatisfaction with Content support responses. Development fixes continue to take longer to resolve than experienced at the beginning of production, which may indicate greater product complexity, a greater strain on resources within Support, or both. All committees report serious issues that need to be addressed by Ex Libris to improve satisfaction.

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| --- | --- | --- | --- |
| Staff Survey Satisfaction Scores (n=129) | | | |
|  | Alma | Primo | Support |
| 2019-2020 | **6.1** | **5.6** | **5.6** |
| 2020-2021 | **7** | **6.5** | **6.4** |
| 𝚫 | **0.9** | **0.9** | **0.8** |
|  | | | |

CSU staff rate Alma, Primo, and Ex Libris higher than last year. Reported issues spanned the breadth of Alma and Primo and expressed more general frustration with the system than in previous surveys. Staff who work directly with the ULMS continue to express high levels of frustration with Alma and Primo. ULMS governance and Chancellor’s Office staff need to continue to share our needs with Ex Libris and work together to find solutions to any issues hindering our libraries from serving their communities.

It is important to note that, although Primo received a higher satisfaction score this year, comments show great dissatisfaction with Primo’s search capabilities. As we evaluate Primo VE in the spring, we will take care to compare VE’s search functionality against Primo’s to see whether VE addresses these concerns or exacerbate the issues with Primo as a discovery solution.

General comments show a mix of support for the ULMS and a “longing for the past”. It continues to be important to thoughtfully balance local needs against systemwide needs. ULMS governance needs to remain open and inclusive when making decisions to ensure staff participation in governance remains high and productive. It continues to be important to understand and communicate our pain points to Ex Libris during the year. Ex Libris is listening and is well-intentioned but need to demonstrate that they will address CSU concerns to make our partnership successful.

Ex Libris remains the best choice of library management system for our needs, but we will continue to scan the marketplace as we work with Ex Libris to address our issues and improve their responsiveness to our expressed needs. As rising costs and decreasing budgets are an immediate concern, we will continue to work with COLD and Ex Libris on a contract that works for us all.

# Top Issues Raised in the Survey

## Electronic Resources Management Issues

### CDI

One of the largest pain points for the CSU this year involves the Central Discovery Index. Rollout of the CDI was informed by the experiences of the SUNY system, one of the development partners involved with the product from the beginning. We realized fairly quickly that our greater focus on centralized e-resource management meant that we would have a different experience with CDI than SUNY, as our use cases hadn’t been incorporated into product development.

The resulting rollout of CDI bore this perception out. Documentation was found to be sparse and training to be too general to answer our specific questions, especially concerning consortial setup and configuration. Content support was slow to respond to queries and CSU ERM staff felt thrown into the deep end. The net effect is that CDI has caused a vast and deep disruption in e-resource management and access that has barely subsided by the time of this writing.

Many issues linger from the past 6-8 months in production:

* It can take one to two weeks (sometimes longer) for the CDI index to update after making changes to the CDI settings. This delay makes managing e-book or media collections in CDI more difficult given the churn in these collections.
* It is not easy to tell the source of a CDI record in a merged CDI record, which makes troubleshooting record issues more difficult.
* CDI records originating from an inactive CDI collection diminish user experience. Libraries would like the option to have those records removed.
* There are no best practices for using CDI settings, when to use to them (active/not active) and the outcome of using or not using that setting.
  + Example: “We subscribe to only some titles in this collection:
    - We use this so we can get the correct “full text available” label on the CDI records.
    - Ex Libris suggested we say “yes” to this setting, but we found that, if the number of records is less than the number of portfolios on the Alma e-collection, “no” to that setting is preferred.
  + Duplication in records from CDI and Alma is a big issue for e-books and streaming media.  Libraries would like those to be merged to avoid confusion, especially when one record works fine and the record for the same item does not link to the full text.

Perceptually, CDI is seen by the CSU ERM community in a negative light. While the CSU community acknowledges CDI’s potential, they feel that the current product is “half-baked” and poorly supported by Ex Libris. Solving current issues needs to be prioritized by Ex Libris quickly in order to turn the tide of opinion back towards the positives that CDI offers.

### Linking and e-resource updates

Issues with accurate full-text linking has been an issue since the beginning of implementation. We recognize that expecting perfection in this area is an impossible ask. However, we also know that each linking issue represents a loss of access to a resource that we are paying for either through publisher subscriptions or through staff time. Most linking issues come from patron reports, meaning that these issues are discovered by users who hope to use the resource in question. An inability to provide the user with the resource that they desire at point of need has the potential for cascading effects in how the user sees the library in their research life that may likely outweigh the waste of dwindling financial resources spent on a resource we cannot deliver.

We understand that most linking data issues ultimately stem from publisher data and there are limits to Ex Libris’ ability to correct bad links without the publisher’s involvement which takes time. We also credit Ex Libris’ work towards improving the quality of inking data through the Providers Zone and other initiatives. However, there are additional steps that Ex Libris should take to show engagement on this issues and recognition of the impact they have on their customers.

Community Zone updates cause a multitude of issues for ERM staff. For example, Oxford, Project Muse and Ethnic NewsWatch were recently updated with archived coverage data instead of current coverage.  In these cases, there were extra records added with incorrect archived coverages. One record would have current date coverage and a second record for the same title was also added with the archive coverage.  This necessitated manual removal of these extra records.

Other examples: In Academic Core Plus, Ex Libris updated every portfolio with the wrong linking so we had to correct the linking for all of our subscribed portfolios. CSU Fullerton reported that 450 records were removed by Ex Libris from their Alexander Street Press American History in Video collection during a recent CZ update.  Another CZ update broke the Safari e-book parser, which took two weeks for Ex Libris Support to address and meant a loss of access to one of our largest e-book packages for a significant amount of time. There have recently been higher than normal reports of broken links in the OA e-collections, necessitating manual intervention and individual reporting to Ex Libris Support.

There are also concerns about the length of time it currently takes for large CZ updates to load into Alma and about record quality. The ERM Committee reports that there are frequently ebook records loaded from the CZ that lack basic access points such as subject headings or anything other than a title and author.

Over time, issues such as these devalue the worth of services purchased from Ex Libris and degrade the experience with Alma and Ex Libris for all. Many staff report that they are “doing Ex Libris’ work for them” by needing to fix so many issues manually. Others have commented that Ex Libris appears to shirk their duty by not informing customers of known issues with linking data, by avoiding regular updating of SalesForce cases, and by taking weeks to fix issues created by mistakes in record updates.

It is worth reminding Ex Libris that electronic resources support served as the initial reason for collaboration between CSU campuses and was a primary need identified in our RFP for a systemwide solution. Great ERM support is a primary (perhaps THE primary) benchmark for assessing whether an integrated library system meets our combined needs. The fact that there are major issues with CDI and with linking should be cause for alarm looking ahead.

## Primo

Primo continues to receive many negative comments regarding relevancy ranking, performance and indexing. As we plan to evaluate Primo VE this Spring, we hope that some of these concerns will be addressed, at least in part, by differences underlying that discovery product. Should VE fail to address these issues, we will need to work further with Ex Libris Primo experts to see what can be tuned to improve user experience, or drop Primo in favor of another discovery solution.

Many staff comments regarding Primo point to underlying issues with CDI and have been covered earlier in this document.

## Support

As seen by reviewing individual survey responses, the CSU’s experiences with Support vary widely. Generally, initial acknowledgement of issues by Support tends to be timely and there are few negative interactions with individual Support team members. Working with Alma and Primo Support managers is typically positive and Support appears motivated to provide great service and quick resolution when possible. In addition to meeting with Alma and Primo Support monthly, Content Support has worked with us on case escalations consisting of a dozen or so cases a month. The attention from Ex Libris management is welcome and serves to help maintain a collaborative relationship between customer and vendor.

The biggest general issues keeping Support satisfaction lower than expected are with responsiveness after the initial intake, growing case queues, and longer resolution times. We have worked with Ex Libris Support on addressing these areas of concern with little sustained improvement. Support will likely need more resources to solve these issues in a way that will lead to improved satisfaction.

The real problem area for the CSU comes from Content Support. As previously mentioned, we acknowledge the issues inherent in supporting linking and coverage, given the lack of control over the data sources.

As mentioned above, Content Support management has worked with us to address a dozen cases every month. However, communication between the CSU and Content Support through SalesForce cases needs to be greatly improved. Status updates are inconsistent and there are typically long periods of quiet between case updates. There also is no real ability to escalate cases in a timely manner, as we currently experience with Alma and Primo, noting that the case escalation mechanism works on only a dozen cases over a month’s time, and this escalation method acts more like a finger in the dyke when the influx of incoming cases outpaces the number of Content cases closed in a month.

We understand that there is often nothing to offer customers while waiting for information from the publisher, but the lack of updates creates a real view that Content Support does not care about our issues or feels no impetus to provide solutions. Coupled with the observations previously shared in the ERM section, CSU ERM stakeholders feel there is not enough attention placed on our need for a robust and modern e-resource solution.

## Other

There is a growing attitude that releases are causing more issues than they solve, while the fix release schedule appears to put necessary code fixes out farther and farther. The end result is that CSU staff feel that releases both come too fast for comfort and take longer than we need to resolve lingering issues. Many staff expressed in survey comments that more bugs are introduced in releases, leading to a concern that features are not properly tested before introduction. At the same time, regressions are taking too long to appear in a release schedule to allow staff to feel that their concerns are being heard and addressed by Ex Libris.

# Chairs’ Survey

*The chairs’ survey was shared with the seven working group chairs, all of whom were asked to poll their committee and community of practice to provide a summary of how well Ex Libris and their products are working for them. As we anticipated little crossover between groups, we provide scores by group as well as an average score to show how much better or worse the products may be working for a functional area.*

**Q1: On a scale of 1-10, how satisfied are your committee and community of practice with how Alma currently performs in your functional area?**

**Average: 7.0**

Acquisitions: 8

Analytics: 7

Discovery: 7

ERM: 7

Fulfillment: 7

Resource Management: 7

Resource Sharing: 6

**Q2: On a scale of 1-10, how satisfied how satisfied are your committee and community of practice with how Primo currently performs in your functional area?**

**Average: 6.9**

Acquisitions: 8

Analytics: 7

Discovery: 7

ERM: 6

Fulfillment: 7

Resource Management: 7

Resource Sharing: 6

**Q3: Please list the top five issues you and your functional area are currently facing below.**

**On a scale of 1-5, how impactful is the issue to your community of practice?**

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| --- | --- |
| Acquisitions | * Order date received refers back to the beginning of the new FY date, rather than payment date - **5** * Look up purchase order status (sent). Give brief display of current status – **5** * Search ALMA for invoices that are In Review or waiting for Approval. Need special search terminology to locate invoice. - **5** * The status of an invoice during processing reporting in analytics (review, approved, etc.) - **4** * Colored pop-ups minimized during ordering - **2** |
| Analytics | * Cost Per Use data is too complex and doesn't include necessary information. – **4** * Network zone analytics for electronic resources is slow and unreliable. – **4** * Inconsistent labeling between Alma data labels and Analytics field names. - **4** * Overlap analysis doesn't include print and electronic - **3** * Fulfillment Area Statistical Category is Blank- **4** |
| Discovery | * "Bad" metadata pertaining to the CDI switch is clearly the top problem based on our survey of the community of practice. We didn't get a lot of detail as to the exact problems with the metadata but I think at this point we're familiar with the number of Salesforce cases and types of problems that people are identifying - inaccurate holdings/full text information in both brief and full records (but not necessarily in both at the same time), merged records that contain inaccuracies, perceived persistence of duplicate records (it is unclear based on the survey if this is due to Alma and CDI records or if people are complaining about CDI records that should be merged), and books displaying in article results (scopes and advanced search). - **5** * Results ranking/relevancy ranking. Concerns here often included specific examples such as many failed known item searches, where the item is not on the 1st page of results. Another concern was the occasion that book reviews show up higher in results than the actual book. (Personally, I think this has improved greatly but a couple respondents claim this is still a problem, so I am passing it on.) - **3** * After the top two issues there was a considerable narrow tail of complaints that didn't really rise to a clear third issue. If I were going to group them under one heading it would be 'authentication'. Several campuses said they were having glitches in this area of unclear origin. Some also complained about the nature of how sign in is required to see specific services and options for holdings, a couple expressed the idea that the buttons to prompt authentication are still not prominent enough. - **2** * Likely pertaining to something in our consortial PNX norm rules, for at least 2 campuses, the facets for audio and video do not return accurate results that show all the various subtypes (e.g. LPs, CDs, streaming and VHS, DVD, streaming). - **3** * Three campuses reported problems with "date range" filters/facets. No specific examples were provided so it is not clear whether the problem here lies in the CDI metadata (which dominated the community's comments) or if there is something buggy with Primo itself. - **2** |
| ERM | * CDI - both the configuration and management in Alma, and the way CDI records display in Primo - **5** * CZ package updates are slow and inconsistent - it generates more work and causes havoc on availability in OneSearch - it says we do/don't have access when we do/don't Additionally too many CZ records are so brief as to not be useful at all - some ebook packages have merely a title with no subject headings! - **4** * Record duplication issues - CDI/IZ/NZ/CZ - **3** * Alma Sushi management and COUNTER 5 implementation - difficult to manage, slow to be available some sushi vendors not available at all - **3** * Open Access collection link maintenance, article linking issues in Primo in general - **3** |
| Fulfillment | * Alma is often slow to perform a task. This has been noticed entering/exiting a user record, checking out, checking in (both in the user record and in Return Items), and scanning in an item. Alma also refreshes the page at odd times, particularly since the last update and with the new UI. - **5** * The need to create a separate library for each pick up location is a burden, particularly when the second library serves the same book locations and as the main library. There needs to be the ability to create multiple pick up locations within a library. - **5** * Searching in Alma does not always bring up expected results. Keyword searches, particularly in the title field, don’t always bring up the items with those words in the title to the top of the list. This can make it difficult finding an exact bib or item record without having the MMS ID or barcode. In addition, each physical search type (bib vs. item) offers different functionality (i.e. you cannot mark an item missing from an item search). - **4** * An item with a temporary location does not return to that location after being loan via resource sharing. The temporary location is cleared, and the item moves to its permanent location. There is no indication that the item was in a temporary location before being shared unless the library has labeled the physical book. - **4** * Alma navigation, categories, and function names are not always intuitive, which can cause delays trying to figure out where to go. Even non-beginner users can have issues. - **3** |
| Resource Management | * Implementation of Alma and MDE new interface/features/functions simultaneously or in an overlapping manner. For some folk, issues with a function were confusing, particularly when ExL Support said that the problem was with another function in Alma (i.e., a problem that is believed to be MDE issue, but ExL say it's The New Alma Interface, or vice versa, and there's lack of clarity about what goes with which. To some degree, it raises questions about the implementation of new functions, features and Interfaces. It's not clear to me that key personnel at ExL are thoughtfully crafting the implementation of new functions/features/interfaces, in order to ensure successful ongoing work, and ensure that most library personnel understand the relationships of various changes. **- 5** * Implementing/releasing MDEditor incrementally, leaving major sections unavailable in the New MDE (Norm Rules is one example). It feels as though ExL have considered release of New MDE something that can be successfully released in parts, as though staff can use the New MDE in partial form successfully. I suspect that in large shops like UMinnesota, or University of Washington, or development partners like Boston College and Boston University, the roles are granular enough to do this successfully. In many CSU Libraries, the people using the MDE need most all of the functionality, requiring a New MDE that permits full functionality immediately. **- 4** * Loss of functionality -- abrupt loss -- of Import Profiles that use Update Inventory and POLine as a match point. ExL implemented changes to API software that broke existing functionality that had been in use across 2 years and was under study for added details to work with Gobi Library Solutions. Additionally, removing the capacity to continue use of the API in a way that conforms to the Library's responsibilities to its Consortium and record supplier (both Gobi Library Solutions and OCLC, Inc.) This, as with the first issue, indicates that ExL expect all libraries to be Development Partners, but leaving the Libraries to develop repair of functionality on their own, not necessarily with ExL's help.**- 4** * Loss of 'return to Set' option in new MDE, currently. When one opens a record to edit in the MDE, one was able to return to the Set. That capacity has been lost, so far, in the habit of ExL to implement and expect the libraries to articulate what was lost. - **3** |
| Resource Sharing | * The pandemic brought to light Alma's deficiencies in allowing multiple delivery methods. One issue is that in order to use Alma's personal delivery feature for home delivery, a user's Alma account needs to have the address type of 'home' populated. As a result, several campuses ran into issues trying to configure. When using Alma’s personal delivery feature for home delivery, you cannot limit to only home delivery but instead must allow two pickup options. The ability to allow users to enter an alternate address is also tricky. Not all labels can be relabeled. Additionally, there is no easy way to produce shipping labels. - **5** * Another issue affecting our ability to configure multiple delivery methods is Alma’s inability to offer multiple pickup locations without having to configure multiple libraries. Ideally, we would be able to provide multiple hold pickup options within a single Alma library. This would allow us to more easily and seamlessly configure curbside pickup, locker pickup and other delivery options. <https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/41518042-provide-multiple-hold-pickup-options-within-a-sing> - **5** * Currently the "ignorelenderduedate" setting in the Alma Customer Parameters Mapping Table is a global setting; it applies to all resource sharing partners. This is problematic for consortia who have resource sharing partners for consortia members, as well as a resource sharing partner for ILLiad. Setting "ignorelenderduedate" to "true" works for our consortia resource sharing standard checkout, but ILLiad due dates must be entered manually. Setting "ignorelenderduedate" to "false" works for the ILLiad lender due date, but then consortia due dates must be entered manually. If "ignorelenderduedate" could be configured separately, for different types of resource sharing partners, this would allow a more seamless ILLiad to Alma integration. As a result of Alma’s inability to configure different due dates for different types of resource sharing partners, only a small number of CSU libraries have integrated ILLiad and Alma with NCIP. https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/18510367-allow-ignore-lender-due-date-setting-to-be-custo - **5** * There are still issues with Alma’s “Convert to Resource Sharing” function. If a hold request cannot be filled because the item requested is missing from shelf, you have to cancel your patron physical item request, mark the item missing, then manually create a resource sharing request for your user -- all while keeping the patron and book title in your memory or writing it down/copy-pasting both into a separate doc. - **4** * If an item is in a temp location (such as with books on display or new releases) and is requested for resource sharing, it will revert to its permanent location when item is returned to lending library. Staff must remember to revert the items back to their temp locations. Ideally, if an item is in a temp location when it is shipped for resource sharing, it would revert to the temp location when checked in by the lending library. - **3** |

**Q4: On a scale of 1-10, how responsive is ExL Support in addressing issues in your functional area?**

**Average: 6.4**

Acquisitions: 7

Analytics: 6

Discovery: 6

ERM: 7

Fulfillment: 6

Resource Management: 7

Resource Sharing: 6

**Q5: Any comments on why ExL Support received that score?**

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| --- | --- |
| Acquisitions | Timing and lack of specific knowledge |
| Analytics | Some people are very satisfied with Ex Libris's responsiveness, but others complained about issues with no response. There were some comments about the recent all-day Analytics outage and the fact that the communication was not very clear. |
| Discovery | Responses to this question varied. No one was thrilled with ExL Support, though one respondent gave them an 8 most responses rated them considerably lower around 4-6 hence the average of 6. A consistent theme here was the unpredictability of both response time and resolution. Sometimes cases are resolved in a satisfactory manner and quickly but other times they either take a long time to be resolved (several respondents noted this is the case for inaccurate CDI records in particular) or the resolution is not satisfactory. Some people said they felt like what they think should be simple fixes for obvious bugs either are not fixed or languish "in development" for too long. |
| ERM | * I have filed numerous tickets in the past 2 months and I rarely hear back from Ex Libris on the status of my tickets. * The documentation for CDI is not always accurate. There is not a lot of communication of changes or updates. Support tickets take longer and longer for a response. * They answer all issues. They could be a bit quicker in their response times. * Often, I get better answers from fellow CSU folks. It seems as if SF reps are only knowledgeable in pieces of ALMA/Primo which limits their ability to help. They also seem to assume I know more than I do. * I believe Ex Libris does a fairly good job responding to my cases. Some issues take a long time to resolve. * Documentation is consistently wrong, and our consortia seems to be more knowledgeable and capable of troubleshooting thank EL Support slowness in responding to deletions, Sales force cases * Ex Libris support does make a real effort, but sometimes they seem overwhelmed by the volume of requests. At times they also have a tendency to fix the examples provided in a case instead of finding and fixing the root cause. |
| Fulfillment | After submitting a ticket, Support is often quick to respond, usually with questions or requests for clarification. The response then slows. Issues reported include not taking the time to understand the issue and a lack of communication from Support throughout the process, specifically when asked. |
| Resource Management | Support Staff have become more engaging, patient and helpful in many cases. |
| Resource Sharing | ExL responds fairly quickly to submitted cases. However, resolutions often take quite a while. Usually, the first person who responds to the case is not somebody who actually has the power to resolve so they case usually gets forwarded to someone else. More often than not, the resolution is considered an "enhancement". |

**Q6: What needs does your functional area have that require Alma and/or Primo development to address?**

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| --- | --- |
| Acquisitions | PeopleSoft - ALMA integration VAT/Use Tax Automation |
| Analytics | Cost per use functionality, more consistent labeling between Alma and Analytics, and further development of the overlap analysis tool. |
| Discovery | Some respondents expressed desire for a better way to highlight CSU+ availability and holdings in the brief results and full record GetIt menu area. Three respondents made comments about "bias" in Primo results and the inability to clearly understand why the results which do appear show for whatever reasons they do. Other suggestions which would require development are: 1) merging/deduplication of CDI and Alma records for the same title holdings, and 2) the ability to customize scopes more, specifically to pre-set filters for scopes which would not affect other scopes. |
| ERM | * Consistent/accurate results in Primo * Better documentation for GES and DLR * I think CDI needs some big improvements. * I wish the criteria available for advanced search and analytics matched more CDI records incorrectly marked as "full-text available". CDI in general better and faster response to CZ update deletions * Returning to my highest priority issue, the constant churn in e-collections seems excessive. I don't remember anything like this much maintenance when I was managing both SFX and Serials Solutions at the same time. While I appreciate updates, Ex Libris needs to make them much more seamless and do much more testing. It's not unusual to see the same portfolios listed again and again in CZUTL as Ex Libris makes changes to linking parameters, breaks the links, customers open cases, and then Ex Libris reverts the changes (Safari is a recent example). |
| Fulfillment | Alma   * The ability to add a second hold shelf / pick-up location within a library with the ability for users to choose the location when requesting in Primo. * Enhance the personal delivery workflow to allow users to enter in their address, rather than rely on the address in their user record and provide the ability to use the School or Alternative address for personal delivery. * The task widget is not sufficient for time sensitive Leganto alerts. Email alerts would be preferred. * Enhance the process for creating an item record at checkout. Multiple steps & page refreshes slow the services to the patron. Allow libraries to determine whether the item is added to a work order.   Primo   * Enhance the Primo hold request form to allow for more library created fields. * For article-level records, where the library has some print holdings, use the print holdings to determine availability of the article when determining how to display the ILL GES link. The link will often not display for articles when the library has physical holdings for that title but does not own the specific year. * Signing in to Primo after performing a multi-line advanced search causes the search terms to appear on the same line, which will change the search results. |
| Resource Management | Coherent release of multiple functions, coherent release of new products, and repair of functionality that existed for multiple years in API Integration and Import Profiles |
| Resource Sharing | The resource sharing community would really like to see improvements in how Alma and Primo can be configured to allow for multiple delivery options. We would like to see Alma's personal/delivery feature improved. The requirement of a home address type in user account should be removed as it only serves as a roadblock. Additionally, we would really like to be able to configure multiple pickup locations in a single library. This would help tremendously with the CSU libraries who are or who have acquired lockers as well as those offering mail to home and curbside pickup delivery options. |

**Q7: Anything else that you want to tell me?**

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| --- | --- |
| Acquisitions | Need to simplify Use Tax in ALMA. The receiving module Keep in Dept - check box, to stay in dept (missing), Entrusted User check mark missing. Sometimes disappears. May be due to search engine (Firefox). During manual invoicing, sometimes dropdown box for vendor subaccounts is blank. |
| Analytics | There were some comments about the complexity of Analytics and not having enough time/training to figure it all out, though that seems less an issue for Ex Libris and more just a consequence of people being overloaded with work. |
| Discovery | In case it wasn't already clear, the DFC ran a modified version of your Chairs' Survey 2020 and crowdsourced our responses that way. Most respondents were pleased that we sent the survey out and that someone 'cares' about how Primo is performing and working for the system. A few respondents urged for more centralization and support for the Central Package - there is a feeling at some institutions that they do not have the staffing level or training(?) to support Primo in the manner that they would like to. So at least some people want the CO or DFC to take the reins of their local situation more than is currently happening. |
| ERM | CDI implementation for consortia is a rolling disaster |
| Fulfillment | Overall the consensus is that Alma is functioning well, though most did not provide examples of what is working well. One staff did mention that the automatic loan and due date email reminders have significantly cut down on their workload. Some improvements could be made in the number of clicks certain workflows require, the amount of times an item needs to be scanned (removing statuses, transiting between libraries, etc.) and the language Alma uses throughout the system. A few responses included issues specific to their library, which were not included in questions above. One staff reported that they still have the burden of cleaning duplicate replacement fines due to the way fines were migrated from Sierra. Another staff detailed an issue where multiple requests for their laptops & hotspots froze those records. In this situation, ExLibris support was unable to fix the issue, causing the library to create duplicate records for those items. A third staff expressed frustration with the Analytics information delay, which causes issues providing up-to-date financial reports. A fourth staff reported that the way their campus in particular manages the Alma configurations makes it difficult for them to enact change in the system, particularly with the changes needed due to COVID and their campus closure. In addition, several staff who have used Alma since migration reported still having trouble finding certain functions due to the navigation and naming conventions ExLibris uses. One staff in particular often uses documentation found in the ExLibris Help and on the ULMS wiki when they are stuck. |
| Resource Management | Thank you for your patient and diligent work to keep the Company accountable and help them be a 21st-century corporation serving Libraries like the CSU. |
| Resource Sharing | We did receive comments that Alma can be slow at times. |

# Staff Survey (129 responses)

**Q1 - On a scale of 1-10, how satisfied are you with how Alma currently supports your job tasks?**

**Average of 7.0**

Chart, bar chart

Description automatically generated

**Q2 - On a scale of 1-10, how satisfied are you with how Primo currently supports your job tasks?**

**Average of 6.5**

Chart, bar chart

Description automatically generated

**Q3 - On a scale of 1-10, how satisfied are you with the support that Ex Libris provides?**

**Average of 6.4**

Chart, bar chart

Description automatically generated

**Q4 - What Alma issues currently affect how well you perform daily tasks, if any? (80 responses)**

|  |
| --- |
| 2 plus day delay of update. |
| A lot of clicks to do anything. Slow to load. Confusing to navigate for things I don't do often. It is not obvious where things are buried. |
| Alma Analytics is too complicated |
| Alma continuously resets itself and kicks me out of what I am working on (often in the M.E. and making sets) and it's extremely slow and unreliable. |
| Alma does not support two hold shelves within one library. We have to create a new library just to provide different request pick up options (on-site, mail, etc.). The Course Reserve analytics still is not very usable. We are unable to get item information (barcode, call number). The Active Course information in Fulfillment does not include the instructor. |
| Alma is a little bulky and not very user intuitive |
| Alma is clunky. Little is straightforward or intuitive with Alma. (Cataloging/Authority Control) Now we have an updated version, one that we will need further training on how to use. Right now, we cannot even figure out how to add an item. It's terrible. |
| Alma is pretty good. There are some minor things that are annoying. Sometimes they change Alma behavior to make it better in one area but then it makes another part worse. |
| Alma still didn't create a Media citation for Reserves |
| Alma's personal delivery feature cannot be used unless a user has an address populated in the home address field of their Alma account. |
| Although there are many helpful features, the language used to attain the reports you seek is complicated and confusing |
| Always when changing from an order pol search to an electronic portfolio pid search, there is a "readjustment" or refresh that Alma goes through before I can perform the new search |
| As a librarian selector, I find it hard to tell in Alma exactly what I have purchased with my funds. The PO lines seem to only tell you if it was a book etc. not the actual item. |
| Broken links |
| CDI is atrocious. It doesn’t work how ExLibris said it would and has required extensive time troubleshooting issues associated with it. |
| CDI is very difficult to understand and has created a huge mess in our IZ that we now need to clean up. The inability to create sets and batch edit holdings records has created some quality control challenges. |
| CDI issues |
| Chronology data in item record cannot recognize and sort calendar/alphabet month (Feb placed before Jan or Dec placed before Jan, ect.) in logical order |
| CSU+ was not necessary as it performs all the functions ILLiad already did. |
| Dearth of user-automation tools |
| Delays in analytics, errors in fine accrual (double-charges, etc.) |
| Difficulty navigating through the UI/UX |
| During checkin of materials, I wish there weren't as many messages that require another click or keystroke to proceed. Can administrators be given the option to suppress or turn these off? |
| Ease of finding locations for different type of items can vary. |
| Encumbrances |
| Every time when there is a new release, it breaks something else. We have been in this constant loop of learning new things while fixing what ExLibris breaks. |
| Every time Ex Libris performs one of their "releases" to correct something they break something else. Speaking of, it’s hard to keep up with those monthly releases. Recently we tried changing one workflow and the monthly release completely broke this new workflow. Alma does not have a good overlap analysis tool. This was brought up in previous meetings, but no solution was ever discussed in detail. The Community Zone Updates Tasklist function occasionally overrides my work. For example, it will deactivate a portfolio that I set up for perpetual access. SUSHI and COUNTER Analytics should be a task performed by the CO and then our campuses should be able to inherit these settings. Currently, each campus has to set up each and every SUSHI vendor record to harvest and then create their own analytics report. The delay in activations in ALMA to Primo are too slow. In this day and age activations should be instantly visible in Primo. Speaking of the move from PCI to CDI created many problems. Examples: eBook duplication in Primo, Open Access resource linking, etc. The activation was supposed to be simplified but is now very confusing. Our campus does not effectively use the automated workflow built into Alma. This is not completely a system problem but a lack of communication between our local staff. Perhaps the complexity/interoperability of ALMA is to blame? You can't just know your section of ALMA to get a workflow to work correctly in ALMA. |
| I am new to the system and have many questions. I find that on-line customer tutorials do not work efficiently. |
| I can't pull out the entirety of the vendor interface information and it might be able to be able to upload a spreadsheet with updated information when needed. |
| I cannot search materials with call numbers. |
| I find changes in the Community Zone Task List sometimes don't work. |
| I find it difficult to work with and get comprehensive collection use reports |
| I often wish that I could search Alma by MARC field, not all of them are indexed and it is not clear which MARC fields are used to index to which search terms!! Once I discover which MARC fields match up with the search terms, I will change the label to indicate, but it is not easy to determine which fields are indexed for each search term. There are still so many clicks needed, but I like the keyboard shortcuts. Wish they would be consistently available across different browsers. I don't like that when you duplicate an item record (e.g., for new issue of periodical) you have to be very vigilant that there are not notes or operator numbers in the issue being copied from that will transfer to the new item. There should be an easier way to duplicate an item but only certain subfields. Like, I would want the Desc and Mat Type, etc. but not Notes or Operator ID. I have lots of cleanup projects now due to those issues. Also confusing is the fact that their naming protocols lean towards using the same term for totally different concepts. That gets confusing. For example, Holdings. There are Holdings Statements, Holdings lists of items, Holdings in OCLC, etc. That can get really confusing but I don't know how to get around that. There are a ton of other Alma terms that are not very descriptive or consistently used compared to cataloging standard terminology. Another example might be "copy to catalog" and all the terms related to that process - so counterintuitive. |
| I would like more than one Hold shelf available in Alma |
| I would like there to be a way to relink a bib record and change the bib reference of an order record at the same time. |
| I would like to be able to run better reports about which books were purchased with a certain fund in a certain time frame. I can do this, but it doesn't include the desired metadata. |
| I'm an ERM person, and I'm happy with Alma in general, but CDI has been a mess. The language describing the CDI options in Alma is unclear, functionality is missing (why can you not search by CDI database code in Alma?), and results from testing are frequently not consistent with the documentation. |
| In ability to charge/discharge items due to large number of requests placed since having gone to new COVID procedures for our library. |
| It seems like support is overwhelmed with all the new customers. It is taking much longer to get a response to a question that should be answerable through documentation/videos (and it is not), then I open a ticket, then it sits for several days (or months). Some of these questions are very time-sensitive (e.g., related to overdues/billing) and then I just end up asking them on Slack and another CSUers can give me an answer before Ex Libris does. I am opening fewer tickets these days because of this. |
| It'd be great if CZ records were as good as the records in OCLC or were actually checked for quality. Some CZ records are quite pathetic and reflects poorly on our library's catalog. It's to the point where I'd rather get OCLC records myself and do that extra work to have decent metadata than to have crap records that none of our users can find. Who knows when Ex Libris is going to bother to update these records at all? It could be years. Some of our students could have graduated by then. How helpful. |
| Item record problem - not able to convert month name and sort them properly from Chronology data |
| Limited configuration options for request forms, and analytics update delay |
| more of an ability to customize what is displayed on search results. |
| N/A |
| n/a |
| N/A |
| N/A |
| n/a |
| n/a |
| Needing to open multiple windows (while working at home) has been problematic. |
| New UI Latency. Lack of join features in Analytics |
| no one. |
| none |
| none |
| none |
| Not sensitive enough. if patrons don't have a card number and we need to look up by names, if the names are different from what is on the record, you will show ''no record found,'' even though the record is in there. Improve it as Google does, ''do you mean this?" |
| Nothing huge, wish for little enhancements that I've submitted to idea exchange like putting a donor field in the item record since many gifts and donations are tracked at the item level |
| Occasionally freezes when I am posting a lot of invoices at once... or slows down greatly. This can be very annoying and time consuming. I usually have to reboot for a small improvement. |
| Patrons cannot select specific volumes in CSU+ |
| Program can be unstable and we lose our place in the workflow and have to start all over again. |
| Receiving isn't linked across features and displays strange status messages in Primo.  Ex.1) if an item is received using Acquisitions>Receive>POL#/ISBN, it changes the item status to "transit" and the message displayed in Primo says "Item in transit until [received date]". If you search for the item after it has been received, this misleads the user and gives the impression that the item is missing. Message in Primo should say, "Item in transit" or "Item in process" with no date listed. Ex.2) If you're editing items and add a receive date to the item in the [Items List] screen, the item will still show as unreceived in the task list and in the Acq>Receive process. Once a receive date has been added when managing items, the title should auto-update and not appear in either the task list or the receive process.  Alma requires a lot of clicking and shortcuts are difficult to discern.  -- It can sometimes take a while to "tab over" to the correct button or field.  -- A user should be able to assign shortcuts for their most commonly used functions.  -- It would be helpful, if a list of the assigned shortcuts was accessible in Alma. -- The new MDE layout doesn't display as many shortcut command hints next to the function/action as the old MDE.  Ex.1) In the old MDE, next to "update from bibliographic" is the shortcut hint [Alt+U]. The shortcut hint is not displayed in the new MDE. Ex.2) I couldn't find documentation stating whether the shortcuts assigned in the old MDE were still usable in the new MDE.  All user levels with acquisitions roles should be able to add notes to a closed POL without having to reopen the POL and having the POL status revert to "in review".  All user levels with acquisitions roles should be able to view item requests. View only, no fulfillment. Being unable to view the requestor information means routing cannot be verified. |
| Slow performance lately, particularly when going to different menus. I would also like better functionality in sets. The ability to edit sets would be very helpful when working on big projects. |
| Slowness and buggy behavior really impact certain tasks. e.g., a lot of actions related to POLs involve Alma loading the entire list of POLs (all active, or all POLs) either in the active screen or in the background (e-resources task lists seem to be impacted by this, e.g.) and this takes longer and longer as we use the system over time. Buggy behavior such as Alma appearing to accept an input when editing an invoice, POL, or portfolio, but not actually saving the data is really frustrating, requires constant vigilance, and sometimes requires redoing the same work multiple times. Actions that cannot be performed in bulk, such as reassigning tasks or deleting usage files, take far longer and involve far more clicking than they should. Finally, it creates frustration when Ex Libris only partially implements new features, e.g. adding new fields but not including them in bulk job options or publishing them to Analytics. The complexity CDI has added to e-resources work is also burdensome. |
| Sometimes takes too long to complete tasks due to clicking on too many links |
| SUSHI and usage data loading issues, CDI issues, setting up authentication for SSO and not EZ proxy, requesting options and customization of hold and resource sharing forms. |
| SUSHI harvesting continues to be not entirely satisfying, and cost/use in Analytics is still a mess. |
| The availability of analytics reports, soon after the invoices are approved/closed, would be very helpful to have on the same day. |
| The late successful implementation of COUNTER 5 SUSHI harvesting, and the trouble shooting of straggling vendor issues |
| The new MDE does not provide the same support when working with/editing members of a set. ; The time between scheduled jobs which display Alma data in Primo is too long. ; Sometimes Alma does not accept input/accept use of templates for record editing. This creates issues with interrupted workflow when I have to wait for Alma to decide to accept the data I am inputting. I once had to wait for 4 days for Alma to accept a technical POL I was manually creating. Alma would not save the record --it kept requesting a fund which is not needed in a technical POL. I had used the same POL for hundreds of records previously.; I have had to wait much longer for Analytics to load over the last 2 months. I have also had more issues exporting Analytics results in Excel. Sometimes it takes 3+ export requests before the export goes through.; Right after we migrated, it was easy to get "lost" in Alma. The screens look the same at different levels and with Alma's interconnectedness, it used to be difficult to determine where you were in the workflow. I sometimes still have a sense of this "loss" however, when I am working with electronic resources because of the 'sameness' to the look of the records. I wish there was more of a demarcation between local stand-alone portfolios, portfolios in a collection, and collection level records. When working with different situations and trying to research to find "errors" in portfolios which affect access, it can be frustrating to work with electronic resources in Alma because I have to look at many different situations to determine access issues and everything starts to look the same after a while. |
| There are periodic delays that have worsened over the past 6 months when trying to complete a task like checking out material or running a report. There are no times of day where it worsens, as in the past, but it seems to lag all day. Sometimes completing a single book checkout can take over 1 minute. |
| titles being deactivated, localized in collections, cz updates that cause more problems than help |
| too many unrelated search results make it difficult to find the order record |
| Very difficult to troubleshoot problems with CDI; analytics is practically useless for building cost per use reports. It stores and reports usage okay, but cost/usage reports have to be manually built. |
| Very slow load times (new UI related?),  the recent entities don’t include POLs or Rialto market items, task list can't be customized or assigned automatically, can't change a POL type, analytics is often down. |
| When I run multiple jobs in Alma, I would like Alma to run them in request order. I have noticed that Alma has run pending jobs based on another criteria - I don't know if Alma looks at the length of the job, or how the job works with the system?? I recall sending jobs for information update and for withdraw item, and even though I requested the jobs as noted, Alma ran the withdraw item job before the information update job. So, I spend more time waiting for job completion before I can submit the next job. |
| When posting a lot of invoices at once it can get very slow. |
| When updating fields in the POL, the entry sometimes reverts back. This happened most recently with updating fund information and occurs both instantaneous and after saving. This causes multiple re-checks to ensure the correct information stays. |
| Why can’t I see my book budget lines in real time? What century is this? |
| workflow for lost books |
| Working Analytics to get the kind of statistics we need easily. And they need a better system to record in house use of materials rather than how they are collected now. Not having one calendar for the Library, the entire library. You have created so many days and reasons and how long and on and on ................ |

**Q5 - What Primo issues currently affect how well you perform daily tasks, if any? (75 responses)**

|  |
| --- |
| Again, mostly it's CDI that has been a problem. Changes made on the Alma side are very slow to appear on the Primo side, or don't appear at all. We have many false-positive reports of full text availability for collections that we don't have and haven't activated on the Alma side. |
| bad cdi linking, free site articles that go through the link resolver when they should, direct linking to ERIC journals, especially when we have no holdings for the journal |
| CDI -- literally everything about it. I estimate that I can easily spend a full day each week just dealing with CDI problems, opening cases, and communicating with frustrated users. Each case requires some hours of painstaking detective work to pinpoint the issue and find relevant examples, and the utterly opaque nature of CDI metadata renders most of our familiar troubleshooting techniques obsolete. We also no longer have many of the tools we once had to temporarily remedy issues while waiting for Ex Libris to implement a fix--the control we had over which metadata appeared in Primo records that was possible with PCI is gone with CDI, and many CDI functionalities (e.g., link structure) override the Alma service settings. CDI also impacts Primo functions beyond the immediate issues of bad search results and broken links, impacting faceting, openURL, and applications that are built around the data in the PNX. Finally, Ex Libris is obviously overwhelmed with CDI-related cases, and their response time has suffered noticeably. |
| CDI makes it difficult to troubleshoot ER access issues -- you can't always tell which electronic collection contains the metadata that is causing the issue. We have seen an increase in ER trouble tickets since CDI went live, usually due to absence of full text when the Primo CDI record says it is available. Results ranking and the search algorithm are not as sophisticated I would like. |
| CDI. It's confusing and hard to follow. It also confuses the librarians. It may be confusing due the lack of time to fully understand CDI, but it seems extremely overwhelming. |
| Deduping is our biggest issue at SFSU. We still regularly have problems with formats deduping where we would prefer, they don't (DVDs and streaming video at the top of the list). |
| Difficulty navigating through the UI/UX |
| do not use Primo much |
| drops requests and CSS doesn’t load at times, usually the first search I perform |
| Errors with citation generator. Students not seeing the links to request materials until they sign in, leading to confusion and fewer requests. They ideally would see the link to request first, and then be prompted to sign in. |
| For patrons, there are too many results and complicated and confusing filter options. |
| Free open access electronic titles have too many broken links and incorrect coverage dates. |
| I call it faith-based searching. So, I have no way of really knowing. I know I often have to massage it to get things I used to find easily. |
| I do not work with Primo |
| I feel that searches are too cumbersome when looking for specific items/formats. Searches that shouldn't require advances searches often do. |
| i find it unrefined for searching as it retrieves too much information. when searching for books some titles i retrieve match but then there are many that do not. |
| i liked before when we will be able to search for everything in Alma. |
| I think Primo creates more work for me, the problem reports are not like the problems I had with the system Sirsi. I know a good deal of it is user error but I can safely say that EBSCO problems are super common and I don't want to get used to explaining to students why the link didn't work. It's a lot of work to receive a problem, troubleshoot, answer student and report to ExL. |
| I use primo primarily to search, and wish facets were more reliable when narrowing down items. |
| I wish would generate a permalink of search results. |
| I would like the cancel feature on a filtered search to be accessible sooner. Because it can take a while for filters to load, I will click on the filter, but then the screen will shift much later and I actually end up clicking on a different filter and have to cancel my search. ; We have MF holdings that are displayed at the holdings level only. Primo displays the message "there are no items available" when we do have material listed in the holdings. I dislike needing to continually click on "Load more results" in Primo to see results. |
| Inconsistent search results. And various issues with CDI. |
| It is so broad and difficult to navigate. You have to be precise with your search or it won't display what you are looking for |
| It sometimes takes too long for information to publish to Primo. |
| Lack of the catalog functionality we used to have |
| Lag between Alma to Primo publishing - it can be such a long delay in providing/confirming access for title-by-title ebook purchases and/or relinking holdings to other bib records. (Looking forward to VE for that reason, but not sure if it will be problematic in other ways!) |
| Lately, too many dup. results both in local physical holdings and online access |
| Linking to full text from Primo since the migration to CDI has been perplexing, puzzling, and unpredictable, with little indication of why some links still work and others do not. It is pretty sad when you have to direct patrons to the native database for the full text of known items, when it should be easily connected by the link resolver. |
| n/a |
| N/a |
| N/A |
| N/A |
| N/A |
| n/a |
| N/A |
| n/a |
| n/a |
| NA |
| Newspaper content is a real pain now, as well as OA content. We get problem reports on a daily basis. |
| no one. |
| none |
| none |
| None |
| none |
| none |
| None. |
| Of course, I don't like that our cataloging changes take so long to publish to Primo. I realize that VE will help that, but it does get frustrating that you have to wait sometimes days to see if your solution to a problem or change to a record took. I don't like the deduping algorithm, so often it goes bad. |
| Our local fields that are supposed to be indexed are not discoverable the way they are supposed to be. |
| Poor relevancy ranking. Why are exact matches for title searches listed 5th and 6th on the results list? CDI records say full text in the results list, and when you click in it says no full text. Even when we do have the full text!!! Patrons do not realize that they will lose their pinned items if the don't sign in. There should be a prompt to sign in to save them when someone pins something (like google scholar does). |
| Primo results - Add a feature to display accessibility status to collection items to primo searches. Add option now to backend and work on large shared CO collection. |
| Primo search results have a lot of errors. Sometimes will give me result inaccuracies. |
| Primo will show that we have a journal online, but the issues that we need is actually in our print collection. |
| Publishing to Primo is not live. |
| Random dup. results for same exact access points, sometimes on physical holdings, sometimes on online access. Yet, sometime, results were splitting in to 2 records for the same title search which all links/access points should be kept together on the same record. |
| Ranking and relevancy, customizing OneSearch interface, simplifying interface and refining/facet options. |
| Real time update. |
| Search result duplicates (CDI). Limited control over the visual display of GetIt and ViewIt information |
| Searching doesn't always bring up proper results |
| Searching strat. Need easier searching capabilities. Too nitpicky of a system |
| Simply looking up a print book owned by our library is confusing, unintuitive, and crazy making. The system is so chaotic it defies description. |
| slow search performance/Advanced search does not default/no option to keep session active (ie timeout loses data)/no option to increase result numbers displayed |
| some duplicate records, quirky search results |
| The ability to solicit mailing addresses for requests placed in Primo is not easy. We have had to re-purpose fields such as the notes and comments fields. Alma's home delivery feature uses the patron's Alma address but this is often not where the user resides. The ability to collect preferred mailing addresses more easily would be a big improvement. |
| The CDI data wonky-ness is a big problem for discoverability in my work with reference and instruction. It's messed up our "Articles" scope and I'm hesitant to create a separate newspapers scope (as to me that seems to defeat the purpose of One.....Search) but I don't want to lose articles in our existing results. |
| The hold request fields customization is limited. I would like the ability to have multiple general note fields. |
| The index is terrible. Text cannot be highlighted on records. Plagued by format issues. Search for climate change articles only, you get books. It cost the CSU 3x as much as what we were spending, and it really doesn't provide that much, if any, benefit. Out library has had budget issues since implementation. |
| The most pressing current problem is CDI. I recognize that Ex Libris is trying to fix all the known issues and I appreciate the various updated documentation and webinars. However, it has still been a difficult time implementing CDI correctly since the rules seem to keep changing. I continue to have concerns that they do not really take into consideration impact of consortia when designing software or services. We are spending far too much time on troubleshooting CDI and opening SF tickets than we should be. |
| The Primo search results are so different from the Alma search results - and that makes it confusing for all. Reference librarians are often asking me in cataloging to find a known title. Usually, I can find it, where they cannot. Need to review the search parameters in Primo. |
| The search does not always bring up the journal searched in the first couple results despite entering the full title. |
| The search has not been improved at all since the last time you sent out the survey. We would like to have the best-matched entry comes up top. |
| The web design can be clunky if using it in a smaller screen. It loads slow and sometimes some functionality is lost. |
| Too many cancelled requests for resource sharing borrowing. If Primo could stop requests from being placed on material that is not available for RS it would be a lot better. |
| Used to do searches by call number, cannot do that now. Frustrating. |
| When a new feature is added, it doesn't seem to follow the existing structure. For example, the Newspaper search. I'm not sure whether the Newspaper Search was added like a sort of patchwork. I thought it should be a tab, so we could add it as a search option on the drop-down menu, but it looks like it is a tile, and can only be elevated as one of the five items on the top of the search result page if we choose to. Also, it is odd to see a search appearing under Resource type in the facet. |
| When patrons enter a book title it should appear at the top of the list. Sometimes a bunch of random formats appear. |

**Q6 - What are we unlikely to have heard yet about how well Alma and/or Primo is working for you? (51 responses)**

|  |
| --- |
| Alma appeared to have been freezing on Circ Department staff a while ago but it looks as if the issue (no problems lately) has already been corrected. |
| Analytics |
| Because we are all forced to use this company and we got what we paid for. We are stuck with it!! Before this system we never had so many workshops or people or committees to discuss the problems with this system. Involved to discuss a work around or what to submit to work force. |
| Cost/use calculations are an important function for Analytics, but the implementation does not parse out usage by platform (publisher subscription to a journal vs. that same journal in a Gale database for instance), putting a real dent in the usefulness for collections decisions. The incompatibility of acquisitions and usage data in other parts of analytics makes it essentially impossible to create your own cost/use reports in Alma to fix the issue. |
| Everyone really hates primo. Many librarians don't use it and send students to work at to check book holdings. |
| flexibility |
| Great! Thanks! |
| I appreciate the new UI that allows for a more streamlined look and ability to spread out more favorites along the tool bar. |
| I guess I miss lists of LC subject headings more than anything |
| I like DARA. I was skeptical at first, but it has been really useful for spotting problems that can be easily corrected. |
| I really like that there are two maintenance releases a year so systems librarians can get a break from all the release changes! I also appreciate that Ex Libris delayed some releases this spring when we were all so overwhelmed by the pandemic and working from home and configuring systems to meet the new needs. |
| I think the idea that it is available on a browser is one major accomplishment and now I figure it must be a very powerful tool if everything we need to do is on a web browser. |
| In analytics, cost per use doesn't include dates. |
| inability to manage users' ILL requests in Alma |
| It is easy to look up a book with only its call number. |
| It is improving, which is great. Several collogues and I wish it had been launched more developed than it was |
| It's fine in general, but there are some sticking points like mentioned above that make it sometimes pretty intolerable to work with when we have issues. But other than that, it's fine. It does what it's supposed to for the most part. |
| Its great users are not yet being forced to use the new interface and M.E. while the bugs are being worked out. |
| It's robust and the complexity of the system allows for a lot of different tasks individual to the campus |
| Many CZ records are terrible, which make discoverability difficult. I've seen: 1) records without full author names.  2) records with only ISBN-10 numbers listed (Users need ISBN-13 numbers.) 3) no subject headings 4) records with incomplete titles/titles on cover 5) records with unreadable diacritics  6) no call numbers 7) no descriptive information |
| More confusion displays in Primo lately |
| n/a |
| n/a |
| n/a |
| N/A |
| N/A |
| n/a |
| N/A |
| No much. Most issues are well known and talked about, but nothing ever seems to get resolved with those big issues so we learn to live with them. |
| No. |
| None |
| none |
| not much. |
| onesearch has some good features |
| Primo dup results create lengthy displays and too confusing for library users to find access |
| Probably you have heard it all - and then some. |
| Same complaint as last year which was never addressed. Some campuses have expert ALMA faculty/staff and the rest of us are left blowing in the wind. Since we are all in this together it would be nice if the more knowledgeable campuses could better support the rest. I would love to have a day with Chris @ CSUN, Nikki for Analytics or Christine for E-resources. Kirstie at LBC and of course Luiz are all examples of ALMA/Primo experts on top of experts in their specific areas. |
| Seriously? You actually are proud of Alma and Primo? Those two products are terrible. |
| So far great!! |
| Some small things could be easier--like the ability to select multiple sets when deleting. |
| Standardizing language within Alma would be a big help to my staff. In some places, different language is used to say the same thing, for example the text to relink bibliographic records differs from place to place. This is confusing for several staff members. |
| Support is much faster in responding than in the past, but web development issues still take a long time to resolve. SUSHI has improved, but the usage still needs to be aggregated by individual platform. The webinars are improving, but old training and documentation can be confusing for trying to train new users. |
| That customer service is terrible, open tickets persist for years... YEARS! Example: Ullrich's (index that peer reviewed tag is pulled from) has a field for reviewed (as in there is a review of it) and refereed (peer reviewed). PRIMO shows both categories as peer reviewed so students constantly find resources that are not peer reviewed when they think they are. |
| There are a lot of things I like about Alma, primarily right now that I am able to do most of my work from home!! |
| they are both good, It is just that i got used to Alma. |
| This may be an unpopular opinion but I believe Alma/Primo is a HUGE improvement over III Millennium/Sierra and the WebOPAC/Encore. The network zone makes copy cataloging and ER management processes SO much easier than they were in the past! And I'm not the best analytics user just yet, but it's still leaps and bounds over what we could do/report in III. |
| This might be a local problem but librarians don't have a way of seeing funds and fund code reports in Alma. I'm not sure if it's a failing on how our folks have set stuff up (or not) or an Alma issue so I haven't raised it. |
| To say something positive, I really appreciate how easy it is to post invoices in Alma, and task lists and work orders work quite well for us. We have noted that Alma has made a lot of pandemic-related services (e.g., curbside pickup and electronic titles on course reserve) possible to implement in ways that would not have been possible in our old systems. |
| Too many "bridges to nowhere" where the results indicate we have in full text but upon clicking on the source link find that we only have title/citation information. |
| what? |
| With new work from home requirements, Alma being a browser-based tool is super beneficial. Allows for access without need for a VPN and can hop from computer to laptop easily. |

**Q7 - Anything else that you want me to communicate to Ex Libris or to ULMS Governance?**

**(45 responses)**

|  |
| --- |
| Before releasing new products/updates, please give it time to thoroughly test and analyze results. Give us a heads up if some or how things might not perform as intended. |
| Call number look up capability. |
| Cases in development take too long. |
| Clearer documentation would be great. I'm depending on other people's Wikis instead like Harvard's in order to find practical solutions to problems I have. Navigating Knowledge Center sometimes doesn't net me what I need. |
| Ex Libris needs to move faster on reported problems that need to be fixed. They need to be more responsive. |
| Get a user-friendly system, an easier system that you don't need a degree in computers. Innovative Interfaces, Sierra, now there is a system that works. |
| Have a short turnaround time for SalesForce responses. Resolve troubleshooting tickets in a timely manner. |
| I appreciate videos demonstrating even mundane cataloging tasks showing different approaches appropriate with the cataloging level and experience of the operator. (It seems to me the instructions and videos are appropriate for those already with a super high level of comfort, and is a confusing blizzard to less experienced operators) |
| I commend Ex Libris for offering the many webinars they offer as well as the low-cost ones they set up when Covid 19 hit and cancelled conferences. I appreciate that they participate in the Alma and Primo listservs. Some of the documentation in the KB is outstanding but I still find it difficult to find when searching for something specific. Most of my SF cases are answered timely and I often get the same analysts so I feel we have a relationship. I appreciate that. Some cases languish and I find that annoying. I appreciate when analysts provide explanations and documentation for the resolution of my cases. |
| I would like to see more efforts into collaborative collection development. This was one of the big ideas for the ULMS project that has yet to pan out. I get that other areas needed built up first, but I think now is when we should start developing collections as a unified system. Also, Pickup and Return Anywhere with P2P Network Zone is desperately needed. Having it only available in Fulfillment Network is no good. Is this something Rapido may be able to do? |
| I'd really appreciate a heads up as to when the website gets updated and what changes are applied when the website is updated. I'd like to know possibly a week in advance to prepare both of my service desks. |
| I'm not especially impressed with support. It seems they are communicating more, but not really moving on cases any more quickly. The first message of "I will be assuming responsibility for your case" followed by relative radio silence isn't really an improvement. |
| Logical set up, streamline steps, clear/precise command or use of words |
| N/A |
| n/a |
| n/a |
| N/A |
| N/A |
| n/a |
| n/a |
| no |
| no |
| no thank you |
| no. |
| None |
| nope |
| Not sure at this point if we can get out of it, but ExLibris is not providing the service or updates necessary for a contract this size. |
| Please make the local fields that are supposed to be indexed are discoverable in Primo. |
| Please redesign the staff positions to better align with the work we do. An example of this is Kirstie Genzel who went from an LSS to Library Management System and Electronic Resources Coordinator. And Thank you for supporting us in our daily work! |
| Please straighten out CDI. Some of the design features of CDI, such as displaying the "best" record even when it isn't from a collection a library has activated, have made troubleshooting nearly impossible for people on the ground. And as usual, it feels like the behavior of new features in an NZ-IZ environment was not well thought out. |
| Thank goodness for the ULMS or else I would be lost; there is a lot of missing or inconsistent documentation from ExLibris so I would like to see a improved knowledge center or at least the ability to have contributing/community answers (similar to Github) |
| Thank you for listening and considering our recommendations for improvements |
| Thank you for your continued help |
| Thank you ULMS! |
| Thanks for all the hard work y'all put it! |
| The alphabet and counting are powerful tools. We should use them more. |
| The students at our campuses deserve so much better. Many people say the only reason this system was selected over OCLC is that a backroom deal was arrived at. OCLC's system in use by similar institution s is giving their students a research advantage over cal state students. |
| They really need to add more support, tickets are taking too long to answer. Sometimes an answer of "I don't know" would be preferable as then I could take the question to CSU Slack or the Alma listserv to get answered. This seems worse in the last year. |
| Though I may sound unsatisfied, I do want to remark that by and large the CSU implementation of Primo has been successful, and a vast improvement over the previously balkanized division between catalog and databases. The fact that most of the CSU instances look and act pretty much the same also makes it easier to field questions for other campuses on chat. Actually, one can see Primo at more and more national and international institutions while providing global chat, and this too makes it easier to help patrons, having a kind of "standard" tool. |
| To Ex Libris: disappointment that CDI was rolled out far before it was ready AND in the middle of a worldwide crisis that required all of our time and attention. To ULMS governance: appreciation for the efforts to help with things like configuring pick-up and delivery and for continuing open forums; also a request to all committees to please send out calendar invitations (not just meeting notices) consistently and broadly--many people have cross-functional responsibilities and could benefit from attending any of the open forums, and it is very hard to keep track of them all or find out when they are happening, and disappointing to keep finding that you've missed yet another one. To management: thank you for filling the Resource Sharing position--we badly need that central support. |
| ULMS Governance is doing a great job. Brandon Dudley is the BEST. |
| We apparently can't add a single new vendor to Alma because it is "impossible," so anything you can do to fix that would be grand. We are currently held hostage by existing vendors. |
| why does it take a long time to have answers to Sales force reports |
| You guys doing an awesome job!! Thank you! |
| You keep asking but you never made any improvement. |