CSU Survey Responses – Oct/Nov 2019

[Summary 3](#_Toc26779982)

[Satisfaction 4](#_Toc26779983)

[Major issues by functional area 5](#_Toc26779984)

[Acquisitions 5](#_Toc26779985)

[Analytics 5](#_Toc26779986)

[Discovery 5](#_Toc26779987)

[ERM 5](#_Toc26779988)

[Fulfillment 6](#_Toc26779989)

[Resource Management 6](#_Toc26779990)

[Resource Sharing 6](#_Toc26779991)

[Other Alma Issues (from staff survey) 7](#_Toc26779992)

[Other Primo Issues (from staff survey) 7](#_Toc26779993)

[Dean’s Survey (16 responses) 9](#_Toc26779994)

[Q1 - Please describe your current level of satisfaction with Alma. 9](#_Toc26779995)

[Q2 - Please describe your current level of satisfaction with Primo. 9](#_Toc26779996)

[Q3 - What other Ex Libris products do you think should be included in the upcoming contract renewal negotiations? 10](#_Toc26779997)

[Q4 - What issues is your library currently experiencing with Alma and/or Primo that are troubling you these days? 11](#_Toc26779998)

[Q5 - What is your perception of how well ExL Support treats issues affecting your library operations? 12](#_Toc26779999)

[Chairs’ Survey (7 responses) 14](#_Toc26780000)

[Q1: On a scale of 1-10, how satisfied are you with how Alma currently performs in your functional area? 14](#_Toc26780001)

[Q2: On a scale of 1-10, how satisfied are you with how Primo currently performs in your functional area? 14](#_Toc26780002)

[Q3: Please list the top issues you and your functional area are currently facing below, along with a sense of the urgency you place on their resolution. On a scale of 1-5, how urgent are fixes to these issues to members of your functional area? 14](#_Toc26780003)

[Q4: On a scale of 1-10, how responsive is ExL Support in addressing issues in your functional area? 17](#_Toc26780004)

[Q5: Any comments on why ExL Support received that score? 17](#_Toc26780005)

[Q6: What needs does your functional area have that require Alma and/or Primo development to address? 19](#_Toc26780006)

[Q7: Anything else that you want to tell us? 20](#_Toc26780007)

[Staff Survey (129 responses) 22](#_Toc26780008)

[Q1 - On a scale of 1-10, how satisfied are you with how Alma currently supports your job tasks? 22](#_Toc26780009)

[Q2 - On a scale of 1-10, how satisfied are you with how Primo currently supports your job tasks? 22](#_Toc26780010)

[Q3 - On a scale of 1-10, how satisfied are you with the support that Ex Libris provides? 23](#_Toc26780011)

[Q4 - What Alma issues currently affect how well you perform daily tasks, if any? (81 responses) 24](#_Toc26780012)

[Q5 - What Primo issues currently affect how well you perform daily tasks, if any? (88 responses) 27](#_Toc26780013)

[Q6 - What are we unlikely to have heard yet about how well Alma and/or Primo is working for you? (46 responses) 31](#_Toc26780014)

[Q7 - Anything else that you want to tell us? (47 responses) 33](#_Toc26780015)

# Summary

Over the fall, we conducted a set of surveys to assess current satisfaction with Ex Libris as a vendor and Alma and Primo as products. Surveys were sent to CSU library deans, to library staff in general, and to the chairs of the various working groups in CSU’s Unified Library Management System (ULMS) governance structure.

Deans were asked to provide short answer responses to several questions from their point of view. ULMS governance committee chairs were asked to provide satisfaction scores for Ex Libris products and support as well as a list of issues currently affecting work in their areas the most severely, with input from their committee members and “communities of practice,” or CSU staff who work with relevant areas of the ULMS. CSU library staff were asked to provide satisfaction scores as well as what issues, if any, hinder their ability to perform their job tasks.

The survey results are summarized below, and raw responses are contained in the appendix. The purpose of this document is to share our mood and issues with Ex Libris in support of our upcoming contract renewal discussions in 2020.

Three years into production, it is clear that CSU satisfaction with Alma and Primo is past its peak. Survey scores show that while satisfaction reported through ULMS committees is holding steady in comparison to campus check-in conversations held a year ago, staff satisfaction with the current state of the products and with Ex Libris support has fallen. It is also clear that the gap between CSU expectations and what Ex Libris delivers is widening little by little over time. Ex Libris’ responsiveness to the issues the CSU libraries are suffering will be closely monitored over the next contract period and guide our future paths forward.

The library deans report general satisfaction with Ex Libris as a vendor and with Alma and Primo in general. There is awareness of some of the major issues reported – the click-heavy nature of Alma and the need for continued training chief among them. Support receives fine marks, although there is awareness of increased response times. The Council of Library Deans (COLD) is most interested in managing contractual costs and pursuing opportunities to add additional Ex Libris products such as Leganto to the systemwide contract.

The ULMS working group chairs give Alma and Primo decent marks overall, with Primo running slightly behind Alma in terms of satisfaction. This matches our perception of product satisfaction. Ex Libris support also receives a fair score from the chairs, although they note that responses can take a long time and waver in terms of quality. They also note that it takes longer for bug fixes to appear in the product currently than at the beginning of production, which is a concerning trend. All governance committees report serious issues that need to be addressed by Ex Libris to improve satisfaction.

The staff survey responses score Alma, Primo, and Ex Libris support much lower than the committee chairs. Given the open-ended nature of the survey, reported issues spanned the breadth of Alma and Primo and were more general in nature. Staff who work directly with Alma often express high levels of frustration with the system, and frustration has increased as CSU employees have become more familiar with Alma. Ex Libris needs to demonstrate that they can progressively address staff concerns if we are going to have a long-term relationship that is mutually beneficial to the CSU and Ex Libris.

Although we believe Alma remains the best choice of library management system for our needs, we continue to scan the marketplace for alternatives as we work with Ex Libris to address system weaknesses, improve their responsiveness to the needs of the CSU, and examine different methods of gathering feedback from CSU librarians, staff and patrons for system improvements.

# Satisfaction

CSU library deans were asked in the survey to describe their satisfaction with Alma and Primo as well as their perception of how well Ex Libris responds to their library’s reported issues. Most described themselves as “satisfied” with both products and with Ex Libris support.

Some deans mentioned local issues with Alma’s analytics and financial functionality and found working with Primo “difficult,” with UI improvements and better search results desired. Support received more consistent satisfactory responses overall, while Primo received slightly less satisfactory responses than Alma.

As a group, CSU committee chairs gave Alma a high score (7.3), with Primo (6.2) and Support (6.4) lagging behind. Alma’s score is representative of all the committees, with no variance in terms of satisfaction scores between committees.

With regards to Primo, the Discovery group’s score of 6 best represents how satisfied both those who support Primo internally and who assist our patrons are with using Primo. Most other committees gave Primo similar scores, with the Analytics group as an outlier likely due to difficulties in gathering and analyzing Primo analytics.

Individual staff satisfaction is much lower as a group compared to the committees, with Alma receiving a 6.1 and Primo and Support both receiving a 5.6. While it is difficult to know exactly where the root issues are, the tone of responses skews more negative than past surveys, perhaps indicating growing disenchantment with the products. Many of the issues detailed are not new, and it is probably that frustration is mounting as issues remain unaddressed.

# Major issues by functional area

## Acquisitions

* Too many clicks in Acquisitions workflow for ordering and invoicing. **– 3**
* Can only use one template for all title descriptions. Cannot have more than one template for all titles. This is used for the descriptions when receiving and adding an item. **– 3**
* Sorting is done alphabetically not chronologically for holdings and items. It would be helpful to be able to select a sort routine for items and have it "stick" in Alma and as displayed in Primo **– 4**
* When receiving in Alma the provenance code does not automatically carry over when duplicating previous issue. **– 3**
* Other issues:
  + Being able to edit a PO Line type would be very helpful. The same with being able to edit manual packaging and acquisition method.
  + Editing functions for the manual packaging and acquisition method option even after saving in the PO Line details section.
  + Being able to edit your templates and list of templates.
  + Being able to edit your PO line type

## Analytics

* Delayed COUNTER5 support has been a drag on our processes as we've grown dependent on Alma to provide comprehensive usage reports. **– 4**
* Scalability – the length of time it takes to run reports; large reports fail or take too long to run (particularly in the NZ) **– 4**
* Reserve stats – the current set-up makes it very difficult to get results for items that do not circulate or were never used; correlating reading list usage with courses seems to be very difficult **– 4**
* Primo – Zero result search analytics reports make no sense – when tried, all listed searches produce results (e.g.: "bicycle" is listed in a recent report); I have learned from presentations & the listserv that the stats cannot be trusted **– 4**

## Discovery

* Facets and limits disappear, don’t perform as expected (lost date filter, format filters show items of other types) – **5**
* Known item searching/relevance ranking still problematic, especially for Title searches. Book reports continue to rank too highly in Primo – **5**
* Article/journal availability (both displayed and in accurate or working links) is highly inaccurate in results, leading to patron frustration – **5**
* Slow screen loading, especially with get it/view it menus, results screen – **4**

## ERM

* Frequency of collection updates leading to Primo linking issues: linking issues, slow updates of CZ records, impact of vendor changes on CZ/PCI records **– 4**
* NZ & IZ Issues: lack of local control of NZ questions, “Held by” messages don’t always display **– 3**
* Delay in Alma changes translating to Primo: publishing from Alma to Primo. **– 2**
* Ex Libris Documentation: improvements needed to documentation of GES and DLR processes, not always updated to match vendor settings, don’t always include all necessary steps. **– 2**

## Fulfillment

* Course Reserves has some redundant steps when creating reading lists for courses. It would be simpler to add items to a course, rather than having to create a reading list and add items to it. Alma analytics is also not convenient to gather for CR. It's inconvenient that it takes a day to publish CR material, though this will be mitigated with Primo VE? **– 4**
* Pick from shelf list and using the Convert to Resource Sharing functionality. Would save time and reduce errors if physical item requests could be changed to Resource Sharing requests and also have the item marked as missing at the same time. **– 3**
* The pick from shelf list is confusing when a title is requested. Sometimes when multiple copies exist, if you pull the correct title, but Alma requires the other copy (barcode). **– 3**
* Often, when using Primo, the 'Show Libraries' menu doesn't show and the search has to be refreshed to get this option to show up. **– 3**

## Resource Management

* More precise "match types" needed in Alma advanced repository searching for all search indexes (does not equal, does not contain, etc) **– 5**
* Lack of clarity in Alma terminology – example: copy to catalog means two things, depending on context. "Copy to IZ" and "Unlink from NZ" would be clearer. **– 4**
* Primo deduping vector could be refined to be more precise and avoid problematic deduping. Perhaps Ex Libris could collaborate with functional experts among its customers to improve this. **– 4**
* Collections in Alma – collection discovery in a consortium environment is not localized. This prevents institutions from enabling this relatively new feature. **– 4**

## Resource Sharing

* CSU+ requests can be submitted even when there is no item availability / visibility of items from other campuses that are not loanable. Students are confused because they place a CSU+ request and immediately get a cancellation notification. **– 5**
* Resource Sharing Lender Due Date: Alma Resource Sharing due date setting is a global one which is a problem for ILLiad/Alma integration. Since dates for item requested via ILLiad vary and are generally shorter, we need to be able to set a different loan period for ILLiad/NCIP materials than we do for CSU+. **– 5**
* There is currently no way to "roll back" the status of Resource Sharing requests in Alma. There is a new "Reactivate Request" feature but it only works on requests in "Request Completed" status. **– 4**
* (For lenders) there are too many steps involved in cancelling a request when an item can't be found. We have to reject the request within the "lending requests" queue and then come out and go into the item record to toggle missing. Ideally toggling an item to missing should move the request onto the next library. **– 4**
* Other issues
  + It needs to be clearer that users have placed a request and that they will be notified via email upon its arrival.
  + Want to be able to manually change from any resource sharing status to any other status, not just roll back one status in the progression.
  + Letters/Notices are a pain point. Both editing/customization of them and the frequency/time frame when they are sent. Periodic hold shelf reminder notification are also needed.
  + Alma Analytics doesn’t retain call number data in the borrowing subject area which makes it impossible to perform an LC subject analysis of requests. Also very difficult to filter out different types of resource sharing requests (CSU+/ILLiad) when they all use the same library.

## Other Alma Issues (from staff survey)

* **Alma is still too click heavy when performing tasks:** “Too many steps/clicks to do a lot of things. There are some tasks I program through APIs instead of having to click several times to do them or having to wait for the screen to refresh after each iteration.”
* **Community Zone records note updated frequently enough:** “Some Alma CZ records are not updated frequently. Local campuses have little control of NZ collections though we have a subscription.”
* **Alma booking is not flexible enough:** “Need better system for booking requests that will work better with equipment checkout, and advanced reservations.”
* **Alma performance is slow at times:** “Some alma pages load very slowly, which effects how efficiently I can do my job”
* **Analytics report designing too complicated for the average user:** “It's incredibly difficult to run reports and do tasks such as inventory”

## Other Primo Issues (from staff survey)

* **Full-text available indication is frequently inaccurate:** “Brief record display results are not accurate. For example, some results will display ‘Full-text available’ but there is no full text for the particular article. This is very confusing and frustrating for users.”
* **Primo Back Office is too complex for the average user:** “The back office is complicated and the learning curve can be too high at times. For a smaller campus, we have to consider how important a change is before we can commit to learning how to make the change.
* **Citations are problematic:** “Automatic citations are terrible and this affects what I have to cover in instruction sessions.”
* **EBSCO absolutely needs to be handled better**: “During in person research consultations I often have to go through multiple searches because the lack of EBSCO indexing or all the broken Gale links in onesearch. So, I begin with a Onesearch then have to move over to an EBSCO database search and then a Gale database search. Often the indexing in Google Scholar is better than onesearch.”
  + **Google Scholar is seen as more useful for CSU patrons than Primo, partially due to the lack of reliable handling of EBSCO databases**
* **Linking issues abound and aren’t handled quickly:** “Links to some e-resources don't go the e-resources as mentioned in the record; tested access in Alma and access is fine, but the same link via Primo ends up at a different record or unfound/404 record.”
* **Limiting searches does not provide expected results:** “Refining doesn't always give me the expected results. Patrons are overwhelmed with options form their searches. “
* **Primo performance can be slow:** “Odd performance issues almost daily, highly inconsistent, support documentation is EXTREMELY CONFUSING, difficult to customize without programming expertise, why are the mapping tables so complicated?? Primo studio is a joke, seriously CSS wasn't even the biggest issue.”
* **Relevancy ranking still needs improvement:** “Relevancy ranking for known item searching is still bad. For example, when searching for a book with multiple editions, the latest edition is still often way down the list. Also, I was in charge of a book display. I needed the following information to both pull the books and create a libguide: title, author, publication date, call number, ISBN, and permalink. I couldn't figure out a way to do export all of that from Primo. The export to zotero doesn't include call number, permalink or isbn. I had to manually enter it into a spreadsheet. I needed to use Primo to search for the books on the display topic. Alma didn't work for that. We are doing monthly book displays, so this really is a pain. “
* **Searching still considered poor, especially with known item searching:** “Finding it difficult to produce good search results for materials that should not be so difficult to find.”

# Dean’s Survey (16 responses)

### Q1 - Please describe your current level of satisfaction with Alma.

|  |
| --- |
| Satisfied |
| It does what we expect. My primary concern is Alma Analytics. It seems to be very hard for library staff to get the data that they need. |
| Staff report that they can get all the work they need to do done. |
| Satisfactory |
| Fairly strong. There is expressed need for stronger development of analytic support; particularly in ways that render database usage statistics meaningful. |
| I don't use Alma directly but I mostly positive news but a few concerns about Alma's financial areas. Specifically, duplicate entries and staff are often not sure if the current balances are accurate. |
| quite satisfied |
| I'm satisfied. I am happy to be away from III. CSU+ seems to be going well, and I have been able to reduce costs in a few areas. |
| We have been very happy so far. We have an Alma operational team in place that makes sure everything runs smoothly. |
| Seems to work OK |
| Good (but not great) |
| Satisfied. |
| Some improvements over Voyager, however, it has not saved time, and I wish it was not so click heavy. |
| Alma works well enough for all functionalities in technical services, fulfillment, and Analytics, though some functionalities as related to electronic resources could be improved, as mentioned below. |
| Overall satisfied. I'm not aware of any serious concerns. |
| Satisfied |

### Q2 - Please describe your current level of satisfaction with Primo.

|  |
| --- |
| Satisfied |
| It is getting better, but the interface still is too busy. Sometimes hard for students to get to what they need. CSU+ interface could be improved. |
| Our coordinator says it is adequate. |
| Satisfactory |
| Its adoption as a discovery layer is varied. Some have embraced the use of Primo as a discovery layer; others avoid it and work directly within individual database interfaces. |
| Satisfactory |
| satisfied |
| Not great. I personally just find it difficult to find what I need, and I'm a librarian. Not sure if this is going to change anytime soon. |
| Primo is more of a mixed bag. It has improved some in the past few months, but I am still hearing reports of unhelpful search results from time to time. |
| Would like to see integration of outside collections (not in CSU, such as Open Access articles once vetted by EAR) |
| Good (but not great) |
| Satisfied. |
| Satisfactory, although I miss Summon |
| Primo works well enough for print resources, but needs improvement on electronic resources. Some of the issues related to electronic resources are listed below. |
| Overall satisfied. |
| Satisfied |

### Q3 - What other Ex Libris products do you think should be included in the upcoming contract renewal negotiations?

|  |
| --- |
| Esploro (I say selfishly! — but obviously this will take exploration) |
| 1. Leganto -- it is the product most directly related to student success. That is an ongoing CSU-wide focus. 2. The new ILL module. 3. Esploro will be relevant to fewer campuses. |
| The 'next generation resource sharing' product. |
| ILL |
| I'm not sure about products, but would like to see more ongoing direct support from Ex Libris for staff training on specific features of Alma/Primo. |
| If it's an Ex Libris product, it should be included. |
| not sure |
| We are using Leganto and negotiated a great deal. If others want to use it, I would be open to participating in a systemwide negotiation. |
| Leganto and Esploro |
| Any that meet the need of a majority of the 23 libraries |
| Possibly Rialto, which I have heard is good but I personally don't know much about |
| Leganto |
| I think we should ask for Pivot or Leganto for no charge addon for renewal. :-) |
| Leganto and Rialto, with Leganto as higher priority than Rialto. |
| Leganto.  Also, depending on our experience as a development partner with the NextGen Resource Sharing Sharing Solution, we may also want to include this new product as part of our Alma/Primo contract renewal negotiations. |
| None |

### Q4 - What issues is your library currently experiencing with Alma and/or Primo that are troubling you these days?

|  |
| --- |
| None that are huge |
| 1. Challenge to get Lenganto working right. 2. Analytics and SUSHI 3. Slowness of primo interface-- definitely could be faster 4. Procedures in Alma still could be streamlined to reduce clicks. |
| One complaint is the time required to learn and use Alma Analytics: in Millennium staff could quickly create and manage sets of records with the Create Lists feature. The same tasks in Alma not only take longer but only a few staff have figured out how to perform them. |
| Training -- it's always an issue with any product |
| Stronger understanding of API management; expanding staff competency in Alma and Primo to maximize configuration and use of system features. |
| Again, the financial reporting has a lot of kinks. |
| I don't have these details. My librarians and staff who work with Alma and/or Primo are better equipped to respond. |
| I am not in the mindset for specifics at the moment. I know my staff and faculty have submitted specifics. |
| One issue would be article access in Primo. We get lots of feedback from students that they are unable to access full text due to linking issues. |
| I do not like that we have annual voting for upgrades; I would like us to be able to prioritize our needs by paying for upgrades that are important to us rather than wait for the EL community to prioritize them by voting. |
| (1) Calculating tax in Acquisitions has been an issue; (2) improve quality of metadata in the Community zone for streaming media and ebooks; (3) in Primo, browsing can be a problem, for example with cross references from authority records. |
| To my knowledge, we are not experiencing any major/troubling issues. |
| Network Zone analytics too slow to be useful; Primo Back Office learning curve is too high; Click & Mouse heavy workflows - need easier function/macros, more batch process with fewer hurdles; primo central index is too separate from Alma & Primo - as a result, more service/training needed on campuses. More intuitive workflows please. |
| In Alma, one issue technical services is experiencing is encountering print records in the community zone (CZ) that are being used for electronic resources/portfolios. Alma considers the record type as electronic, but in OCLC, the record is considered print. Ex Libris needs to either select records appropriate to electronic records or create new original records for electronic resources. The quality of some of the records in the CZ also needs improvement.  We do experience some issues on occasion with CZ records with links that lead to incorrect resources. In Alma, the link goes to the correct resource, yet in Primo, it points to a different resource. A case has to be filed with SalesForce in these instances to have Ex Libris correct it. It is worrisome if a library user finds a resource in OneSearch that they would like to use only to find that the link in the record leads them to something different in a database.  Another ongoing issue regarding Alma/Primo is related to holdings, full text, and Document Delivery. Primo lacks the capability to determine our library's holdings down to the item level and only considers the title level. For example, if our library has part of a subscription to Journal A, for example, from the years 1990-2000, Primo will display full text availability in other article records falling outside of the year range or issue range. Our library's current setting for Document Delivery is to have the link to Document Delivery availability appear when our library lacks access to a resource or does not own the resource. But since Primo is displaying availability at the title level and not the holdings/item level, the link to Document Delivery does not appear, inconveniencing our users. Ex Libris's solution to this problem is to change our current Primo settings to have the Document Delivery option appear on all records, including records in which we have access to the electronic resource or hold the print resource. Our library has chosen only to display the Document Delivery option on records which we do not have access or own the resource because having it on all records would burden our Access Services department with requests on items that we already own/hold.  Our library has also noticed a field called Collection Path in Primo appearing in records. If another CSU library has set up Collections/Collection Paths, the links associated with those Collections appear in other CSU Primo records. While helpful in some ways as the Collections only reflect our library's holdings (in other words, if one CSU has 200 items in the collection and our holdings overlap with 100 of them, then the Collection Path link in our Primo results will only show the 100 items that we own), if more campuses create more Collections, the Collection Path links in Primo may become too cumbersome. Ex Libris should consider its functionalities when it comes to consortia, especially ones as large as the CSUs' consortium. |
| These aren't issues specifically about Alma, but would like to see support from the CO and ExLibris with integrating Alma with campus systems (e.g. PeopleSoft).  We have also received complaints about the lack of browse functionality for journals. Time consuming to browse by titles and can't browse by subject/discipline. |
| Generally, things are going acceptably well. Staff do find Analytics to be really aggravating, however. It times out in the middle of creating reports. Sometimes changes made do not seem to take. My librarians report that other librarians at other CSUs find Analytics performance glitchy as well. |

### Q5 - What is your perception of how well ExL Support treats issues affecting your library operations?

|  |
| --- |
| Satisfactory |
| OK -- I don't hear complaints from staff, but I think that sometimes they are not assertive enough. |
| Staff say they are no help when third-party products are involved. Timeliness could be improved. |
| Ok so far |
| Satisfactory |
| There is concern that support is not responsive to financial glitches |
| unsure |
| Positive perception. This has evolved over time to become more positive. |
| If I were leaving an online review, I would give four out of five stars. |
| Most issues we experience are shared by other CSUs, and we don't submit many tickets for campus related issues |
| They have been responsive |
| My understanding is that issues are being addressed as they are reported; some may take longer than others. |
| n/a |
| In terms of responding to a filed case, Ex Libris Support via SalesForce almost always acknowledges that a case has been received, which is appreciated. But as for actually following up with answers or updates to these cases, Ex Libris Support is much slower or sometimes non-responsive for over a month or two months. In the end, the issue usually is resolved, but the amount of time for Ex Libris Support to resolve the issues is concerning.   Our library had a case that took Support six months to resolve, though the functionality that needed to be fixed was working without issue previously. When asked why the functionality suddenly stopped working, Support offered no explanation. Currently our library has two cases over a month old with only the acknowledgement and no follow-up. One case involving a single typo to Release Notes documentation took Support over a month to resolve.  Our library also had a case that took almost two months to resolve. At one point, Support responded that the issue would be fully resolved after the "3rd September Alma CKB Update" to be released on 9/15/2019. On 9/20/2019, the issue still persisted. When questioned about the delay, Support responded that there was a "slowdown in updates" and that our library's updates were current as of 8/31/2019. When asked if Support had an estimate as to the update's final release, Support responded that they did not have an estimate. It was disappointing to hear. The issue was returned to by our library a month later and it was discovered that the issue was resolved. There was no indication from Support that the update had been released and our library had to discover the resolution on our own.  Our library would appreciate better communication and better answers to our cases. However, whenever Support has been contacted, they have always been professional and courteous in their responses. |
| Overall ExLibris is responsive to our support needs. |
| Ex Libris is slow to respond to issues we report as an individual institution. Staff are unsatisfied with the response time and with the nature of the responses. Mostly, they avoid reporting issues and try to figure them out themselves, sometimes successfully, sometimes not. Staff perception is that only issues that impact the CSU as a network are escalated and dealt with quickly |

# Chairs’ Survey (7 responses)

*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 you with how Alma currently performs in your functional area?

**Average: 7.3**

Acquisitions: 7

Analytics: 7

Discovery: n/a

ERM: 8

Fulfillment: 8

Resource Management: 7

Resource Sharing: 7

### Q2: On a scale of 1-10, how satisfied are you with how Primo currently performs in your functional area?

**Average: 6.2**

Acquisitions: 7

Analytics: 5

Discovery: 6

ERM: 7

Fulfillment: 7

Resource Management: 6

Resource Sharing: 6

### Q3: Please list the top issues you and your functional area are currently facing below, along with a sense of the urgency you place on their resolution. On a scale of 1–5, how urgent are fixes to these issues to members of your functional area?

|  |  |
| --- | --- |
| Acquisitions | * Too many clicks in Acquisitions workflow for ordering and invoicing. **– 3** * Can only use one template for all title descriptions. Cannot have more than one template for all titles. This is used for the descriptions when receiving and adding an item. **– 3** * Sorting is done alphabetically not chronologically for holdings and items. **– 4** * When receiving in Alma the provenance code does not automatically carry over when duplicating previous issue. **– 3** |
| Analytics | * Delayed COUNTER5 support has been a drag on our processes as we've grown dependent on Alma to provide comprehensive usage reports. **– 4** * Scalability – the length of time it takes to run reports; large reports fail or take too long to run (particularly in the NZ) **– 4** * Reserve stats – the current set-up makes it very difficult to get results for items that do not circulate or were never used; correlating reading list usage with courses seems to be very difficult **– 4** * Primo – Zero result search analytics reports make no sense –when tried, all listed searches produce results (e.g.: "bicycle" is listed in a recent report); I have learned from presentations & the listserv that the stats cannot be trusted **– 4** |
| Discovery | * Facets and limits disappear, don’t perform as expected (lost date filter, format filters show items of other types) – **5** * Known item searching/relevance ranking still problematic, especially for Title searches. Book reports continue to rank too highly in Primo – **5** * Article/journal availability (both displayed and in accurate or working links) is highly inaccurate in results, leading to patron frustration – **5** * Slow screen loading, especially with get it/view it menus, results screen – **4** |
| ERM | * "Frequency of collection updates leading to Primo linking issues: linking issues, slow updates of CZ records, impact of vendor changes on CZ/PCI records **– 4** * "NZ & IZ Issues: lack of local control of NZ questions, “Held by” messages don’t always display **– 3** * "Delay in Alma changes translating to Primo: publishing from Alma to Primo **– 2** * "Ex Libris Documentation: improvements needed to documentation of GES and DLR processes, not always updated to match vendor settings, don’t always include all necessary steps **– 2** |
| Fulfillment | * Course Reserves has some redundant steps when creating reading lists for courses. It would be simpler to add items to a course, rather than having to create a reading list and add items to it. Alma analytics is also not convenient to gather for CR. It's inconvenient that it takes a day to publish CR material, though this will be mitigated with Primo VE? **– 4** * Pick from shelf list and using the Convert to Resource Sharing functionality. Would save time and reduce errors if physical item requests could be changed to Resource Sharing requests and also have the item marked as missing at the same time. **– 3** * The pick from shelf list is confusing when a title is requested. Sometimes when multiple copies exist, if you pull the correct title, but Alma requires the other copy (barcode). **– 3** * Often, when using Primo, the 'Show Libraries' menu doesn't show and the search has to be refreshed to get this option to show up. **– 3** |
| Resource Management | * More precise "match types" needed in Alma advanced repository searching for all search indexes (does not equal, does not contain, etc) **– 5** * Lack of clarity in Alma terminology – example: copy to catalog means two things, depending on context. "Copy to IZ" and "Unlink from NZ" would be more clear. **– 4** * Primo deduping vector could be refined to be more precise and avoid problematic deduping. Perhaps Ex Libris could collaborate with functional experts among its customers to improve this. **– 4** * Collections in Alma – collection discovery in a consortium environment is not localized. This prevents institutions from enabling this relatively new feature. **– 4** |
| Resource Sharing | * CSU+ requests can be submitted even when there is no item availability / visibility of items from other campuses that are not loanable. Students are confused because they place a CSU+ request and immediately get a cancellation notification. **– 5** * Resource Sharing Lender Due Date: Alma Resource Sharing due date setting is a global one which is a problem for ILLiad/Alma integration. Since dates for item requested via ILLiad vary and are generally shorter, we need to be able to set a different loan period for ILLiad/NCIP materials than we do for CSU+. **– 5** * There is currently no way to "roll back" the status of Resource Sharing requests in Alma. There is a new "Reactivate Request" feature but it only works on requests in "Request Completed" status. **– 4** * (For lenders) there are too many steps involved in cancelling a request when an item can't be found. We have to reject the request within the "lending requests" queue and then come out and go into the item record to toggle missing. Ideally toggling an item to missing should move the request onto the next library.**– 4** * Other issues   + It needs to be clearer that users have placed a request and that they will be notified via email upon its arrival.   + Want to be able to manually change from any resource sharing status to any other status, not just roll back one status in the progression.   + Letters/Notices are a pain point. Both editing/customization of them and the frequency/time frame when they are sent. Periodic hold shelf reminder notification are also needed.   + Alma Analytics doesn’t retain call number data in the borrowing subject area which makes it impossible to perform an LC subject analysis of requests. Also very difficult to filter out different types of resource sharing requests (CSU+/ILLiad) when they all use the same library. |

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

**Average: 6.4**

Acquisitions: 6

Analytics: 7

Discovery: 5

ERM: 7

Fulfillment: 8

Resource Management: 5

Resource Sharing: 7

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

|  |  |
| --- | --- |
| Acquisitions | Fixes take too long. Have to go through long hoops just to get fixes done. |
| Analytics | Some issues are resolved very quickly and others are left hanging. For analytics issues, the answer from support is almost always a fix in a release in a few months. Meanwhile we can't do the reporting we need and have to create workarounds, then remember to test several months later; Analytics responses have been better than support responses in other functional areas. |
| Discovery | Some responses:   * I have no idea where to report my issues. When I have reported, I hear back oh, we might be able to add that to the next round of fixes but there are too many priorities, and also, oh the last round of fixes won't be made until next year. * I like that ExL is responsive to a point but when it comes to fixes, they sometimes don't get fixed. I feel like I shouldn't need to doublecheck these fixes, it takes a lot of work to create a case in the first place. * Sometimes I've gotten very helpful responses from EL support, and sometimes my questions are sucked into the black hole of development. * For the most part, I receive detailed responses to my cases and I really appreciate that. However, sometimes, I get the dreaded "defect" or "going to development". That usually means it'll never be fixed or it will someday in the distant future maybe. |
| ERM | Some responses:   * I've had some excellent support in which they went into detail and provided documentation. I've also had Zoom sessions that were very productive, having to do with implementing the ebook integration profile job. I've also opened cases for PCI and Primo that sometimes sit around for weeks or worse, go to Tier 2 Development (basically no resolution). * In terms of responding to filing a case, I'd give them a 9 since they almost always acknowledge that a case has been received. But as for actually responding with answers or updates, I'd give them a 4. I say 4 because in the end, the issue usually does get resolved, but it's just the amount of time it takes to get to that resolution. * I wish they had more explanations as to why certain functionalities aren't working or more definitive answers to updates. I also wish they responded faster with answers and followed up more frequently. |
| Fulfillment | The response time is adequate, however, sometimes the content of the response isn't satisfactory. There is a sense that they don't understand how individual campuses might use their product/functionality and they give a response that seems to say that the product is working as intended. It would be better to if they could probe further as to how the functionality is being used. |
| Resource Management | While Ex Libris promptly acknowledges the receipt of a case via Salesforce, they rarely provide meaningful and detailed updates in a timely manner. Simply writing “I’ve referred this to Tier 2 Analysis” doesn’t tell me what was found at Tier 1 Analysis. Or “this issue will be fixed with December 2019 release” doesn’t tell me what was causing the issue. Updates from ExL support are rarely effective or helpful without escalation or pressing for more details. That said, excellent responses to Resource Management-related Analytics cases have been typically addressed in a prompt and helpful manner, complete with example formulas. |
| Resource Sharing | ExL initial response time is quick but the effectiveness and extent of support could use improvement. Some cases seem to go nowhere as far as solutions or improved performance go or the cases take a long time to resolve. One response was that talking to someone whether on the phone or over video chat to make trouble shooting easier would be nice. Being able to actually show the support person the unwanted behavior as it happens would make explaining the issue much easier. |

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

|  |  |
| --- | --- |
| Acquisitions | Comments received: I usually vote for items in development that have hot keys or short cuts for the many clicks that are needed in ALMA for Acquisition type functions. The ordering and invoicing procedures in Alma should be less complicated with much fewer steps. Having to override funds/or add funds when posting even if you are only over by a few dollars while you are in the invoice. you should be able to finish the invoice and add the funds after acknowledging the warning. |
| Analytics | A tighter integration between the way information is organized and presented in Alma and how it is reported in Analytics would be helpful. Much more extensive documentation on the ETL process and the data dictionary would be enormously useful. Consortial support needs improvement; Access to more MARC record and POL fields; Primo Analytics is an underdeveloped product. ExL knows that most people use Google Analytics. The out of the box reports for Primo Analytics are good. It's a shame though that more reports and training are not being offered as those for Alma Analytics. |
| Discovery | A lot of needs concern the consortial environment. I feel like Alma/Primo loses a lot of features when you are in a consortium. Examples: we can't localize Collections display, we can't apply local display logic rules to shared e-collections, we can't add shared NZ e-resource records to our local Reserves lists, we can't pull local turn away analytics for NZ e-resources, etc. More user-friendly Back Office. Subject heading and call number browsing. Reconciling differences between “Full text Online”, “Full Text Available”, and “Online Access” in display of links. |
| ERM | Not sure if anything can be done about it, but I'm still finding records in Primo that require a 988 NODEDUPE note in Alma. It'd be nice to have separated bib records for print versus electronic  There are also still records in the CZ that use the print version of the record, for example, OCLC #34688912. It'd be nice if Ex Libris either found the appropriate electronic records to go with their portfolios or they do original cataloging and create new records.  I believe that many of the Primo issues are because of the Primo Central Index, so I would like to see improved functionality of the technology that allows Primo, local catalog metadata, and PCI to communicate. |
| Fulfillment | This semester has seen more reports of Alma slowness during peak times (10am-7pm), where checking in/out material can take minutes rather than seconds. |
| Resource Management | 1) More precise Primo deduping. 2) Reduce the click-heavy nature of Alma. 3) Please stop using print record OCLC numbers in CZ records for electronic resources. |
| Resource Sharing | Pretty much all of the stuff rated and commented above. |

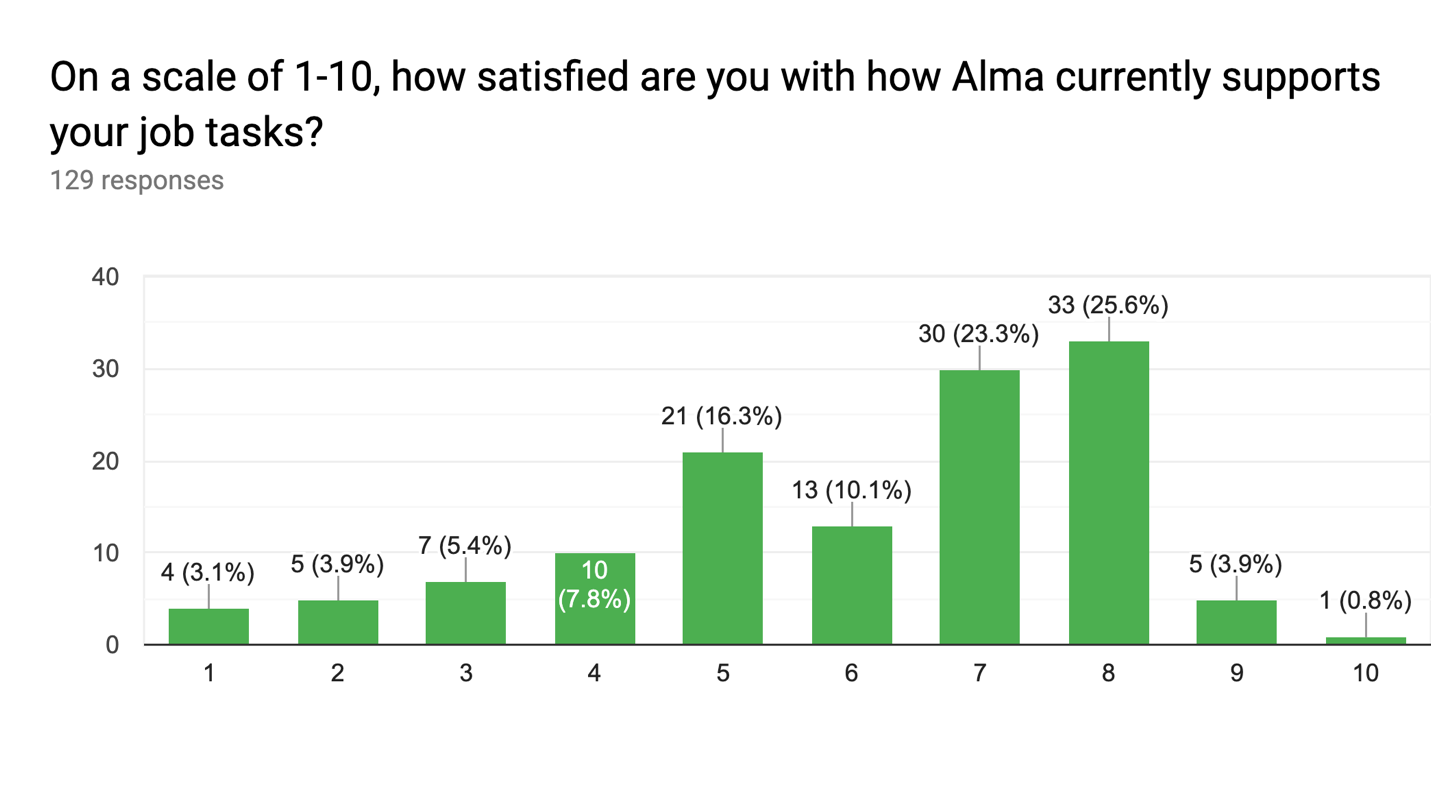
### Q7: Anything else that you want to tell us?

|  |  |
| --- | --- |
| Acquisitions | Comments received: When renewing orders, the subscription dates from ….. to ….. aren’t automatically filled in. When searching in Alma, and when receiving you have to have the exact spelling and whole title. |
| Analytics |  |
| Discovery | Sometimes it's not necessary to keep at a such a pace as to offer new features almost monthly when some of the old ones have yet to be fully implemented or developed. For example contextual relationships. Great idea to have book chapter links but I haven't any idea when a record will have book chapter links. It's not clear to me that you have this really worked out. You rolled it out but it seems half baked. |
| ERM |  |
| Fulfillment |  |
| Resource Management | We look forward to more information about the ULMS’ plans for CDI and how it’ll affect our consortium. And thank you for the opportunity to provide input. | |
| Resource Sharing |  |

# Staff Survey (129 responses)

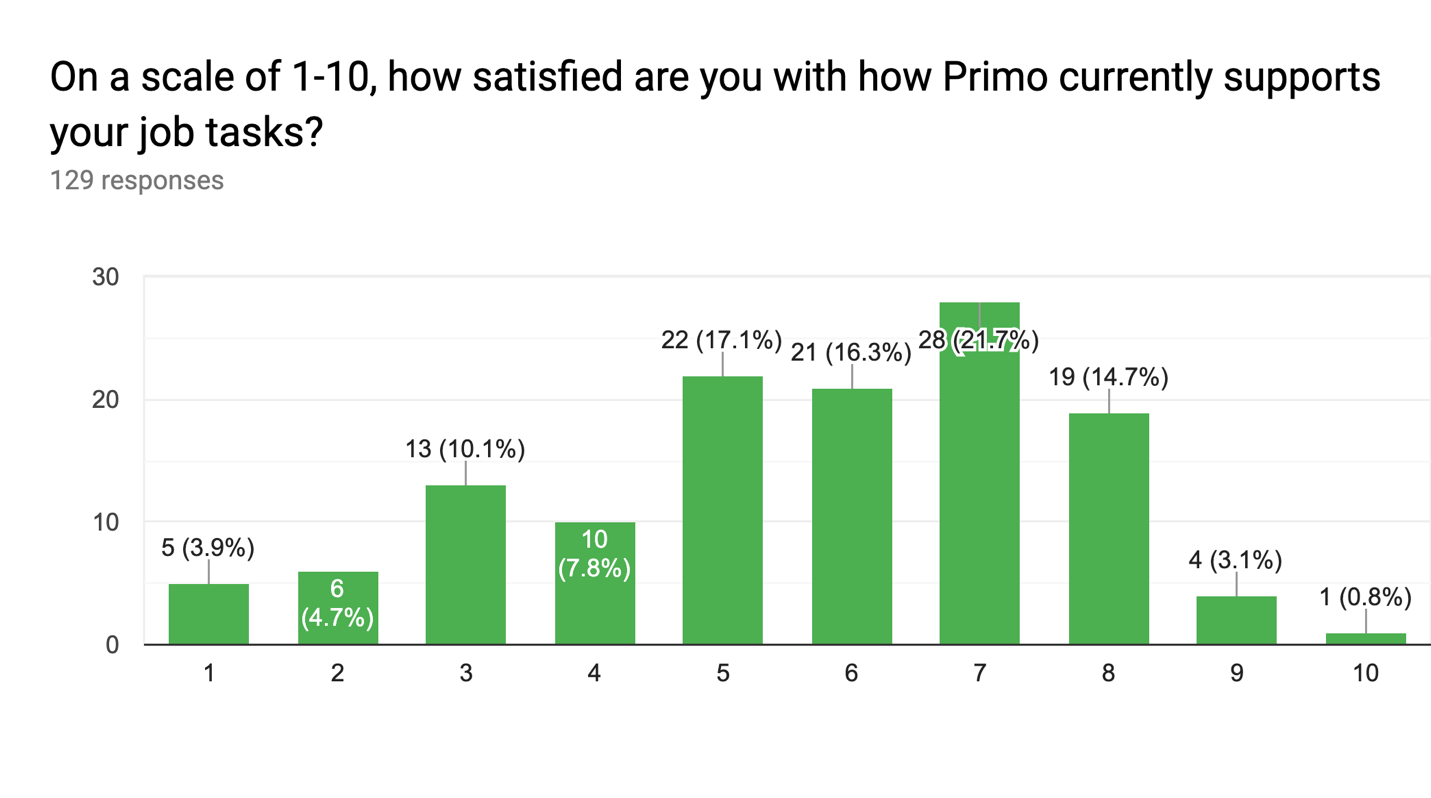
### Q1 - On a scale of 1-10, how satisfied are you with how Alma currently supports your job tasks?

**Average of 6.1**



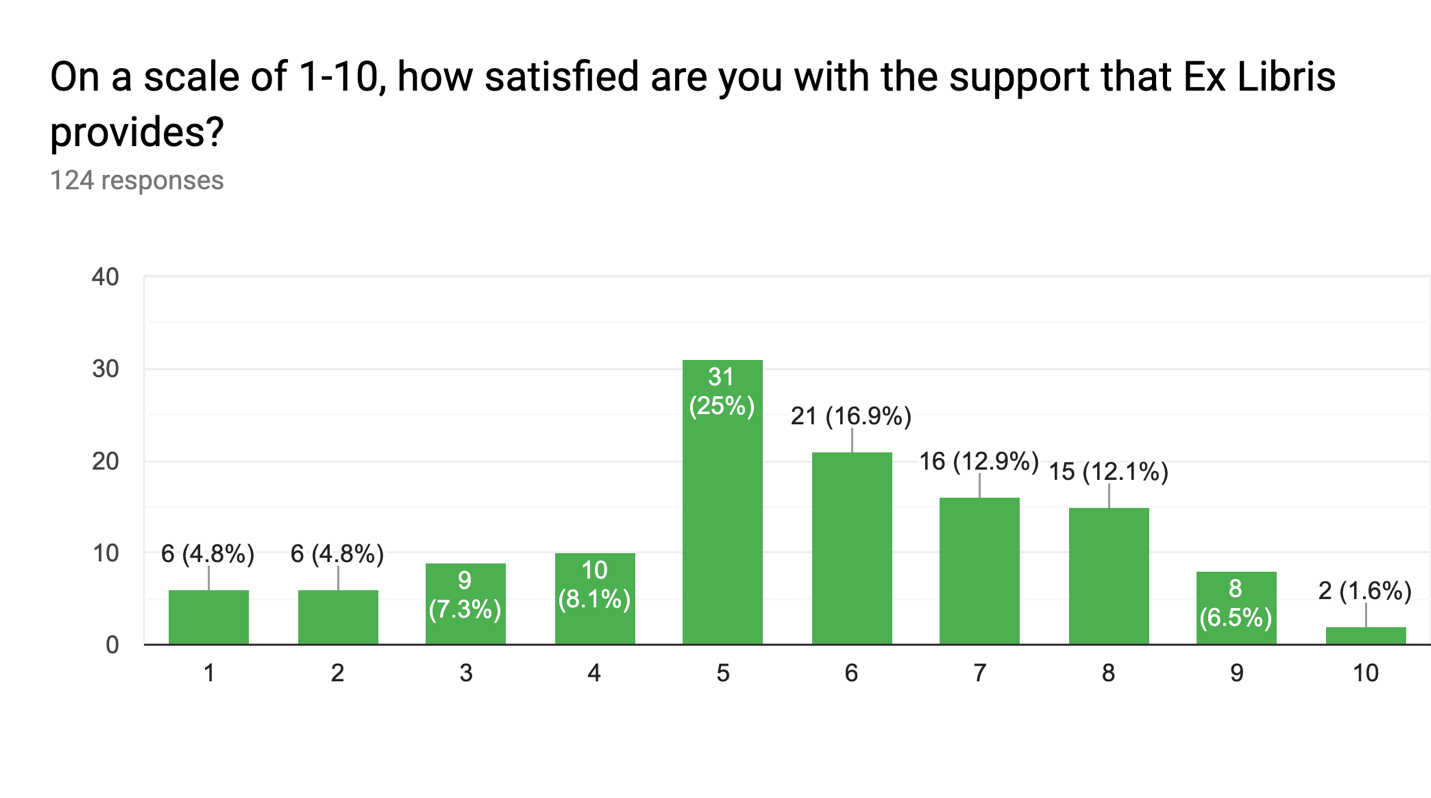
### Q2 - On a scale of 1-10, how satisfied are you with how Primo currently supports your job tasks?

**Average of 5.6**



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

**Average of 5.6**

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### Q4 - What Alma issues currently affect how well you perform daily tasks, if any? (81 responses)

|  |
| --- |
| Ability to run real-time financial reports and move collections of items between statuses and locations in a timely manner. |
| Encumbrances and transactions in funds - need further improvement/customization; need ability to have $0.00 as price in a subscription order; sales, use tax and shipping.handling fees are problematic for exporting to our ERP. |
| The biggest challenge is probably the uresolver and the quality of data in the community zone. |
| Things work well mostly. I wish it was easier in analytics to run reports on the different types of processes for physical items, and that ALMA and Analytics mapped fields better. |
| While there are some improvements with the new UI, it is still extremely click-heavy to work my way through routine tasks in Fulfillment. It is also very difficult to get EL support to respond to tickets. I don't know if there are workflow issues on their side or not, but it does feel like once we were up and running, they were done with us and on to chasing their next big customer. We would also like to purge our attachments (notices) but are afraid to do so because of the record it keeps when managing expectations with our more cantankerous users. |
| Mouse clicking, clicking, clicking, clicking, forward and back all the time. No ability to move from one item in a list or a set to the next. Ongoing inability to export to Excel \*all\* of the fields we need from a set or list of records, and \*only\* those fields we choose. The whole ridiculous mess that is norm rules/indication rules. You have to nearly be a programmer just to get a set of the records you want. I don't even try any more. These are the kinds of basics that were great in our previous system. We took a giant step backwards here with Alma. |
| You have to be in the right screen to do the task at hand. Example, you can navigate to an item record several different ways but if you didn't go the right route you won't have the same options you would if you got there a different way. WAY TOO MANY CLICKS! |
| Acquisitions doesn't work well, claiming periodicals doesn't work well, receiving periodicals isn't great, creating lists is rocket science, the funds don't make sense. |
| Would love to see better batch functionality for catalog records. Alma is limited by what job configuration allows. Likewise, norm rules could use a lot of work. |
| Booking. I would like to be able to reserve multiple items at once. Patrons frequently request multiple items from the same record. It can take up to 30mins to reserve a dozen items from the same record for one patron. |
| Slow, too many clicks, course reserves too complex and time consuming |
| analytics often doesn't work the way I think it should; odd naming conventions |
| Alma is ridiculously slow and cataloging individual items is excessively burdensome. I should not need to rely on workaround APIs to request items because Alma's built in work order job running functionality is so poor. The norm rules and indication rules are not perfectly logical and can be faulty for no good reason. Alma should not be showing our addresses or any other personal information to the entire library. Call number look up functionality is cumbersome and substandard. The sandbox widget needs to be reinstated. Keeping up with all of Alma's updates is overwhelming and exhausting. The authority control task lists are not useful. |
| Putting items in process might be simpler |
| Following through with discoverability in Primo Central |
| It's incredibly difficult to run reports and do tasks such as inventory |
| how issues and portfolios are sorted: alphabetical sorting does not work for issues that are volume month year |
| I'm generally okay with Alma. Besides being too click-heavy, it works as expected for an ILS. |
| I think that Alma supports/encourages/allows the fragmentation of tasks that are best done by a single staff person. It does not force an inexperienced manager to scatter parts of a task around the staff, but it makes it easy to do and thereby fosters the illusion that it is good "system administation." |
| Analytics |
| Random alma crashes while working in POL. Unsuspected fund information deletions in POL. |
| Difficult to navigate through e-resources. |
| Weekly task of checking the CZ updates: Delay of jobs completion results in delay of checking the task list |
| ALMA Analytic |
| Deleting portfolios job not working |
| very user-unfriendly when it comes to searching by call numbers. Also the fact that we have to log in with our own school credential is just dumb and inefficient. |
| Having to wait a day for a bibliographic record to be republished. Problems also with Analytics in terms of delay with getting SUSHI and COUNTER 5 to work. |
| Too many steps/clicks to do a lot of things. There are some tasks I program through APIs instead of having to click several times to do them or having to wait for the screen to refresh after each iteration. |
| Lack of OCLC field in Analytics, inability to work with two tabs of Alma open within the same browser. Letters configuration is still pretty quirky, what I see is not necessarily what I get. Documentation can be helpful, but sometimes it just dead ends... we are understaffed so there is a lot of just figuring things out on my own. It would be wonderful to have ExLibris support that assisted with configuration tasks not just problems. (ULMS site is often a helpful gap filler!) |
| When the system times out and logs out, it doesn't let you know until you try and do a task. It needs to have a long log in time and a screen that tells you that ALMA is logged out. |
| slow sometimes |
| not very user-friendly; everything about Alma is just unsatisfactory; the fact that we need to sign in with our school credential instead of a generic code each institution can create is just time-consuming. It is very frustrating when there are patrons waiting in line for you to sign in to your school credential because the previous staff has logged out of his/her account. Also the search function is not user-friendly, either. You have to know how to enter call number in a way for it to generate search result; otherwise, it would show nothing, even though it exists in the catalog |
| Some alma pages load very slowly, which effects how efficiently I can do my job |
| The e-collections are not up-to-date. What is happening is the title list in ALMA are not reflecting the title lists from the vendor. This leads to broken links in Primo, which is frustrating to our patrons. Another problem is the NZ Analytics are so slow. Third problem is with the overlap analysis tool. We can't compare to the NZ only IZ to IZ or IZ to CZ. |
| When searching for titles, search results with the exact name are often buried towards the end of the page instead of appearing at the top of the screen where the most relevant search results should be. When checking out items the most recent item checked out appears at the end of the loans list instead of the beginning. |
| Alma needs to be able to make some assumptions when searching. If there is a typo in your search, it should be able to say "Did you mean this?" instead of giving you completely wrong results, or no results at all. Alma needs to be able to push information to Primo much faster. The "next day lag time" is very unfortunate for the catalogers working on records and MORE importantly for the students. Alma should be more intuitive and the language used for functions needs to be logical. Cancel for Back etc. Also if there are function keys for certain actions, then they should work for that function. ALT B is supposed to cause the system to go back, and it does....sometimes, but not always, and yet if you hover over the back button it continues to give those function keys. Very frustrating since Alma is so click heavy. |
| The inability to add local fields in Connexion and import them to the NZ creates additional steps in my Alma workflow. |
| Not user friendly; we should be able to customize defaults that can make task faster; The use of alma is not intuitive, there are far too many clicks required to accomplish basic tasks; often have to wait anywhere from 12 to 72 hours for new & updated catalogued entries; |
| Import errors |
| speed |
| Generally Alma works better in ways than Primo. There are some issues I have encountered with icons for portfolios not showing in the NZ. |
| Time delay for metadata changes made in Alma to be reflected in Primo; time delay for OCLC record export/overlay to appear in Alma. |
| I get frustrated that I can't search by MARC field. |
| Some CZ records are not updated frequently. |
| The timing and triggers of some of the fulfillment letters - such as the On Hold Shelf, Requests Report, and Loan Receipt - and the lack of differentiation between different libraries or types of items make the XSL customization more important. |
| Some Alma CZ records are not updated frequently. Local campuses have little control of NZ collections though we have a subscription. |
| Connection with Alma servers, changes in processes, different lengths of time depending on the type of task to see Alma work reflected in Primo. |
| Reserve functions are non-intuitive. |
| extremely too much "clicking" to get to different tasks |
| too many fields to look a book title up in. Too many fields with a due back date |
| Analytics user interface is very difficult |
| Too many clicks in daily work with Acquisitions |
| it has a big lag in the evening times |
| I don't use Alma directly. |
| I think Alma, from the patron account perspective, is overly complicated in account creation. I'd liek the ability to turn on/off fields that we don't need, and generally streamline the overall account creation process. |
| Not COUNTER 5 compliant, SUSHI sucks (seriously please reconsider how ineffectual running every week is, also why is it so hard to delete old/error data???). It takes FOREVER to get metadata corrected when there is a discrepancy between EBSCO and ProQuest indexing. DARA is a joke and so frustrating and unhelpful. Here's an idea, why not just improve help documentation??? |
| There's a lot of clicking and saving in order to process invoices for payment. |
| Lack of authority control is huge. Being able to effectively and easily search call numbers for shelf listing with reliable results. |
| COUNTER5 SUSHI, & ProQuest SUSHI harvesting |
| The indexing is just bad. On multiple occasions I have done title searches, for example, for items I know are in our collection, and get no results. |
| I still don't feel that cost per use in analytics is useful. The subscription dates are incredibly important in this calculation. |
| I have trouble accessing Alma Analytics after the initial access. It times out and then will not allow me back in unless I log out of Alma and log back in. |
| Unnecessary complexity. We understand what to do and how to work around it, but there are additional steps that could be simplified for both timeliness and efficiency. I think other functions could be made available while maintaining the integrity of Alma's work processes (back-ups, etc.). |
| limit to export data, interrelationship between policies, locations & terms of use |
| Resource sharing messages need to be more easy to customize. Cancelled physical hold item requests need to be able to be made directly into resource sharing requests, including the toggling of the missing local item--it takes too many steps to do this now. Resource sharing statuses need to be able to be reversed and this should be made easy for staff to be able to do. |
| I would like LOCATION to be a primary facet!! Oftentimes (for example) I might need to pull up ALL of a certain type of item from the Arne Nixon Center--or maybe the Map Library, and it is not easy to do this. I have not been able to even though I try different approaches, ask for help from others, etc. It just doesn't seem to work properly or in a clear straightforward manner, and honestly, this should be a simple and direct way to seek quick results. |
| Search lists not exact . Analytics does not reflect accurately or easily. I need an active balance search list of users. |
| Sometimes you have a patron in front, try to search for something and boom, not working. |
| Ability to design specific reports to give needed data seems unnecessarily complicated. |
| Lack of a macro language to automate some tasks. |
| Listed functions, don't function. Such as, "Convert to Resource Sharing Request" when local/inhouse hold items turn up missing. Must make Res. Shar. in network tab, cancel missing item from Pick from shelf list, then toggle missing status in Item search. |
| Excessive number of clicks to complete tasks. For instance, creating an Electronic Portfolio, as opposed to having an 856 link appearing on the OPAC in Sierra, without creating an "Electronic Portfolio". |
| All the numerous places you have to look to see what's going on with something, but you have to go other places to fix them. Also, all the things that stop working whenever there's a new release. |
| Searching for jobs and sets is a pain. There should be the ability to group delete sets or have a list of jobs you frequently run for quick access. |
| confusing interface |
| sporadic slowness of a web-based system; overly click-heavy |
| The way it locks up and you have to close the whole program and reload when performing everyday tasks. We call this being glitchy. |
| Need better system for booking requests that will work better with equipment checkout, and advanced reservations. |

### Q5 - What Primo issues currently affect how well you perform daily tasks, if any? (88 responses)

|  |
| --- |
| Metadata issues and the inability to use FRBR because it doesn't function correctly. |
| Again, the uresolver and data quality. It's really interoperability between the two systems that causes the most work for us. |
| I use ALMA as a cataloger so don't use Primo much, but when I do it feels clunky and weird. |
| The back office is absolutely inscrutable. We had a capable person here through our implementation, and they departed. Now we have a highly customized interface that is difficult to maintain and we are lacking the bandwidth to do so. It's partially our institution's fault, but also Primo is really damned difficult to use without highly specialized knowledge of AngularJS, which is a niche market for recruitment for a new hire. This pathway is not sustainable for smaller institutions within the CSU, too. |
| The copy and paste clipboard function of citations still strips out formatting. This is a known issue for Ex-Libris' to fix but so many issues just sit for them to fix |
| -The system does not identify when a specific journal article is available if our institution has any version of the journal. For example, if a patron is looking for V.25 of a journal but we only carry v.2-23, the system will tell the patron that it is available.   -Not all the article come up on the search results from our databases.  -"Available" links direct you to blocked articles  -You have to check the box next to the date on the filter in order for the date to change. |
| Badly merged records, crazy numbers of duplicate article results for the same articles. It's really hard to limit results properly and to wade through them. If I were a user I'd give up, frankly. |
| Primo is too slow. Also it may be a campus issue but I dislike that the same title can have multiple different holdings depending on format (ex: online, periodical and MF can be three different holdings or two or one depending on the journal title. Also, the MF can sometimes be listed first or last) |
| It's hard to narrow down searches the way I want to. |
| De-duping records which don't have the same material type. This is an ongoing issue for us. |
| Booking. Reserving an item is not very user friendly. The user interface in primo is very confusing for most people. |
| Hard to find items in your library--even with facets. Very slow. Doesn't update immediately. |
| frequency of updates, sorting and indexing of some fields for Primo |
| UI is confusing to students, difficult to navigate, and incredibly slow to load |
| It is horrible that I cannot see bibliographic data changes real time in Primo. I should not have to wait two days to see changes; I shouldn't even have to wait 2 minutes. The searches are worthless in that there is no good way to conduct precise searching and far too many false hits are retrieved. The dedup and merge "functionality" causes far too many problems and confusion; it does nothing to make the appearance cleaner or simpler. I have to spend time addressing complaints from subject librarians about improperly merged titles. Titles that are not shared in the Alma NZ should not be discoverable by outside institutions/instances in Primo! |
| Lack of call number indexing. Inability to search by LC classification |
| Search results are not great |
| I need to familiarize more with Primo to understand it better |
| Difficult to use and frustrating to access the data need to do job tasks |
| it is somewhat difficult to use |
| One Search is the WORST search engine i have encountered in my 30+ years here. I work a public service desk and really miss our old search engine. |
| The Angular framework being used is older and also has accessibility issues. This means my development skills stay anchored on older Tech and I'm not able to take advantage of newer methods/solutions. |
| The back office is complicated and the learning curve can be too high at times. For a smaller campus, we have to consider how important a change is before we can commit to learning how to make the change. |
| Primo tries to do too many things. |
| Relevancy ranking for known item searching is still bad. For example, when searching for a book with multiple editions, the latest edition is still often way down the list. Also, I was in charge of a book display. I needed the following information to both pull the books and create a libguide: title, author, publication date, call number, ISBN, and permalink. I couldn't figure out a way to do export all of that from Primo. The export to zotero doesn't include call number, permalink or isbn. I had to manually enter it into a spreadsheet. I needed to use Primo to search for the books on the display topic. Alma didn't work for that. We are doing monthly book displays, so this really is a pain. |
| the accuracy of search results and the persistent link resolver issues |
| Lost functionality for several aspects of the OPAC. Can't do things I used to be able to do. |
| The search engine brings up really confusing results. |
| Links to some e-resources don't go the e-resources as mentioned in the record; tested access in Alma and access is fine, but the same link via Primo ends up at a different record or unfound/404 record. |
| Primo (OneSearch) is doing everything possible to hinder me from effectively and efficiently helping students, faculty and staff. The number of complaints I am receiving is staggering, and I have yet to meet a single person who has not had a difficult time finding items in the catalog - even when looking for a specific item in advanced search. Students are overwhelmed and confused, and are increasingly resulting to googling things instead of using OneSearch. faculty are angry and not adverse to blaming librarians for OneSearch. |
| Records not showing up in Primo on the same day that it was added. Can't check to see if links are working through Primo. |
| The way notes display |
| Automatic citations are terrible and this affects what I have to cover in instruction sessions. |
| same: very user-unfriendly |
| I'm looking forward to the CDI and hopefully an improvement over PCI. |
| I don't do much with Primo |
| Lag in publishing records. Lack of new books or featured titles display functionality. |
| Currently: subject headings breaking apart and excluding print results; not always clear if available online actually refers to our institution; repeated needs to sign in |
| too many irrelevant results with one search |
| Searching by call number does not seem to be supported |
| Take a look at how other libraries design their catalogs and improve. It doesn't make me want to promote the usage at all. |
| Finding it difficult to produce good search results for materials that should not be so difficult to find. |
| During in person research consultations I often have to go through multiple searches because the lack of EBSCO indexing or all the broken Gale links in onesearch. So, I begin with a Onesearch then have to move over to an EBSCO database search and then a Gale database search. Often the indexing in Google Scholar is better than onesearch. |
| The "course" button on Primo is very confusing. It does not necessarily mean that the item is a course reserve item but patrons think that is the case. |
| Searching in Primo should be able to make some assumptions. If there is a typo in your search, it should be able to say "Did you mean this?" instead of giving you completely wrong results, or no results at all. |
| Collection discovery is not localized for institutions in consortia. This makes it difficult to take advantage of Collections in Alma. |
| Searching for items is very difficult |
| Display and UI issues |
| fine in my capacity |
| There seems to be problems linking from articles in Ebsco databases to full-text using the find it link and generally problems with linking from Primo to Ebsco. I have noticed that some content in Ebsco for journals/magazines that have a web component are problematic. |
| Delay for changes in Alma to appear in Primo means that fulfilling reserves, rushes, and requests are also delayed. |
| inability or poor ability to recognize/differentiate local print holdings vs. electronic holdings of a journal run |
| I hate that it isn't current. |
| Some Primo collection records are not updated frequently. |
| Metadata is not compatible between Primo records and target databases especially for EBSCO databases. It looks like Google Scholar indexing is much better to link to full text than Primo. |
| Occasionally the list of holdings at other CSU campuses is slow to load, or doesn't load at all. Refreshing the browser tends to fix the problem. |
| Some metadata from PCI do no work well with other databases especially EBSCO. It causes a lot of dead links when using Alma link resolver. |
| Brief record display results are not accurate. For example, some results will display "Full-text available," but there is no full text for the particular article. This is very confusing and frustrating for users. |
| List of serial items in Primo different from sort order in Alma, requires more clicking to find item in Primo. |
| I still find that more useful results show up in Google Scholar searches than when trying the same keyword searches on OneSearch. Sometimes results show up that have little to no bearing on what I'm searching for. |
| don't really have much use. |
| Finding articles that say full text available but then it is not. Finding articles in the database listed but not having access to it. |
| Prime is quite useful |
| the inability to do a call number browse is a genuine impediment to good reference service. This is an embarrassment for our whole CSU Library system. |
| Refining doesn't always give me the expected results. Patrons are overwhelmed with options form their searches. |
| Odd performance issues almost daily, highly inconsistent, support documentation is EXTREMELY CONFUSING, difficult to customize without programming expertise, why are the mapping tables so complicated?? Primo studio is a joke, seriously CSS wasn't even the biggest issue. |
| Updates/changes in ALMA displaying a day later in PRIMO is NOT time effective. |
| Lack of authority control; Primo (like Google) dredges up too much junk that is unrelated to what I want. I often do a search for a known title, and I cannot find it in Primo. Additionally, because we have a different search parameters in Alma than Primo, you can do the exact same search in Alma and Primo, and almost always yield a different set of hits. Public services staff often ask me why they can't find something in Primo, and when I do the same search in Alma, it pops right up. It is not the proper intention of the library catalog to have different search results from the back end, as you have from the front end. The front end (Primo) and the back end (Alma) need to be better aligned. Additionally, the time lag of at least 24 hours (and sometimes more) to be able to see the results of your cataloging work on the public side is extremely annoying. I want to make sure that the work that I do is showing up properly on the public side, which means holding the books back a day or more, in order to search them again on the Primo side. |
| We don't like the fact that we are not able to view our corrected work live as soon as we done updating or cataloging a bib record. |
| The interface is not intuitive. |
| Not being able to make a change, and see the effect in Primo in real time is a big problem. |
| Sometimes the permalink doesn't show in Primo public display records. Have to try reloading the record. |
| mainly haven't been able to work on service pages , upload CSS and use APIs, but this is more a problem of not having in house expertise |
| Actually, I prefer Alma to Primo. Primo feels more "restricted" somehow. It is hard to pull things up by call number for one thing; never seems to work for me or others! (No idea why.) It'd be great if one of the facets on the left side offered the LOCATION filter as an initial choice; and sometimes the results are an odd assortment. I'd appreciate being able to have results appear alphabetically as an option. They frequently seem so random. |
| relevance retrieval. perplexed on the type of material retrieved and its order |
| Broken links, empty records , error codes |
| It is just a little embarrassing, to tell them to try again later. |
| Lack of a macro language to automate some tasks. |
| Items that appear "available" in Primo, from another institution to request from, and buried under layers of clicks, finally see that it's a "course reserve item," at that university, and therefore unavailable for requesting, similar to "reference." Patron gets no cancel notice no explanation why it was cancelled, but are now very upset and asking me for answers. So I do. |
| Having to hunt for the edition information and translator information in the LONG record, as opposed to having it appear in the title field. |
| You find an article that the library has full-text, but you can't open it with the full-text link, you have to redo the whole search using the journal title. Also, all the problems different browsers have finding things -- all the errors, all the "no results found." you switch browsers and you find them, but there is no one browser that usually works. It's a complete waste of time. |
| Search function is very unreliable and can come back with crazy results--not very user friendly. I can navigate it, but students don't have an easy time solo. |
| The way it locks up and you have to close the whole program and reload when performing everyday tasks. We call this being glitchy. |

### Q6 - What are we unlikely to have heard yet about how well Alma and/or Primo is working for you? (46 responses)

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| Pretty sure you've heard about the acquisitions issues |
| You constantly improve ALMA and listen to the people using it without getting much thanks probably. |
| We are very happy to be able to backtrack to specific operator error to provide correction to staff and student assistants when they make mistakes. It is also incredibly powerful for us to have the Resource Sharing through our CSU+ system. We're lending and borrowing materials that may not have moved so easily and seamlessly among lenders. I appreciate that it is largely unmediated, so we don't have to guess when finding an institution that will lend to us. I'm excited about the RS pilot project as well, and think it will be a real benefit to our system. |
| Weekly CKB updates task list is, to me, very similar to what I used to see with SFX so that works well for me. |
| Finding Media in Primo is almost impossible unless you know exactly what title we own and search for it. You can't browse media titles. CSU+, "requested" message should be bigger and more obvious to patrons. Campuses should be consistent in what shows available for CSU+. If it can't loan via CSU+, it shouldn't be visible at my campus because it autocancels for my users. |
| This whole time I've been adding interested users to new material ordered and I'm not sure if anyone was ever notified. |
| I do appreciate Alma's integration with APIs. Opens up a lot of exciting possibilities. |
| The delay in analytics is frustrating--as it's not always easy to get the format and info we need in Alma sets. |
| the inability for Primo to sort on the item description field in order to show serial issues or archival box numbers in sequence. |
| It is absurd we have to submit requests via idea exchange to get Alma to work the way it should, and SalesForce cases are not addressed in a timely matter if at all. Having to campaign to make a fix or get an improvement is tiresome and ultimately a popularity contest. |
| Overall it works fine for me |
| I can't keep up with all the little things and have to relay on the staff in my library to do everything. This is very nice of them, but I want to be able to do things on my own and not interrupt their days to do basic things like see usage statistics |
| It doesn't matter; you were the low-ball vendor so we have to accept your crappy service |
| We did focus groups of students about Primo. They say it works pretty well for them. They find stuff when they search it. |
| Replace OneSearch with a system that is user-friendly, actually produces results, and draws our constituents to the using it, rather than avoiding it at all cost. If this contract is being renewed, the library will send a strong signal that it does not care one bit about its users. |
| It is nice the Analytic report can be exported to Excel |
| you will never hear from us Alma is an excellent system |
| the expand my results which I use sparingly is awesome for arcane subjects or materials in foreign languages |
| Editing of invoices is nice. |
| Our campus still needs training to perform basic tasks. We are often left to contact campuses with better Alma knowledge instead of being able to ask someone in house. I have no one to demo a problem in person. Often it is easier to show in person than try to explain via slack or email. |
| Primo is very easy to use |
| The implementation of Alma has guided us to make changes/improvements to our technical services workflows. Workflow analysis has been a positive thing. |
| not sure, mostly working out |
| The everything index in primo is a little problematic |
| There are many aspects I like about Alma, not so much with Primo. |
| Local campus can't use NZ collections to control Display Logic and Online Services Order. |
| Despite the minor issues here and there, Alma is a better product that it was when we started the ULMS. |
| You have probably heard this issue MANY times -- the desire to see a list of more than 10 results at a time on OneSearch. |
| Maneuvering in Alma is user friendly |
| Wonderful, thanks! |
| I don't know how I would know this. |
| I like the look of the "My Account" feature, and I think patrons find it easy to use. |
| The Ex Libris webinars suck!! Get presenters that are easier to understand and do not sound horrible. The presenters never seem very knowledgeable. The worst webinars I have EVER attended and I have to got to multiple monthly?? The presenters are rude about questions and do not leave enough time to answer questions at the end. |
| The lack of authority control is the greatest issue for me on both the Alma and Primo sides. I find it ironic that the authority control was the very piece that "sold me" from their Spiel. If only I had reached out to my colleagues in Orbis Cascade, I have since found that their authority control does not work well for any of them, not even the libraries with huge cataloging power. Without authority control, we lose a significant layer of access. Works are lost without proper authority control. This is unsatisfactory. |
| The quality of support is very inconsistent. I recently had some cases that were handled very thoroughly and I felt I got extremely good service. But I've had other cases in the past where I had to continually remind the technician I was waiting, and got very brief explanations. |
| Resource sharing messages need to be more easy to customize. Cancelled physical hold item requests need to be able to be made directly into resource sharing requests, including the toggling of the missing local item--it takes too many steps to do this now. Resource sharing statuses need to be able to be reversed and this should be made easy for staff to be able to do. |
| Not sure, but I hear a lot of grumbling and complaints. |
| great product by graduate students and faculty. |
| My biggest issue was instant notifications (items on hold). I believe that issue has been solved. |
| How am I supposed to know what you have not heard? |
| hmm, "...unlikely to have heard...how well...," tough wording. Well, I suppose after I place a Res. Shar. request, it arrives almost immediately in the lender's que, which allows trouble shooting over the phone to be that much more quickly done by us. Allows for very quick processing of requests, very quick turnaround, and with our great Courier, (Unity Courier services), we get Res. Sharing items to people on other side of the state in 2-3 days. So you help in that. |
| 1. I never know if the problem I'm seeing is with Alma/Primo or with our configuration. 2. Sonoma has lots of issues with its ARS and Alma setup. |

### Q7 - Anything else that you want to tell us? (47 responses)

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| It looks like you're improving the usability and reducing the clinks for ALMA and that is appreciated. I hope you update training videos, etc. with new interfaces so when we have new staff it is more like what they'll use. |
| I still miss Millennium each and every day. |
| I miss Sierra. I miss Horizon. |
| Over all it's an impressive system |
| Being in this shared environment simply subjects us to the tyranny of the majority. If anyone wants to object to the majority's opinion, they have to publicly defend themselves, only to be met with verbal abuse, embarrassment and disregard. If opinions and input were truly valued, there would be more anonymous webforms to submit feedback and votes. For instance, there are subject headings far more offensive that "illegal alien[s]" that are being glossed over. Since when is subject application about joining the most popular political movements and only catering to the loudest voices? "Best practices" are not truly the best, but only the most convenient for the powers that be. We are often forced to compromise our bibliographic data, choosing records that do not always describe our item the most accurately because of ULMS policy, and I have to deal with subject librarian complaints with handcuffed hands. It's terrible to be so limited with regard to the changes we can make to our local records; this is a much needed privilege most other libraries outside of a consortium get to have. Everything is about automation and simplification so libraries can justify being understaffed. ERM is often taken over by metadata nitwits that act in the name of "efficiency", automating processes that give yield to horrific bibliographic data, and catalogers are regularly shut out of the process; discovery suffers and subject librarians are left aghast. The ULMS project is an epic fail. |
| I do value ALMA over the previous Library System we used |
| reminders should have pop ups or some way of notifying the user that there is a reminder for that day or week |
| Please refuse any more business with the CSU. |
| I don't think that Ex Libris is using their Github repositories as a means to get feedback or community participation. I'd like to see them more responsive through this communication channel. |
| Too much to go into here. |
| This survey does not really speak to anything in particular. What is Alma? What is Primo? What is ExLibris? A brief introduction of each would have been helpful for the survey-taker. It would also be helpful to outline what work processes you seeking to survey for each iteration. Also, a "does not apply" response option should be added to avoid forcing people into picking an option they do not utilize. |
| ALMA customer service is not helpful. When a ticket opened, it takes a long to get response and sometime the response is not completely satisfactory. |
| let us go back to have our own system. |
| It would be great if it could handle call numbers better and when doing a search not be spelling sensitive. Also when inputting a student id number to either take a dash or no dash after the four number. Thanks for everyone great work. |
| By and large fairly happy with Primo, but I have to admit I still resort to specific databases or sets of databases first. But that has more to do with the fact that a discovery tool is more like a pizza with everything on it, and is not the fault of Ex libris. |
| unexplained crashing while posting invoice lines is frustrating |
| try to take into consideration that each institution is unique; don't do updates until those updates are catered to each institution. |
| OneSearch is dreadful. |
| This is only my 6 month with daily hands on Alma usage so I am still figuring out what I find works well and what doesn't. |
| Given all the time we have spent on learning Alma and creating workflows and procedures I understand it is unlikely we would move away from Alma. But can you please make sure Ex Libris does there best to make ALMA a better product. |
| It could be more streamlined; It takes more time to do everything now; Difficult to work with. |
| thanks for the ULMS committee teams & vigilance w/issues - appreciated |
| I like that the company is open to our suggestions and that they have a robust user group. |
| Thank you for fighting for us. |
| Alma should develop and test consortial functions in a better way. |
| What is also odd is that sometimes, before authenticating on OneSearch, the citation result will show a full text option and then after logging in with university credentials, the article or item is no longer available as full text. What I DO like and appreciate very much is the ability to lock filters in order to prevent starting over from scratch when changing keywords in the search field. |
| terminology for various tasks does not relate what I have in mind for its use. |
| We have made everything work within the parameters of the products. I are getting used to the way that ExLibris products function. Primo does not do a good job indexing overall. We often see duplicates and bad results in our searches. It is really horrible that Ebsco products are not directly indexed in Primo, they need to get over themselves (on both sides). ExLibris support is works best when they have a solution, if it is anything difficult then getting an answer is challenging. They also don't always know their product well, it can be frustrating when we know more about what is going on than they do. |
| Excellent! |
| I miss the functionality of our previous ILS. Innovative was an easier, better system. |
| It is clear that Ex Libris is still unable to support many consortial functional areas - like analytics. The CSU made the commitment to Ex Libris predicated on the ability to behave as a consortia, to be able to analyze our collections as a consortia and I find it appalling that they have not responded intelligently and responsibly to address these severe shortcomings |
| Really appreciate all of the support from the CO (specifically Jessica and Brandon) and their willingness to address concerns. They go ABOVE AND BEYOND daily!! |
| One of the main reasons that we were told that we were moving to a ULMS was because it would save us tons of money. I hear that this scenario costs us even more money. In other words, we are spending more money on a less effective product. Additionally, we are 2 1/2 years out from our go-live date, and we are still knee-deep in cataloging migration messes. At this rate, I figure that it will take us 5 years to clean up this mess. In the migration, we lost a ton of data in the form of our special notes and added subject headings. We are now having to go back, culling through our stacks, to put these special value-added notes and subject headings back into the records as local notes or local subject headings or to actually go to the OCLC record and add them there. It is shameful, how much data we lost, and the many decades of work that data represents. In the meantime, we still have cataloging to do. We still have materials coming in. Overall, I find that the cataloging processes are clunky, taking many more clicks (than before) for everyday workflows, such as copy cataloging a book or withdrawing a book. God forbid that we have to deal with a bound-with! I mean, we have figured out workarounds to force the system to work ... but it is not pretty, the process is often painful to implement in terms of time and keystrokes, and it is far from elegant. |
| More is not always better. It can translate to "more" work. Sometimes less is more. There's a feeling, by many, that Alma is complex simply because it cannot relate to other processes within its functionalities, ie: some procedures must be done independently (separate prompts), when they could be brought together to accomplish a multi-task all at one time (in the same prompt). |
| i'm concerned about information overload. |
| I would like the analysis search categories to cross over more |
| I like it. It does what we need it to do. |
| The various campuses seem to use widely divergent methods. There is probably a "best practices" way to obtain the information and perform the operations we all use, but there doesn't seem to be any coordination to discover what those are. |
| It would be great to have a macro language or, failing that, support for AutoHot Key, Python, or another scripting language to automate repetitious tasks in Alma. |
| Is it possible to change the name of the fields? For instance, we are using the "Enumeration A" field for volume numbers. Can this be changed to "Volume"? |
| In a consortium, ExLibris requires a lot of very committed systems people at the network zone level, and I'm concerned that the management in the CO don't realize this or don't take it seriously. If the CO isn't interested in retaining our skilled library support people, then I don't feel like we can succeed with Alma/Primo. |
| I feel like ALMA uses so many steps to get to something simple. It isnt very intuitive and the terminology used sometimes is strange. It has always seemed very clunky to me. |
| Love using the OCLC master record as I know none of the staff are doing odd cataloging edits to make things fit. |