# Survey "Dealing with Content issues"

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*On behalf of the IGeLU/ELUNA Content Working Group*

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## Introduction

In 2019 the joint ELUNA/IGeLU Content Working Group conducted a user satisfaction survey so that key customers' opinions and concerns about Content issues could be better understood.

The group was looking for feedback in the form of personal opinions from content operators and managers. Multiple people from within the same organization were invited to share their point of view. People were asked about how they deal with Content issues and how satisfied they are with the Ex Libris Support and working with Salesforce for Content.

Anyone involved in 360 KB, Alma CZ, SFX KB, Primo Central Index or Summon index management was invited to take part in the survey which was open from June 19, 2019 to July 15, 2019. The survey was promoted on the Alma, SFX, Summon and Primo discussion lists, and members of the INUG (IGeLU international User Groups) list were also invited to share the survey link with regional/national user lists.

The survey was composed of five sections:
1. Handling of Salesforce Content cases
2. Escalation Process
3. Reporting Content issues to Ex Libris
4. Publishing to All
5. General Comment

Questions are listed in the appendix. A last section asking respondents about the products they use, their country and institution was also proposed.

The joint ELUNA/IGeLU Content Working Group received 226 replies from 149 identified institutions spread over 21 identified countries[1]. The most represented countries are the United States (109 replies, 48%). United Kingdom (24), Australia (18), France (15) and Germany (13) are the next four most represented countries. North American customers represent 52% of all respondents, APAC customers 9% and European customers 9%. Only two respondents (1%) are from a South American country and no Asian customer took part to the survey.

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[1] The list of the 149 identified institutions/libraries can be found in the appendix.
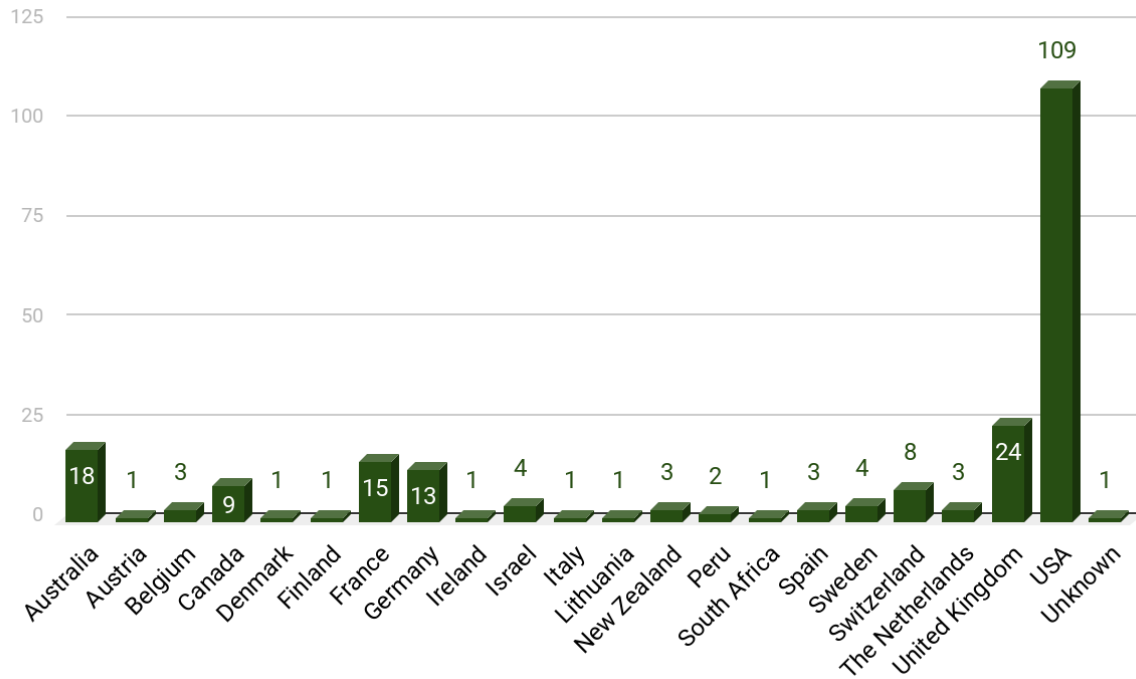
Respondents were also asked about the Ex Libris Knowledge Base and Index they use. Unsurprisingly, Alma CZ and Primo Central index are the most represented tool in the survey, but 360 KB, SFX KB and Summon Index are honourably represented.

# Survey Analysis

## Handling of Salesforce Content cases

Of the 226 respondents, 99 (44%) are satisfied or somewhat satisfied with how their support case is handled in general. Approximately the same number of respondents (97) are dissatisfied or somewhat dissatisfied.

Participants were also asked if they fill in the satisfaction survey once a case gets closed. They could select several proposals. 45% of respondents always or usually filled in the post closing survey whether satisfied or not; 76 respondents replied that they never fill in the survey. For 11 respondents, it really depends on the time they have at the moment they receive the survey form.

- 28% of respondents were satisfied or somewhat satisfied with how long it took for their support case to be resolved
- 58% of respondents were dissatisfied or somewhat dissatisfied with how long it took for their support case to be resolved
- 43% of respondents noticed a different experience between KB and index cases, with satisfaction somewhat higher for KB cases.

### Do you fill in the satisfaction survey once a case gets closed?
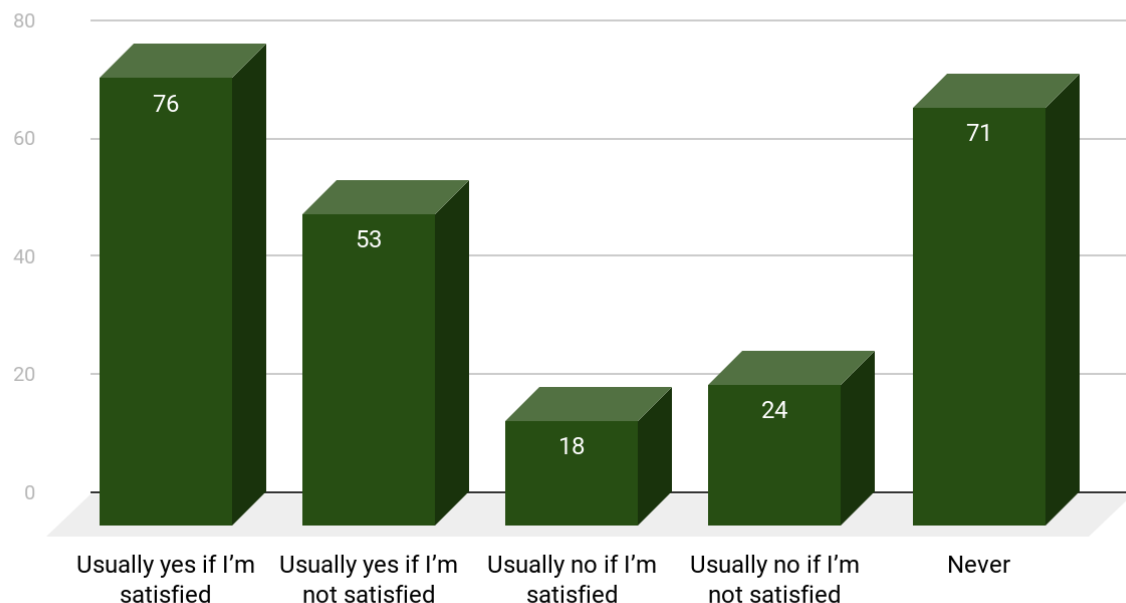


The survey also asked, "Do you think that support experience differs for Content cases vs. product/software cases (functionalities in Alma, SFX, Summon, Primo...)? 43% of respondents indicated yes; 13% indicated no;  44% didn't know/didn't answer.

Themes from the comments:

- Strengths of how cases are handled: cases are acknowledged quickly when opened, cases eventually resolved (not quickly), professional and knowledgeable staff, quick resolutions to easy problems
- Weaknesses of how cases are handled: long resolution time, communication (both status and understanding of case), passing of cases from one tech to another and having to re-explain the problem, lack of understanding of how libraries use the products, complex cases take particularly long to resolve, only fixing a specific problem when it was indicative of a larger problem.
- Comments on the handling of Salesforce Content cases: slow response times, lack of communication, Ex Libris understaffed, more than 1 lamentation that support was better with 360 for customers who switched to Alma and before Ex Libris took over for 360 customers.

## Escalation Process

The second section focused on the Support Escalation Policy. This policy is intended for customers who may have an issue with an outstanding support case, and need to escalate the urgency of that case[2].

Of the 226 respondents, 169 (75%) said that they are aware of the escalation process. Only 28 respondents are not aware of it (12%), 29 respondents are not sure. Since one in four respondents are not fully aware of the escalation process, there is still room for improvement for Ex Libris to promote the support policy, but also for the libraries themselves where it may not be known by all e-resources operators.

Ten respondents reported that they have often used the Escalation process for Content issues. 35 said that they have sometimes used it, 50 rarely and 22 don't remember. 109 reported that they never used that service (never or N/A answer).

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[2] Support Escalation Policy
https://knowledge.exlibrisgroup.com/Cross_Product/Knowledge_Articles/Escalation_Policy
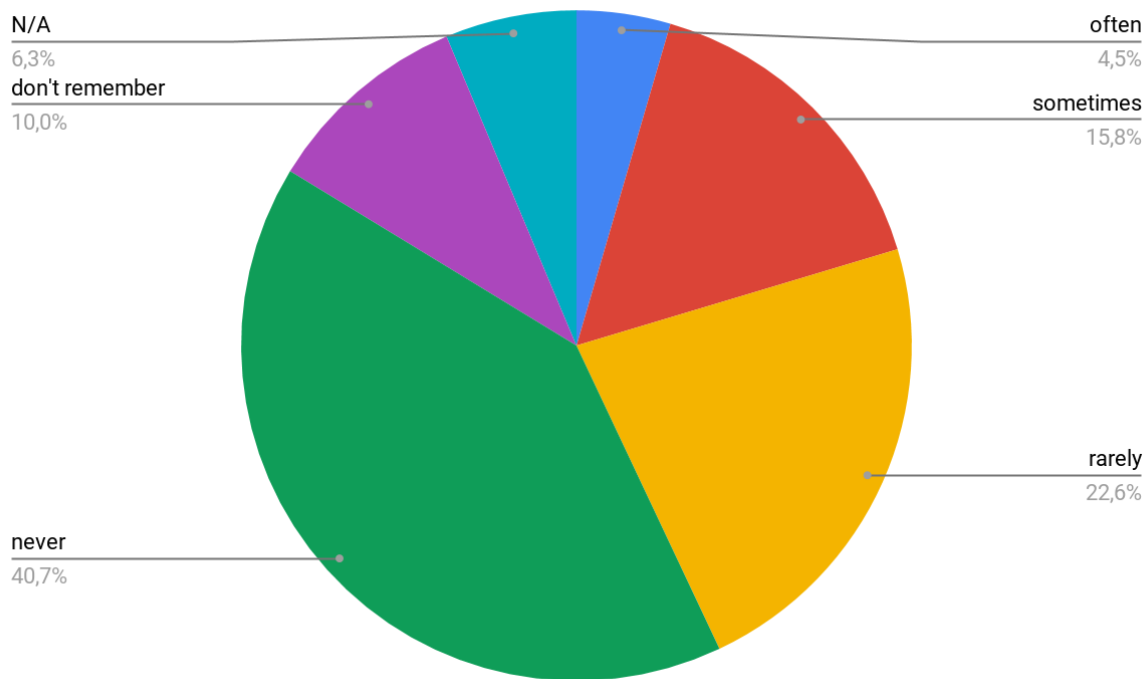
Of the 95 respondents who reported they have already used the escalation service for Content issues, 53 (56%) replied that escalating has somewhat helped to solve their Content issues while 24 (25%) considered that it did not help much. Thirteen did not remember if escalating their Content case was of any help.

From the comments, it is becoming apparent that there needs to be better guidelines as to what merits Escalation and how to do it (reported more than a dozen times). Three respondents suggested that there should be a function for this in the case (like an "escalation button"). However, many provided comments report that Content escalation has not been helpful to get cases fixed earlier or handled with higher priority, which is somewhat in contradiction with the above mentioned 56% of satisfaction. Another respondent suggested to get monthly status updates on open cases. Here too, the time it takes to get Content issues resolved, even if escalated, is considered as too long by many, notably because of the inner nature of these issues:

- "Escalation doesn't seem to make any difference - can still take months for a response that is not helpful"
- "It's a waste of time. All that happens is maybe I get an update to the case, to the effect that "we're still looking into it" but never yet has anything been resolved in a timely manner after escalation."
- "If it involves direct interaction with a 3rd party provider, the customer is generally stuck in the middle without resolution for way too long and at times has to intervene as the ambassador."

## Reporting Content issues to Ex Libris

The "Report to Ex Libris" function is available in SFX and Alma for submitting issues from within the KB; it is not available in 360 KB or Summon. Of respondents,
- 45% know this functionality and often use it
- 31% know this functionality but almost always use Salesforce
- 8% have never been able to get it to work
- 12% aren't interested in this functionality
- 4% never report content problems

Themes from suggestions to improve "Report to Ex Libris": Ability to add attachments, ability to add additional emails; make the link easier to find/present in more places.

## Publishing to All

- Nearly half of survey respondents did not know if their content cases were published. Only 26% surveyed actually publish their cases.
- Less than 13% of those surveyed often search Salesforce to find a case that might be similar to theirs. Almost 60% rarely or never search Salesforce.
- Only 53% of respondents would like to see more content cases published in Salesforce.

Comments or suggestions related to this functionality:
56 responses (24,7%). Major themes include:
- Didn't know the functionality existed.
- Lack of training about this feature
  - Example: "It was barely mentioned during our Implementation and Switch to Support, even though it is a vital resource for the community which should be encouraged."
- Variety of suggestions for improving Salesforce: ability to join a case submitted by another organization; ability to publish without directly connecting the case to the institution; have a better way to control which cases are published such as indicating Yes or No within the case.

## General Comments

When offered a chance for general comments at the end of the survey, 78 responded. Comments fell in the following areas:
- Support themes
  - Need more support/content/metadata staff
  - Time it takes to resolve cases
  - Satisfaction with good support staff
  - Support cases often passed to different people, with delays
  - Phone/WebEx/Skype communication with support would help
- Content themes
  - Quality of the metadata (bibliographic records)
  - Collection data and coverage
  - Delays in updating content

- General comments and suggestions

Some quotes from the responses:

"A time estimate for how long it will take to investigate an issue would help."
"Content cases seem to take longer but I understand that content changes need to be verified before they can be put in place."
"Communication varies in speed, and in understanding and level of explanation. Issues with linking problems I have usually received quicker, detailed and expert responses. Problems affecting entire collections take months or years, sometimes related to vendor responsiveness, sometimes not."
"I think the support team is generally helpful and does the best they can in sometimes trying situations."
"I think Ex Libris should prioritize some cases over some others. For example, when there is a big problem (for example, several collections stopped working and they contain thousands of titles), the case should be handled as a high priority. I was told again and again that the cases in SalesForce basically are treated equally according to the time order."
"It really depends on who answers the question. Some reps are extremely responsive, and do all they can to help, and communicate clearly what they have found to be the problem."
"The problem appears to be that ExL needs to send content issues to publishers - and then the waiting begins. ExL needs to be more proactive about quality control of the metadata ingested into PCI and Alma - rather than relying on vendors."

## Conclusions

The survey provided a picture of experiences in the user community, both positive and negative. Responses pointed to a number of areas for improvements and areas in which greater knowledge of capabilities would be helpful.

This summary has been shared with Ex Libris Content Operations staff, who have indicated that they found the information very useful. They are investigating changes, and are discussing some options with the Content Working Group, including changes to Salesforce and to communications about known issues.

The Content Working Group welcomes feedback from the user community and suggestions for how we might be able to assist libraries and to help close some knowledge gaps.

Thank you to all who participated and shared your experiences.

# Appendix

## Survey questions

### 1. Handling of Salesforce Content cases

1.1. How satisfied are you in general with the way the Support Team has handled your Content cases?

- Satisfied
- Somewhat satisfied
- Neither satisfied or dissatisfied
- Somewhat dissatisfied
- Dissatisfied

1.2. What are the strengths that you generally see in the way your Content cases are handled?

1.3. What are the weaknesses that you generally see in the way your Content cases are handled?

1.4. Do you fill in the satisfaction survey once a case gets closed? Select all that apply:

- Usually yes if I'm satisfied
- Usually yes if I'm not satisfied
- Usually no if I'm satisfied
- Usually no if I'm not satisfied
- Never
- I don't know
- Other

1.5. If you don't fill in the satisfaction survey, why? Select all that apply.

- I don't want Ex Libris to know my opinion
- I don't want to cause any problem to the Support analyst if I'm dissatisfied
- I receive too many requests to complete surveys
- I'm not sure if my feedback will make a difference in improving support
- Other

1.6. How satisfied are you in general with the time it takes before a case related to a KB issue (Alma CZ, SFX KB, 360 KB) is solved? Select "N/A" if you don't deal with KB issues.

- Satisfied
- Somewhat satisfied
- Neither satisfied or dissatisfied
- Somewhat dissatisfied
- Dissatisfied

- N/A

1.7. How satisfied are you in general with the time it takes before a case related to an index issue (Primo Central or Summon) is solved? Select "N/A" if you don't' deal with index issues.

- Satisfied
- Somewhat satisfied
- Neither satisfied or dissatisfied
- Somewhat dissatisfied
- Dissatisfied
- N/A

1.8. Do you think that support experience differs for Content cases vs. product/software cases (functionalities in Alma, SFX, Summon, Primo...)?

- yes
- no
- I don't know
- N/A

1.9. Any comment on the handling of Salesforce Content cases?

## 2. Escalation Process

2.1. Are you aware of the Escalation process?

- Yes
- No
- Not sure

2.2. Have you ever used the Escalation process for Content issues?

- Often
- Sometimes
- Rarely
- Never
- Don't remember
- N/A

2.3. If you have ever used the Escalation process, do you think that it has helped to solve your Content issue?

- Somewhat yes
- Somewhat no
- Don't remember
- N/A

2.4. Any comment or suggestion related to the Escalation process?

## 3. Reporting Content issues to Ex Libris

This section is for Alma CZ and SFX KB users only.

3.1. KB issues can be reported to Ex Libris by using the "Report To Ex Libris" functionality in the interface of Alma and SFX. The tool automatically creates a case in Salesforce with all Portfolio or Collection/Target information. Select the statement that best describes your situation:

- I know this functionality, but I almost never use it and usually create my cases directly in Salesforce.
- I know this functionality, but I have never been able to make it work.
- I'm not aware of this functionality and it does not interest me.
- I'm not aware of this functionality and I would like to know more about it.
- I know this functionality and I often use it.
- I don't report content problems to Ex Libris.
- N/A

3.2. Do you have any idea or suggestion to improve the "Report To Ex Libris" functionality?


## 4. Publishing to All

4.1. Are your Content cases generally published (= visible to other customers with "Publish to all" in Salesforce)?

- Yes
- No
- I don't know

4.2. Do you make searches in Salesforce to find any case describing your Content issue?

- Often
- Sometimes
- Rarely
- Never

4.3. Would you like to see more Content cases published?

- Yes
- No
- I don't know

4.4. Any comment or suggestion related to the "Publishing to All" functionality?

## 5. General comment

5.1 Any additional comment on support in general or Content?

## Responding institutions

List of the 149 identified institutions/libraries that took part in the survey. Providing information was optional.

1. AbbVie
2. Advocate Aurora Health
3. Alexandria Library Network
4. Allegheny College
5. American University
6. Auraria Library
7. Aurora Health Care
8. Babson College
9. Bank of Finland
10. Bar Ilan University
11. Bavarian Library Network
12. Bibliothèque Cantonale et Universitaire de Lausanne
13. Bibliothèque interuniversitaire Cujas
14. Boston College
15. Bradley University
16. California State University San Marcos
17. Capella University
18. Carnegie Mellon University
19. Chemeketa Community College
20. City University of Seattle
21. Collège de France
22. Community College of Philadelphia
23. CUNY
24. Dalarna University
25. eLABa Consortium
26. European Parliament
27. Flinders University
28. Freie Universität Berlin
29. Georgetown University
30. Glenbrook South High School
31. Haifa University
32. Hamburg University of Technology
33. Hamilton College
34. Harvard University
35. Heriot-Watt University
36. Hope College
37. Houston Academy of Medicine-Texas Medical Center Library

38. Humboldt-Universität zu Berlin
39. Inholland University of Applied Sciences
40. Inver Hills Community College
41. James Cook University
42. Jonkoping University
43. Kansas State University
44. Karolinska Institutet
45. Leiden University
46. Library of Congress
47. Linfield College
48. London School of Economics and Political Science
49. Los Alamos National Laboratory
50. Macquarie University
51. Marist College
52. Maynooth University
53. McCartney Library
54. MnPALS Consortia
55. Molloy College
56. National Library of New Zealand
57. NHS Education for Scotland
58. Northeastern University
59. Northern Illinois University
60. Northwestern University
61. Open University
62. Pittsburg State University
63. Princeton University Library
64. RERO (Réseau des bibliothèques de Suisse occidentale)
65. Royal Children's Hospital Melbourne
66. Rutgers University
67. Simon Fraser University
68. South Metropolitan Health Service
69. Southern Methodist University
70. St. Clair County Community College
71. St. Olaf College
72. State Library Victoria
73. Swarthmore College
74. Technische Universität Berlin
75. The Catholic University of America
76. The George Washington University Law School
77. The Hebrew University of Jerusalem
78. The Open University
79. The University of Notre Dame Australia
80. The University of Queensland Library
81. Trinity College
82. Universidad de Granada
83. Universidad ESAN
84. Universität Basel
85. Universität Bern

86. Universität Paderborn
87. Universität Zürich
88. Universitäts- und Landesbibliothek Bonn
89. Université Bordeaux Montaigne
90. Université de la Réunion
91. Université de Liège
92. Université de Poitiers
93. Université de Toulouse
94. Université Paris 1 Panthéon-Sorbonne
95. Université Paris-Dauphine
96. Université Paris-Saclay
97. University at Buffalo, State University of New York
98. University Library of Southern Denmark
99. University of Alberta
100. University of Arkansas
101. University of Brighton
102. University of California, Santa Cruz
103. University of Cape Town
104. University of Colorado Anschutz Medical Campus
105. University of Colorado Boulder
106. University of Edinburgh
107. University of Huddersfield
108. University of Kentucky
109. University of Leeds
110. University of Massachusetts Amherst
111. University of Milano Bicocca
112. University of Nevada, Reno
113. University of New England (Maine, USA)
114. University of New South Wales (UNSW Sydney)
115. University of North Carolina at Charlotte
116. University of Northampton
117. University of Northern Iowa
118. University of Notre Dame
119. University of Nottingham
120. University of Otago
121. University of Ottawa
122. University of Portland
123. University of Reading
124. University of Rhode Island
125. University of Salford
126. University of Sheffield
127. University of South Australia
128. University of St. Thomas (MN)
129. University of Technology Sydney
130. University of Tennessee, Knoxville
131. University of Texas at San Antonio
132. University of Texas Medical Branch
133. University of the Sciences in Philadelphia

134. University of Washington
135. University of Waterloo
136. University of Wisconsin--Madison
137. University of Wisconsin-Milwaukee
138. University of York
139. University System of Maryland and Affiliated Institutions
140. US Geological Survey Library
141. Vienna University Library
142. Washington Community and Technical College Library Consortium
143. Washington Research Library Consortium
144. Washington State University Libraries
145. Western Michigan University
146. Western Washington University
147. Worcester Polytechnic Institute
148. York College of Pennsylvania
149. Zentral- und Hochschulbibliothek Luzern