

ELUNA 2023 - Consortia roundtables summary

10 participants + 5 EXL membres + Erez Shabo

- Erez: *"What are your pain points as a Consortia? What is missing - what will enhance the experience?"*
 1. 2 participants stated (chair of RS group in the consortia): **Training and onboarding - there were no training and attention to the NZ while migrating and implementation**
 2. **Documentation:**
 - a. What and how should we use the CZ?
 - b. How should we use CDI?
 - c. Support portal, it is hard to find relation to the NZ
 3. We need to experiment in order to do troubleshooting
 4. The training issue is ongoing not just in implementation
 5. There is a variety of configurations that can be done in the IZ, these settings can be done as a holistic approach in the NZ but we have **no information which settings were done in the IZ**, we are afraid to break something in the members IZ, so we log-in to each member and make these changes there
 - a. Sometimes we enter manually to each member to modify holiday dates and then re-enter the member to change the dates back
 - b. There should be an option to **prevent members from changing "manage in network" settings**
 - i. Loan rules (policies) for example can be modified by each member, we control this as an NZ, but they touch the configuration, this should be locked if the setting was set by the NZ institution (today we can lock the 035 and this is great - there is an issue if the record was created via import profile).
 - ii. Erez: *"Will all members of the consortia agree to "lock" some settings?"*
 1. Participants generally agreed that locking is ok.
 6. Retention: **From the release notes, we did not understand if this could be done as the NZ institution.** When we understood we can, we saw that other members of the consortia already did this by themselves.
 - a. Expects that the release notes will have explanation if this enhancement is also relevant to the NZ. Sometimes the documentation has a yellow note, but the release notes never have this indication.
 7. Yoel is leading a documentation user group - **there is no member from a consortium in this group**
 8. If you release a new **feature that is relevant only for standalone institutions - please state this (Alma and Primo)**
 9. **Primo - Collection discovery cannot be associated with NZ collections** - we need to create a local collection in the IZ to achieve this, and we lose the link to the NZ
 10. **"Primo is the main issue"**

Selected quotes:

"Our institutions need a lot of independence, but they also need the NZ institution."

"How does EXL work? If you identify that there is a need to work on multiple areas on the product, do you have the power to dictate other functional areas roadmap?"