

Pendo for Ex Libris

Higher Education Platform (HEP)

Purpose

This document details the flow of data and the anonymisation process for user data between the HEP servers and Pendo. Pendo is a third-party Digital Adoption tool that enables usage analytics, in-application help, and messaging, and offers a feedback portal.

The implementation of Pendo on the HEP is designed with our business partners to ensure that no personal data is passed through to Pendo. This document provides explanations of the data that is collected and where it is stored.

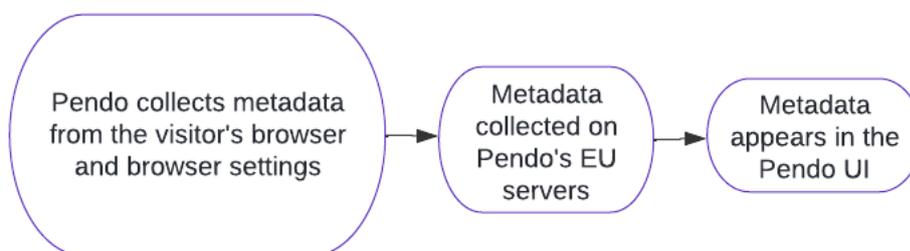
Data collected by Pendo

All visitors to the HEP will have a new randomly generated unique IDs in the Pendo server and interface, which will be unrelated to the original User ID from the HEP. As result there will no way to connect the information in Pendo to the user data in HEP.

The decision to implement a unique visitor ID in with this method was a conscious decision taken by the Ex Libris-product and operations teams. The implementation of this randomly generated visitor unique ID has several benefits including:

- 1) This is a unique, randomly generated unique id that is only kept in Pendo. The generated visitor ID is not passed back to an HEP server and cannot be found anywhere outside of the Pendo servers. This configuration ensures a clear separation with HEP server data and a greater anonymisation.
- 2) The staff user keeps the same randomly generated visitor unique ID until they clear their cache/cookies or if there is no activity for 100 days. This continuation allows the HEP team to understand usage at an aggregate level. For example, the team can benchmark usage for power users versus new or occasional users. This benchmarked knowledge allows teams to build better resources and meet the needs of a greater number of users in a more efficient manner, allowing the teams to deliver the most relevant information to the staff users where and when they need it.

Metadata capture and flow



When Pendo is installed, there are two levels of data collection that form part of the technical implementation: Visitor metadata and Account metadata. Visitor metadata reflects data for an

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individual staff user. Account metadata reflects data for a combined group of users, usually connected by an account and, in the case of Ex Libris HEP, an institution.

The metadata described in the chart above is automatically collected if the staff user (visitor) accepts functional cookies and Pendo initialize on their browser. The collection of this metadata is also dependent on their browser settings; for example, if the visitor has adblockers installed this may impact Pendo initializing.

Once Pendo has initialized, the metadata is collected and stored on Pendo’s EU servers. Internal Clarivate employees, contractors, and approved support staff from Pendo can then access the data from the Pendo UI. Due to the configuration of the Pendo metadata, the data collected is an aggregate level, resulting in the Clarivate user accessing from the Pendo UI being unable to identify usage data attributed to an identifiable user.

The usage data collected by Pendo is page and feature use at an aggregate level. This means that Clarivate, through Pendo, is collecting page views and feature clicks throughout the HEP with the purpose of evaluating how to build an easier to use and more intuitive platform. Clarivate staff, contractors, and approved Pendo support staff will not see what searches have been run or specific documents users view but will be able to see result page usage or document view usage at an aggregated level.

Data storage locations

All installation related to the HEP will take place on Pendo’s EU servers. No data collected by Pendo, neither at the metadata level nor at the usage level, will be stored outside of the EU by Pendo.

Below is a list of the metadata Ex Libris will collect via Pendo

Param	Visitor metadata	Account metadata
ID	Visitor ID – random, unique alphanumeric sequence generated by Pendo	Account ID - Pendo will receive the institution ID as the account ID by default. In a case of an institution with small number of users it will be populated with a fixed account ID.
First visit	✓	✓
Last visit	✓	✓
Number of days active	✓	✓
Number of events	✓	✓
Time on site	✓	✓

Additional Account Params:

- **Geography** - General location of the account: APAC, EMEA, NA, SA
- **Number of visitors**
- **Size of account** - large, medium, small accounts based on number of users.
- **Usage trending**

Additional Visitor Params:

- Most recent **browser** name and version
- Most recent **operating system**
- Most recent **server name**
- **Usage trending**
- **Browser language**
- Interface language*

*Interface language is passed from the platform to Pendo to allow Ex Libris to deliver in-application messages in the user's chosen language.