ELUNA Opening Session, Ex Libris Updates, & DEI Session Q & A

How is Ex Libris mitigating bias as you develop AI and machine learning? What types of processes are in place to lessen human and/or machine bias?

Itai and Judith: Regarding our strategy for DEI we invite you to take a look into https://exlibrisgroup.com/diversity-inclusion-equity/ you can find there our strategy regarding this topic. We divide our efforts between HR strategies, technological approaches that include consulting with experts on the field and the collaboration with the community. We are aware that unintentional bias might be incorporated in our products and our goal is to identify it and address it.

As you think about DEI and impact on our end-user tools, such as Summon and Primo, how will you ensure attention to DEI in other developments such as use of AI in staff-facing tools like Alma? Have tools like DARA been reviewed with a DEI lens?

Itai and Judith: We started our DEI efforts during 2020. Our first focus area was aimed at Discovery tools understanding the impact they had on a large number of people. We have done this work together with our advisory group and we will continue to work together with the community to identify areas of work. Please check this site: https://el-una.org/advisory-groups/dei/. Regarding new areas of work, such as functionality in Alma and other products, we are starting our work with the advisory group to identify new areas of work that should be addressed. Please note that we are happy to receive feedback from the Ex Libris community and users to help us make the invisible visible. All of this work is integrated with our HR diversity policies and awareness that bias can be part of any product, AI process, etc.

Since Clarivate now owns ExLibris, will EndNote be corrected to better map to records such as book chapters that appear in Primo VE? Right now that mapping does not work.

Dana: We understand the question to be that there are issues with importing references from Primo VE to EndNote if this is the case please open a support case with https://support.clarivate.com/Endnote/s/?language=en_US and provide additional details so we can evaluate what can be done to improve the service. Now that Ex Libris and Endnote are part of the same

company this of course means that there would be more communication between the products in order to resolve issues.

Although we have had a lot of success, our development of an open source discovery interface to Alma has hit some snags, with key data not available through the Alma general publishing process or API integrations that didn't work as advertised to provide the detail of user delivery data we needed. This contradicts Ex Libris's stated goal of "open platform" - we'd like to understand why this is happening. Can we hope for better support for interoperability in future?

Itai: Alma General Publishing provides the ability to enrich the bibliographic metadata with inventory information (see Publishing and Inventory Enrichment (General Publishing). Ex Libris provides institutions with the flexibility to deploy any discovery system. Alma integrates with open source discovery systems such as VuFind and Blacklight using several protocols and methodologies (see Open Source Discovery Systems - Ex Libris Developer Network). More technical details can be found via the community blogs (see Blog - Ex Libris Developer Network). In order for us to be able to address the gaps and snags you mentioned, we'll more details are needed about the missing data. There are several options to communicate with us these gaps: the Interoperability Working Group (Joint ELUNA/IGeLU) or Idea Exchange.

Interesting to hear about removing the "organized by the Women's Group" from your marketing messages for your programs. Sad to think that in the 21st century men automatically turn off from those labels. Reminds me of women submitting resumes with only an initial to get past the automatic dismissal of applications from women. Do you think that you'll resume at least including "planned or supported" by the Women's Group now that it is more widely understood that these events are not solely for women?

Lili, Shalhevet, Peg, Tali: We believe it's important to be visible and we do take credit for most of our events and initiatives. However, we will also help promote important events and causes without, when we feel there's a good reason not to. We love the idea of presenting events as "organized by" the network – thanks! We can see how it might be confusing for some people to see a women's event, thinking they may not be welcome to take part, while an event organized by women should have no effect on intended audience perception. We'll definitely try it!

Did the group advocate for and see any business -wide HR policy changes? If so, what types of changes?

Lili, Shalhevet, Peg, Tali: Yes, we did. Most notably, we worked with the Ex Libris HR VP to write a proposal for senior management, promoting more flexible work hours to parents of young children (including references to papers and articles on how this promotes women at the workplace without hurting productivity, etc.). However, before this had a chance to have an impact – COVID came along and flexible work hours became the new norm for all. In addition, we always welcome ideas and suggestions for important things that we could promote in order to improve women's working conditions, recruitment and retention.

I'm wondering if there would be a way for ExLibris to share the personas they've created for UX work for products like Leganto or for other ExLibris products?

Yael: We are happy to share the instructor persona document. The file is now uploaded to OneDrive: 2020 Leganto Instructor Personas and Journey Maps.pdf

What are some strategies you use for approaching UX for the wide variety of cultural contexts for international software?

Yael: There are multiple ways to approach this issue. First, when we are still learning about our users, we interview real people, either users or potential users. At this stage, we make sure we are interviewing people from a variety of cultures and regions. This method gives up multiple perspectives.

Next, we make sure our products are as flexible and customizable as possible. Admins can change any label or text that appears in the software and can activate or deactivate functionality. This allows our product to fit any cultural context.

Is there any kind of "seal of approval" for UX in design of interfaces such as found in Ex Libris products? Or a kind of scale on how good/bad a web site has re: UX and design?

Yael: As far as I know, there is no formal "seal of approval". The main reason is that there is no "one fix for all" and good UX is hard to evaluate without really understanding the full spectrum of uses.

There are best practices that are research-based, heuristics, and other guidelines, but not all of them are relevant for every situation. Especially in complex systems, because there are a lot of factors to keep in mind, particularly about the user capabilities and prior knowledge, there is no definition of ""good UX"" that would fit everybody.

When you were creating user personas and examining instructor/researcher workflows, did you speak with "real" researchers to inform the process?

Yael: Yes. In the first step, before building the personas, we interviewed real instructors. Only then, we aggregated and categorized their answers and created the personas.

Can you give us the names of the people that do the same in other Ex Libris products?

Yael: We have a dedicated user experience team in the Platform group, led by Yulia Stepanov, and this team works with most Ex Libris products.

As part of your process, how/where do you take into account familiarity with other Ex Libris products? For example, if you don't know Leganto but know Alma do you try to use similar steps for similar processes?

Yael: When creating personas, one of the things we look at is familiarity with other products and workflows (not just Ex Libris products). For example, when we build our instructor personas, we evaluate our real users' familiarity with the learning management system and with academic databases (not all personas will necessarily have the same level of familiarity with these products).

When we build our librarian personas in Leganto, we assume familiarity with Alma. In this case, we would create workflows that are similar to the Alma workflows to make the librarian experience as easy and as smooth as possible.

Could there be a working group strictly focused on ux as a whole or instructions provided to help guide institutions in using ux when making data driven choices to reflect their local needs?

Allen: There is currently not a group that has focused on overall UX of Ex Libris products. There is a training and documentation task force that is leading the discussion of Alma documentation.   Most groups are started by the community. if this is something you wish to pursue, please followup with myself or Hong Ma on the steering committee and we can discuss how to begin a community of practice that deals with these types of cross-product issues.

Can you speak to how libraries in a "community" such as a statewide academic library consortium can advocate for more resources to support cooperative collection work, especially when resources and time is tight?

Todd: Statewide consortium can particpate in cooperative collections work in several different ways. First, encouraging the members of the consortia to begin to work together in cooperative collections development is a great way to start the conversations. A second way to test the willingness of members (possibly through surveys or discussion groups) to test the waters of the willingness to engage in this kind of work. A third approach would be to engage in the ongoing conversations around this topic (feel free to email me to discuss this in more detail). As to the question about resources, I would focus on the cost-saving potential of working collectively. A great deal of library acquisitions is historically not well-invested and there has been a documented mismatch between collections develoment and actual patron use. Reducing this and deploying those resources more effectively is a key goal of cooperative collections efforts.

The terms CDL is often a blanket term that includes both locally digitized material as well as lending licensed resources. This project seems to be focused on the locally digitized materials. Is there a separate group looking at the lending of licensed resources?

Todd: The NISO CDL project is focused on controlled lending in a digital form of whatever the library has the rights to share. It is true that the focus has been mostly on digitized materials, but it is possible that a library may have negotiated the rigths to lend digital resources (for example to external communities) and the same approach could work for both. The group is presently defining its scope of work, which has included the exploration of the entire lending user experience for licensed materials, which could apply so long as the circulation is controlled. The same working group could explore both of these approaches, but the question is where the distinction is and since we try to maintain a reasonable scope, we're not trying to answer every circulation problem with this single NISO group.

How can we convert our records to KBART standards? Is it easy? Is it expensive?

Todd: The KBART standard was designed to be easy to work with and it is expressed in a simple text format. It should be easy to create KBART standard files. The cost is of course tied to size and complexity, but the work could be done in Excel and exported to a CSV file, if you're talking about a modest record set. OCLC has a useful tutorial (based on OCLC's toolset: https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Knowledge_base_collections/Choose_a_method_to_add_or_create_a_knowledge_base_collection/Create_a_knowledge_base_collection?sl=en You can also view this link of NISO resources: https://www.niso.org/standards-committees/kbart/kbart-additional-resources

You expressed optimism that we'll be able to reach agreements with publishers for Collaborative Collections. Do you think it's just going to be a matter of money, or are the other kinds of compromises we should be thinking about?

Todd: Realistically, negotiations with publishers are alawys going to hinge on a variety of issues. Cost is one, defining the universe of users is another. Other rights, such as CDL, text and data mining (of digital resources), digitization rights, accessibility remediation, metadata creation and sharing, usage data reporting, boundries of fair use are alll things I expect might come into question when negotiation of a cooperative collections deal. Imagine in the 1990s the things we didn't expect would be included in a "Big Deal" licenses that are now common place, such as COUNTER/SUSHI, discovery and privacy. At the outset, it can be difficult to know what will be required or what benefits one might see on the other side.