

4th IGeLU Meeting Helsinki 2009, session 26:**Ex Libris General Questions & Answers**

Wednesday, 9 September 2009, 13:30 – 15:00

Minutes taken by Clare Whittaker, Pat Busby and Peter Klien (as at 2009-12-16)

Ex Libris staff on the panel:

- Matti Shem Tov, President and Chief Executive Officer
- Anat Kuper, Vice President Global Support
- Einat Zviran, Vice President Development
- Marc Daubach, Corporate Vice President, General Manager Europe
- Nancy Dushkin, Vice President of Marketing
- Oren Beit-Arie, Chief Strategy Officer

Chair: Peter Klien, The Austrian Library Network and Service Ltd.

1. Museums and archives

It was mentioned on Monday that Ex Libris has a focus on libraries. What kind of plans / strategy does Ex Libris have concerning museums and archives?

2. Common search portal for libraries, museums and archives

During IGeLU in Madrid, it became clear that a number of countries aim for one integrated search portal for libraries, museums and archives on a country basis. Has Ex Libris decided how to respond to this?

Oren (answering Q1 & Q2): Agree, the realms of museums & archives are drawing closer to libraries – there are services for libraries & Ex Libris to provide (Ex Libris sees this as an opportunity). Many academic institutions are also starting to require this type of support. They don't have solutions/systems which can be used for all these memory organisations yet, BUT they plan to address this and products like Primo can be used to expose data from these other memory institutions. There will be tools in version 3 of Primo which will assist with this and there are ideas to further improve this.

Rosetta – digital preservation – will also be applicable to this sector as it addresses some preservation issues and Ex Libris will continue to enhance this.

There is much to be done in the URM as well and the development partners for the URM will help Ex Libris develop in these new directions. This functionality won't be available in version 1 of URM, BUT Ex Libris will ensure the data models are appropriate from the outset.

Ex Libris plans to engage further in these types of partnerships as they see this as a great opportunity.

3. X-Server licences

The X-Server licences for most products have been made free of charge as part of the Open Platform Strategy to encourage developers to build new features. However (for users in some countries at least) there is still an "activation fee" of around 1000,- EUR and an annual additional support fee associated with the X-Server. Could Ex Libris please consider abolishing these too, to encourage more institutions to get involved with development?

Marc: The licence fee is part of all product's licence fee. Ex Libris charged an activation fee to deal with the admin of activation, but as of now, this will be waived in all countries. The maintenance fee for X server is justified because of ongoing work to support and this will continue to be charged.

4. Collaborative testing infrastructure

In the reports from all collaborative testing procedures so far, it is mentioned that infrastructural improvements are required:

- better test environment
- more up-to-date and appropriate database
- better preparation of test scenarios
- expanding testing with upgrade process
- testing of interaction with external systems

What are Ex Libris' plans in this regard?

Einat: Four cycles of collaborative testing have taken place (MetaLib, Voyager & 2 x Aleph). Ex Libris has analysed each cycle of testing, and Primo & SFX collaborative testing (coming up) will take advantage of this.

The test environment has been tuned and improved to handle the load. Investing a lot of effort to refresh customer data before QA of every major release.

Test scenarios – Ex Libris will share its test scenarios with the collaborative testers BEFORE the testing in future.

Collaborative testing only lasts one week. Beta testing (at beta sites) is when the upgrade process is tested. Would need to lengthen the collaborative testing period to include testing the upgrade process – could be done if the users asked for it and testers are prepared to spend more time in Israel.

Testing with external systems – this can only be done in a beta environment.

Planning to do more extensive testing. There may be some improvements, but most work will still happen at beta.

5. Primo and Aleph

Having performed a search in Primo today means that the end-user has to place a hold in Aleph, using Aleph web pages to check availability and performing the hold. I understand that better integration between the products is on its way. Will this integration be downgraded to Aleph v. 18?

Nancy: There has been investment in Aleph & Voyager so that Primo users don't have to be directed back into the OPAC. Will happen in Aleph 20.1, Voyager 7.2 & Primo 3. They hadn't planned to downgrade this functionality to Aleph 18 but they

will evaluate and reconsider this after hearing comments at the conference although it would require much work for Ex Libris.

6. Clients for other platforms

Are there any plans to port at least some of the Voyager or Aleph applications to other operating systems than Windows? I'm sure a lot of people would love to have Wine on Linux/BSD or MacOSX versions. Or simply a works-on-all-browsers solution?

[was already asked & answered in Aleph Q&A.]

7. Factory testing procedures

Which test procedures does Ex Libris follow when testing on the web? Our users are increasingly using Mozilla Firefox, Chrome and Opera browsers. How does Ex Libris ensure, that their products work not only for Internet Explorer, but also other popular browsers?

Einat: In general we have automated integration test as much as possible. Currently support IE & Firefox as these are the most used browsers in the customer base. Will support other browsers as they become more mature & more widely used.

8. Support policy

What is the policy for support in terms of languages, countries, products?

Anat: One year ago an analysis of support processes revealed different work processes & know-how among staff. Also a customer survey showed different response times for different products in different countries. Therefore set up a streamlined support organisation, with a centralised support team rather than the 1st line / 2nd line model used before so all customers should experience the same response time. Also have put in place measures to measure quality of resolution & support time. There are gatekeepers in place who make decisions about the urgency of the query.

Preferred language for support is English, but staff are able to respond in French, German, etc.

9. Support strategy of Ex Libris

Why refer to a two steps higher program version for solutions of urgent or important errors / support incidents - especially if the version upgrade is in the further future? This is unsatisfying and can only be accepted in reasoned exceptions? As a rule the solutions should be made available in a contemporary and customer oriented manner in the actual program version.

Anat: Support policy in terms of version. A critical problem will be fixed in the current version. Other problems will be fixed in the development version. Ex Libris asks customers to check the problem in the most recent version.

Response from the floor – it's very annoying after hearing nothing about an incident for some time, then you hear from Ex Libris "why don't you check it on the new version," – shouldn't Ex Libris do this?

Anat replies Ex Libris expects the users to use the most recent version.

From the floor – we usually have the same version on our test & production systems. So how can WE check? And NB in some countries, e.g. Germany, they are always 2 releases behind the latest version.

Marc – weeks of silence is not acceptable response time from Ex Libris. BUT also some customers do not upgrade within a reasonable time (1-2 years after the release).

Matti – Ex Libris may need to revise procedures in this area. Will communicate back.

10. Support systems

There has been some discussion about Ex Libris purchasing new software to better manage documentation, support incidents etc. Many customers are also confused about the variety of user id's and passwords needed to get into different resources. What progress has been made in this area?

Matti: Ex Libris is looking to replace its back office systems – currently going through a RFP process. Will decide soon – one is locally installed, another is SaaS. Pivotal & doc portal will move into one environment, but this will be at least one year away. The new learning solution will be a separate system – are looking at a commercial product & Moodle (open source solution). Ex Libris appreciates that users need single-sign on as far as is possible but can't make promises at this stage. As soon as decisions are made users will be informed, also re roll-out dates.

11. Customer survey

It is a year since Don presented the findings of the customer survey. Some areas were identified as needing 'work'. They included: attention to product needs, collaboration with customers on development, and the effectiveness of the escalation process. What improvements do you feel have been made to address these areas of concern?

Anat: In the last 12 months we have invested much effort into working on areas identified by the survey. Had two development meetings & implemented EL Commons, carried out collaborative testing (very beneficial); created upgrade kit for Aleph v20 (has received good feedback), working on Voyager upgrade kit; looked at the process for escalating queries – you can escalate to one other person & then to Anat herself. Process is published in Pivotal news section.

Janet Lute, Princeton – that isn't the best place to publish that escalation procedure – send to multiple places, including email lists.

Anat agreed – will do.

12. bX

Do you think a Library 2.0 is entitled to influence the reception of literature at the forefront of research (i.e. research papers) by providing ranked recommendations?

Was asked & answered in SFX session.

Oren: Libraries need to ask themselves how much risk they are willing to take to add some added value into the research arena. We can't just do what we did in the past, we will become less relevant. bX type services give an opportunity to add value to our user community. Being neutral might mean libraries become invisible. We should put options out there and let the users choose what they think is useful. Ask users what they think. These types of services give us the chance to be relevant.

It is important to note that the library is not "recommending" articles, but simply "reporting" that other users have used these articles.

13 and 14. bX

Was asked & answered in SFX session.

15. URM and ILL

Interlibrary Loan (ILL) is one of the basic services of the libraries - will it be part of the URM version 1?

Nancy: Yes, ILL will be part of URM v1. Feedback from development partners & focus groups indicates it should not be provided by 3rd parties.

16. ILS migration to URM

It is becoming clear that the URM will not have the functionality that is available in either ILS. What justification do we have for migrating to the URM and in doing so lose needed functions?

Oren: Moving forward is a tough job. We have to decide what to do & what not to do – this applies to Ex Libris as well as to libraries. We can't move forward without considering that we can't provide services we did in the past. This is a time to re-think / question what we do. He quotes comments in the development partner's session earlier today. Version 1 scope is still not finalised and Ex Libris is still working hard with customers to be sure not to lose "needed" functionality! Ex Libris continues to develop its thinking – if you have any suggestions, take it offline and discuss with Ex Libris.

Marc – think of new ways of working, TCO reductions might be a quite compelling reason to move away from ILS.

17. National cataloguing rules and URM

How will national cataloguing rules such as the new Italian ones, REICAT, be supported in the URM environment?

18. New cataloging standards

What plans does Ex Libris have for supporting new cataloging standards called RDA (in Aleph? in URM?)

Oren: URM is designed to support a wide variety of standards, materials and objects being managed by libraries not currently supported by e.g. MARC today. So this will extend far beyond what MARC and Dublin Core can support. URM will be very flexible and extensible as we know (we can't know exactly what the future will bring). Ex Libris pays a lot of attention to what happens in RDA, even though progress is slower than some might have hoped, and is working with 10 sites in testing. Have tools and plans to support much of RDA. About the Italian REICAT standard – we do not exactly know this standard by now and need to check specifically. But the URM will be able to accommodate different rules and schemas without being dependent on Ex Libris doing this.

RDA XML probably will not be the only format to be supported in the Community Zone.

19. Software as a service (SaaS) and impact on users

SaaS (software as a service) seems to be the current trend in the development of discovery systems for libraries. I'm wondering how this change may impact the capability of users to influence development efforts. Has Ex Libris given this any thoughts? Has the issue been discussed with IGeLU Steering Committee?

Marc: Ex Libris doesn't expect SaaS to impact negatively on users' ability to influence software development - in fact, quite the opposite. Therefore we did not see a need to discuss this with the IGeLU Steering Committee.

20. Balance between URM and existing products

How is the company balancing staff time and budgets between developing the URM and maintaining current products? Are there any conflicts or problems arising from this?

Matti: There are obviously conflicts between the two requirements – but not problems. In the management team there are some exciting discussions about this, and we have to use our judgement and market experience to balance delivery of new versions of current products and longer term development of new products. The Ex Libris Board of Directors supports the approach the management team is taking. This is an ongoing challenge.

21. URM price model

Do you have any clearer sense of how the URM pricing model will look like? Will existing customers of Aleph and Voyager receive some discount for migration to URM, and do you have any specifics to share yet? We need to work within our institutions to budget for this in advance, ideally.

22. Cost of URM

We are currently paying large annual support fees for Aleph, MetaLib etc., but development on these products has slowed down. Will the URM, when it is launched, be free of charge to current product users to reflect the fact that we are already paying for its development?

Marc: There was a significant discount for Aleph 300 to 500 migrations, and Ex Libris will look to apply a similar principle to the move to the URM. But it isn't a straightforward move from traditional ILS to new model. The URM business model is a complex one e.g. Total Cost of Ownership would be reduced with the SaaS service. The aim is to offer a more cost effective solution overall to customers. MetaLib customer base will be migrated free of license charge to MetaLib next-gen. Also Digitool will be moved to Rosetta free of license charge, and Verde to URM v1 for the management of electronic resources also.

Comment from the floor – the MetaLib migration, even if free, is two years later than planned.

Marc feels this is an issue of release date and release planning.

Nancy: We will see how many customers will find Primo 3.1 functionality relevant, and will look at doing some early migrations. They might also offer Primo Central to MetaLib customers.

23. Using old and new products in parallel

With the next gen system coming in phases - what business models will you offer for institutions using for a certain period of time an "old product" and URM / URD2 in parallel?

Marc: There is no particular business model in mind, but customers will not pay twice, any overlap will be a migration issue only..

24. Costs for URM in SaaS mode

In what relation will the yearly fee for URM in the SaaS mode be to the current maintenance fees for Voyager or Aleph?

Marc: Ex Libris can't comment yet, is too early in the process. The model for pricing will be shared with the IGeLU Steering Committee for feedback. Some SC suggestions may be used ... as was the case with Primo.

25. Data Services as a stand alone product?

Will the Data Services (CKB, Primo Central etc.) be available for purchase to non URM / URD2 customers?

Nancy: Openness is part of the Ex Libris strategy e.g. SFX is totally stand-alone. The short answer to this question is "yes." That said – should Primo Central be a stand-

alone product which allows other front ends to hook onto it. Will look at MetaLib & Primo first. There have been some discussions about this already and will be more going forward.

26. Economic downturn and Ex Libris sales

How is the economic downturn affecting sales across all products and all regions? What do you expect the next 12-24 months to be like?

27. Accommodations due to economic crisis?

What type of accommodations has the company had to make as a result of the downturn in the global economy?

Matti: It's a tough time for everyone. BUT – Ex Libris has been around for 25 years & has an established customer base of 4600 customers in 77 countries – so Ex Libris isn't as exposed as some competitors. That said, Ex Libris sees some slowdown, there are some RFPs being cancelled or delayed. Ex Libris hasn't reduced its R&D budget & continue to invest heavily. There will be a very conservative 2009 budget – so less recruitment, more caution on expenses, less travel within the company. Meantime they are looking at new incentives for sales on a regional basis to keep sales at a reasonable level.

28. Google Books

What does Ex Libris think about Google Books? Is it possible that in five years from now the whole library landscape totally has changed because of Google Books? And will Google Books be a danger to the Ex Libris business model?

Oren: Yes and no. Very possible that Google Books will change how libraries work. There are several layers to how Google Books works. Having a large corpus of knowledge available to users – outside academic research environments – is extremely exciting. BUT there are complex legal and intellectual property issues in the USA; which give other parts of the world opportunities to resolve this proactively. Commercial & privacy issues too; also an issue of monopoly. Ex Libris does have plans to embed Google Books types of service into library systems services. Oren urges Google Books partners to encourage Google to use open standards.

29. Business partners

In URM acquisition “module” there is a button planned to directly send an order to amazon.com. Is amazon an Ex Libris business partner? Does Ex Libris head out for any partnerships with the “global players”?

Nancy: Ex Libris is looking at business partners on a global basis. Susan Stearns is responsible for strategic partnerships for the URM. Too early to say who Ex Libris is talking to. Amazon is not a business partner at the moment, but looking at them is a pretty good idea!

30. Data instead of service?

Primo Central and the Data Services within the URM show that Ex Libris slightly is starting to act as a data provider rather than only a software provider administering library functions. Is Ex Libris prepared to do so? And what is the strategy regarding other players in the field (WorldCat, publishers etc.)?

Oren: Ex Libris is a technology company which provides software solutions. Ex Libris is not a data provider but a service provider. A knowledge base is exactly this type of service. Ex Libris won't become a publisher (won't create or provide content), but will provide centralized services. The business model is not based on selling data, but it will work with stakeholders which do. Is one of the few providers of purely software solutions.