

IGeLU Steering Committee / INUG meeting

September 7, 2013

Jirka opened the meeting and thanked everybody for their national and regional reports. These will be loaded into the IGeLU website in the member only session.

Jirka reported on the Steering Committee and PWG Coordinator meetings.

Knowledge Base content

IGeLU Steering Committee and Product Working Group Coordinators have been discussing how IGeLU will handle the structure of the Ex L products. One issue is the management of the metadata management of the Knowledge Bases. It is recommended that a new working group be established to work on this issue. Andreas Sabisch is willing to chair this new group. Discussion has not yet occurred with Ex Libris but it is hoped that they will be agreeable with this.

Andreas Sabisch commented that it would be good to have input from the national user groups.

Interoperability

There are issues with how managing the old products and interoperability with Primo, as well as interoperability between Alma and Primo. As a result, we have decided to create a new group on this, with representatives from each PWG. Masud Khokhar has agreed to coordinate this group.

Mandy asked if people from outside the PWG could be involved. Jirka replied this could be possible as long as people have the expertise and capability and are prepared to work.

Enhancement process

Jirka reported on discussions with Ex Libris about their willingness to commit to enhancements. Ex Libris have committed for the next 3 years, 10 enhancements from top list will be implemented. In 2013 and 2014 there will be additional enhancement relating to Opac via Primo.

It is unlikely we will get Ex Libris to agree on committing to a particular number for the other products.

With MetaLib and SFX there have been special voting cycles for regional resources. While these seem to be going well it is important to keep this issue alive.

The Swedish group has concerns over the quality of metadata in PCI for new local Swedish resources. They are unable to work out where the problem is. They would like quality control. Christian Haenger (Primo PWG) noted this issue will be dealt with in the PWG Business Group.

Jirka reported there will be enhancement processes for PCI in the future.

Documentation

There is concern about the lack of detail in the documentation relating to Total Care and Primo Direct. INUG are asked to send through details of areas for improvements.

It is suggested that in contracts items relating to hosting, availability, data security and data protection could be improved in the documentation. INUG members are asked to give feedback about what areas they would like added to contracts.

Support issues within region

John Greer (ELUNA) reported they also have issues with SLA contracts and do not feel that Ex Libris meet the minimum.

SalesForce

The switchover process was rocky. Ex Libris have a very poor understanding of the contacts at local institutions and so emails went to incorrect people, whereas other people who should have got emails didn't. Initially the contacts used were not the Pivotal contacts. The initial process was through adding details into a spreadsheet, and they were activated in this process.

The communication was fairly bad and it is hoped this will be improved when the other countries are moved across.

Customers need to be aware that this is an externally hosted environment, and therefore not within the Ex Libris hosting environment, and so might need to be aware of any security or privacy issues.

The situation with group contacts is also unclear with variations in what incidents can be

viewed across consortia.

There have been some problems with creating incidents in Salesforce.

There had been discussion about the migration of open incidents. IGeLU and ELUNA had wanted all open incident migrated but it was recognised that there could be old incidents in Pivotal that are no longer current.

The ELUNA Steering Committee could not comment on the limited migration and the effect on customers. It is felt too early whether this is an issue, and it is also likely to be institution specific.

SalesForce works in more browsers and seems to have more functionality but also migration issues with incidents from old structure. It is thought that in the future there should be advantages with Salesforce. It seems to offer new way of doing support, master profiles and link incidents, leading to the building of a better KB, incidents solved one on one. Searching should be better. The question of how good the Knowledge Base will become, will depend on how Ex Libris builds the system.

Betsy Friesen also report that the interface seems to be easier to use and the learning curve for staff to use the system is easier. The messages received after logging an incident seem clearer. The system response time has improved and seems more stable.

Masud reported there are some inconsistencies with what customers have variation in access.

Laura Morse reported that the connection between SFX and Salesforce has not always worked smoothly. There is concern there is still a lot of work with implementation issues with North American customers and that is taking a lot of work on behalf of Ex Libris to resolve.

John Greer reported that Noam Morginstin has been very responsive and has fixed any issues logged.

The project plan seems to have been OK, but the implementation lacked value. The pilot process seemed to have lacked details and the customer registration process for the pilot sites was different from that of the migration process which caused problems.

There is an email which is devoted to customer registration process and sites are not getting any responses to any emails.

It is unclear that how many sites do not have at least one working customer login.

The preference is that the migration for international customers will be delayed until more issues relating to the North American customers are fixed.

Product Managers

The Steering Committee is aware of issues relating to the continued changes in the Product Managers roles and the need to educate them about the role of the User Groups and how our enhancement processes are helping to develop the roadmap.

IGeLU authentication

The overall goal is to have one login for all IGeLU systems, i.e. proxy voting system, NERS, IGeLU website within 12 months. There will a meeting about this.

There is an issue with sites not knowing who is the registered contact for their institution. In NERS you can see the name when you have logged in.

IGeLU website has a list of member sites and it lists the contacts for each institution. If you are unsure of the website login, complete the Contact us form and you will receive an email with the website password.

National and User Groups

Jirka asked that INUG give feedback on how IGeLU could help them more.

Naomi asked if INUG wanted any additional information to be made available through either the website, or on the specific INUG list. It is recognized that most INUG contacts will also be on the IGeLU website. There are regional user lists which are not as active compared to the product lists but INUG contacts will forward on emails as relevant.

There was a question from Liliana Bernardis (Italy) about a national project where all universities are to use an integrated information system with integrated procedures between Aleph and U-Gov (handles matters such as budget, personnel). It will also be important to have this same integration with Alma and U-Gov. She asked whether any other countries had a similar system. However nobody at the meeting reported they had a similar system. Liliana promised to feedback to the INUG list any outcomes from meetings with Ex

Libris on this matter.

It is suggested that matters such as these could be posted to the INUG list between conferences.

Ex Libris personnel

There has been a new appointment of Koby Rosenthal, to the role of Corporate VP General Manager Europe. Marc Daubach left the company earlier in 2013 as he felt he had been at Ex Libris for 18 years, and felt he wanted to make a change.

There have been a number of senior departures from Ex Libris.

- Axel Kaschte has moved to OCLC which has been a loss to the German office
- Yaniv Avni has also departed through some personal issue
- Susan Stearns has departed and has taken a new role with the Boston Library Consortium
- Shelley Hostetler, US Support team has also moved to OCLC.
- Alan Manifold has moved to State Library of Victoria

IGeLU 2014 conference

The 2014 conference will be held in Oxford, with an Ex Libris systems seminar attached to the conference.

IGeLU 2015 conference

At this stage there is no agreed location and so INUG sites are asked to consider whether they could host the conference.

Conference App

For 2013 we have worked with Boopsie for a conference app. This was the first time we have developed such an app. We are interested in hearing any comments you have about this app. There will a question on the survey.

A large number of the attendees at the INUG meeting have installed the app.

Comments were received about the navigation around the agenda, and the desire to integrate the agenda into separate calendars. The main feedback that ELUNA receives is that with the Boopsie app, if you don't have wireless access then you lose access to the details.

Masud noted that when the app is developed it will be offered to ELUNA for them to use.

Comments from ELUNA regarding the app will be circulated.

Two institutes (Mannheim and Lancaster) offered to develop an IGeLU app for the next conference in Oxford.