INUG & Ex Libris Executive Management Meeting
Saturday 10th September 2011
Haifa University, Israel

Ex Libris: Matti Shem Tov, Anat Kuper, Oren Beit-Arie, Bar Veinstein

INUG Meeting attendees.

1. **Welcome and introductions**

Jiri welcomed Ex Libris Executive Management and the meeting attendees.

Matti reported that the company was doing well and he believed it was a good decision to have the conference in Israel with more than 400 attendees from 30 countries.

2. **Matters arising from the INUG 2009 & 2010 meetings**
    a. **CRM/Pivotal replacement – Progress?**

Matti reported that Ex Libris was back to square one about this as there were very few suitable software options. They will start the evaluation process again in about 12-18 months. They need software that can be run in a number of countries and that was able to manage finance, customer support, and sales.

The issue of a Common search interface across all products, i.e. Pivotal, El Commons, and Documentation Centre was raised.

Action Ex Libris: Anat will investigate this issue.

3. **Support issues**

Regional issues

There are still some regional issues, e.g. within Scandinavia where sites are moving from old support. Customers reported that some local issues are not well understood within Global Support. Bar reported that copies of the local code are available within global HQs.

Action Ex Libris: Bar/Anat/Bettina will arrange a meeting with the Swedish and Danish representatives to discuss specific issues.

Documentation

Jiri acknowledged the good work which has been occurring regarding Documentation. However there were still some concerns about the slow time to update the online manuals when errors were found in the manuals.

Support on Fridays from Israel

The question of lack of support on Fridays was raised. Anat reported that there are staff working on Fridays so customers should get some level of response.

24x7 Hub

This new system is managing all "system down" issues as highest priority and seems to be working well. However one customer had one bad example where they were trying to report a "system down", at the same time as Pivotal was down. They experienced a problem in trying to provide proof of their customer credentials.

Action Ex Libris: Anat reported they would develop a policy for situations such as this.

Primo support – 1st level

The User group felt that 1st level support was adequate, except that sometimes Support Staff lacked information about local setup.

Ex Libris emphasized that a first response should be received within 4 hours.

Anat reported that Ex Libris used an Asset Management system, which details system topology, which is designed to prevent the need to ask questions of the customers about the setup. During implementation, Professional Services loads this information into the system. However where local customization occurs after implementation there can be the need for Support to ask for this type of detail depending on the Incident. If sites have any concern about this they should report these to Anat.

Monthly calls with Primo customers can be arranged if there is seen to be the need. There are criteria about how often the calls are made. Any queries about these should be directed to Anat Kuper.

Primo Support – bug fixes / development

The main concern was when an issue was identified as requiring 'development', where long delays and lack of communication with regard to progress was experienced. It was felt there was insufficient development capacity which resulted in lack of progress information and delays in rectifying defects. Whilst it was acknowledged that there was the need to take time to test various options there was still concern over the length of time taken to resolve bugs or implement basic functionalities.

Matti noted that one question was 'how much do you invest in support vs. future versions?' but he acknowledged that Ex Libris was producing too many bugs. It was important to get the right balance between 3rd line support and development. In terms of prioritizing, Support determines priorities depending on criteria, e.g. number of customers affected, is a workaround available, what is the consequence if there is no workaround?

Service Packs

It was important to communicate details of what the Service Pack contains to customers on release.

Primo V4

Disappointment was expressed that the release of Primo V.4 has been postponed to Q1 2012. Matti noted that V.4 will be released with true SaaS compliance.

Interoperability between systems

Jiri noted that the issue of resolving issues across products had been much improved with the policy regarding the "Handshake within company" of joint issues. There were fewer issues with Incidents getting 'lost' between products.

Escalation policy

Some promotion had occurred about the escalation policy but it was felt that more was needed. Janet Lute and Fiona Burton will undertake to try and promote this further within the User Groups.

SI's: Publish to All

The "Publish to All" option was implemented this year following the request from the User Group. Janet Lute and Fiona Burton will undertake to publicise the relevant information about changes.

4. **Licence/maintenance fees for test servers – clarity**
Action Ex Libris: Ex Libris undertook to clarify the situation with test servers.

5. **MetaLib/Primo Central models**
Jiri noted that the situation regarding the MetaLib/Primo Central models had been clarified after the INUG 2010, meeting but it was felt there was still uncertainty amongst some customers. The new MetaLib+ website is good and has details but needs more information. For example, the three options for MetaLib KB are not clear on the website.

Hosted MetaLib+ solution

This option provided only limited administrative access, i.e. the only administrative functions are to switch resources on or off. Sites thought the details of these could be specified a bit more.

Action Ex Libris: It was agreed that the website should include a link to the Doc center where more detailed information about the administrative access is the available.

Oren noted that the interface for Primo Central was being offered without extra cost so limited administrative options are provided. However Ex Libris would be willing to consider further options for configuration. Matti asked if Jeremy Acland and Laura Morse would be willing to meet with David and Gilad about this issue.

There seems to be some confusion amongst marketing people about what customers are entitled to. Matti believes this has been resolved internally so they would like to know whether this is still occurring.

6. **All Product Purchase/Subscription models**
3 models were now available for most products:
- Local
- Direct – hosted system (it was suggested that this was like a 'Platform as a Service")
- Total Care – 'Software as a Service"

Matti reported that Ex Libris used to sell various customized options but that these have now been standardized and contracts state clearly what is offered within each model, with the majority of new customers moving to "Total Care". Jiri asked if the information about the various services offered with each model could be made available for all customers.

Action Ex Libris: Matti promised to load relevant documents such as SLAs (now only part of the contracts) on the Documentation Portal so people can view them.

It was reported that some institutions have different access levels and felt there was a need for a service agreement. For example there had been a question regarding varying access rights for Voyager Direct sites. Anat will check the details of this issue.

The latest statistics indicate that 65% of new Primo sites were implementing the SaaS model with the highest numbers in the United States and Australia.

7. **Alma**
The question was raised as to whether there could be local instances of Alma. Matti says this will be investigated depending on the customer and what type of solution they are interested in. Whilst Ex Libris did not want to actively sell a local option model, they will consider this option as required.

Jiri asked whether customers could have Alma at a consortium level. Matti noted they did not want to be a 'competitor' to consortia.

Early adopters had not addressed the specific details of the unique consortia requirements but will need to investigate this further at the right time. Matti suggested that specific meetings with various consortia could be held in 2012 to see what issues needed addressing and what features needed developing. It was noted that there is a specific Consortia meeting scheduled at the conference for people to discuss consortium issues relating to Alma.

Bar noted that Consortia could have the Infrastructure support and basic software support outsourced but could undertake local customisation and configuration. For example, Leuven wants to undertake some local customization themselves.

For Alma, customers don't need to obtain a separate Oracle licence as Ex Libris arranges this. Ex Libris doesn't charge a separate Oracle license but customers won't be able to use their local Oracle licenses for Alma.

8. **SFX**

Jiri asked where SFX fits within the Ex Libris structure. Matti reported this is within the Discovery and Delivery layer but that SFX will continue to be a separate product in future.

Fiona Burton & Pat Busby
2011/09/30