EX LIBRIS
GENERAL QUESTION & ANSWER

8th IGeLU Meeting

Session 13

Berlin, 10 September 2013

Minutes taken by Fiona Burton, with assistance of Mark Dehmlow and Peter Klien

(as at 2013-11-21)

Ex Libris staff on the panel:

- Matti Shem-Tov (phone), President and Chief Executive Officer
- Kobi Rosenthal, Corporate Vice President, General Manager Europe
- Bar Veinstein, Corporate VP Resource Management Solutions
- Oren Beit-Arie, Chief Strategy Officer
- David Beychok, Vice President, Discovery and Delivery Solutions
- Shlomo Sanders, Chief Technology Officer
- Bettina Forster, VP Professional Services Europe
- Noam Kaminer, Support Director

Moderator: Peter Klien, Austrian Library Network (OBVSG)

QUESTION 1
Read-only access to Alma configuration
Can you tell us the date read-only access to the Alma configuration screens will be available?
1. the parts of the configuration that will be viewable?
2. how read-only access will be controlled (e.g. by role permissions)?
3. whether the roles with view-only access will have editing rights after Alma certification?
Being able to see what configuration has been set up will mean more useful requests being sent to Ex Libris during implementation, and a more rapid understanding of how Alma works.

Bar explained that read-only access applied during the implementation period where Ex Libris undertakes the configuration. After customers go live, they will be certified and from then on, the customer will undertake the customization. There is no intention for Ex Libris to manage configuration on an ongoing basis but rather this will be the responsibility of the customers.

Ex Libris is looking at adjusting the process used with the early adopters, as customers want more transparency and understanding of the configuration elements. Ex Libris understand this and are developing this read-only access which should be available by the end of the year. Initially the access will be available for fulfillment, but Ex Libris are working on how it will be configured with relevant permissions and roles to limit access.

QUESTION 2
Community Zone data

Data quality and how to re-use cataloging already done is important. What is happening with the plans for the Alma Community Zone where we expect we should be able to find most records instead of searching them via external sources?

Oren noted the Community Zone and Catalog was a very important part of Alma project, and further information has been provided in conference sessions. The Zone and Catalog are part of the key goals to increase efficiencies and values, with the focus on enabling resources by modeling. Ex Libris are working with the Community Cataloging standards and advisory group, and are aiming to recommend governance and policies by the end of year. The aim is for development of the recommendations to be completed in 2014 with the work currently on track. Further information was conveyed in sessions, and the work is on track, on plan, and is important to Ex Libris.

Question from the audience: are there any plans to share EZproxy configuration?
Oren: No there are no plans currently but it was a good question and is worth thinking about.

QUESTION 3 (#3 and #4 combined)
Display of licensing / copyright information
Our library is contractually obliged to display copyright information for our e-resources. This has been done via the SFX copyright icon which is drawing information from Verde. Currently this is not supported by ALMA / uResolver so migrating would mean loss of important functionality.

When can we expect to see license information in Alma's uResolver?

QUESTION 4 (#3 and #4 combined)
Display of licensing / copyright information 2
We understand Ex Libris will develop display of licensing terms using the DLF-ERMI terminology. While we appreciate this we think it is important to keep the user in mind and make this information understandable.

Will we be able to rename fields or add local terms be added to the uResolver copyright information when finally built out? Users would not understand the DLF-ERMI terminology.

Bar answered this ability is planned for Q1 2014 and is listed on the roadmap. Ex Libris will allow people to adjust terms and fields to make them more user friendly

QUESTION 5
Cloud safety - lots of eggs in one basket?
For Europe I understand "in the cloud" means "in Amsterdam". If a catastrophic event were to hit Amsterdam affecting all parts of that area of the Netherlands, what steps would Ex Libris have to take to restore all services to customers whose data and applications are housed in the cloud? Does the company have some idea of how long it would take to restore services to some, most and then all customers.

How would Ex Libris deal with such a catastrophic event - are we talking about hours, days or weeks before services would be resumed?

Shlomo answered they are very aware the cloud is large responsibility, and Ex Libris has spent a lot of effort and resources on multi redundant hardware, and obtaining the best hosting services they can find. The current configuration is multi redundant, with multiple inter-connections and the system undergoes data backup with data backed up offsite to disks which are faster to restore from in any emergency. Because of high redundancy in the Datacenters there are multiple ways to handle restoration including it being faster to restore in same site. However they are working with Equinix, with sites in Berlin and the UK, to see if there are alternative ways of restoring to a separate site.

Matti reported they had conducted an extensive survey of suppliers and Equinix is major US company providing datacenters in US, Europe and Asia. The current systems utilize daily backups, disks, tapes, for restores. If a catastrophic event occurred it would take days or a small number of weeks to restore but Shlomo will be looking into this issue to see if the times can be reduced.

QUESTION 6
Analytics and updates
When can we finally expect daily analytics for Alma? This has been promised for far too long and not delivered so far.

Bar reported they had finalized work on architecture to allow for daily refresh of data for analytics (previously weekly). The issue does not just rely on simple architecture but requires transforming in to a data warehouse, where the data keep on growing, and it took time to develop. The new environment will be available shortly for 10 US sites, and will be available mid-October for all customers.

QUESTION 7
Alma vs. WorldShare Management Services
WorldShare Management Services (WMS) is OCLC's response to Alma. Of course, Alma's features are more mature, Alma's APIs are more open and stable, and Alma's data model is superior by far.

However, given WorldCat as the primary cataloging database of WMS, do you really think it makes sense to build a second (and, thus, semi-)global BIB library within Alma?

Oren reported the focus and goals are to increase efficiencies and services, and develop new services, particularly in metadata management system, community zone and catalog. The goal is to develop new processes rather replicating WorldCat, which was designed many years ago and so is an old model. Ex Libris is looking to the future and are assessing existing apparatus that would be useful. They are specifically building the capability in Alma, where libraries can continue to use WorldCat if they wish.

Comment from the floor: Their site went live with Alma are using OCLC in Alma through z39.50 where they bring records into the metadata editor. They are finding that the Community zone is not as important to them now that z39.50 is working.

Comment from the floor: The issues is not the re-creation of OCLC, but rather they are wanting to efficiently use records in Community zone, by linking to common records rather than everybody having to redo the same records.

QUESTION 8
WorldCat Metadata API

OCLC has recently published information about the WorldCat Metadata API. Is Ex Libris planning to fully integrate this service in Alma (and also in Aleph). It looks like a very good replacement for the outdated Z39.50 protocol.

Oren reported that Ex Libris has started discussions with OCLC about this API service.

QUESTION 9
Display of licensing / copyright information
How soon will UStat information (SUSHI and COUNTER stats gathering) be implemented into Alma Analytics?

Bar reported that this is already integrated into Alma.

Comment from the audience: SUSHI and Counter do not exist in Alma, but rather the information is collected by UStat, and then pulled into Alma. Ex Libris had noted their future goal is to build this capability into Alma in the 2nd half of 2014.

Bar agreed they are trying to use the capabilities of UStat, thus allowing support for existing customers, while they look at creating capabilities. They are enhancing capabilities in Alma in the 2nd half of 2014.

QUESTION 10a
UStat
Does Ex Libris intend to keep supporting UStat?

QUESTION 10b
UStat and Alma
UStat is the first SaaS component from Ex Libris. Now the functions from UStat are in Alma analytics. How long will UStat stay as a separate product for SFX user? And will UStat, as an separate product, have the same functions as in Alma analytics?

Bar reported that they are not planning to integrate all Alma functionality into UStat, but will continue to support and maintain UStats for SFX users.

QUESTION 11
UStat and Alma 2
When is it possible to collect and analyze Counter-Data for books in UStat (and in the Alma-component) as well?

Bar reported that Version 4 of Counter should include ebooks, and so while these capabilities are being investigated and the roadmap assessed, as the Counter specifications are not finalized there is no answer on when it will be incorporated into UStats.

QUESTION 12
Salesforce

Does salesforce.com also offer a "Cloud Status" page in order to indicate when the servers hosting Salesforce CRM are down - or do they operate a cloud service that deserves that name?

Noam reported that Salesforce's status will be listed on the Cloud Status page so you do not need to check Salesforce directly to check the status.

Bar reported you can also check the Salesforce website where you can also see the status for the Ex Libris instance.

Question from the audience: Is the Cloud status page hosted in same place as cloud?
Bar reported this is not from within the Ex Libris cloud.

Question from the audience: Will there be additional push notification methods, e.g. RSS feeds? Bar reported they have listened to these requests and they are working on developments that will be better than RSS feeds, allowing you to register for mail alerts.

QUESTION 13
Could Ex Libris offer a Primo to search for information stored in CustomerCenter?

Primo is one of the best information discovery tools on the market, but when we (customers) need to find information in CustomerCenter - news, e-service, commons, documentation - we need to use other tools such as Microsoft SharePoint.

Is it possible for Ex Libris to create and offer to us a Primo site with that content indexed? Would be perfect!

Noam reported that it was great to hear that Primo is being suggested for this option but they are wanting to concentrate on its use in libraries and improving Primo functionalities. It is recognized there are other systems like Sharepoint. It was recognize they could develop Primo but this would distract from main goal for users. In the meantime we need to continue to use Sharepoint.

Comment from the audience: The issue is that people find Sharepoint difficult to use and were not seriously suggesting Primo is used.

Noam Morginstin reported there are plans to improve the search engine.

Primo Central und SFX CKB
Why is it not possible for Ex Libris to bring data in SFX and Primo Central into parallel? We cannot explain to our users, that they have full text access in Primo for some articles, but not in SFX. How will Ex Libris explain this to the users?

Example: Encyclopedia Britannica. SI 16384-438072

David reported that this specific issue had been discussed with the person who raised the question. However to address the general issue of scholarly publishing, and the classification of new material, where you cannot create a dynamic link, Ex Libris are developing a next generation links to handle these types of links in the future. Currently you need to use the existing style of links.

Article level access
The increasing importance of Gold Open Access and hybrid access models, requires a change in the way availability of books and articles is administered. In SFX, with effects in Primo, we work at the journal level, with the risk of missing out on available Gold Open Access articles. At last year's conference Ex Libris mentioned a rebuild of content repositories to help solve this problem.

What is the current status and when can we expect results from this in systems like Primo and SFX?

David agreed there is an issue, but they are addressing this by two methods. The first involves the open access packages where the provider is providing metadata that will allow you to search content from open access material and see full-text links. They are looking at providing links into the link resolvers. In addition NISO is recommending that providers provide full-text information in a standard format which allows more packages to be added at article level.

Primo Central content documentation 1

We are a happy Primo Central customer. But we want to offer a better overview to our customers of what we have indexed to what extent in our discovery index. It's a complex process to get this data out of the published Primo Central documentation and out of our setup page. As we provide Primo Central with the holding file from our SFX link resolver, the index knows what we have in our collection.

Primo Central content documentation 2

It would be really helpful to export a file out of Primo Central ready for updating the bibliographic records in Aleph with the necessary metadata to provide this useful information,

if a journal is indexed in Primo Central and how deep the indexing is. This would also enable us to provide our licensing group with the information whom of our providers to ask for support for discovery indexes.

Do you have any good advice how to build that kind of interaction between Primo Central, SFX and Aleph/Voyager/Alma?

David acknowledged this seems a valid request but would like to gain a better understanding of the need and so would like to receive some examples. He asked the questioner to see him afterwards so they could see how to progress this issue.

QUESTION 17
Open Access repositories in Primo Central
Ex Libris has opened their Primo Central for OpenAccess repositories of the universities, which is a very good benefit.
But my feeling is that a lot of customers are not aware of this. What will ExL do to promote this option to open access repositories in the academic world?

Oren reported this had been successful, with more than 130 institutions registering. It was acknowledged there are more repositories so the question is a good one. Ex Libris are interested in hearing ideas to increase the take-up, including maybe finding ways to provide incentives. The goal is not just to increase the numbers but they are also paying attention to quality. It was recognized that repositories have varying degrees of quality with metadata that does not really help to promote content. Ex Libris is interested in ways they can help to provide feedback details regarding the quality of the metadata. It is possible to load metadata for articles to primary content, including datasets as well as articles. They are also looking at potential incentives at loading these resources into Primo Central with links to the data repositories. Oren would like the questioner to approach him and talk more about this issue.

Shlomo also noted that customers could also contact Lukas, Corey and Shlomo to see how this could be incorporated into linked data strategies.

QUESTION 18
bX
Is there a list of the universities, which provide their usage data to bX?
If not, can you give an overview in percents or absolute numbers with an arrangement, which country the provider come from and how many data they deliver for a period (month or year), so we can give our user information about the basis of the recommendations.

David noted they would need to check the legality of providing this info, and would need to get the agreement of the relevant universities. They would be willing to explore the options. This issue will be raised with Christine Stohn (bX PM) to see what options can be explored.

QUESTION 19
Hot Articles from bX

Is it possible, that we can have a country specific view in Hot Articles?

Background: some of the subjects are only useful in a country environment, i.e. Law. Nobody outside the USA is interested in USA laws and their hot discussion, but in the own countrywide information.

David reported there isn't a country specific view as normally usage is global so the country is not applicable. It was recognized that law is one subject area where a country view makes sense. However currently usage is too low, but if this increases in the future they might re-consider this decision.

Comment from the audience: While country might not make sense, language does makes sense as most of the Hot Articles are in English. Would a language filter be possible? Or some subjects could be language specific?

Christine replied that filters depended on what type of data there is. Currently the usage data is not distributed enough to create clear filters. However in the future they can look into adding more subjects, language and regions as more usage for articles increases.

QUESTION 20
Hosted Aleph TCO
Session 4.1 showed that the Aleph GUI can be deployed via Terminal Server Web Services. This means Ex Libris can extend the Aleph Direct hosted services by offering the GUI in a hosted environment, thus lowering TCO for the customers.

Is Ex Libris willing to consider offering this extension to the Aleph Direct services? And if not, what are the reasons or doubts?

Bettina reported that while they are investing a lot to improve cloud service, they are based on impact on the number of customers. This question has only been asked a few times, and so it is not currently on roadmap.

Question from the audience: If more customers asked for this option would it be then supported?

Bettina reported this option is not officially supported.

Question from audience: Would EL certify GUI for terminal services?

Bar reported that this would require a large investment to offer this. If there are a substantial number of customers who want this option it could be investigated. However it needed to be understood that terminal services cost Ex Libris so needed the customer demand.

Matti acknowledged that while it was very easy to develop services for customers, it has to be worth it for Ex Libris as they would have to train staff and develop infrastructure. However in the future if there were more customers they could look at developing the expertise. They needed to ensure they had the expertise as they could not always rely on the recommendation of the customer.

QUESTION 21
E-book loan
Is the e-book loan functionality scheduled in any ExL library software: Alma, Aleph, Voyager?

Bar noted this was a question more for ebook vendors as he hadn't seen ebook loans being recorded. If somebody had seen a vendor with this model in place they would be working with them on this issue. If anybody had more information, they are encouraged to approach Bar or Dvir about this.

QUESTION 22
RDA
How far did the implementation of RDA (Resource Description and Access) in combination with Aleph and Alma proceed? what will be the next steps?

Shlomo reported that Ex Libris has implemented RDA rules. Voyager developments occurred with Library of Congress and so extra configuration was required. RDA in Alma will be fully supported in a few months. Aleph required only some configuration.

Regarding Bibframe. It had not been agreed that the full FRBR model should be implemented. Ex Libris will keep a watching brief on this model but until these questions have been resolved it was not ideal to move too quickly in this area.

QUESTION 23
Software Quality Assurance (QA)

1) Does ExL have software QA certifications?

2) If yes, for which products?

3) If not, when does ExL intend to acquire a certification for software QA?

4) Is it possible to find information on the ExL website on certifications currently in place? If the answer is no, would ExL be willing to disclose this information in a near future?

David reported that Ex Libris does employ certified staff. However the certification is a personal certification. The QA department is certified by ISTQB, which involves international training programs and examinations. Ex Libris either recruit staff with certification or they send staff for certification if they don't already hold it.

He acknowledged this information was not on the website but they will look into adding information about relevant certification to the website.

QUESTION 24
Frontend and backend decoupled?

Primo was launched as part of the strategy to decouple the front-end from the back-end. We now see many Primo services are available only to Alma users, and the front-end of Alma *is* Primo. Could you please expand on this strategic shift to a monolithic (or symbiotic) couple?

Oren noted this issue was tactical rather than strategic. It was believed the de-coupling of the back end and front end still relevant. Primo does allow the integration with third party components. However in practice, there are seen to be many advantages in the Alma/Primo pairing. The pairing is of value especially in certain complex situations, for example patron driven selection and acquisition where the systems need to interact at a granular level, or smart fulfillment. It also needs to be understood that next generation systems are still relatively young with Alma released only slightly more than 12 months ago.

While they understand the needs, there is the need to develop use cases, standards and best practices. It is expected these will be developed in the future. In the meantime both components can work with 3rd party systems. Tightly connected actions are based on interfaces such as APIs.

QUESTION 25
Relations with EBSCO
The marketplace for metadata requires cooperation between all parties involved. A lot of press releases mention agreements between EBSCO and suppliers of discovery tools / KBs. OCLC, Summon and others seem to be able to agree with each other to share data. This is also the case for legal information from Kluwer.

Ex Libris does not seem to be able to make the same kind of deals. What are you planning to do about this?

Oren reported this was an extremely important matter. With Ebsco, the good news is that is now more publicly apparent that EBSCO does not enable content in discovery systems. More information is available on the Orbis Cascade website. Ebsco are insisting that users have to use EDS, in addition for paying for subscriptions, and in addition to buying another discovery system. The only way to avoid this is to use data through API, although they agree that indexing is better.

Both IGeLU and ELUNA have published suggested language for sites to use in negotiations with providers who are reluctant to provide data.

In additional there are other initiatives, such as Open Discovery Initiative. Carl Grant's blog contains more information about these issues.

Regarding content of aggregators their content is often not unique so they are working on alternative coverage. Ex Libris are making good progress in discovering alternative content through other sources.

In addition they have made progress with unique content in negotiating with SwetsWise Online Collection, containing 40m articles, including full-text, and Newsbank. They are continuing to sign deals with publishers which are in the best interest of everybody. Additional content options added to Primo may provide options for content.

Comment from the audience: An Ebsco Vice President commented that they do agreements where they can exchange content, so if Ex Libris owned some content, then they could exchange it.

Oren replied this argument is all but gone, and EBSCO does not say this now. Ex Libris had previously offered data, but this is now not the issue. Ebsco's position, as released in their online letter, is their content deserves their discovery system.

QUESTION 26
Ex Libris and other companies
Why is it that Ex Libris doesn't create direct working relationship with other companies/suppliers, but via their clients? Can Ex Libris work directly with companies like Bibliotheca, Talis, 3M, campusM, Bretford, etc, so that clients' time is not wasted?

Koby reported that Ex Libris with their CKB project are working with a lot of suppliers. Other companies they are working with include 3M, Bibliotheca and OCLC Germany. However they often preferred to work directly with customers to ensure developments gave the customer the right solutions.

QUESTION 27
Ex Libris Strategic Direction

Can Ex Libris reaffirm to the customers that they still have a strong strategic direction for their products? Events like people leaving Ex Libris and joining OCLC leadership has caused some doubts in some customers' mind?

Koby reported that Ex Libris has a very strong strategic direction which is represented by the people representing them today in person or on the phone. Most of them have been employed by the company for 10-15 years. The retention rate of staff is very high with a large number employed for 15-20 years, which is long for an IT company. It was acknowledged that 1 employee had moved to OCLC.

Bar noted that no one responsible for strategic direction had moved to OCLC. Matti also noted that no one had the intention to move.

QUESTION 28
Integrated research information support

Academic libraries are more and more expected to support scholarly research in the broadest sense. The usual systems traditionally focus on isolated subdomains: cataloguing/discovery/delivery of publications, administration of research projects, and lately also preservation/reuse of research data. Libraries need to be able to connect all this research

information, including research projects and related projects, people, organisations, events and output, and make it discoverable and accessible. Ex Libris systems focus on publications (Aleph, Voyager, Alma, Primo, SFX) and long term preservation (Rosetta).

Does Ex Libris have any plans for an integrated research information infrastructure?

Oren reported the answer was yes. This is part of what they are evaluating in the area of research infrastructure. They have a key interest in this area and are watching it closely.

Comment from the audience: Did they know of researchobjects.org and whether this might be interesting to look at.

QUESTION 29
Open infrastructures instead of system specific data silos
Next generation back end and front end tools like Alma and Primo are developed with their own dedicated proprietary data infrastructures. The same applies to other commercial and open source tools (OCLC, SerialsSolutions, EBSCO, Kuali, etc.). These semi-closed data silos may or may not be accessible to others via an API, which needs a functioning system installation to send system service calls to. There is no direct data layer access independent of the system.

Wouldn't it be much better to provide open direct data layer access for all to use, so there would virtually be a software independent open data infrastucture?

Shlomo agreed the answer was probably yes but is actually harder to do. The whole market would need to develop and adhere to standards. Examples include OAI-PMH and MARC21. They had implemented DLF in Voyager and Aleph, but no one else followed it. The whole objective of linked data Bibframe is to develop standard to connect data in whole world.

Bar noted that in the CIP project of which FU is part of, the German government have money to investigate how vendors could work together to synchronize systems. Ex Libris and OCLC are looking at Alma and WMS and how these can be used. Ex Libris is always interested in participating in this type of project.

QUESTION 30
Libraries and internet companies
Amazon is already offering, Google is right now preparing to offer an option for users to lend ebooks (as has become official as a kind of surprise in July this year). This might be seen as a step towards the end of (at least public) libraries - not today, but in ten years from today, when all the effects have arrived. True?

Skipped (Peter)