

IGELU STEERING COMMITTEE / INUG/ EX LIBRIS SENIOR MANAGEMENT

SEPTEMBER 14TH 2014

Attendees: Oren Beit-Arie, Kobi Rosenthal, Shlomo Sanders, Bar Veinstein, Matt Shem Tov, Yair Amsterdam, Tamar Sadeh, INUG and SC members

Ex Libris company update

Matti thanked the INUG members for the invitation to the meeting. He reported that overall while there had been some changes in the company, Ex Libris had the same focus on research, educational and national libraries. Customers are increasingly moving to Alma and Primo.

While there has been a few changes in senior staff the workforce is mostly stable, with one staff member in Germany employed for 25 years.

Jirka noted there are continuing changes in Product Managers, and there have been some difficulty in working with the new Product Managers and getting them to understand what the user groups do.

Alma

132 institutions are live. By the end of 2014, there should be close to 200 sites, and it is predicted that by 2015 there should be 350 – 400 institutions live.

It was acknowledged that the implementation of 34 institutions from Leuven has been a long journey, which has involved the first move of a consortium from Aleph to Alma.

Salesforce

Jirka reported that after the initial US implementation where there had been some issues, the worldwide implementation went well. The impression is the system is stable and does what it is supposed to do. There was a survey of what customers wanted developed in Salesforce and it was appreciated that some of these enhancements are already being implemented into Salesforce.

However, some incidents are closed in Salesforce without any customer input. There should be a way to give those incidents a different status 'customer feedback' or some other 'pending' status. It is requested that Ex Libris add a step 'waiting customer consent' and then 'awaiting development' 'product management review' or similar.

Yair questioned whether they were support issues or enhancement. Theo commented that either way they should be kept open in Salesforce. Bar stated that if they were enhancement request should not be kept open in Salesforce.

Yair commented that if the issue has been sent to R&D, another status should be created and only closed in Salesforce if there has been date of release, e.g. 'closed fixed in 4.10', or they could be kept open until the release is available giving the customers the possibility to test.

Matti stated Yair would investigate the issue and fine-tune the process with a general agreement that the incident should not be closed until the relevant version is released.

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Announcements of SP for hosted customers

Sites have reported that announcements of SPs have been released quite late, which has caused sites some difficulty. Customers would prefer 2-3 weeks' notice before release, e.g. SFX release. The main issue seems to be with Primo and SFX.

Yair commented that sites normally want the product upgraded as soon as possible, but he will discuss this further with Shlomi. The request is that sites could get at least 2 weeks' notice and information about SP before sites are upgraded.

It was also suggested that SPs are not released very close to the IGeLU/ELUNA conferences

Difficulty with Professional services with Aleph and Primo upgrade

There have been some issues with the Aleph and Primo upgrades conducted by Professional Services relating to Aleph 22 and Primo upgrades.

The Aleph issues include major functionality not working, printing issues, extremely slow circulation response with patron displays. There had been problems with previous versions but there was surprise that these have re-occurred. It was reported there have been issues in Europe as well as the US.

Yair commented he would like more details about the problems. Bettina Foster also would like more specific information to see if they need to work on internal workflows. Mark noted there are known stars in professional services so the issue is not with all staff.

To do customers: supply informations about the issues with professional services to Bettina

Yair stated they have not moved any support people, including European support. He said this should not be a resource allocation as the team size has stayed the same and he will need to investigate this further to see what is causing the perception.

It was reported that SFX also has had issues. For example after upgrades there have been issues where features are not worked and SFX 4.7 has been withdrawn. Matti commented they would check the situation.

Jirka noted that support has not been a problem over the past years but we wanted to raise this as an issue so it can be fixed fast.

It is also reported that the escalation process does not really work, so people are bypassing it. It seems that the regular escalation process is not working, and some sites using this only to get more attention but the issue does not seem to get resolved faster. Sites then bypass this process and email elsewhere.

Yair reported that if sites used the Escalation email this automatically raised the priority in Salesforce.

Yair reported on the new Tier model for support: Tier 1 for initial support; Tier2 for more complex issues or requiring more work. He acknowledged that this is still a new process, requiring alignment between Tier2 and R&D. He would like to see details of the product and issues.

To do customers: supply examples of issues to Yair

The Steering Committee and INUG will refer people to report details to Yair.

Cloud Status page

Jirka noted the page is a good development but there is concern over the 15 min delay in updating status. The procedure is to update the customer and page as soon as possible. However sometimes it takes a few minutes to identify what is the issue, and whether there is actually a problem.

It is requested that once it is known there is an issue, then it should be notified to the cloud page. Yair reported there is no approval process before updates can be loaded to the cloud page, however sometime it can be harder to identify issue and if there is a problem. Staff do not troubleshoot what is the root cause or whether there is an issue but rather investigate whether there is an issue.

Yair noted they try to balance speed versus the possibility of posting false issues.

It was noted there had been an issue with the NA01 instance where it seemed to take a long time before it was posted on the cloud server status page. Bar reported the update should be within 15 minutes, if not able to be immediate. Betsy commented it was rare for the cloud status page to be slow in updating.

Yair stated that the monitoring process is dynamic, and they would like to improve monitoring process for the future. When issues are discovered, additional monitoring processes are implemented if these had not been done before.

Service level reports

Jirka reported that some customers would like specific reports of cloud status performance.

Yair reported that customers could ask for specific reports on cloud status performance. There is also an Alma quarterly report, which is available on the Documentation Portal, but other products need to have some work undertaken to generate the reports.

To do ExL: However investigation will occur to see if they can work towards customers generating their own reports.

Web accessibility standard

It was requested that Ex Libris publish information about standards. It was suggested that the information could be attached to the Primo page in the footer so people can check what the standard is. It was acknowledged that the situation has improved with Primo.

To do ExL: Tamar will locate the document and send us the link.

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Alma localization

The Alma PWG was requested that they should help with translations. Ex Libris are taking care of the main languages but are giving the option to local distributors to do it. However for other languages some sites/distributors have undertaken translation. If a country has 'flavour' of a language, then they should be able to offer translation service. If sites undertake this work, then they need to understand there is a commitment.

Bar noted this related to integration points between Alma and Primo, e.g. request types and for patron letters if sites want local customization of letters. Bar reported there were 3.000 initial terms that need translation, but ongoing there were only 10-15 terms that need to be changed monthly so the ongoing time should be minimal.

It was suggested that the request for support of the translation should go to the respective national user group first. If there was no national user group then often the first site implementing the product is a consortium.

It was noted that some languages are covered for the full interface but other for customer facing issues only. The Danish group commented they do not need staff localization but they do require customer localization.

Fiona Burton for the SC