

**Ex Libris, IGeLU, INUG and Working Groups Coordinators Meeting
Budapest - 2015 09 01**

Primo SaaS Policy

Jirka provided an update on discussions between Ex Libris and the community.

Ex Libris provided an update on the Primo SaaS meeting in Israel

Key points of the update are as follows

1. Ex Libris is moving to a SaaS environment as they see this as being the future
2. Ex Libris is not forcing any customer to the SaaS environment
3. Ex Libris needs to align internal communications so that a single common message is provided to the customer base. Customers should not feel forced by Ex Libris to move their Primo installation to the SaaS environment
4. Ex Libris are looking on improving their communications so as to avoid any issues that was previously raised from moving to a SaaS environment
5. The current SaaS roadmap is based on inputs from the Ex Libris / customer meeting in Israel
6. Ex Libris are investigating together with the IGeLU and ELUNA developer working groups strategies to make enable developers to add local developments to the SaaS environment
7. Ex Libris explained that the same code base is used for all Primo configurations (local, direct hosted and SaaS)
8. Ex Libris have indicated that they are spending a lot of support resources on resolving Primo local and direct hosted issues. These issues would not be a problem in a SaaS environment and save resources that could be allocated more efficiently
9. Ex Libris indicated that there will be a single Primo road map
10. Ex Libris is working to the principle that all customers will get the same functionality, only Primo Analytics - Oracle Business Intelligence (OBI) - and Auto-complete functions are technically tied to the SaaS environment
11. Ex Libris believe that the customer base will benefit from moving to a SaaS environment

New Ex Libris Policy Documents

Customers are jarred by sudden publication of documents about Customer Responsibilities on the Ex Libris DocPortal (Cross-Product > Security > Security Updates > Policies)

There are two problems with this:

1. The announcement of these documents is not widely spread and only to be found inside release notes for Alma customers. This is poor communication

and not in line with the professional attitude we expect from a state of the art SaaS company

2. The text inside these documents seems quite legal and customers would expect the policies described there would be part of contractual documents. It also raises the question if Ex Libris can set such policies without having to consult individual customers or the user groups.

Ex Libris regrets the misunderstandings caused by the communication and will come back to this. The documents are published on advise of the external security auditor and are part of the renewed ISO 27001 certification. According to Ex Libris, these policies don't have any legal impact above the signed contracts by customers, but they are more detailed regulations based upon these contracts. Ex Libris is going to check this and will react to the community, together with a statement on the communication on these policies.

Developer's Day and systems seminar

IGeLU indicated that they plan to repeat the Developers Day at the 2016 conference. The next conference will start at Monday and so Ex Libris developers can more easily participate to a Developers Day on Thursday.

According to IGeLU it means the conference schedule will not fit for a combined Conference & Systems Seminar. Also the more modern Alma and Primo SaaS applications don't need that much technical instructions like Aleph, Voyager and SFX in the past. These old products are mature and the recent System Seminars were valued more as trainings than as technical detailed instructions and discussions as it used to be in former times. The nature of the Systems Seminar has changed and it remains to be seen how much need the user community has for future Seminars.

Ex Libris indicated that they are happy to be guided by IGeLU on this matter.

Running the Systems Seminar as a parallel event to the Developers Day could be an idea, where Developers Day is more interesting for developers of the User Groups and Ex Libris and the Systems Seminar would become some sort of Systems Training, giving customers the benefit of cheaper trainings than normally would be possible on smaller occasions.

It was agreed that future Systems Seminars should include Primo SaaS Development tools.

Alma Analytics

Ex Libris indicated that the Analytics availability issue in the EU data centre has been resolved. There was a problem with the OBI in the EU data centre which required bringing in senior Oracle OBI support to resolve the issue. The solution is carefully monitored to see if it solves the root cause of the issue and will, if accepted as stable be rolled out to the NA and APAC data centres.

The Analytics daily refresh issue has also been resolved. The time taken to Extract from Alma, Transform and Load (ETL) the Analytics database has been greatly reduced and changed from Full to Incremental.

Some of the customers indicated that there was still a slowness experienced with the Analytics interface. Ex Libris have requested more information on this issue from the customer base. The Alma PWG will deliver Ex Libris more information.

Ex Libris indicated that increasing the Analytics data scope is an on-going development activity. Ex Libris would like to know what data needs to be made available as this will assist in the prioritising of on-going development work. IGeLU and ELUNA are specifically asked to deliver use cases on this.

The issue of Analytics availability on the Cloud Status page was raised. The customer base indicated that the Analytics refresh failure has an impact on the workflows within the institutions.

Ex Libris indicated that the ‘!’ icon on the Cloud Status page should be used to reflect this issue. The non-availability of components like Analytics will not reflect the periodical SLA reports on availability since the contractual obligations do not cover system components, only total system availability.

Support

Various National User Groups report on the issue that Salesforce cases get into the ‘blackhole’ of the status ‘in development’ without getting updates or feedback on the chance nor the release date of the case being solved.

Ex Libris indicated that there is no backlogs in development. The number of cases logged as ‘in development’ is reducing. Ex Libris have instigated an ongoing process to review backlogs.

Also there are complaints about cases not being treated as bugs but instead categorized as enhancement requests. Customers feel they need to show much assertivity to convince support staff to judge their cases as they feel they should

Ex Libris are happy to investigate further but would like specific examples that they can follow-up on.

Ex Libris indicated that there are SLAs in place for cases with 'high' and 'system down' statuses. Ex Libris also indicated that there are no SLAs in place for cases with 'normal' statuses.

Detailed Roadmap on Alma and Primo, being agile developed products

Especially the Alma PWG, but also the Primo PWG would like to receive more updates on the roadmap on a regular base, since the enhancement list of these products changes much faster and more often due to obligations to newly contracted customers and progressive insight by product management. The PWGs do not complain about changing the roadmap, but they want to be able to act rationally on it, deleting enhancement requests from their ballots if it's clear the roadmap will provide for the requested functionality.

Ex Libris acknowledges this request by both PWGs and will investigate how they can deliver an updated product roadmap every 6 months for both products.

Alma-D

The user groups are desperately waiting for more Alma Digital functionality to be released. It feels like there is not enough speed and progress in delivering the promise of Alma being a full URM supporting Print, Electronic and Digital formats of information objects.

Ex Libris explains they are using a three phases roadmap for Alma-D functionality.

- Phase 1 was completed in 2014
- Phase 2 will be completed at the end of this year and one of the features will be support for special collections
- Phase 3 is planned for the end of 2016 and will support full Institutional Repository functionality.

The issue of Rosetta was also raised. Ex Libris indicated that Rosetta was a standalone product and that it has been installed now at 100 sites. Ex Libris are currently working with RMIT in Australia in regards to using Amazon cloud services with their Rosetta installation.