

EX LIBRIS GENERAL QUESTIONS & ANSWERS SESSION

12th IGeLU Meeting Session St. Petersburg, Russia, September 13 2017

Ex Libris staff on the panel:

- Bar Veinstein, President
- Oren Beit-Arie, Chief Strategy Officer
- Dvir Hoffman, Corporate VP Resource Management Solutions
- Jane Burke, VP Customer Success
- Ofer Mosseri , Corporate VP and General Manager Europe
- Shlomi Kringel, Corporate VP Discovery and Delivery Solutions
- Yaniv Cohen, Corporate VP Global Professional Services
- Judith Fraenkel, VP Content Operations
- Barak Rozenblat, VP Cloud Services
- Adi Fubini, VP Customer Support

Moderator: Shameem Nilofar, Singapore Management University

Minutes taken by Dave Allen and Mark Dehmlow

Question 1

Can Ex Libris share how it ensures that all clients receive the same quality level of support for all clients (even those using re-sellers, such as South America)?

Ofer Mosseri – Ex Libris Support personnel worldwide are all governed by the same procedures, KPI's and processes. Some markets such as South America, where the Ex Libris products are sold via resellers are required to go through detailed training and certification similar to standard ExL support people worldwide. Resellers also have direct access to tier 2 support people. This is new so support may be a bit wobbly at times, but please be assured that resellers are required to supply same quality as standard ExL support team.

Question 2

Customer satisfaction is often based on closed cases. What about cases that are open for quite some time, because this often leads to customer dissatisfaction, and we feel that this is where the pulse of the community can be more keenly felt?

Adi Fubini – This issue has been raised during the National User group meeting and we will definitely look into it. We acknowledge that using closed cases may not be the only way for gauging customer satisfaction. We also welcome any suggestions that the user community has in terms of how this can be done more effectively.

Question 3

We hear reports from the National Groups that the quality of responses, especially at Tier 1 levels, seems to have dropped. There is more back and forth, in situations where support staff should have known better and should have been able to guide customers better. How can customers expect better support?

Adi Fubini – Support staff have to go through an internal global certification process. However, there is always a learning curve when new people are introduced. How Ex Libris improves quality is by providing examples and using feedback as part of the training to improve the services provided by the Tier 1 support staff.

Question 4

The level of expertise among professional service staff, seems to be slipping, especially in markets where Alma is new. Can Ex Libris explain the training initiatives (initial and on-going) in place, to make sure that implementation PM's have the necessary product knowledge to support these customers?

Yaniv Cohen – Global professional services is an initiative that consists of teams which are split across global regions. These teams are split based on culture, language and time zones. Ex Libris is looking at building a new support layer to improve services such as knowledge delivery, certification plans and support engineers. The whole idea behind this is to act locally but build a global professional layer.

Follow-up question from Shameem - Is there a feedback mechanism?

Yaniv Cohen – Yes, this is an on-going process. Ex Libris has new plans for knowledge delivery and training and in 2018 we will start to see the difference.

Bar Veinstein – We are creating KPIs and working closely with each of the regions. The Knowledge delivery team is now a new team headed by Yaniv Cohen. The new initiatives will soon be shared with the user community.

Question from the floor (Jiri Kende) – Is there an option to send support team to libraries to see how libraries function?

Yaniv Cohen – Project teams will examine local workflows to ensure faster turnaround of projects.

Bar responded that this may be hard to roll out to global sites. Will first concentrate on using Israel libraries and Bar will take this as an action item.

Question 5

Could Ex Libris share about the customer care program available to the user community? How do customers get more information of this option that is available to them? How does Ex Libris measure the success or value of the program to the customer?

Adi Fubini – There are no special programs for individual sites. The current practice is to normally have special meetings around specific issues reported by customer sites.

Jane Burke – Customer success is an evolving program within Ex Libris. This is a process adopted from the SaaS industry. At present this is a limited program, and focus for 2017 has been on standalone discovery environments. Under this program there are 5 people in US and 1 person in EU currently. The goal is to have a set of people who will be in regular contact post implementation. We are looking at 3 calls per year to review with customers their use of products and new features. There are no plans at this stage to take this beyond stand-alone discovery sites. The measure of success is based on contract renewals. As program expands Ex Libris will also be tracking other elements. In addition, for NA, there is a program called ‘expert service’, which is a fee based service and offers advanced training options to customers.

Question 6

The amount of information in the status alerts is very general. Would it be possible to include more information about the problem and how it might affect users? How often can the updates be provided, to help customers gauge the extent of the problem?

Barak – In the event of a service disruption, support, cloud and development engineers are focused on resolving the problem as quickly as possible. Ex Libris tries to be as transparent as possible when working on the disruption. Normally we resolve issues very quickly and updates are provided hourly, whenever possible. Ex Libris tries to share the technical information via the Root Cause Analysis document that is published afterwards.

Question 7

We see for Alma, Primo or campusM ideas that have been planned for more than 1 year, sometimes even for more than 18 months! On the other side, Ex Libris publishes a roadmap for many products and ideas with planned status are rarely or never added to the official roadmap.

If it is planned, can we know if it is going to be within 12 months or more than 12 months? In many circumstances, customers need to know if they can wait until an idea becomes completed or if they have to revert to plan B and sometimes develop something locally (waiting the new feature).

Dvir Hoffman – Ex Libris commitment is to NERS enhancements. ExL reviews ideas that have been logged in Ideas Exchange. There is no commitment at this stage for those ideas that have been flagged as ‘planned’. Ex Libris does a weekly review of ideas. We have also increased number of points allocated and when idea has moved been to ‘planned’ points are returned.

Question 8

Communication is our biggest challenge with the cloud team. For instance, sandbox refresh questions seem to take about a week for an answer, though some have taken longer. We have had similar communication issues around timely answers around Primo installation/upgrades. Please explain why these take longer than a couple of days to answer? What should be our expectation for a response?

We subscribe to the premium sandbox which is a paid service, we expect a higher level of service than a standard sandbox?

Barak – A sandbox refresh involves multiple internal teams. The refresh itself is implemented by cloud engineers and the duration of the refresh depends on the amount of data that is copied. Once the refresh is completed, the case is assigned back to the Support team for testing and confirmation. On average, the refresh and validation time together is around 3 days. Sometimes technical issues during the refresh process cause delays beyond the average time. These technical issues are analysed in order to improve the overall process and train staff.

Bar Veinstein - In Alma users can manage and see the status of refresh. 25% of our customers have premium sandboxes. As a result processes are not optimised. This is something that is in Ex Libris work plans to improve the process.

There is no service differences between premium and standard sandbox. The extra funds is just to support premium infrastructure required for the customers.

Question 9

Any update in the beloved soap opera played by EBSCO and Ex Libris? Has Ex Libris' acquisition by ProQuest had any positive or negative impact on the negotiations? Please tell us that a season finale is planned where metadata owed by EBSCO will (soon) be added to Primo Central Index and Summon. If not, do not forget that we customers are still very interested...

Shlomi Kringel – Ex Libris has many agreements with publishers and A&I, like Web of Science and Scopus. We had an agreement with ProQuest to upload their content before the acquisition. Following the acquisition, we leveraged ProQuest's relationship with publishers to get even more content into Primo Central. Ex Libris has been working with ProQuest for improved metadata. There has not been much progress with regards to EBSCO. Customers should push for the Open Data Initiative with their respective vendors.

Laura Morse (from the floor) – Libraries need to get involved with NISO ODI. Tools to support the initiative are available on the NISO web site, which is also a good site for resources on the topics of how libraries can benefit and advance with ODI.

Question 10

Could you explain the process by which vendor metadata is added to the PCI (Primo Central Index)?

We would like to understand why there are delays for new material added to vendor collections appearing in Primo, and to understand why record corrections or deletions are delayed in appearing in the PCI?

Judith Fraenkel – The content section of the Idea Exchange does not use up individual points. With regards to updates and corrections – updates are done automatically and are based on either vendor provision of the data or the extraction by Ex Libris. We also monitor collections that are not being updated. Ex Libris has been working with providers on how the updates can be made more regular.

Ex Libris agreed to provide more visibility of the activities between ExL and providers, as well as publish holistic release notes, sneak peeks, and any other information related to known issues and those that are currently being worked upon.

Question 11

What actions are taken to ensure that the new (Alma/Primo) UI delivers on performance? The expectations would be a performance that is equal or better than the current user interface!

What end node monitoring is undertaken by Ex Libris?

Dvir Hoffman– Ex Libris has the same expectations as the customer base with regards to the performance. The new UI should offer the same or better performance results and should not become poorer. If users can switch between the new and old UI when such performance issues are encountered, this will allow Ex Libris to gather more statistics to gain a better understanding of the issue encountered. Performance is a key, and so far there has been no specific functionalities that have encountered performance issues. Customers should log SF cases as and when such performance issues are encountered. Ex Libris have tools to examine traffic to the end-point and this would be useful in seeing the full situation.

Question 12

Ex Libris' services for Open Access

nowadays, we recognize a strong switch to Open Access publications in the European Union. The European Union obligates all researchers getting funds from EU programs to publish the results in OA journals or online archives. One third of the German academic libraries cancelled their Elsevier contracts at the beginning of 2018. In which way does Ex Libris support this Open Access turn?

What is Ex Libris stand on open access and what is being done to support this initiative?

Oren Beit-Arie – Ex Libris is committed to working with the scholarly community by offering services and building tools to reduce barriers to discovery and production of OA content. This includes work in data services, products, engagement and community outreach activities.

With regards to Products, there has been an addition of a visual OA indicator, as well as adding facets in Summon to help libraries and users identify open access collections. The same feature is planned for Primo. Similar features for open access are also planned for Alma. We have also added, in both SFX and 360Link, the ability to use the oaDOI service (now unpaywall) to check for open access versions of an item in case the library has no subscription.

Esploro is a new product in this space that, among other things, is designed to help with compliance and adoption of OA. With regards to Community and engagement, customers should share ideas with Ex Libris on collections that can be included. The publishing industry and academic libraries needs to be involved in identifying open access articles and hybrid journals.

Ex Libris is working on a number of initiatives in this space.

Question 13

Is there someone coordinating at a high level the inter-operability between the various products in the Ex Libris suite of products? As customers buying products from the same company, we expect a certain degree of inter-operability between the products without fiddling too much with API's, something like a plug-and-play concept.

Bar Veinstein – In the case of Primo VE, there was a strong operational initiative to align and optimize Alma ↔ primo. Ex Libris is also looking at integrating and improving workflows with all products, and this includes working on other ProQuest products as well.

Shlomi Sanders role as CTO is to work on the connectivity points and push for integration. As a platform Alma needs to have stronger connectivity with other products such as Leganto. A new unit has been created to look at the platform and allow sharing of analytics across all other products. A lot of work has been undertaken recently to allow for such functionality. This also involves working with a lot of non Ex Libris platforms such as BlackLight.

Question 14

Is there a process by which institutions can become development partners in new/ongoing initiatives (E.g., Alma-R, Primo VE)? Has it been communicated with the user community? What is the criteria to become a development partner?

Jane Burke – There is no criteria for the selection of development partners. Partners are selected based on the initiative and it is hard to create specific criteria in those cases

Oren Beit-Arie – Ex Libris has benefited from customer partnerships. Please contact us with any new ideas you may have. The most important step in a number of these initiatives has been the conversation, which has led to further discussions and eventual partnerships. However, development partnerships are just on aspect of the relationship. Early adopters is another option for institutions to come on-board for development initiatives.

Bar Veinstein – Ex Libris deals with a number of institutions and there is no specific criteria for all. It also needs to be pointed out that being a development partner involves a lot of work for the institutions.

Question 15

Institutions are seeing a bigger percentage of electronic resources in their collections. We understood previously that eBooks will not be subject to deduplication and FRBRization, in the PCI. Is there any changes to this stand since then?

Shlomi Kringel – This could be done in Summon, however Primo is different and more complicated. Ex Libris are currently looking at what can be done. We had underestimated the complexity involved and there does not seem to be an easy solution for Primo.

Question 16

Why is there a limitation of the amount of premium sandboxes that can be set up for an installation and why is the sandbox not part of the regular package? Each institution should have a sandbox with their own data.

Dvir Hoffman – The sandbox environment is basically a production environment. Alma has a standard and premium sandbox option, and this is an option that is not offered by other SaaS providers. Providing a premium sandbox has cost implications and this is usually charged back to the customers. Standard sandbox is part of the subscription.

Questions from the Floor

Masud – Primo ⇔ Alma – What options are available for sites/countries that have performance issues due to poor and/or low connectivity problems? Do they have an option to do a local installation in such cases?

Shlomi Kringel – There are currently no plans for local solutions or possible caching options.

Dvir Hoffman – This cannot be addressed by opening up a data centre. There is a need to resolve connectivity issues. Ex Libris is currently working with local network vendors on addressing this problem.

Joan Kloarik – There is currently no way to get analytics from Alma Sandbox. Is this going to be possible in the future?

Bar Veinstein – This is simply a cost issue around sandbox. OBI is very expensive and these costs would need to be passed back to the customers. Roughly, we are looking at about 3x the cost to premium service. However, we will take this on-board for future consideration.

What is the status of real-time acquisition on EBSCO platforms?

Dvir Hoffman – Real time acquisition has been completed for GOBI. This is also available for other platforms.

