

Topics coming from the National and Regional User Groups reports

Ex Libris staff on the panel:

Bar Veinstein, President

Dvir Hoffman, Corporate VP Resource Management Solutions

Ofer Mosseri, Corporate VP and General Manager Europe

Shlomi Kringel, Corporate VP Discovery and Delivery Solutions

Yaniv Cohen, Corporate VP Global Professional Services

Adi Fubini, VP Customer Support

Moderator : Theo Engelman

- **CZ issues**

Issues with updating content in CZ - Providers claim they sent the updates, Ex Libris not updating this new content fast enough. Not only on the CZ, also on the PCI side

ExL Responses

Dvir - Aware of the fact that updates are not fast enough. Investing time into streamlining processes, working on new ways to allow update by vendors into the CZ. Calls with vendor already in progress. Close monitoring and contacting vendors when there are issues with data. More to share in the coming weeks.

Shlomi - PC cycle is once a week, while new collections are updated once a month. With the new instance of PCI coming soon, the updates can be more frequent.

Bar - More human resources has been allocated to handle content since Proquest merger. So this delay is not due to the lack of resources. 2019 will have a major breakthrough in how CZ is handled.

- **CZ Maintenance planning**

Too many times downtime without prior notification regular maintenance running out of time on Sunday morning

ExL Responses

Dvir - This does not happen very frequently. There were a few cases, where it took longer. There is only 1 instance of CZ for all.

- **Language specific issues in CZ**

Not being updated fast enough

ExL Responses

Shlomi - There is no separation between local and global content. In some instances, the ability of the vendor to load the content directly, may reduce the lead time.

Currently the master is the SFX Kb. However, the new direction is to look for a hybrid model where not everything that goes to CZ has to go through SFX.

- **Video training**

Not sufficient for the French speaking customers. No interaction.

Documentation translation is available, but issues with quality.

ExL Responses

Yaniv - Working on the quality side, however, there are new releases every month and this has to be taken care of.

Ofer - working with selected customers to improve the quality of the materials.

- **Pilot with Salesforce accounts**

Using National User Group accounts in Salesforce, trial with Ex Libris

Participating in training Support Staff in library knowledge and skills. Some sort of Program where Ex Libris Staff is introduced in specific Library Workflows and services apart from or as a result of Ex Libris products and services

ExL Responses

Adi - There was feedback on the library knowledge of the support group. Partnered with a few institutions to train support staff. No longer a pilot and will now be rolled out to all customers. There is a cycle every 4 or 5 months.

- **Case handling**

Cases that are in development as a bug fix are sometimes too far ahead. May 2019 - August 2019 as solution dates for functionality that is troublesome for customers is not acceptable. Sometimes they get even moved forward when the predicted date comes nearer.

ExL Responses

Shlomi - Longer cycle with Primo due to different installations. Manage the backlog based on the priority coming from the support. In each of the releases, there has been bug fixes built into it. Whenever, there is more variations of the same product, there is bound to be delays. When there is a plan announced, it usually adhered to. If there is a need to fix urgently, then an escalation needs to be done.

Quick analysis done between support and R&D, and if there is a quick fix it is done. In cases where additional info is required, customer feedback is sought.

Bar - not happy that there is bug with core functionalities. High level of impact is determined by the user community. 50% of the manpower for releases is devoted to bug fixes.

- **Bug fixing**

Repairing bug in core functionality takes too long. Example:

U-resolver database shows obsolete information taking 5-6 months

Getting this speeded up seems to be possible by using Alma-L and Primo-L. Is that company standard?

There should be some sort of a published known issues list and Me Too functionality in Salesforce would be great to get better insight in bugs and bug fixing.

ExL Responses

Dvir - Monitoring of lists is done. But this is not the way for escalation.

Shlomi - Feedback on regression helps in the quick resolution of the issue.

Dvir - Will be sharing more details in the Igelu panel session. However, the mechanism for handling regression and bug fixes are separate.

- **Development and communication**

Development is not communicating with the customer who initiated a specific development by a Salesforce case. Leading to functionality that does not solve the original request.

Acceptance or Beta testing for new development might be an idea in this.

Ideas coming from Ideas Exchange seem to be handled better in this perspective.

Allocating the case in Salesforce to a specific product sometimes creates confusion if the actual development tends to be done at a related product.

The customer files it as a Primo use case and it turns out to be an Alma development.

All communication keeps on going through the 'Primo channel' then.

ExL Responses

Dvir - Contact between development and the customer is not a scalable solution. Agree that this is a lose-lose situation as there is a huge amount of resource invested by the customer and ExL. ExL is doing a drill down analysis to get to the root of the issue.

Laura Akerman (from the floor) - ExL could work with the customers to develop acceptance criteria before proceeding with development.

Adi - Analysis is done at the support end to decide where the issue should go to and is then routed to the technical team of the specific product.

Dvir - The customer should not have to worry about where the actual issue is caused. Case should be raised based on where the issue is encountered. Communications channels are in place to make sure that inter team issues are channeled correctly.

Bar - Platform team has been in effect since last year to act on issues that cut across various products such as Analytics.

- **Big Data**

Data usage by Ex Libris:

What are Ex Libris' plans for the usage data coming from their/our services. Do we have some control on how, where and when our usage data is being reused, analyzed and becoming the base for new services and/or products.

Alma Smart recommendations??

Opting in and opting out possibilities

Sharing of usage data with mother company ProQuest.

ExL Responses

Bar - Clear definition on who owns the data in the contract. Benchmark analytics was an opt-in service. If you need to benefit, then there needs to be an opt-in. Aggregate and anonymized data is used to ensure privacy is maintained. This is the philosophy. Sharing with Proquest is not done unless it is requested specifically by the customer.

- **GDPR** causing a problem at some topics.

Using the Ex Libris standard DPA document sometimes not acceptable for some institutions.

What happens if Ex Libris moves our data out of the EU.

Procedure on Data breaches

Issues around audit rights and division of expenses

ExL Responses

Bar - Worked with external institutions such as KPMG to ensure compliance. GDPR is silent on the topic of sharing costs for auditing. So ExL has no legal obligation to provide the funding. For individual contracts, it may not be possible due to the large number of customers. In cases where the discussions can be had at a country or consortia levels, this has been done.

- **Market position**

Ex Libris winning many tenders up to now, making customers scared for dealing with a monopoly in their country.

Building new services upon the Alma platform creates a vendor lock-in situation in the end. It makes it difficult for institutions to execute their freedom of choice for products of other vendors.

Tendering for specific products like a research data product or a readers list product is hardly possible when these products are part of or depending on the licensing of an ILS product/service.

ExL Responses

Bar - To avoid the problem of the past, to eliminate the problems of silos being created. The platform being created should be open and support api's. There is a lot of value in having the core platform.