
Clarivate Q&A session

IGeLU 2024



C O P E N H A G E N

9TH - 12TH SEPTEMBER



Agenda

1. Work through the Q&A submissions

2. Time permitting, we will take questions from the floor

3. Clarivate Management Team may not be able to respond to specific Salesforce questions

4. Clarivate Management Team will supply formal written responses after the conference and these will be published on the IGeLU website

Question 21 – Now Question num 1 😊

The Clarivate acquisition has meant that Ex Libris is now part of a 'shareholder' company. Is there mounting pressure within Clarivate to drop support for heritage products such as Voyager, Aleph and MetaLib? If so what financial incentives are Clarivate offering to move customers from the heritage products to the newer products?

Answer:

Products like Voyager and Aleph continue to serve a significant customer base and are actively maintained and supported by Clarivate. The acquisition of Ex Libris by Clarivate has not altered our commitment to being a trusted partner and provider of top-tier technology solutions to our global customer community. We are eager to facilitate customer transitions to our latest solutions, offering reduced total cost of ownership, modern features and technologies, along with favorable commercial terms and migration pricing.



Question 1

I hear that Specto will have an 'exhibition' component - where does this leave the proposed (and announced) exhibition feature in Primo?

Question 17

What are Clarivate's plans for a exhibition type platform -- something similar to OMEKA? Will this development work be in Primo or Specto?

Answer:

We are planning to develop an exhibition tool as part of Specto, this will allow institutions to create exhibitions based on their digital and non-digital collections.



Question 2

Will Primo's back office have the New discovery experience (NDE)? If not, how long will customers have to transition from the AngularJS-based UI to the NDE?

Answer:

The Next Discovery Experience (NDE) User Interface is part of Primo VE and will be in general release May 2025. Primo VE customers will have a 2–3-year period to plan and execute their migration to the NDE UI. During this time, institutions can test side-by-side and choose when to transition to the new interface.

Question 3

What is the best channel to get something fixed that concerns several products?

Example: the request note, which a patron explicitly adds in Primo as additional information concerning their request, is not visible for the lending library in Alma / Rapido / RapidILL.

This is really frustrating for the patron as well as the librarians.

Answer:

Our support portal is the primary channel for reporting issues. Please feel free to open the case wherever you believe the issue is relevant or where you observe the problem. In the description, kindly include complete details of any other products you believe may be impacted. Our support team will analyse the case and route it to the appropriate team on your behalf, so you don't need to worry about that.

In this specific case you may pick Alma / Rapido / RapidILL or Primo and we will take care of proper internal routing.



Question 4

What is the current timeline for the release of the two Rosetta Cloud Services (Plus and Pro)?

Question 9

The early concept for the Rosetta Cloud solution envisaged three tiers which later evolved into the two announced products Rosetta Plus and Rosetta Pro. What is the role of Specto Preservation and how will the preservation-related products be positioned in relation to each other?

Answer:

Rosetta Plus, which in the future will be part of the Specto suite and will be called Specto Preservation as part of our unified digital management concept, is planned to be released in Q1 2025.

The release date for Rosetta Pro, which is an enhanced version of Rosetta Plus, has not been determined yet and is expected to be available in the coming years.

Question 5

We've noticed in several communications from Clarivate, such as the ELUNA conference, an increased usage of the term "premium" (and similar terms) in relation to various products, such as Primo Premium and Specto Premium. Is this indicative of a new strategic direction from Clarivate to offer different versions or packages of products? Could Clarivate either confirm or deny this approach and, if applicable, provide further details about this strategy?

Question 24

Clarivate have been talking about “Premium” versions of the software. What will the difference be between Premium and Standard product versions other than costs?

Answer:

As Clarivate develops major extensions to functionality across our software platforms, there will be some decisions to include essential aspects of these extensions at no additional cost to customers of the Alma and Library Open Platforms. Premium features of these extensions may be offered as an additional subscription service, with associated subscription fees. One example is Specto, our upcoming AI-powered digital collection management platform. Essential DAM functionality will be offered to existing Alma customers at no additional subscription cost, while advanced functionality such as special collections and preservation management will be offered as a premium option.

Question 6

Last year you had a presentation on "Achieving Better Content" (Stohn/Ganor, Sept 13th, 2023). There you announced plans to enrich CDI data with ORCIDs and to connect them to the authors. Nothing happened during the last 12 months in this regard. Lately I was told that this development had to be pushed back because of other important issues. What's the new timeline for the improvement regarding ORCID enrichment in CDI data?

Answer:

It is still part of our plans to enrich CDI data with ORCIDs and this is one of the roadmap candidates for the coming year. This was delayed from the original timeline as part of in-year prioritization to allow us to focus on other value areas in 2024, such the Primo Research Assistant.

Question 7

We found out that there are many CZ records for e-resources with a really low bibliographic ranking (the amount is not negligible; for our institution, it concerns about 200 thousand records). Would it be possible to contact the suppliers of these records and nudge them towards better quality? That would also allow for better searchability.

Answer:

We continuously monitor the Community Zone to improve record quality. By identifying brief bibliographic records, we collaborate with content providers to advocate for higher-quality, standardized records.

To reduce dependency, we've developed an AI-based tool for record enrichment, improved metadata feed utilization, enhanced merge methods for alternative coverage, and integrated third-party cataloging. In the past two years, we've improved the quality of more than 2 million bibliographic records and recently enriched 100,000 EBC records using AI.

If specific content providers don't meet your expectations, we'd be happy to explore enriching their content if we're not already doing so.

Question 8

What is the current status of the Unpaywall situation? The unsatisfactory situation has gone on for too long and undermines the whole idea of up-to-date and accurate information in the discovery.

Answer:

Open Access metadata from aggregators presents an industry-wide challenge due to the dynamic and multi-layered facets of Open Access indicators and definitions. We are working closely with Unpaywall and have established direct communication with them to address the challenges of this specific access format.

To reduce inaccurate Open Access occurrences for you and your patrons, we have created two separate collections—one for journals and one for books.

Additionally, we have improved the frequency of updating the metadata for CDI, ensuring that corrections made by Unpaywall are reflected more quickly in the CDI collection.

As we implement these changes, we hope to reduce inaccurate linking and Open Access indications.

However, due to the nature of this material, we expect these issues to persist (although to a lesser extent) until the publishing industry adopts more accurate methods for identifying and delivering Open Access metadata.



Question 10

Is the new Alma-Digital going to support sub collection searches within Collection discovery? We have been trying to raise this as an issue since we went live with AlmaD in 2020.

Answer:

As part of the Next Discovery Experience (NDE) User Interface we will be enhancing the Collection Discovery based on the community feedback, and among other improvements will allow searching within a collection and its subcollections.

Question 11

Does Clarivate have a set of AI Principles that they are using to guide development? If so are these principles publicly available?

Answer:

Yes, Clarivate's AI Principles are documented and publicly available on Clarivate web site.
[Artificial Intelligence | Clarivate](#)

Question 12

For AI generated descriptive metadata from institutional digital assets -- who owns the copyright on the outputs? Does it belong to Clarivate or the institution?

Answer:

Metadata created by the institution using AI for digital assets of the institution belongs to the institution.

Question 13

For AI Generated output -- especially around descriptive metadata -- will there be some sort of feedback mechanism that will allow the AI engine to learn from mistakes?

Answer:

The Alma Metadata Assistant includes a built-in feedback mechanism. Feedback can be submitted through the AI feedback button in the MD Editor when working on a draft created or enriched with AI. The product team reviews this feedback to understand what changes are needed to improve the quality of metadata generated through the Metadata Assistant.

Question 14

Are there plans to allow institutions to 'keyword' unique local publications and manuscripts held in Alma-D/Specto/Rosetta and make it searchable in Primo -- possibly as a separate search index/facet?

Question 15

Are there plans to provide a HTR (handwritten text recognition) Platform for manuscripts, etc submitted to Alma-D / Specto / Rosetta and making the material keyword searchable

Answer:

We plan to allow full text indexing on local digital items with full text as part of Specto and Alma Digital.



Question 16

We are hearing about interesting developments with the Vega discovery product. It seems to fill the niche for institutions that cater for both public and academic libraries. Are there plans to allow VEGA to interop with Alma and CDI?

Question 18

What are Clarivate's plans for greater integration with the Ill (public library) suite of products? In particular integration with Alma and Polaris? We would like to be able to get to stage where we can pick-and-mix Clarivate Library Solution products.

Answer: We have already expanded Rapido to integrate with additional ILSs. Rapido can now work with FOLIO and Sierra, and we are currently working to integrate Rapido with Polaris, Koha, and SirsiDynix. This will support the ability to create seamless integration of Academic and Public libraries within our Open ILL Network, using Rapido as the workflow solution.

Question 19

What are Clarivate's plans to consolidate resource sharing products to a single application/platform? Currently there is Alma Resource Sharing, Rapidill, Rapido and INNReach?

Having a diverse product strategy must be impacting internal development and support resources?

Answer:

As also referred to in Question 18, Rapido is expanding to be able to integrate with many different ILSs, for academic and public libraries. The ability to unify resource sharing using Rapido as a workflow solution, our Open ILL Network for gaining access to a wide set of libraries, and our extensive integration capabilities with other ILL solutions, are the 3 main aspects of our plan to create a superior solution for any type of library. To support this goal, we have created one unified team across academic and public libraries groups to make this a reality.

Alma Resource Sharing has always had a different role – primarily to be able to integrate into your Resource Sharing solution of choice, and to be able to perform peer 2 peer transactions with other ILSs. This role is needed no matter your Resource Sharing workflow solution and will continue to be enhanced and supported.



Question 20

Will the migration costs from Alma-Digital to Specto be a 'free' migration or will there be a cost in the migration such as licensing costs, project management fees, etc?

Answer:

We plan to release Specto at the end of 2025/beginning of 2026. Alma Digital customers will have the flexibility to transition to Specto Essentials at their own pace after the general release. Initially, we will collaborate with development partners to define the transition methodology, which will include training and workflow adjustments. Since the data is already in the underlying system, no data migration will be necessary. We envision a self-service transition model to simplify the process as much as possible, without additional service fees. Additionally, we will offer optional premium services for any extra support you may need.

More details will be provided as we approach the transition period.

Question 22

Where does Esploro/Converis fit within the Clarivate Library Solutions?

Will it become part of the Esploro, or will it be moved to Web of Science?

Answer:

Esploro and Converis are part of the Clarivate Academia & Government business segment, along with library software. Esploro continues to be part of IGeLU and ELUNA, and Esploro customers benefit from integrations between Esploro and many other Clarivate products – for example Web of Science and InCites (a recent example is the asset metadata enhancement from Web of Science), and Leganto and Alma (a recent example is creating Esploro teaching activities from Leganto and Alma courses).

As presented in the Web of Science Research Intelligence session, the new next gen solution will be the upgrade path for the Esploro portal and profiles, and together with the Specto team we are looking into the best solution for the Esploro Institutional Repository. That said, there are no sunset plans for Esploro, and customers will be able to upgrade to Web of Science Research Intelligence at their own pace. Converis will continue as a separate product.

Question 23

On Friday, July 19, industries worldwide were impacted by a global IT outage affecting 8.5 million Windows PCs and servers connected to the CrowdStrike security platform. Alma and Primo were also unavailable for many hours, but the most status page was all green. We believe the most center is running on Linux. What is the critical system component running on Windows that is not covered by the uptime monitoring system?

Answer:

The CrowdStrike event was certainly an extraordinary event that impacted almost all areas of our life. Clarivate managed to recover from the CrowdStrike issue in less than 13 hours while it took many other affected companies around the world several days.

There were various levels of impact on some of our products. In terms of the impact on Alma and Primo, most customers were not impacted by the event – Alma and Primo were up and running for most customers. The affected component for Alma and Primo was our Windows-based identity service, which facilitates internal user management in Alma. Most institutions integrate our products with their own institution's authentication system and therefore were not impacted. To sum up, for Alma & Primo the issue with CrowdStrike only impacted institutions that relied on the Alma identity service to log in to our systems. An official root cause analysis (RCA) was published by Clarivate following the event explaining the details.

Question 25

How is the AI Advisory Board meant to work/influence on the development of products?

Answer:

The Clarivate Academia AI Advisory Council serves as a global forum for senior library and academic leaders to guide the responsible adoption of AI in academia. It influences Clarivate Academic AI product development by:

Identifying priorities: Sharing and validating key GenAI use cases to address academic needs

Establishing guidelines: Providing advice on principles for ethical AI, including transparency, anti-bias, and pedagogical integrity, to shape product design

Knowledge sharing: Sharing expertise and real-life AI initiatives from across the academic spectrum

The Council helps us ensure that our AI solutions align with academic values and address real-world challenges, fostering trust and impact.



Question 26

What is Clarivate's default policy on opt-in/opt-out and "activated/turned on by default" when introducing new functionality and features?

Answer:

We understand the importance of giving libraries control over when new features are introduced, therefore most of our new features are "opt-in" by default. The exception is larger upgrades when all users must adopt the new functionality, but in those instances, we give plenty of lead time and communicate frequently to prepare our customers.

Question 27

What happened to The Azriel Morag Award for Innovation?

Answer:

Thank you for asking about this important award, in honor of the founder and first CEO of Ex Libris, Azriel Morag, and his immense contribution to the academic library world. Azriel believed in innovation, daring, and the power of individuals to make a difference. This award, with a value of \$3,000, was started in 2014 to carry on his legacy. The Azriel Morag Award for Innovation will be given to an individual who demonstrates exceptional innovation and initiative during the two years leading up to the date of nomination. The winner's accomplishments and the institution that the winner is associated with will be publicized globally.

We invite the international Ex Libris community to submit nominations of qualified individuals by *May 31, 2025. The winner will be announced at the 2025 IGeLU conference.* The panel of judges consists of representatives of Ex Libris/Clarivate and our international user groups (ELUNA and IGeLU).

For more information about the award and submission guidelines, see <http://www.exlibrisgroup.com/category/AzrielMoragAward>.

Thank you

