

Ex Libris General Questions & Answer
10th IGeLU Meeting
Session 9
September 3 2015

Minutes taken by Dave Allen, Mark Dehmlow and Peter Klien
(as at 2015-12-11)

Ex Libris staff on the panel:

- Matti Shem-Tov, President and Chief Executive Officer
- Bar Veinstein, Corporate VP Resource Management Solutions
- Dvir Hoffman, VP Product Management and Marketing
- Oren Beit-Arie, Chief Strategy Officer
- Shlomi Kringel, Corporate VP Discovery and Delivery Solutions
- Shlomo Sanders, Chief Technology Officer
- Yair Amsterdam, Chief Operating Officer

Moderator: Peter Klien, Austrian Library Network (OBVSG)

Question 1 - Asia Pacific region support

We are an international campus of Monash University located in Malaysia. What are Ex Libris' plans to support customers in this region, particularly for customer support and training? I understand Ex Libris has a regional office in Singapore which mostly concerns itself with sales. For the long term, what are Ex Libris' plans in the Asia Pacific region?

Yair: Ex Libris is committed to supporting the APAC customers. Ex Libris has transferred two support people to APAC. The support personnel are Alma/Primo and Rosetta experts. Ex Libris has also transferred an additional person to provide support in Korea.

Questions 2 - Alma performance

Earlier in 2015, an Aryaka performance enhancer was introduced to the Singapore data centre with a stated 10% improvement in speed and performance. Are there any plans to further improve Alma speed and performance and if so when?

Yair: Ex Libris is constantly monitoring and researching options for performance improvements. Performance monitoring is being undertaken from the customer's side. In 2015 Ex Libris had identified subpar performance. As a result they changed CDN performance and there has been a performance improvement of about 30%. It should be noted that the performance improvement becomes more noticeable as you get further away from the data centre.

Bar: Ex Libris is investing in speeding up product performance. Ex Libris are also working with ISPs to ensure optimal network paths to the data centers. For example in the APAC area, Ex Libris is working with AARNET (Australian Academic Research Network) to optimise traffic flow. Ex Libris have indicated that they are happy to enter into joint conversations with customers and their ISPs to optimise traffic flow to the data centres.

Question 3 - Alma Digital

In the earliest days of Alma, a Digital Asset Management component was offered for an extra fee. Work on that functionality is moving forward. How is this "module" priced if bought with Alma?

Dvir: Pricing is based on a combination of metadata and how the digital objects are stored. Pricing is affected by whether the digital objects are stored in the Ex Libris Amazon S3 storage or customer supplied storage.

Customers can expect a lower pricing structure if using the Ex Libris Amazon S3 storage compared to the older option of storing the digital objects in the Ex Libris data centres. Ex Libris has brokered a special price with Amazon for storage.

Question 4 - Alma Digital

I recently heard that if an institution has Rosetta and Alma that they would need the digital module in Alma. Is that the case? If so, please explain the gain in functionality. Is the cost included in Rosetta or is it extra?

Dvir: If harvesting descriptive metadata (from for example Rosetta) into Alma then the only cost is the costs associated to metadata management in Alma.

Question 5 - Alma Digital

What are your final plans for Alma Digital?

There are 3 main phases.

- Phase 1 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 end of 2016 which will support full Institutional Repository functionality.

Question 6 - Primo in conjunction with Alma

We have been told that you would need to change from Primo local to Primo SaaS in order to use Alma. Now it looks like this is not necessary. Would you please clarify?

Shlomi: Ex Libris still has a lot of local Primo customers. Ex Libris indicated that for customers moving to Alma the best solution is to move to Primo SaaS. Primo SaaS has a smoother integration with Alma as it has been optimally configured for integration with Alma.

If the existing customer does not want to migrate to Primo SaaS then this can be discussed on a case-by-case basis with Ex Libris.

Ex Libris are no longer supplying Primo Local or Direct options. Ex Libris would like customers to migrate to Primo SaaS but will continue supporting Primo Local / Direct until the site makes the transition to Primo SaaS.

Ex Libris reiterated that they are not forcing existing Primo Local / Direct customers to Primo SaaS

Question 7 - Alma and Primo Analytics

Ex Libris is using Oracle Business Intelligence for Alma and Primo Analytics and Reporting. Some SaaS customers' reporting needs will go beyond the pre-packaged options or require combining Alma & Primo data with other sources. Are there any plans for bulk data download or streaming APIs for these customers who wish to use their own Data Warehousing and Analytics solutions? If not, why not?

Bar: There are a lot of export capabilities currently available.

For customer data warehousing, customers would need to carry out incremental data exports using existing publishing mechanisms. Large exports will affect other customers in the SaaS environment. It should be noted that Analytics was not designed to be a tool to export all data.

Ex Libris are looking at options to accommodate the requirement for data extracts for data warehousing.

Question 8 - Alma and Primo Analytics

We, and other several institutions that I know of, were promised "access to ALL of our data" for reporting purposes via Analytics. I have been told recently by Ex Libris that Analytics is "not a reporting application." If Analytics will not be fully open for "reporting purposes with full access to all of our data", is Ex Libris considering an alternative "reporting tool" for Alma and Primo? Reporting is important to libraries.

Bar: It was reiterated that Analytics is a reporting tool and that it is not an exporting tool. Analytics does not use the operational database, instead, Analytics uses a normalized version of the operational database. This normalized version has been optimized for report querying.

Analytics is meant to be a data warehouse and it is a star schema which is quite different to the operational database.

Ex Libris are adding fields frequently to the Analytics database. Due to the nature of Analytics databases it can take some time to add additional fields as there may be a requirement to redesign the normalised database.

Ex Libris has indicated that they will make all data available to the customer base but it may take time to complete this task.

Question 9 - Analytics

What plans do you have to ensure Alma Analytics provides a stable platform and keeps data current? The APAC servers we use have not been as unstable as the European servers, however, we often receive a message stating that "...Alma Analytics data will not be refreshed today in your environment." This lack of current data impacts scheduled reports.

Shlomo: Ex Libris is aware of the problems with nightly refresh.

Resolution has involved taking a 3 step process to fix these issues

- Ex Libris are making incremental refreshes
- Ex Libris are making changes to the physical infrastructure
- Ex Libris are rolling out the fix across the different data centres

The fixes have resulted in a 75% time savings in refreshing the Analytics database.

Ex Libris indicates that the updated environment will be rolled out across all of the data centers by November 2015.

Bar: There was an issue with Oracle. Oracle has significant bug in OBI that created the problems. This issue was prevalent in the EU data centre which had a negative impact on performance.

Ex Libris indicated that the Analytics refresh is now taking between 2 to 3 hours.

Ex Libris' long term roadmap includes a plan to refresh the Analytics database more regularly than the current daily refresh.

Question 10 - Analytics

Is there some sort of performance monitoring option available for Analytics?

Shlomo: There are various performance issues in OBI. Ex Libris have been working closely with Oracle to configure the system to solve the performance problem.

Ex Libris does internal performance monitoring and are currently working with Oracle for more proactive monitoring.

Ex Libris proactive monitoring means that they see problems before the customers notice the problem.

At this stage there are no customer monitoring options for the customer base and Ex Libris believe that there will be no need for this requirement as monitoring of the environments is an Ex Libris issue.

Question 11 - Cloud status page and Alma Analytics

The cloud status page is a big help to users, but it is not always clear to me how the status page works when Alma Analytics are down or are not refreshed. Is Ex Libris consistently monitoring this very important component of Alma? Is this simply indicated by the 'i'? How does Alma Analytics downtime effect the overall calculation of uptime for Alma?

Yair: Ex Libris monitors Analytics as part of the 24/7 hub. Analytics is considered a component and is not counted as a system down unless all of Alma is down. Ex Libris will use the 'i' icon to indicate if there are any non-downtime related issues.

Down time calculations are based on unscheduled system downs.

Bar: Ex Libris are monitoring and trying to identify problems before the customer. They have many sophisticated monitoring tools. Ex Libris undertakes central monitoring.

Ex Libris expressed concerns that if customers carry out their own monitoring, systems resources will divert to monitoring resulting in a negative impact on the environment.

Question 12 - UStat

What is the roadmap for UStat? Will it be integrated into Alma not just via Analytics but as functionality of the system? What are the plans of being able to load other formats, e.g. MR1 (Multimedia Report 1)?

Bar: Yes and yes. Ex Libris are integrating the functionality of Ustat (counter and sushi report) into Alma Analytics. Ex Libris are working on integrating the functionality of Ustat in the first half of 2016 and adding additional 'counter' reports incrementally.

Question 13 - Alma and third party discovery tools

What is the status of Alma integration with Summon or third party discovery tools such as VuFind? Alma is supposed to be open standards based, so this should be a core feature of Alma to integrate it with any resource discovery product.

Oren: Alma has about 100 API queries. A subset of these queries support discovery. All Alma customers have access to it. Some institutions are using the APIs with their open source or home grown implementations. Commercial implementations require a commercial license. API queries are open to Proquest who currently have a commercial licence.

Question 14 - Alma and Linked Data

Our institution received an invitation to participate in more BIBFRAME testing with Zepheira. In the email Zepheira staff said, "Zepheira has had several meetings with Ex Libris on how our organizations may collaborate on the evolution of Linked Data and BIBFRAME." Would you please share with the audience your thoughts on how organizations may collaborate on Linked Data and BIBFRAME?

Shlomo: Ex Libris is moving LOD into the development stage. Some URIs have been developed. The SIWG over the last 2 or 3 years has pushed this agenda forward. Ex Libris have indicated that BIBFRAME is still not quite there. BIBFRAME have released a first iteration and are now working on a second iteration. There are various developments of linked data in the road maps of each product. Ex Libris will be shortly formalizing a call for participation in contributing knowledge to the design of those features.

Oren: Ex Libris are committed to and will follow the guidance and progress of the Library of Congress.

Question 15 - Alma link resolver

SFX is one of the best link resolvers on the market. One would hope that lessons learned and functional requirements needed by users would have been applied to the Alma Uresolver. Would you talk a little about the challenges, resources, and/or timing it would take to move Alma in that direction?

Bar: Ex Libris would argue that the Alma resolver is stronger than SFX already. The technology in Alma is totally different than SFX and a result SFX could not be loaded into Alma. The vision is to make Uresolver better than SFX.

Ex Libris are planning to allow cross referencing of usage data in Alma - for example usage cross referenced with discovery.

It is expected that the gap between SFX and Alma will be closed by 2016

Question 16 - DigiTool

What is the roadmap for the next two years for DigiTool both on its own and in relation to Alma and Primo? When will DigiTool 3.4.4 that was announced for Q2 2015, be released?

Dvir: Ex Libris plans to continue and support DigiTool. There are no plans to drop support. Ex Libris will continue to provide bug fixes. DigiTool version 3.4.4 will be released in the coming weeks.

At this stage Ex Libris has not issued any dates when DigiTool support will be closed.

Question 17 - Rosetta and SaaS

Does Ex Libris have any plans to offer Rosetta as a SaaS product? Why don't you follow Amazon's strategy and offer a huge cloud space for your customers?

Matti: Rosetta has only been an on-premise solution. Alma-D will provide learnings on using Amazon services. This information will be used when revisiting Rosetta as a local installation. At this stage Ex Libris will not manage storage for Rosetta and will instead push storage out to Amazon.

Bar: Bar reiterated that there is only Alma -- there is no Alma-D.

Question 18 - Proprietary data format

From an interoperability perspective it is very resource intensive, time consuming and inefficient to use and reuse proprietary data formats between Ex Libris products as well as other tools and products. Is Ex Libris considering implementing some kind of integrated universal data format and/or platform in order to enable more efficient and innovative data management across all products?

Shlomo: The only universal format Ex Libris know of is MARC. There are so many formats of linked data, which do you choose? There is no universal format. Ex Libris do ask how they can make data as universal as possible. Ex Libris are moving towards it, but there is no easy, simple solution. They are working to bring Primo in alignment with the Alma data standard but this will take some time.

A further question was raised about a standard platform. Shlomo responded that there are no standard formats.

Question 19 - API limitations

Why did Ex Libris introduce API limitations on Alma (based on the number of named Alma users) without any announcement or warning? When we bought Alma, this was never indicated to us. Can we expect similar limitations in the future?

Bar: Ex Libris has invested a lot in APIs. Ex Libris didn't know they were going to do governance threshold on APIs 2 or 3 years ago. It is because 100s of customers share the infrastructure, so you don't want one customer to impact others. Ex Libris has had a situation where a small customer unintentionally created a large negative impact on the environment. Ex Libris are trying to find ways to increase the API thresholds. Ex Libris has indicated that they want to support any regular needs.

Follow up question: You handled it from the technical perspective, but what about the communication?

Bar: Ex Libris needs to communicate better on issues like this in the future.

Follow up question: What happens if an institution hits the threshold?

Bar: Ex Libris did an analysis over a 6 month period to come up with the threshold. The threshold is based on named users and reflects the sizing of the system. Information to date indicates that no customers have reached the threshold limit.

Follow up: What was the logic of named users for API? They bought named users based on what they thought they needed. Why not allow institutions to buy more API calls?

Bar: The idea is not to charge for APIs, they don't want to create packages. They tried to create thresholds that reflect normal usage.

Question 20 - Enhancement requests

There are so many options for adding CKB enhancement requests: NERS, Salesforce, potentially Idea Exchange. What is the proper tool to use for advancing these requests?

Yair: They get many requests for collections for the KB. NERS voting is one way. The second process is logging a request in Salesforce. Customer can vote in Salesforce. Idea Exchange is not meant to be for voting. Targets should not be logged into Idea Exchange.

Question 21 - Customer Appropriate Usage

Ex Libris posted a document called "Customer Appropriate Usage" to the Doc Portal with no announcement. The document is meant to outline appropriate and inappropriate customer usage, including penetration tests or auditing of Ex Libris software or services. The document further notes that these restrictions are for protection of the cloud infrastructure. Please explain, in more detail, the reasoning behind the document and other examples of what is or is not included in "inappropriate" usage?

Bar: Apologized for lack of communication. It is part of contracts now to not allow penetration testing, for example. Security auditors for ISO 20071 recommended that they publish this policy.

Question 22 EBSCO metadata

What is the current status of the work to include EBSCO metadata in PCI?

Question 23 - Ex Libris Strategy: Research Information

Is Ex Libris planning to become a CRIS (current research information system) supplier?

Question 24 - Ex Libris Strategy: Research Data

As the IGeLU opening keynote has shown, the field of research data is becoming more and more important for academic libraries. What are Ex Libris' plans in the area and what is the timeframe?

Oren: Not currently looking to be a CRIS. Ex Libris did an extensive study and decided to not get involved. Supporting research and the lifecycle of research data management is important to them and they are looking to integrate functionality to support it in Primo, Alma and Rosetta. They are starting the process of understanding the needs of full cycle research data lifecycle management.

Question 25 - Developer's Day

For the first time ever, the IGeLU community this year has organized a Developer's Day following the IGeLU meeting. How does Ex Libris think about it?

Shlomo: Ex Libris think it is great initiative.

Question 26 - oMbiel and campusM

What are your plans with the newly required company "oMbiel" and its product "CampusM"? Are you going to maintain these two as separate brands or are you planning to fully integrate them into Ex Libris' corporate design and structure?

Question 27 - oMbiel and campusM

What will be the impact of your acquisition of oMbiel? What synergy will this bring to existing products? What direction does Ex Libris want to go in with oMbiel?

Covered in the previous day's information session.