



# **EX LIBRIS GENERAL QUESTION & ANSWER**

9th IGeLU Meeting

Session 13

Oxford, 17 September 2014

## **QUESTION 1**

Salesforce

What plans does Ex Libris have to improve turnaround times on the resolution of Salesforce cases, particularly in light of the increasing number of libraries adopting Alma? Are there plans to increase the size of the Alma support and development teams as more libraries come on board?

## **QUESTION 2**

Support cases closed without timetable

Why are support cases / development requests being closed, particularly for Alma, without a date / release when it will be fixed? Whilst it's good to know that they're on the roadmap it makes it difficult to plan and to keep our colleagues informed if we have no timescale for when issues will be resolved.

### **QUESTION 3**

Telephone support?

We frequently use Ex Libris support in order to solve problems with our products (SFX, Primo). Unfortunately the technical assistance is not very efficient:

- Slow response times
- Difficulties in understanding the problems, especially at the first line of analysis
- Excessive slowness in solving cases: sometimes the initial scenario has changed at the closure of a case
- Unresolved problems after many messages

**Could you also provide a telephone support service, maybe managed by local Ex Libris offices?**

## **QUESTION 4**

### Primo and Aleph Support

From our perspective the (German) Aleph support is far better than the one for Primo. Examples: 1) Relevant answers (non-templates) are given faster. 2) Better understanding of given descriptions and the affected environment.

**What kind of outlook can you give for the Primo support?**

## **QUESTION 5**

Support for local installations

What is Ex Libris' strategy for providing services (example: for upgrades) for local installations with the concentration by Ex Libris on the cloud? How will Ex Libris ensure that the competence for supporting institutions using local installation will stay at Ex Libris?

## **QUESTION 6**

Hosted versus local installation

On Monday morning Ex Libris has shown us the impressive percentage of new customers which are hosted by Ex Libris. Are there any plans to draw existing customers with local installation into Ex Libris hosted environment?

## **QUESTION 7**

Performance of hosted products

Customers of various products hosted in the cloud have seen sluggish response times and jobs/processes either failing or taking a very long time - either when the customer is new to that product or when the products have been used for some time but performance is suddenly degraded.

**What steps are Ex Libris taking to make sure that all hosted products are performing satisfactorily and in a stable environment especially as many new customers are coming online with Primo and Alma?**



## **QUESTION 8**

Alma and the Cloud

Are there any options of Alma NOT being hosted in the Cloud and if yes, can you (attempt to) tell us what the advantages are of choosing this option?

## **QUESTION 9**

Hosting site in Australia?

**Can you talk about issues related to having a hosting site in Australia, as opposed to hosting Australian customers at the Singapore site?**

## **QUESTION 10**

Page down message

We are a Cloud customer. Our Primo is maintained by the Ex Libris Cloud team. Several times a year we have a short downtime when Service Packs are installed. What irritates me and my customers is, that during the downtime of our Primo web server no meaningful ""Maintenance! Please come back later." message is shown.

**Can the Cloud team in our data center please find a workaround for this situation?**

## **QUESTION 11**

### Data security

The Ex Libris Privacy policy found at the web-page states among others: “We may share or transfer Personal Information (i) as directed by our library customers, to whom Users originally disclosed their Personal Information; and (ii) as may be required by law. Can personal information be disclosed to US government authorities, if a US court orders Ex Libris to transfer this kind of information? Not long ago Microsoft was ordered by a US court to disclose personal information although this was stored in Ireland.

**Please clarify your position regarding protection of personal information of users from EU-libraries which are hosted in Amsterdam.**

## **QUESTION 12**

Data security and privacy in hosted solution

How does Ex Libris prevent unauthorized access to the personal data in their hosted solutions? Are our data in the centers in Amsterdam, Chicago and Singapore secure? Why doesn't Ex Libris choose an European data host who must not follow the patriot act?

## **QUESTION 13**

### Alma Community Zone

Currently, the Alma Community Zone incorporates global authority files from the Library of Congress (LC), the United States National Library of Medicine (NLM), and the German National Library (GND).

**Does Ex Libris intend to integrate \*soon\* other main global authority files, like those of the French National Library (Autorités BnF, RAMEAU) or the Virtual International Authority File (VIAF)? If so, when?**

## **QUESTION 14**

Alma and agile development

If Alma is really an agile product, then why is the customer feedback not incorporated in the product using a regular enhancements cycle? Development partners or individually speaking to institutions does not really qualify Alma to be a true agile product, neither does monthly releases. Can you please respond?

## **QUESTION 15**

Integration of Alma and Rosetta

What is Ex Libris' vision concerning the integration of Alma and Rosetta? Which system is going to handle which part of digital asset management in practice? Is there a roadmap for the integration and if so, what does it look like?



## **QUESTION 16**

Rosetta and DigiTool

In recent presentations of Rosetta Ex Libris claims it to be a complete digital asset management and preservation solution. Which are the features supporting digital asset management - as opposed to preservation related activities? Is there a roadmap for when Rosetta will replace DigiTool as a product?

## **QUESTION 17**

Knowledge Bases in Alma, SFX and Primo Central

Can you please explain the way Ex Libris handles the existence of KBs for SFX, Alma and Primo Central. There is a partial (though not full) overlap in requirements from these systems, and even some dependencies.

**In what way does Ex Libris make sure all KBs are kept in sync and at the right quality level?**

## **QUESTION 18**

Primo Central content

How do you characterize the content scope of Primo Central today and where do you want to go within the next three years? What kind of publication types you want to integrate and who are your preferred partners on the publishing side? As a library with a focus on STM we would be happy about patents and standards for example.

## **QUESTION 19**

Strategy for UStat?

What is the strategy of Ex Libris for UStat?

Will UStat stay as a stand alone product and development?

If it will be developed, is this development in cooperation with Alma analytics?

If it will be developed, when can we use Ustat for books counter data?

## **QUESTION 20**

IPv6

**Are your products IPv6 compliant?**

**What is the roadmap for migration for those that aren't?**

## **QUESTION 21**

Change management in LMS?

Aleph and/or Alma : As admin tasks create a bottleneck situation we're looking at alternative workflows that would enable us to "outsource" recurring service requests such as password resets so that our systems librarian can focus on incident management instead.

**How will change management and service management processes be supported by future version of the library management system?**

## **QUESTION 22**

### Quality Assurance

Quality Assurance is a big issue in various Ex Libris products. As an example, there was a Primo Hotfix within two days after Service Pack 4.8.

**Why not use automated regression and integration testing tools for this? If you do use it, then why is it not finding out issues?**

This is not a new issue. Year after year, this keeps happening and customers are getting really frustrated. Furthermore, please don't answer the question by saying you should be on the Ex Libris cloud.

## **QUESTION 23**

### Quality Assurance

After an upgrade to Aleph 22 we have experienced major difficulties with printing from the client. The reason is unclear, but seems to have something to do with integration of a third party software called Bersoft HTMLPrint (a new version of this s/w was used for Aleph 22). Problems are: 1) It is not possible to copy from the preview window (a degraded functionality) 2) In some libraries the system is unable to print to a default printer. This raises questions:

**Which policies does Ex Libris follow when using a third party product in their own products? Does Ex Libris test integrations with third party products especially prior to rolling out a new release or SP?**



## **QUESTION 24**

### Quality Assurance

I am concerned with the quality assurance of product releases and versions. There are continuing issues with monthly releases breaking functionality in Alma. There always seems to be something major in the Primo upgrades. Even the most mature Ex Libris products have not been exempt from serious problems (for example the recent disappearing display rules in SFX).

**Please explain how Ex Libris plans to remedy these issues? Does/will Ex Libris use automatic iteration testing and regression testing in their quality control?**

## **QUESTION 25**

### Quality of metadata

We import records from our vendor, e.g. Alexander Street Press (ASP) and Ebook Library (EBL), or from a 3rd party supplier, e.g. Serials Solutions, because they are of a higher standard and offer more chance for discoverability than the records in EL products. ASP assure us that the same file is provided to EL as is made accessible via their website for customers who choose to download directly.

**What is Ex Libris doing to improve the quality of the metadata records in PCI, SFX, CZ?**

## **QUESTION 26**

### Ex Libris vs. OCLC in The Netherlands

In the light of the recent agreement between UKB, the association of the 13 Dutch university libraries and the Royal Library, with OCLC about moving the national ILS platform from the old PICA/OCLC union catalogue platform to Worldshare, and the tight integration of the new public libraries National Catalogue with the PICA/OCLC union catalogue –

**What are the options for Ex Libris Alma in The Netherlands, especially in respect to the four Aleph libraries?**

## **QUESTION 27**

Accessibility standards

**Would Ex Libris be willing to have an external company audit their Primo/Alma code for conformity to common programming and accessibility standards?**

## **QUESTION 28**

Move towards linked data?

At the IFLA 2014 Satellite Meeting "" Linked Data in Libraries: Let's make it happen!"" in Paris August 14th, Shlomo Sanders announced a move towards linked data. He mentioned that all internal references in Alma, Primo and Primo Central will use URIs and that the move towards linked data in these services will be divided into stages.

**Could we please get a clearer understanding of the underlying strategies, the timeframe and how - in practice - this move will change the internal systems and end user services?**