

EX LIBRIS GENERAL QUESTIONS & ANSWERS

11th IGeLU Meeting

Session 13

Trondheim, September 7 2016

Minutes taken by Dave Allen, Mark Dehmlow and Peter Klien (as at 2017-01-20)

Ex Libris staff on the panel:

- Bar Veinstein, Corporate VP Resource Management Solutions
- Bettina Forster, VP Professional Services Europe
- Jane Burke, VP Customer Success
- Ofer Mosseri, Corporate VP and General Manager Europe
- Shlomi Kringel, Corporate VP Discovery and Delivery Solutions
- Yair Amsterdam, Chief Operating Officer

Moderator: Peter Klien, Austrian Library Network (OBVSG)

Question 1 - Response times for support incidents

I am unable to create set of users with "SSO_ID" and "email addresses". I already raised a Salesforce ticket and there is no response so far. Can Ex Libris please advise what they believe is a reasonable response time (in days) for a normal priority support call submitted to the Ex Libris support portal?

Yair - initial response time commitment is 24 hours for high priority, 48 hours for a normal priority. They have an internal target that issues are handled by tier 1 within 14 days. After that it goes to tier 2. They endeavor to have a proactive updating. In this case, they didn't meet the SLA are are looking to fix it.

Question 2 - Upgrade is bringing resolutions - and new bugs

We have a situation where a particular Alma functionality was working but an upgrade has prevented it from functioning as per the published manuals. The response in Salesforce is that it will not be corrected for 6 months. We would have hoped that introduced defects in an agile environment could be fixed a lot sooner. Salesforce case #00237660, Title: 'Suppressed' records being published to Libraries Australia'. Could you please explain processes and policies around correcting defects that have been introduced into a product upgrade?

Yair - When they break functionality in upgrades, it is called a regression. They treat it as a high priority. When they identify a regression, they look to fix right away with a hot fix injection. The priority is always top. One challenge is determining whether something is a regression or a bug. The escalate regressions from tier 1 to development immediately. For the community, it is helpful to identify breaks as a regression.

Bar - This was raised to them on Sunday. The issue is that this wasn't identified as a regression. They are looking into it and want to fix it sooner.

Lazlo from McQuarrie - When features that are broken, when told a long standing feature is broken, you

have to put in an update request, when it is a feature that used to work, is problematic.

Bar - Not aware of the specifics. There are rare situations where a feature that was used by customers was not working according to the original design, but a customer got used to it. Customers can use the escalation process to address issues that are felt to be very problematic. Bar invited Lazlo to raise it to him later.

Theo - Why not add a category 'regression' in Salesforce.

Yair - Just putting 'regression' in the sales force title can save a lot time.

Question 3 - External / Social Authentication in Alma

When internal storing of passwords in Alma and Primo will be disabled in the next 12-18 months, will Ex Libris provide an external authentication mechanism of their own, as an alternative for the so called 'social' login with Google / Facebook / Twitter?

Question 4 - Internal authentication in Alma

Is the reason for removing Alma internal authentication related to the PDS security alert in July?

3) and 4) Bar - We should apologize for not communicating about the change well. Ex Libris is working to issue more detailed information soon. Primo doesn't have passwords. They are planning to disable passwords for internal users because they are improving security practices that are used. Now they require data from self checks to be encrypted. What they received from auditors is that they are not as secure because they store passwords locally and that they need to change it. So they came up with the social authentication because it would be easy. They understand that not every library is willing to do this, so they are looking at other options - for example Microsoft Azure AD in the cloud. They will work together with the community to develop other ways to perform authentication.

The pds example shows why they shouldn't be doing this. PDS was created a long time ago out of necessity before there were mature, secure methods. They don't plan to be an identity manager in the future.

Masud from Lancaster - Have you considered market issues like in the UK where they won't allow Microsoft Azure authentication or social authentication.

Bar - They are still working through creating a plan. There are different options. The feeling is that local passwords are a back door that represent a big security hole. They are eager to hear more ideas to work things out.

Christian from Mannheim - Really afraid of being locked out from their Alma system. They only have 8 - 5 service.

Question 5 – Community Zone

From two Salesforce incidents we got the information that Community Zone (CZ) updates by Alma customers are not overwritten and/or merged with Alma CZ enrichment and/or vendor records. On the other hand the service level agreement states: "Records edited by a member of the community can be merged with incoming enhanced vendor records, which could cause edits to be overridden." In practice we already noticed that records are overwritten, or at least that local fields have disappeared.

Could Ex Libris please give us a clear answer on this matter? It is important for our network policy, do we have to copy every record to the network zone or can we use the CZ records?

Question 6 – Quality of Community Zone Records

When will the overall quality of the records in the Alma Community Zone be improved? At present the record quality is inconsistent and often poor. This impacts search and discovery via Primo. The CZ is a fantastic resource but the company now needs to ensure that only full level records are contributed to the Zone for use by libraries.

5) and 6) Jane - In fact, enhancements can overwrite a CZ record. The policy is correct. It was created by a working group who defined the governance of the CZ. Ex Libris wants to invite discussion about it. There may be a need to refresh the Alma working group looking at this.

Journal records in the CZ are all CONSER level records. The content team that is coming in from the ProQuest side include CONSER trained catalogers and we should see improvements. eBook records are a problem across the profession. Ex Libris has a number of processes they are developing to improve the overall quality of records, but quality is a general issue from vendors.

Abul from Leuven - You do have the opportunity for the community to improve the records, but if data is overwritten, the effort is lost.

Please find a solution and to reconsider the current policy.

Jane - We should get feedback on how to enhance the existing policy.

Abul - Important to consider more than just English.

Question 7 – Alma RTA agreement with EBSCO

Last year Ex Libris presented an agreement with EBSCO which contained among others an Alma RTAcq (Real Time Acquisition) integration with EBSCO's vendor platform. What is the current status of this agreement?

Bar - agreement still in place. The status is that it is in the process of being tested. Testing with the University of Manitoba. The work mostly needs to be done on the EBSCO side. There are some issues being worked through.

Question 8 – Regional specifications in Alma development

It seems that when Alma functionality based on national or regional specifications is developed, e.g. ILL and copyright requirements, some countries are occasionally forgotten. Please explain why requirements for all countries Alma is sold to aren't available at the same time? If this is impractical - what is a reasonable timeframe to expect all national/regional requirements to be included for a specific functionality?

Ofer - We understand how wide and diverse the community is.

Eventually it is a matter of balancing requirements with resources to accomplish. Niche requirements come from different markets and require prioritization. They will look at how to reuse work done for other countries.

Question 9 – Alma Mobile

Alma Mobile was introduced with the slogan "Leave your desk and boost your productivity". But the

slogan could as easily have been: “Work everywhere at every time – forget about your private life.” Librarians of course are hardworking people, but do you think many of them will want to do cataloguing on their mobile phone? I don’t want to be expected to do office work while lying in the green grass.

Jane - Alma mobile is being developed to give techniques to manage physical items - like pick list and charge. They are things to help move around the physical collections easily. They would like the library to be like an Apple store where there is ease of providing service.

Question 10 – Alma Digital - and Rosetta

We are investigating using Alma Digital for scanned readings, open access image collections, and as a learning object repository. In testing we have identified that key functionality is not yet available i.e. being able to suppress digital representations (readings) and being able to publish digital content to Google (open access). What are the plans for Alma-D in this regard? Are there any plans to develop Alma-D as a repository? How does Alma-D's development fit in with Rosetta?

Bar - The digital functionality in Alma today should be viewed as a repository. As they grow the digital management functionality in Alma, there will be some overlap with Rosetta, but Rosetta is a full functional digital repository and preservation system. There is a good integration between Alma and Rosetta. They don't feel they contradict each other.

In terms of suppression level, the system is designed to suppress at title level. If someone could bring the business case to them, they would be open to discussion. They do plan to have publishing to google scholar on the roadmap.

Rosetta is also an on-site solution only.

Question 11 – Alma uResolver and SFX

Can Ex Libris please outline any plans for Alma uResolver? It is far less sophisticated than SFX and we're interested in Ex Libris' plans to build more of the functionality currently available in SFX into uResolver.

Question 12 – Alma uResolver and 360 Link / Summon IEDL

Can Ex Libris please outline any plans to develop uResolver functionality? For example, are there any plans to incorporate ProQuest’s 360 Link/Summon IEDL (Index Enhanced Direct Linking) technology into uResolver?

11) and 12) Jane - There are inherent difference between SFX and uResolver because uResolver is not stand alone, it lives within the entire Alma ecosystem. They feel Alma has equivalent functionality to SFX. They do feel they can improve the documentation. There are some changes on the roadmap. Their is an intent to include IEDL into Alma.

The functionality will be tested by libraries by the end of the year.

Lukas - University of Amsterdam - Is it worth looking at a more module architecture for Alma?

Bar - SOA failed. You can do it in small systems, but large systems it is a challenge.

Question 13 – Root Cause Analysis for Cloud Customers

I have just read the latest RCA report on an Alma outage and have a couple of questions / comments:

1. the RCA reports should have a date of publication so that we can easily see if an update to the RCA has been published.
2. due to the long time delay in publishing the RCA it would be great to have a RSS feed / email alert that you can subscribe to.
3. I think it is great that Ex Libris have made all of their documents freely available on the Internet - however I am wondering about the 'confidential information' statements -- the statement language is at odds with the fact that the documents are now freely available to anyone on the Internet?

Yair - We agree. Usually the goal is to publish within 14 days.

They had delays in this RCA because they had to work with a third party. They agree that confidential information statements should be taken out of open documents.

Question 14 – Interoperability between Alma and Aleph

Since we will go live very soon with Alma and Primo, I'm desperately trying to find out a few things about Resource Sharing. For example, is it possible to do ILL/DD (Interlibrary Loan / Document Delivery) with Aleph libraries?

Yes.

Question 15 – Interoperability between Alma and Primo Sandbox

We are interested in being able to publish from our Alma sandbox to our Primo sandbox because we want to be able to test changes in the Alma sandbox and see how they look in the Primo sandbox before committing these changes to production. Does Ex Libris plan to allow libraries to publish from an Alma sandbox to a Primo sandbox? If Ex Libris doesn't plan to allow this development, could you please explain why?

Bettina - They can address it now. It is possible to connect sandboxes because the systems are now aligned. They are able to link the sandboxes. You can test with 10,000 records. Refreshes impact both systems.

Question 16 – Institutional repositories in PCI

In 2013, Ex Libris started to include Open Access institutional repositories in PCI. At the beginning of the program, Ex Libris communicated a lot and integrated many IRs in PCI (69 until September 2014). There are now 75 IRs in PCI and no new IRs added since December 2015. Moreover, not all records from those IRs were effectively in OA (false positives, eg. campus restricted access). Customers and end-users have been complaining about that. Ex Libris does not communicate anymore about the program. Is it stopping? What is Ex Libris' strategy about the integration of IRs, or other analog free resources, in the new index in terms of quality and quantity?

Shlomi - They encountered some problems with poor quality from the IRs and it introduced noise into the system. They put the program on hold. As part of the shared content, looking at both systems and how they handle IR content.

Question 17 – MetaLib and Alma KnowledgeBase

When can we expect to see the database list in MetaLib included in the Alma KB (Community Zone)? This has been promised, but no date set.

Jane - early 2017

Question 18 – ProQuest and Alma Knowledge Base

How exactly is the ProQuest knowledge base going to be integrated with the Alma knowledge base?

Bar - They are looking to add database titles from MetaLib to Alma. Customers are concerned about how this will impact Alma. They are enhancing data with ProQuest data, for example - augmenting data with Ulrich's. The third step will be to align content with Alma. They will work with KBAB about how they start to align the packages. This is not going to come all of a sudden. They are looking what they can do at the level of a platform.

Question 19 – ProQuest and Ex Libris Knowledge Bases

Could we have an update on the progress of merging the Serials Solutions Summon and PCI knowledge bases? Can Ex Libris also advise if the Serials Solutions knowledge base reporting capabilities will be incorporated into either Alma Analytics or Primo Analytics?

Shlomi - The plan is to have a shared content project. First they will map the gaps before integrating the two. Any new content added to the systems today goes through a consistent process. The goal is to have 100% by the end of the year. They are adding OA indicator to Summon. Working toward having the exact same content in both.

They are looking at adding enhanced data for reporting.

Question 20 – PCI records for ebooks

When will Primo Central Index records for ebooks be subject to de-duplication and FRBRization?

Shlomi - There is no plan to do this.

Question 21 – Personalization in Primo and Summon

I think that it is very important that search services offered by the library are neutral and that if any kind of personalization is implemented, it should be transparent and optional for the end user. What is Ex Libris' thoughts on personalization in Primo and Summon?

Shlomi - You need to register for personalized ranking. Now users are able to see that items are ranked based on personal attributes.

Question 22 – Advantages of SaaS versus hosted/Primo direct

Can Ex Libris describe the actual advantages of moving from Primo Hosted/Direct to SaaS? It seems that there are only some disadvantages: 1) PDS (Patron Directory Services) admin is moved from the customer to Ex Libris. 2) The general Installation level configuration is no longer available, identical configurations for multiple institutions will have to be managed redundantly.

Yair - There are some advantages moving to SaaS - enhanced environmental monitoring, release date installs, enhanced capacity, etc.

Local installs can be error prone.

Question 23 – Processes for making feature decisions

Can you explain the relationship between the NERS enhancement voting, the Ex Libris roadmap and the Idea Exchange. Specific example: linking Alma and Primo sandboxes. This was on Round 1 of the Alma NERS enhancement voting, but did not make it to Round 2 due to insufficient votes. Now this feature is being made available in the September release of Alma.

Question 24 – Ideas Exchange Limitations

What is the reason for limiting the number of votes, and consequently the number of ideas that can be submitted per person in Ideas Exchange?

23) and 24) The Ex Libris roadmap is the superset. It allows Ex Libris to iterate on process. NERS is an input to the roadmap. The market place and people's ideas contribute to the roadmap. With NERS, there is a commitment to make features available within 1 year. The Idea Exchange is a place where you can quickly get an idea in front of Ex Libris. When something is planned in Idea Exchange, there is not a formal commitment on time frame.

There is a limitation of 10 points to Idea Exchange is so that one thinks seriously before submitting something to Idea Exchange. The 10 point limitation reverts back when an item is completed, withdrawn, or rejected.

Boaz - University of Haifa - Why aren't all products in Idea Exchange?

Bar - Idea Exchange is not for older products which don't have an agile development process. Will be adding Leganto.

Lukas - University of Amsterdam - Offended that you are protecting us from submitting stupid ideas.

Francois - Liege - We don't get the votes back when something is planned?

Bar - Correct. The idea is to use the points to give some sense of priorities. If there are too many points, it will not be effective for Ex Libris.

University of Bolzano - There is a community filter that people won't vote for less good ideas.

Yair - No one is implying that ideas are not good. We respect all ideas. It's about capacity to review and respond and commitment to do it properly.

Wolfgang from Austria - Maybe there can be a more sophisticated solution. Maybe give more credit to some who have great ideas.

Yair - It is worth reviewing. We were just implementing best practices.

Lazlo from McQuarrie - If idea chose, can I get a bonus vote?

Masud - It would be useful for how Ex Libris defines best practice.

Bar - A lot of vendors do this. Initially there was even resistance to doing it. It would be helpful to give them a chance to continue trying it out.

Question 25 – Ex Libris products and open platform

Ex Libris has mentioned open platforms a lot in their presentations so far. Wikipedia states that "Using an open platform a developer could add features or functionality that the platform vendor had not completed or had not conceived of. An open platform allows the developer to change existing functionality, as the specifications are publicly available open standards." How many of Ex Libris products allow this to happen without intervention?

Shlomi - They are implementing a new framework that allows maximum flexibility with integration to tools like GitHub. Encouraging attending Developers Day.

Question 26 – Situation of the (Library) Market

With the reduction of the number of ILS (Integrated Library System) vendors, where does Ex Libris see its main competition coming from? For example open source products, III, OCLC, etc.

Question 27 – Next generation library systems

Recently we have seen EBSCO announce its investment in and support for Folio as an Open Source and community owned and designed new SaaS Library Workflow Services model. It promises more competition, whereas now the market only shows Alma and WMS as competitors for next generation ILS systems. Can we expect lower prices for Alma and so should customers wait a few years before migrating from Aleph and Voyager?

26) and 27) Ofer - Ex Libris has always had competition and we never underestimate our competitors. We believe that competition is a good thing that definitely help keep us sharp and competitive. Ex Libris focus has always been and will continue to be to constantly invest in delivering real value to our customers through innovation and close working relationships and full visibility.

Ex Libris doesn't believe in boxing or comparisons. They feel Alma is a market leader. Their biggest competitor is themselves.

Question 28 – System seminars and Developer Days

There has not been a system seminar for two years. With more and more institutions going into the cloud – was Oxford 2014 the last system seminar? Will we need any more systems seminars? Is the Developer Day, which IGeLU has invented in 2015, the successor of system seminars?

Bettina - The system seminars were always initiated by the demand of the customers. If there is demand, they are happy to organize a new one.

Question 29 – Merger with ProQuest

Will Ex Libris keep its name also in ten years from today or will it get renamed some day – and fully “merged” with “ProQuest”?

Ofer - There are no plans to change our name. They have a very strong brand in the industry.