# 5<sup>th</sup> IGeLU Meeting Ghent 2010, session 14:

# Ex Libris General Questions & Answers

Ex Libris staff on the panel:

- Matti Shem Tov, President and Chief Executive Officer
- Marc Daubach, Corporate Vice President, General Manager Europe
- Nancy Dushkin, Vice President of Marketing
- Oren Beit-Arie, Chief Strategy Officer
- Susan Stearns, VP of Strategic Partnerships
- Bar Veinstein, VP Resource Management Solutions

Chair: Peter Klien, The Austrian Library Network and Service Ltd.

## QUESTION 1a – 1 of 2
*El Commons and Documentation Portal*
*Do you have any plans to integrate the Ex Libris Documentation Center into El Commons or simplify the login to these two resources? (Maybe your Learning Portal should also be considered to be integrated.) Could you provide a search covering all your support materials (documentation, learning, user generated)?*

## QUESTION 1b – 2 of 2
*Documentation center vs learning center*
*Ex Libris launched the learning center with a more 'user friendly' way of learning. But at a subscription fee. At the same time, you have a documentation center, with quite good documentation. How can you make a clear distinction between what goes on the documentation center and what goes on the learning center. Is learning not documentation and vice versa?*

Answer: Matti Shem Tov

Matti apologised for Anat Kuper's absence who was unable to attend IGeLU.

He reported that Ex Libris was currently working on a new customer portal. They have seen the prototype and it was anticipated that the new system would be ready within two months. The result would be one portal incorporating: Pivotal; EL Commons; Learning Centre; and Doc Portal. Ex Libris was also looking into a single search option across all these

components. It was recognised there would be documentation and training issues associated with the introduction of this system. The Documentation Portal was the place where all the documentation relating to Ex Libris products and events was accessible. The Learning Centre provides remote learning which might reduce onsite training. It was not designed to replace documentation but should reduce customer costs even despite the Learning Centre fee.

### QUESTION 2
*Costs of the learning center*
*We agree that the learning center is an interesting initiative, but shouldn't all courses and information on upgrades and new versions be available for free - as is the case with e.g. "SFX 4: How to Upgrade"? Smooth upgrades are in the interest of both Ex Libris and customers.*

Answer: Matti Shem Tov

Matti agreed with that e-learning information relating to <u>upgrades</u> should be free. If this was currently not the case, this will be changed as this was within Ex Libris' own interest.

### QUESTION 3
*Support Incidents requiring action on multiple products*
*Against the background of Primo as UI for other systems such as OvP for Aleph and Voyager or forthcoming changes with MetaLib NextGeneration, could Ex Libris inform us how SI's that require multiple service teams to be solved are going to be handled in a timely way. Explanation: An issue described in an SI may be visible in the Primo UI but require work with another product or multiple products to be solved.*

Answer: Marc Daubach

Marc reported that cross-product SI answers should be supplied from the team which received the original SI, as the policy is that overall responsibility for resolving the SI should remain with the original "owner", which meant that the Ex Libris support people are responsible to undertake liaison within the company. He asked that if there were instances of this not happening, sites should report the issue so the situation could be re-emphasised within Ex Libris Support.

Peter Klien noted there had been three questions relating to this.

Question from floor (Gerard Bennett) If the policy is for the 1$^{st}$ person who is named as SI owner remains as owner of the SI, he has experienced cases where SI has been moved to another owner.

Noam Kaminer (Aleph Customer Service Manager) reported that the main owner is the 1$^{st}$ line analyst, and therefore the owner. This means that if the SI is passed within the company it will get passed back. However some SIs, defined as not belonging to the original support

team, will get moved to the correct team as it was better to have issues owned by the correct team.

### QUESTION 4
*Inconsistent levels of support (high – medium – low level)*
*Customer base is still dealing with inconsistent levels of support. Our specific experience are delays and different quality of support in response to open Primo-SIs, even when priority is set to HIGH. These effect project timelines, deadlines, and user satisfaction (not to mention staff satisfaction). It is vital that EL provides the highest level of scrutiny in this area.*
*What are Ex Libris' quality checks to ensure that the SI requests are followed efficiently through to conclusion?*

Answer: Matti Shem Tov

Matti replied that there was a definite goal to have consistent support across products. However it was acknowledged that when Primo 3 was released, a large number of the Primo 2 customers wanted to implement Primo 3, which caused a backlog of support in Primo 3 migration. Ex Libris has now taken measures to address this, and to improve Primo support.

The support levels are measured internally within Ex Libris through internal report mechanisms, e.g. KPIs measuring different teams, # of open SI's. This measurement includes assessing any backlogs through weekly and monthly reports.

### QUESTION 5
*Support escalation process*
*What are your experiences with the newly launched support escalation process so far? Does it work? Is there a lot of escalation going on?*

Answer: Matti Shem Tov

Matti noted that a new escalation policy had been released and positive feedback had been received. However it was recognised there could be a pocket of current customers who are not aware of this. Ex Libris is working on expanding this knowledge amongst customers. The current number of escalations globally within the company is 1-2 per month. If customers aren't happy with the escalation procedures, then Ex Libris would like to hear from them.

### QUESTION 6a – 1 of 2
*Knowledge Base vs. SIs*
*Knowledge base entries seem to be produced very accidentally and without any system. On the other hand they are always historical, dealing with known problems only.*
*Would it not be easier to open all support incidents to all users? This would enable users to certainly find a solution for their problem and help especially with new/ongoing incidents.*

*Pivotal SIs*
*It is evident that many customers regard it useful to share - at least certain if not all of the problems they run into - with other customers.*
*Will Ex Libris ever facilitate this sort of openness by adding functions for - optional publication of a newly created incident to all other customers - "following" a given published incident (being alerted whenever this SI is modified) to their CRM system?*

6a Answer: Shelley Hostetler (Director, NA Aleph and Global Voyager Support)

Shelley reported on the process of moving issues to the Knowledge Base. The process was that when it was decided an issue related to a software defect, it is then added to the Knowledge Base. Other sites can then add a Me Too, and they will also be notified when the issue is resolved.

6b Answer: Matti Shem Tov

Matti reported on the question of opening all incidents.

Ex Libris is now agreeable to opening incidents but the method to arrange this needs to be resolved.  For example, there were two possible methods:

1.  Ask every customer to agree to expose all incidents

2.  Allow customers to check a box to share incident with others (with the default set to "share")

It was recognised that it was up to the User community and which we would prefer. Ex Libris will work with the user community on this matter.

Peter Klien acknowledged the total change by Ex Libris on this issue.

**QUESTION 7**
*Influencing the supply chain. Can you describe how Ex Libris interacts with the supply chain to effect improvements in (vendors') supply of metadata to the Ex Libris product knowledge bases (for example in requesting KBART format metadata or in PrimoCentral interactions). What are the views of content providers to any approaches you make?*

Answer: Oren Beit-Arie

Oren noted that Ex Libris strongly supports streamlining between information providers and vendor products.

Ex Libris are involved in KBART and encourages information providers to use this, with Christine Stohn actively involved in the NISO workgroup developing standards and tool sets, and they are investigating how to implement this.  Currently this is not available with Primo Central as Ex Libris is happy to get data in any format. It is considered more important to get

the data and then normalise it so as not to create any barriers to adding content. The preference is for standard method of description. The result so far has been positive and improving. However some suppliers are slow to get involved. The User community should ask suppliers if they support mega-aggregators, and the data should not just be the 1<sup>st</sup> load but also allow for updating of the metadata.

### QUESTION 8
*Scopus in PrimoCentral?*
*Ex Libris announced on August 11th that Thomson Reuters agreed to make Web of Knowledge accessible through PrimoCentral. Great news! So did Ebsco two months before: EBSCO Publishing and Thomson Reuters came to an agreement allowing mutual customers to access Web of Science within the discovery tool EBSCO Discovery Service (EDS). What about Scopus? Is there any hope to get Scopus accessible through PrimoCentral too?*


Answer: Oren Beit-Arie

Ex Libris have a definite agreement with Thomson. They are also currently working with Elsevier and have an agreement to work towards enabling content in Primo Central and are about to start a pilot with ScienceDirect. There have been discussions about Scopus but no agreement has been reached yet. Ex Libris understands the motivation of the business providers and the need to make sustainable arrangements. It is important that there are incentives for information providers and so Ex Libris is working closely with them to create trust. This was similar to what happened with the development of OpenURL. It is important that customers also talk with providers if we want their data in Primo Central.

### QUESTION 9
*Real efficiency savings with URM?*
*One of our essential criteria for the URM is that it allows us to save staff and to work more efficiently.*
*How is Ex Libris ensuring that the URM will provide real efficiency savings for libraries and not just replicate the existing functionality of the systems it replaces?*


Answer Bar Veinstein

It was recognised that the development partners have been involved from very early in the development process, and at least one development partner has given similar feedback. The long-term vision is to move from an automation phase to an optimisation phase where workflows can be streamlined.

Current work is concentrating on deep analysis and they are using intelligence tools to provide insights about what issues could be improved, and what we currently measure. This analysis will involve improved workflows after discussion.

Ex Libris are working with development partners to draft a ROI model which can be used for sites to take to their own institution to build the business case to move to the URM.

**QUESTION 10**
*Pricing structure for the URM*
*In the present economic climate libraries have to plan spending decisions at least three years ahead, often five years ahead. If Ex Libris cannot give us some firm figures, we may have to look elsewhere.*
*How will the pricing structure for the URM be calculated and how will it relate to our current costs? We have to make savings.*


Answer: Marc Daubach

Ex Libris are looking into the budget requirements for 5 years. There should be a paradigm shift re pricing with the integration of many products into a single product as well as the Software as a Service (SaaS) model. The pricing model will involve a number of parameters. At this stage the identified parameters include: Print; digital, electronic and the incorporation of the No. of records; No. of journals; No. of Terrabytes. There will be caps on unlimited records. It was recognised that the costs of hosting linked to the cost structure.

Susan Stearns reported they are starting to analyse all the costs of current systems, not just systems costs, to check the ROI. It is anticipated that sites should result in savings if they migrate to the URM.

**QUESTION 11a – 1 of 2**
*Economic downturn*
*Do you think the time has come to already look back to the economic crisis? What is your resume concerning Ex Libris? Has there been a significant downturn and/or any other major effect?*

**QUESTION 11b – 2 of 2**
*URM*
*Has the changing financial climate affected the funding for the URM?*
Answer: Matti Shem Tov

Matti reported that Ex Libris has had a reasonably good 2 years, particularly considering the Global Financial Crisis. They have experienced a 7-8% growth in 2 years, with growth in the number of Ex Libris staff and customers. The company is also enjoying the advantage of being a Global company as they are now able to use "hedging" across regions, where if one region is not doing well they still benefit from other regions. Currently they are getting good returns from Asia with 300 customers.

The company financial situation is good, and is doing reasonably well with both the management and the shareholders happy.  It is the smaller companies that are struggling and Ex Libris may have benefited from this.

There is no problem with funding the URM even though this is a massive investment. The current situation is working to plan with 50 full-time employees, and more employees might still be added.

**QUESTION 12**
*URM Focus Groups*
*Focus group activity appears to have stalled recently. When and what will the URM Focus Groups be doing?*

Answer: Susan Stearns

Susan acknowledged there had been a bit of a stall as the Focus Groups were regrouped, with four separate Focus Groups being incorporated into one. There will be some initial work to bring all participants up to the same knowledge level regarding the URM, with a series of recordings. This has been delayed by the switch from the AT&T web conferencing system to WebEx but the new Group should become active soon.

Feedback from development partners will be made available to all.

**QUESTION 13**

*URM name*
*Is 'URM' the final product name for the URM?*

Answer: Bar Veinstein

The URM is a framework and is not a product name. There will be a product name, so if users have good ideas, let Ex Libris know.

**QUESTION 14**
*ILL in URM*
*From the FAQ on your website I understand that URM 1.0 won't support ILL. Not incorporating the ILL functionality in URM would be a great obstacle for many libraries to move to the next gen system of Ex Libris. When do you expect ILL functionality incorporated in URM or are there no plans to offer this basic functionality of the current ILS in URM at all?*

Answer: Oren Beit-Arie

Oren said they would check the FAQs. The URM will have to support resource sharing workflows, although it was recognised that these workflows were different across the different regions so they are planning how to support this. ILL will be supported in the URM V1. It was understood there were some specific needs, e.g. Australia. By the end of the year they should have the product mapped out and so would know what is supported, and will communicate with users.

## QUESTION 15
*ILS to URM*
*Migration from one system to another requires planning, financial resources and staffing, all of which require advance notice in the university budgeting process. Library directors are disadvantaged in their budget negotiations with their institution if they do not know when their existing systems will become unusable. When will Voyager or Aleph become obsolete/superseded/unsupported?*

Answer: Matti Shem Tov

Matti noted that the old systems wouldn't become obsolete for 15-20 years. The URM won't be ready for 2 years and migrating 3,000 customers will take time. Currently there are still customers on old product releases (Aleph 300) which are still fully supported and they are still developing Voyager 8 & 9 and Aleph 21 &22. They would not leave customers on unsupported versions until it is the right time for customers in various regions to move.

## QUESTION 16
*URM for single product users*
*Many Ex Libris users use only one or a few of Ex Libris products. What kind of consequences will we see when all services and products are put together in URD2/URM? We do not want to pay for services we don't use.*

Anwer: Marc Daubach

Marc noted that SaaS helps facilitate this. There will be distinctions on the print, digital and electronic side but Ex Libris will not expect customers to pay for what they don't use. Customers will continue to use services they have now at the lowest possible cost on URM.

## QUESTION
*RFID in ALEPH and URM*
*In our library all barcodes are now on RFID-Tags. We use a RFIDsolution from Bibliotheca, Switzerland, for acquisition, cataloguing and circulation in the ALEPH-client. This solution works good, as long as the ALEPH-GUI is running on a PC. The solution cannot be used when the GUI is running on a terminal server. Which solution will Ex Libris offer for using RFID on staff working places (acquisition, cataloging and circulation) in future versions of ALEPH and in a browser-based GUI of URM?* This was covered in the Aleph session.

## QUESTION 17
*Reports and statistics*
*As of last year reports and statistics are not in the URM/URD2 framework. Where is a product like UStat located and what happened with a product like ARC here?*

Answer: Susan Stearns

Susan apologised if that was not shown in her presentation but Primo (and URD$^2$) does include reports and statistics.

The URM will be looking at replicating the UStat's functionality, replacing ARC and Analyser with robust statistical and reporting features.


## QUESTION 18
*UStat very slow*
*The UStat service is often very slow to return pages of results. This is of particular concern to customers looking at the company's future strategy, as for many of them Ustat is their first experience of an Ex Libris hosted service. Will Ex Libris' hosted solutions simply require customers to be more patient? Does Ex Libris' own monitoring of the Ustat service confirm these performance problems? Why are they occurring? What plans are in place to improve matters?*


Answer: Matti Shem Tov

Matti said he was not aware of the UStat's performance and would address this as an extreme situation if the customer could identify themselves, then they could look at fixing this. The relevant customer should approach Shelley or Noam.

Ex Libris as a company is moving towards a more hosted (SaaS) environment. Currently many new installations are hosted solutions with 400 customers hosted out of facilities in Chicago. They are also investigating extra providers as all products currently provide a hosted option, i.e. Metalib, SFX, Voyager, Primo, Aleph, bX (only available hosted), and DigiTool. They are also looking at growing the hosting facility, which is currently provided by Quest in the USA. Moving in this direction is a challenge and it is necessary to ensure that all the issues associated with hosting systems are covered, including issues around 'Where does support start and end', 'where does hosting start and end''. Currently the internal KPIs are showing 99.7% availability for hosted solutions. It was important that they do better so any issues such as that with UStat doesn't repeat itself.

## QUESTION 19
*UStat filter*
*The option in UStat to filter reports 'by Journal' and 'by Database' is very useful.*
*Are there plans to add 'by Publisher' and 'by Platform' filters to the UStat report service?*


Answer: Bar Veinstein

Bar was happy to see the usefulness and thanked the customer for the feedback. Future analytics will be focused towards the URM.

***QUESTION***
*UStat*
*When will UStat be supporting counter reports for e-books?*


This was covered in the Verde session.

***QUESTION 20***
*Competition in the ILS world, threats for URM*
*In the market place for library systems a serious new competitor is appearing: OCLC with their Web Scale Management intiatives. Some suppliers see this as a real threat to their position, they are even filing lawsuits against OCLC. On the other hand OCLC, as the owner of WorldCat, will be a very important player in the metadata field, cooperation with OCLC is a must. What does Ex Libris think about this development and what kind of strategic position does the company take? Are you (still) on speaking terms with OCLC about metadata?*


Answer: Oren Beit-Arie

Oren noted that OCLC has been around for many years and they have been doing a lot for many users and whilst there was lots of interest in developments in some regions OCLC was not as important. OCLC has two parts including the membership organisation which resulted in huge benefits, e.g. WorldCat. It was beneficial to users, vendors, and the interactions across platform for users.

Ex Libris are currently speaking with OCLC about metadata as WorldCat will continue to be important in the future.

It was likely they would change so monopoly not important as long as the access to data was promoted and there was no unreasonable reuse policy.

Regarding competitors, OCLC are not the only one and customers will need to analyse products and needs to assess what companies are doing what better.

The current lawsuit with OCLC relates to bibliographic services and resources sharing and Ex Libris are not part of the lawsuit.

***QUESTION 21***
*Public libraries*
*What plans does Ex Libris have for fulfilling the needs of public libraries in URM/URD2 systems?*

Answer: Susan Stearns

Susan noted that many public libraries are using the URD, in Primo, often through a consortium.

Regarding the URM, whilst their use was not the primary focus for Version 1, Ex Libris is looking at long-term requirements so they can be incorporated into the roadmap.

***QUESTION 22***
*Google Books*
*What does Ex Libris now think about Google Books? Will it be a revolution for libraries and librarians? Will it be a danger to the changing Ex Libris business model? Or is Ex Libris even planning to cooperate?*

Answer: Oren Beit-Arie

Oren noted this model has two parts; digitisation, and search and delivery to end-users, and Ex Libris supported these goals. It was necessary to meet needs of scholarship and he believes Ex Libris have the means and tools and are moving the right way forward.

Question from the floor:

Gerard Bennett asked about the issues of monopoly, intellectual property and copyright. Oren said he couldn't comment on this but if customers wanted to think about this type of service, they should try to keep the interests of users and the community in mind if they worked with specific providers. It was acknowledged this was a moral question and we should all support it and recognise this was a huge opportunity to open a world of discovery. When thinking of mass digitisation, it is important to think what one would do with the digital copy – how to store and access in the future - and so start to build infrastructure to deal with these assets.

***QUESTION 23***
*PrimoCentral*
*From various discussions with Ex Libris I learned that there is no publicly available list of publishers and/or resources covered by the PrimoCentral index. Why?*

Answer: Nancy Dushkin

Nancy noted they are about to have a tool available this month which will provide a monthly update freely available, which will show what updates have been loaded, what data have been signed for but not loaded. She also noted they are back loading daily.

Question from floor - Where would this be published and to whom?

Nancy stated that all Primo and MetaLib customers would be able to see it. In addition, if a customer doesn't have Primo Central, they could ask for a coverage analysis against a list of their own resources.

Question from floor – Analysis title by title basis?

This is available on a journal level and on a % level. If sites were interested they should get in touch and Ex Libris can provide the analysis.

### QUESTION 24
*PrimoCentral*
*How does the MetaLib announcement impact existing MetaLib/Primo customers? Do they get PrimoCentral also for free?*

Answer: Nancy Dushkin

Nancy reported the short answer is 'Yes'. Any sites who pays MetaLib maintenance and KB will have access to Primo Central. If sites have Primo and MetaLib they can use Primo for one search interface.

Question from floor – no charge?

Nancy noted there was no charge for Primo Central if sites have Primo and MetaLib.

### QUESTION 25
*E-books and reading devices Reading devices such as Kindle are become more and more common on the market. There is a reason to believe that sooner or later the usage of these devices will become outspread. Borrowing and lending functionality within libraries for electronic books will be much different from what we know from the Aleph circulation module today.Has Ex Libris decided how to accommodate for these new circulation activities? How will libraries be able to keep track of borrowing and lending activities?*

Answer: Oren Beit-Arie

Oren noted the short answer was yes as they endorsed this model but would be changing it, including looking at coverage. It is recognised that E-books are becoming more frontline and E-textbooks could in the future become a core component of a discovery system. The model for E-books is still involving, including issues around fulfilment and circulation. Ex Libris would like to talk with the questioner, to hear details of required providers.