

**INUG & Ex Libris Executive Management Meeting
Sunday 29 August 2010**

1. Welcome and introductions

- **IGeLU:** INUG representatives, IGeLU SC and PWG Coordinators
- **Ex Libris:** Matti Shem Tov, Bar Veinstein, Moshe Eisenberg, Nurit Ergaz-Shavit, Marc Daubach, Nancy Dushkin, Oren Beit-Arie

2. Personnel changes reported by Matt Shem Tov

- Ron (Chief Financial Officer) has retired after a long period with Ex Libris, and has been replaced by Moshe Eisenberg.
- Einat Zviran (VP Marketing) has left for personal reasons.
- Bar Veinstein is the new VP Resource Management Solutions, who will be responsible for the URM product management replacing Kathryn Harnish. Bar will be replacing Einat Zviran initially and John Larson is currently carrying out the URM role.

3. Matter arising from the INUG 2009 meeting: CRM/Pivotal replacement – Progress?

Ex Libris are planning to replace their internal systems but the system initially selected to do so would not do all that was required, so Ex Libris is now looking at other alternative systems. This will mean that Pivotal will be used for a longer period, so Ex Libris will have to look at making more changes to Pivotal as it will be used for longer than planned.

Pat Busby asked about the possibility of users being able to access all support incidents, not just those logged by their own libraries. Matti Shem Tov replied that Ex Libris would need individual customers to agree to their incidents being made publically available. This would be discussed further with Anat Kuper. It was noted that just the support issue itself should be made available publically, and not customers' personal information. **[Action & Communication to IGeLU: Ex Libris]**

It was noted that the Knowledge Base is being updated, but that the perception was that sometimes this occurs too slowly.

It was also noted that better synchronization was required between Pivotal and NERS. This may be difficult to achieve but the NERS group would discuss this further with Ex Libris.

4. Support issues - Portugal, Scandinavia, Italy, others?

Matti Shem Tov requested an update about local support issues:

Portugal:

Reported that this had improved and was progressing well.

Scandinavia:

Ex Libris is working on improving support in Scandinavia. Local Distributors have been replaced by the Scandinavian Ex Libris Office supporting Denmark and Sweden, but not Norway.

In Norway the Local Distributor seems to be a barrier and seems to be just escalating issues to next line support. Customers want to know if they can get escalate SI's themselves. Marc Daubach replied that he is going to meet with *Bibits* and arrange that customers can log SI's directly to Pivotal, thus making Ex Libris their 1st-line support. **[Action & Communication to IGeLU & Norwegian User Group: Ex Libris]**

In Denmark, the information meetings about the changes seemed promising and satisfactory. Closer access to Ex Libris seems an excellent solution. However there are concerns over less home language support with local staff leaving. Previously sites could phone their Local Support Office and discuss problems in their own language but now have to post these in Pivotal. Marc noted that this was a natural reaction which others had experienced with such changes. The loss of previous local support staff was balanced by improved Ex Libris support in the newer products which expertise was not previously available in the local support staff. Key developers and other staff still remained with Ex Libris and were working to get aspects incorporated into the URM. Ex Libris is trying to make local support work and trying to retain local knowledge, but want to build systems that can survive loss of local staff. He was aware 3 people have left and couldn't guarantee who will leave in future.

In Sweden there is also concern over loss of local staff, particularly regarding the loss of knowledge regarding the local environment. Ex Libris noted that there is still access to Thomas for some time.

Matti queried whether there is sufficient interaction between Ex Libris and National/Regional User Groups? For example Ex Libris should be talking to these groups / attending NUG meetings in order to discuss these issues in more detail.

There has apparently been one Swedish User Group meeting since the Ex Libris takeover and the Hamburg representative (Axel) attended. The next meeting is soon and Ex Libris will present on URM. The User Group does not want demos or sales persons but does want more information and communication about issues.

In general, Matti wants ongoing relationships / interactions between Ex Libris and NUG's.

Marc agreed to take this issue back to Anat Kuper and ask her to investigate when the next National User Group meetings are. **[Action & Communication with IGeLU and NUG's: Ex Libris]**

Jiri Kende suggested that Ex Libris needs to clearly articulate and post its Support Escalation Policy again. **[DONE by Ex Libris: see below]**

September 2010

Dear Colleagues,

The Global Support Organization was established with the goal to provide world-class service through single-contact support for all Ex Libris customers and products worldwide. The GSO is committed to a best-practices approach that establishes and delivers consistent and predictable service levels, allows for tiered escalation of support incidents, transparency of processes, and unified response levels for all products through a continual measurement and improvement process. The GSO is a hybrid structure that provides support through centralized first-line, second-line and global support models determined by local needs.

Support Escalation Policy

In the event that you wish to escalate an issue--giving it more importance, please use the following steps:

1 .Escalate to the assigned owner via e-Service, first.

2 .Escalate to the customer support manager responsible for the product affiliated with the incident, as per the list below :

Aleph:	Noam Kaminer	ALEPHsupportescalation@exlibrisgroup.com
bX:	Eitan Ben-David	bXsupportescalation@exlibrisgroup.com
DigiTool:	Opher Kutner	DTLsupportescalation@exlibrisgroup.com
MetaLib:	Ran Levi	MLsupportescalation@exlibrisgroup.com
MetaLib KnowledgeBase:		
	Ron Lozinsky	MLKBsupportescalation@exlibrisgroup.com
Primo:	Julia Goldstein	PRIMOsupportescalation@exlibrisgroup.com
Rosetta:	Opher Kutner	ROSETTAsupportescalation@exlibrisgroup.com
SFX:	Brian Noone	SFXsupportescalation@exlibrisgroup.com
SFX KnowledgeBase:		
	Ron Lozinsky	SFXKBsupportescalation@exlibrisgroup.com
Ustat:	Eitan Ben-David	USTATsupportescalation@exlibrisgroup.com
Verde:	Zvi Finkin	VERDEsupportescalation@exlibrisgroup.com
Voyager:	Shelley Hostetler	VOYAGERsupportescalation@exlibrisgroup.com

3 .Escalate to the corporate vice president, global customer support:

Anat Kuper Anat.Kuper@exlibrisgroup.com

Anat Kuper
VP Global Customer Support
Anat.Kuper@exlibrisgroup.com

5. General situation with enhancement processes: CKB

CKB enhancement process: IGeLU acknowledged this was a great step forward but would like information about what is happening with the identified resources. **[Action & Communication to IGeLU: Ex Libris]**

NERS & Pivotal: Jiri Kende noted that IGeLU would like the transfer of data between the two systems to stop users having to enter enhancement requests into 2 systems. Nancy Dushkin noted that this issue would need further discussion to work out the details of what would be required as a two-way synchronization was complicated. It would be important to ensure that if data was loaded between the two systems that the data was not corrupted. This issue would be discussed further after the meeting. **[DONE: see below]**

“Following was agreed:

1. Ex Libris will send a monthly report (once per cycle - one month for SFX and one month for ML) including:

- List of all open requests and the number of votes for each request.*
- Mark the ones that are "In Process"*
- Ex Libris will check if there's any option to add information about the region of the institute that opened the request*
- Ex Libris will add the date of entry to each KBI exported from CRM, if possible.*
- Ex Libris will issue a preliminary ML report quickly to support the first NERS ML voting cycle.*

2. IGeLU will send Ex Libris a list from NERS of all voted targets/ resources sorted

- The top 6 are a part of the Ex Libris commitment.*
- The rest (50 maximum) is for Ex Libris information, if there are "quick wins" Ex Libris will make the effort to add them.*
- Should a new target/resource be sent from NERS (one that will have no Ex Libris ID), Ex Libris will check adding it to the CKB. Ex Libris will check if we can also load the requesting contact person/organization. We will update you what is the best possible option.*

3. Excel Spreadsheets will be used for data exchange with an agreed format.

Both parties will work in full collaboration to make the most of this knowledge sharing. Requests entered in to NERS first will be passed to Ex Libris to enter them in to Pivotal so that these requests come with the Pivotal number in the monthly report for the next voting. Ex Libris will let us know what data structure is needed. Otherwise IGeLU / ELUNA would enter the requests in to Pivotal.”

6. URM updates at User Groups

Ex Libris are prepared to talk at National User Group meetings about the URM.

The separate Focus groups were consolidated into one Focus Group but there has been limited activity in the new Group. Susan Stearns reported that Ex Libris was waiting for the completion of the move to a new web conferencing tool, so that all the URM sessions would be recorded on the same tool. There was a Focus Group session scheduled for Wednesday 1 September. Ex Libris is hoping that Focus Group activities would start again shortly.

7. Customer portal

A new customer portal is to be released within the next few months with the new site based on Sharepoint. This will provide ongoing communication on Ex Libris issues, it will include a Document Management Repository (which will replace the DocPortal), and will provide access to Pivotal, the EL Commons, and the E-Learning Center, all with one signon.

8. Documentation

Gerard Bennett (and others) reported that there was concern about documentation validity, and inconsistency in document formatting. For example with Primo they were relying on local documentation prepared by local support staff.

Nurit Ergaz-Shavit asked that comments on documentation be sent to Ex Libris. They are looking at revising documentation as the current documentation is moved into the new system. Nancy Dushkin reported that there was a current project looking at Primo documentation and updating all documentation. If there were particular issues sites were encouraged to open SI's. It was suggested that the Primo documentation could be divided into "Technical" and "User Focused". It should also be made clear what is required to be done on site and what is done by Ex Libris.

Matti suggested that Ex Libris could assign somebody to work on documentation issues with IGeLU, similar to that happening with Pivotal.

It was agreed that the Steering Committee would select a representative who would discuss this issue with Ex Libris. **[Action: Ex Libris & IGeLU]**

Subsequent to this meeting, Fiona Burton was identified as the IGeLU Steering Committee representative.

9. Impact of budget cuts on new products/projects

Gerard noted that sites are moving to using the Primo interface and so are no longer using the Aleph OPAC, MetaLib interfaces, etc, but with no decrease in maintenance agreements for these products while new licences for Primo are being entered into.

Marc reported there would be an announcement on Wednesday. Details of the announcement clarified below:

“Primo Service with the Primo Central Index for MetaLib customers!”

During the meeting in Ghent Ex Libris announced that that a new Primo Service will be available for all MetaLib customers. This service provides a fully hosted Primo end-user interface for the Primo Central mega-index as well as MetaLib. Institutions will also have the ability to extend the Primo search through their institutions MetaLib, where necessary. Most, however, will find that their electronic collections are largely covered within the Primo Central Index.

This gives all the benefits of Primo, such as an intuitive next-generation user interface, instantaneous results, ability to narrow the search through facets, etc. at no additional cost to the institution. The only fees involved are three days of implementation to setup Primo. This is good news for the MetaLib customers, and is in-line with requests made by the MetaLib community at IGeLU 2009. This is a much more preferable option than using Primo Central as a MetaLib target.

Clear cost implications where applicable:

MetaLib customers who currently do not have Primo: - There are no additional fees for access to the Primo Central Index only as it is included as part of the Metalib maintenance and KnowledgeBase fees. There is a one-time professional services charge for three days of work to setup Primo, for the Primo Service which will provide a fully hosted Primo interface for both the Primo Central Index and MetaLib.

Primo and MetaLib customers: - There are no additional fees for access to the Primo Central Index only as it is included as part of the Metalib maintenance and KnowledgeBase fees.

Primo customers without MetaLib: - There is a small annual fee. For customers who purchase prior to the end of 2010, the fee for the first year is waived.”

10. Information regarding new customers for IGeLU membership recruitment

Jiri requested that Ex Libris advise National User Groups of new customers in their regions so that NUG's could approach them to become NUG/IGeLU members, with a copy to IGeLU.

Moshe Eisenberg noted that Ex Libris will need to develop a mechanism to provide this information. It was requested that IGeLU identify a representative to work with Ex Libris to work out what information is needed, for example name of contact person, user ID.

Subsequent to this meeting, Jiri Kende was identified as the IGeLU Steering Committee representative, and Moshe confirmed that he would send a quarterly list of new customers by country, noting product purchased, contact person and address. The first list will be sent at the end of the 2010. Jiri would send this information to the National User Groups for their use. IGeLU would also send Ex Libris a recruitment pamphlet for them to pass onto new customers.

Regarding ARC, IGeLU would like a specific list of all ARC customers to look at building an ARC customer community. Ex Libris said this could be provided. **[Action: Ex Libris]**

11. Movement of Installation services from Chicago to Israel

Bob Trotter asked about installations being done in Israel. Matti reported there would be no further moves occurring.

12. Carrying over of features to new products

Gerard and Andreas Sabisch noted that, while Aleph servers can identify where requests are coming from via IP, this useful feature was not in Primo. This was an example of features in one product not being carried over to other products, which implied there was no oversight of products. Other issues relate to the storage of Library specific local information being stored in individual products in different ways.

Habib Tabatabai also raised the issue of support for multiple products and how issues across products were dealt with.

Oren Beit-Arie noted that, when transferring one product to another not everything can be carried over, but that it was important to improve methodology when transferring to new systems. Ex Libris would like the user community to help identify what things should be carried over. Marc noted that Ex Libris needed to learn from this. One method to assist with this was by having MetaLib and SFX developers in the same room. Also with the URM, the goal was to improve and integrate the front end and back end developments

Jiri asked about how to keep knowledge of current systems going whilst also developing the URM.

Matti noted this was a balancing act. Ex Libris is having to move some individuals but recognizes the need to keep knowledge in Module support. They recognized there were initial problems with the URM teams but are working on fixing this. Mathias Kratzer noted that the issue was less the problem of moving people but more the perception that the right persons are not talking together. It was asked whether Netti Legace was involved in the URM development. Matti replied that she was involved. Matti also reported that the DigiTool and Rosetta URM development is occurring within the same group.

Jiri asked that, if an issue was found in Primo that relates to Aleph, should the Primo support person be discussing this with the Aleph expert? The answer from Ex Libris was that this should be happening.

Matti noted he found this discussion useful and that it should occur more often, for example by phone. Jiri thanked him for the offer and would discuss this and get back to Ex Libris. **[Action: IGeLU]**

13. Ex Libris Restructuring Feedback

Nancy reported that the new Ex Libris structure is working well. For example, splitting into focused areas so product managers and developers are together is working well as they can resolve any problems together, and in this way the developers have also been moved closer to customers.

Jiri asked whether Quality Control was moving into Development. Matti reported that this was moved to Support so they can signoff on upgrades. This meant there was an independent person from Development checking the release before Support signoff.

Bar reported that while the divisions were separated they were required to work hard on integration across the divisions.

Fiona Burton & Pat Busby
IGeLU SC
2010-11-02