EX LIBRIS GENERAL QUESTION & ANSWER
6th IGeLU Meeting
Session 12
Haifa, 13 September 2011

Minutes taken by Fiona Burton, Pat Busby and Peter Klien (as at 2011-11-29)

Ex Libris staff on the panel:
- Matti Shem Tov, President and Chief Executive Officer
- Oren Beit-Arie, Chief Strategy Officer
- David Beychok, Vice President, Discovery and Delivery Solutions
- Marc Daubach, Corporate Vice President, General Manager Europe
- Anat Kuper, Corporate Vice President, Global Support
- Shlomo Sanders, Chief Technology Officer
- Bar Veinstein, VP Resource Management Solutions
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Moderator: Peter Klien, Austrian Library Network (OBVSG)

QUESTION 1

Knowing the customers' system situation

It happens often, that in support cases Ex Libris staff do not know the actual configuration of the application or the underlying system parameters. Is the management of Ex Libris aware of this problem? What solutions are planned e.g. Configuration Management Database for all customers?

Anat reported that Ex Libris used an Asset management system, which details system topology, e.g. hardware details, which is designed to prevent the need to ask questions from the customers about the setup. During implementation, Professional Services loads this information into system. However where local customization occurs after implementation there can be the need for Support to ask for this type of detail depending on the Incident. Support staff can access the system to identify details, however there are some cases where they might still need to ask the customer for more details. If sites have any concern about this they should report these to Customer Services.

QUESTION 2

Closing of support on Friday

Closing of support on Friday is not a minor problem. If you open an incident Thursday evening, you know that you will not be able to have a (first!) answer till Monday. It is a long time. It is good that if an incident is critical, now EL has at least a "system down" team. But to have only four effective labour days for "normal" support really slows down the support process.

Has Ex Libris ever given any thought to this? Do you have any ideas to improve the situation?

Anat reported on the 24x7 hub initiative which was launched a few months ago which is designed to deal with System & component "down" situations. There are people working in the hub all week during standard hours but the hub is staffed 24x7 during holidays.

All other support services are operated according to the following schedule:
Sunday – Headquarters (Israel)
Monday – Thursday - Europe, Headquarters, North America
Friday - Europe, North America, reduced staffing level in Headquarters

So depending on the severity of the incident you should be able to get an answer throughout these scheduled hours.

QUESTION 3

Customer Portal search

The new Customer Portal has been implemented with Microsoft SharePoint. Of the six components only the new Documentation Center is a SharePoint portal. The most important advantage of the Customer Portal would be an integrated search through all systems. However, the "Search - All Sites" box only searches all SharePoint sub-sites, meaning: only the Documentation Center, not the EL Commons Confluence, Pivotal and Ex Libris Website.

When will Ex Libris repair this bug?

Anat reported that the Portal implementation was a big initiative, and as the Portal was implemented with a customer single signon this has lessened the issue with passwords and logins.

The issue of a 'single search' across systems will be investigated to see whether this can be implemented within the portal.

It was suggested from the floor that maybe a dedicated Primo system could be used for this purpose. Matti answered this was one option but it would have to be investigated.

QUESTION 4

Oracle database documentation

Recently we learned officially that the customers' SQL-access to Primo Oracle database is not supported. As in opposite to Aleph, Primo uses the "embedded license" that does not grant (!) access to the Oracle database and no documentation on Oracle tables can be provided. Our experience (a complex Primo installation) shows however, that the local Primo operations, quality control and troubleshooting procedures require certainly access to selected Primo Oracle tables in order to keep our Primo running.

Can Ex Libris explain this strict decision and perhaps change its mind?

Matti reported that the Oracle component (an embedded licence) to Primo has been negotiated with Oracle in an attempt to reduce fees. With Aleph a full Oracle license is required so customers need to pay for a full Oracle license.

Most customers seem to be happy with this current situation but if any customers want to change the situation to use their local license then this can be investigated on a case-by-case basis. Customers should identify themselves to Ex Libris who can investigate this. Ex Libris will need to go back to Oracle to see if this option can be accommodated.

A question from the floor was that the assumption is that if the customer upgraded their license, they would need to pay more. Matti replied that Ex Libris needed to check the situation with Oracle, including information about the number of customers in this situation etc. to see if an exception would be granted.

A question from the floor was could customers use their own Oracle license in Alma. Matti said that since Alma is a cloud service customers can't use their own Oracle license.

QUESTION 5

Oracle Critical Patch Updates (CPUs)

Oracle CPUs are released too slowly by Ex Libris. Currently only the October 2010 CPU can be used with Ex Libris products, the April 2011 CPU is only announced. We feel that Oracle CPUs are crucial security patches and they should therefore be released much faster by Ex Libris. Please consider this.

Shlomo reported that Ex Libris was looking at alternatives to Oracle it was unlikely they could replace Oracle fully. Part of this investigation was to look at open-source options. It is anticipated that Oracle usage will be around for long-time.

Regarding the Oracle CPU release, Ex Libris evaluates any critical issues in every patch, but every patch needed to be tested. If a critical patch was released this patch would be tested and released ahead of schedule. Otherwise there was a twice yearly release of non-critical patches.

Regarding Alma, as this is a SaaS product and would have a large customer base, patches would receive a high-level of testing as if they released a version too early there could be unanticipated problems. As this would be in a controlled environment it is planned to have four releases per year.

A question from the floor related to the issue that releasing of Apache updates was critical. Shlomo replied this was an easier situation, where they can release an Apache update if critical, but otherwise there underwent 4 releases per year. Either way Ex Libris investigates the situation for each patch, they undertake QA for the patch, and then release the patch.

QUESTION 6

PDS/Shibboleth on Sun Solaris

We need to implement PDS/Shibboleth on Sun Sparc Solaris platforms for ALEPH etc. As far as we heard this is not out of the box, as important libraries for Solaris are missing. Are there successful implementations of PDS/Shibboleth on Sun Solaris by Ex Libris or customers?

The customer should direct this question to Ex Libris as it is very specific.

QUESTION 7

Apache web server

Apache used with Ex Libris products is a customised version especially compiled for Ex Libris products.

How do we as systems librarians update and maintain this version of Apache since it's neither a free version from apache.org nor the installed version that comes with Red Hat Enterprise Linux?

Shlomo reported that the Apache version used is an Apache.org standard release, but many of the sub-parts of Apache are needed to work with 3rd party products. In addition a very specific version worked with Aleph and DigiTool.

It was very difficult to ensure the right version worked with all products so new released versions needs a great deal of testing. While theoretically versions could be compiled locally Ex Libris couldn't guarantee these versions would work with all products, therefore this option was not recommended as it would be difficult to verify versions. Ex Libris provides an 'End – to

end' solution, including testing updates, every new release comes out with a new Apache version.

Jiri Kende noted that updates need to be done regularly, as older versions of Apache can contain IT security versions and so it was important to have regular updates.

Shlomo replied that Ex Libris' policy was that Apache was updated regularly.

QUESTION 8

License for test servers

What is Ex Libris' general policy for license / fees for test servers?

Marc replied there are different parameters for different products (especially re third party e.g. Oracle costs). However the general situation was a test environment using a basic configuration that was good for all. In these cases there would be no license fees but customers would pay maintenance fees. However if customers wanted a complete replication of the production environment, then Ex Libris would need to check this situation on a case by case. This investigation would apply to all products.

QUESTION 9

Copy request functionality

We are missing the copy request functionality in the Restful API. The request has been rejected by the Product Management and resubmitted. As this is a common functionality of ALEPH WebOPACs, we consider the copy request also as indispensable for Primo and other Metacatalog implementations.

Please tell us about the plans and time schedule to enhance the Restful API with the copy request functionality.

Bar replied that Ex Libris had not had time to research this question further and could not say in this session why this feature had not been developed. It was acknowledged that the openness of the system was important, but the specifics will have to be checked. Ex Libris undertook to come back later with this information.

A question from the floor was the general policy to include all end-user OPAC features into Primo. Matti replied Ex Libris used their best judgment, and could not commit to all features being included as some functionality was used infrequently. The general user report was that OvP was seen to be robust enough and so Ex Libris were interested in seeing how many customers were moving to Primo for full catalogue access. It seemed that 60% of Aleph users had implemented OvP. There had been some changes in V.3.1 and more features would be

available in V.4.0 and Ex Libris would be constantly monitoring the situation. Ex Libris were also interested in knowing how they could help libraries market moving to OvP within their libraries.

QUESTION 10

Backend user interface design
User interfaces for the backend in Primo, SFX, MetaLib are not very user friendly, e.g.
- Sorting dropdown lists (predefined)
- Too many clicks to reach often used functionalities
- ML-Backend doesn't work with Safari.
Does Ex Libris follow guidelines for user interface design?

Oren replied Yes but acknowledged there was always room for improvement particularly as they learn more about how people use back ends. For example, based on feedback, SFX v4 included significant improvements relating to the User interface for adding objects, and the use of shortcuts.

Relating to Safari, the priority was to concentrate on browsers used by the majority of customers so currently Safari was not incorporated into current priorities for backend usage.

QUESTION 11

Primo Central and MetaLib

Ex Libris announced Primo Central Index to be free of charge for all MetaLib customers.
Communicating the detailed implications turned out to be tricky.

Could you please again explain in how far Primo Central Index is free for customers who subscribe to the MetaLib Knowledge Base (in whatever configuration)?

David replied that if a MetaLib customer subscribed to the Knowledge Base and paid maintenance fee, then Primo Central was free. The options are
1. Primo Central through MetaLib
2. MetaLib+ then get Primo discovery (free but one time nominal implementation cost)
3. If a MetaLib and Primo customer, then could use Primo Central through Primo

Matti stated the basic idea was that a Primo and MetaLib Knowledge Base customer was not supposed to pay twice. If institutions had any concerns they should talk to their relevant customer office.

A question from the floor asked about 3rd party option, such as APIs for Primo Central. Matti replied that Primo Central would not be available for use within 3rd party services.

QUESTION 12a

MetaLib and Primo Front End?

According to Ex Libris the MetaLib (ML) front end (FE) will be replaced by Primo. Due to multiple, very severe shortcomings of Primo as ML FE the replacement will cause an effective downgrading of ML as we know it. Nevertheless we find ourselves often in the position to argue with the Support whether something is a bug or an enhancement.

What is Ex Libris' general policy in regard to the bug/enhancement issue in this context?

Joined with 12b

QUESTION 12b
Integration between Primo and MetaLib 1

The idea of Primo as the discovery tool and only gateway for end users is excellent, but the role of MetaLib is not clear. On one hand integration exists, giving the library the possibility to use MetaLib quicksets and now also search for databases. On the other hand response time, error messages from MetaLib and presentation of records (which is perfect in MetaLib) is really poor. Creation of facets is doubtful. In fact we are not certain that we can rely upon MetaLib search from Primo.

What are the plans for integration between Primo and MetaLib functionality? Will xml search be part of Primo (4th node?) or what will be done in order to

1) keep Primo as only discovery tool and
2) search other resources that cannot be hosted locally?

12a and 12b together

The question was addressed in depth in the Unified Resource Discovery & Delivery session.

Ex Libris acknowledges the importance of metasearch, in particular for handling the long tail of special resources that are not all indexed in a centralized mega-index. Metasearch provides librarians and users valuable freedom of choice in terms of searched data scope and is crucial for expert users. In that context it is important to mention the API search provided by Primo, e.g. to EBSCO resources, which is available to MetaLib+ customers and will be extended in the future to additional resources from other providers.At the same time for the majority of users and use cases, Primo and Primo Central brought about a quantum leap in discovery and delivery, in particular with respect to the three core elements of discovery: ranking quality, coverage and search performance (response time). From that perspective MetaLib users got hugely improved tools with the introduction of MetaLib+.

We are not stopping there and will continue enhancing MetaLib related functionality within Primo.

QUESTION 13

Hosted solutions (in the cloud) 1

What is the company direction as far as hosting of applications is concerned? Is the company planning generally to move everybody to a hosted platform, and to phase out local installations? If that is the case, will there be more options for hosted platforms within different regions around the world?

Matti noted that Ex Libris had being working on local installations for 25 years and so would not force customers to move from local to hosted in the foreseeable future. It is likely that local installations will remain for at least 10-15 years even though 75% of new customers are hosted, which growth is much faster than anticipated. The major interest in hosted systems is coming from the United States and Australasian regions whereas Asian sites were opting for local installations.

Regarding Data Centers, the existing locations are Chicago and Amsterdam. The location for the third data centre is still being investigated but it likely to be in Singapore or Australia. Originally sites were located within the original Chicago Data Centre but now new sites will be hosted within their regional Data Centre, with existing customers to be moved over time.

The current installation options are:
        Local installations
        Hosted service - Platform as a Service
        Total care - Software as a Service

Ex Libris would be working with large consortia to investigate options for future installations.

If any customer wanted any clarification about what services were offered within each option they should ask Ex Libris for the information.

QUESTION 14

Hosted solutions (in the cloud) 2

Could you please give us an update on the status of Ex Libris hosted services. How many installations of AlephPlus, MetaLibPlus, PrimoPlus etc. are there? How do you expect to develop this part of your business?

Matti reported that the numbers are growing. Latest statistics are:

Primo – 300 institutions
SFX – 245 institutions

Voyager – 205 institutions
MetaLib – 86 institutions
Aleph – 25 institutions
Verde – 20 institutions
bX – 984 institutions

QUESTION 15

Hosted solutions (in the cloud) 3

If all customers should move to hosted services – what about Rosetta? There is usually a mandate to collect digital information and house it locally rather than offsite. Will this still be able to be accommodated?

Marc replied that not all customers would be required to move to a hosted solution if there were local reasons, e.g. Mandate or nature of material, and in these cases it could be possible to keep implementation local.

It was noted that currently Rosetta implementations were all local. However if institutions wanted others to host Rosetta for them, there could be the option of a consortia taking this on for others. Ex Libris was evaluating whether they should offer this as a hosted service

QUESTION 16

Level of server access for hosted products
Just recently there has been a discussion about the Voyager Plus and customer level of access to the hosted servers. I assume the same type of question may exist for other hosted products. Would Ex Libris consider having a clear base statement regarding what is covered in the contract for all of these hosted services for everybody?

David acknowledged this question has come up with other products. The Contract would state the level of access for Total Care and Direct customers.
Ex Libris will develop a clear statement and make this available on the Documentation Portal so sites can see clearly what access is available for the various models.

QUESTION 17

Data center security

With there being just one data center for Europe, based in Amsterdam (where I understand the Equinix disaster recovery data center is also based), please convince me that "in the cloud" (more accurately "in Amsterdam") services are adequately safe.

Bar noted there are different levels of Disaster Recovery service, including Server redundancy, backups, load balancing, Oracle RAC, and server clustering.

An offsite Disaster Recovery system was a separate site which can be offered as part of hosted services. An offsite DR server would not be in the same building and Ex Libris was investigating options. This investigation would include looking at offsite DR options for the three Data Centres in Amsterdam, Chicago and for the 3rd data centre.

The investigation would address issues such as: options for offsite locations; different options such as public clouds, private clouds, or a mixture of all these. Depending on the options chosen this could affect the location. For example, if a public option was implemented, then this could mean London as a possible location. Other criteria included cost and how quickly the available services could be implemented. The final plans are scheduled for finalization with Q1 2012.

QUESTION 18

Oracle database connection

Nowadays we can access Aleph's Oracle database to integrate Aleph database tables with our institutional systems (select, insert, update, delete) via (e.g.) ODBC (Open Database Connectivity) connections. Will Alma allow this kind of database integration?

Bar stated it was very important question and this had been raised with the development partners, and collaborative partners. With the Alma SaaS model, they would need to resolve the multi-tenant issue. Whilst direct SQL access would not be tolerated because of security/performance issues within a SaaS, Ex Libris would be taking all steps to answer sites specific needs and was investigating the most efficient way to extract data from Alma, and publish within other systems. There would be multiple ways to achieve this and Ex Libris was investigating the tools and techniques to achieve this. Even if direct SQL access would not be available it was acknowledged that the need to extract data, and publish, would need to be addressed. Different options were being investigated, e.g. APIs

It was acknowledged there had been problems with ARC and Analyzer where not all data was available and Ex Libris was committed that full data would be available within Alma.

QUESTION 19
Staffing levels for Alma

Frequently I hear of staff being brought in to work on Alma either full or part time. Is the company confident that the Alma development is fully staffed and do you feel that other products are having to take a back seat?

Matti stated they believed that the number of Alma staff, i.e. 60 was adequate. However they were looking at how to actually staff the Alma project. Staff were being utilized with the following skills:

            Product knowledge: e.g. Aleph, Voyager, DigiTool
            Different skills: e.g. IT, security skills
            Regional knowledge: Asia, Headquarters, Europe

Whilst Omri was leading the development of the product he was supported by a mix of people, and experience. Luda Cherinsky is responsible for the professional readiness, and is working with regions and taking advice from them. For example staff from the regions were participating in addressing the design and migration issues. The SaaS issues were being led by Uri Livnat and was addressing issues associated with making Alma ready as a SaaS integrated product which could be managed by Cloud Services and Products.

Support staff are participating in the Alma project part-time as they will eventually have to support it. There was a need to educate staff about the new system, so they should be participating in the development of next generation systems as part of their own career development. Currently 90% of the Alma staff were full-time, with the part-time staff often involved as an educational service. In the future the majority of part-time staff will probably move to full-time when Alma is operational.

QUESTION 20

Alma and ILS

My institution has used Aleph since 1993 and we know that it continues managing many of the current library's tasks very well. So I ask you if my institution will be able to replace Aleph entirely or partially with Alma?

Bar noted that it will take at least 10 years to migrate customers to Alma from Aleph and Voyager systems. As a result they are still developing the Aleph and Voyager systems.

While Matti stated that the short answer is 'Yes', Marc noted that the decision will have to be made by the customer to assess the market, the competition, undertake an evaluation and decide what is the right choice for the customer. Whilst Ex Libris believes Alma and Primo would be the right choice, the customer will need to do the relevant evaluation.

QUESTION 21

ILL in Alma

Can you elaborate on inter-library loan workflows in Alma?

Bar noted a few years ago when he saw presentations relating to smart fulfillment he wondered if this could replace ILL. However it is now agreed that both are needed in Alma.

Whilst ILL is now part of development this is a big subject with different workflows and requirements across regions and countries. Other issues relate to mediated versus unmediated services so addressing the issue is complex. Different workflows are part of the plan and will be implemented during the 2012 – 13 roadmap and onwards.

For some early adopters this product needs to be available before they will go to production. Development partners were using OCLC whereas early adopters were involved with the National Library of Australia and British Library systems. In addition the British Library was part of the kickoff program.

Axel Kaschte is collecting requirements of the various ILL systems in Europe as part of an Early Adopter Program. It would be important to consider aspects relating to electronic document delivery as well as print delivery systems and ensuring that the Library knows what sort of collection gives the relevant information that meets its needs.

QUESTION 22

Hot keys in Alma?

Aleph uses hotkeys. What provision is made for similar shortcuts in Alma, to help prevent repetitive strain injury (RSI) problems when putting in data?

Bar noted that there were differences with client services and web services, then there are difference with hotkeys. It was acknowledged that accessibility requirements creates constraints relating to colours and shortcuts.

Ex Libris is trying to achieve the best outcome and were still trying to achieve this but sometimes this could be difficult and challenging. They were working on the metadata editor to achieve the best hotkeys to create the most efficient interface. They felt that in many places they have achieved this and hoped that the development partners can attest to it.

Janet Lute commented that in some situations if the hotkeys were not there now they would be added in PR5.

QUESTION 23

SFX functionality ported to Alma

With each Alma demo it becomes more and more clear that the functionality of the SFX Admin Center is integrated into the Alma back office component. While Ex Libris keeps confirming

that SFX will continue to be maintained as a stand-alone product we are afraid of what might be the impact of this promise on the development of SFX.

Are there plans to port SFX from Perl to Java (or whatever is the language Alma has been implemented in)?

Oren stated that while Ex Libris was continuing to support SFX as it was acknowledged this was a very important component used by large numbers of customers they are also developing this functional component in Alma. It was seen that both options would be part of the suite of solutions, and would be mutually developed with development shared between services.

Technology migration was not seen as a priority as they were considered secondary to services provision.

QUESTION 24

High voted enhancements requests and Alma

There are enhancement procedures active for the various back office products and the current OPACs. Recently high voted enhancements, that have been implemented or are about to be, are obviously of major interest to the users. Could you please elaborate on if and how these enhancements are taken into account in the ongoing Alma development?

Oren stated that whilst Ex Libris was working with development partner, early adopters, and collaborative partners they were building on the cumulative knowledge, and what was being heard from existing customers. However Alma is a new framework and should be dealing with the problems of 2011 onwards. This meant some old problems are now not as relevant. It was agreed that ILL needed to be included as part of the role of providing access to resources.

QUESTION 25

Open source products

Has Ex Libris considered setting up a division for paid support for open source ILS products such as Evergreen?

Marc stated that this had not been considered but it was acknowledged that new systems services could be required. However it was not anticipated that support for open support ILS would be provided.

Ex Libris was looking at its strategic framework relating to the decoupled environment where discovery systems are taking the pressure of users away from back-office. This then allows the opportunity to think about back-office systems. Ex Libris believes there is a complete advantage to bringing the products together, with back-office to front-office and vice versa

and they have delivered this in Primo but customers will have to decide what is the best option.

QUESTION 26

Open source search engines

The life of Voyager (and possibly Aleph) could be extended by replacing the ageing OPAC interfaces with an open source search engine such as VuFind. Is this under consideration or is the only strategy to offer Primo as an alternative interface?

The decoupling of discovery from the application has occurred for exactly that reason. Ex Libris' product is PRIMO. We do support OS solutions in the sense of integration, e.g. Open Platform and VUFind bridge. However we do believe that PRIMO offers a much wider functionality list and are able to offer specific features only because of a tighter coupling between our portfolio, e.g. bX recommendations for example to be used in ranking.

QUESTION 27
Plans for UStat

UStat is a useful working tool for e-resource statistics for Verde and SFX customers. Does Ex Libris have plans to give access to this tool for other Ex Libris customers? And what will be the fee?

Matti stated that the product will only be available with SFX.

QUESTION 28

E books: delivery issues

The e-book market is expanding and libraries want to present their readers the most user-friendly and best content available. We understand that Ex Libris has solutions for purchase, discovery and delivery of e-books: Primo for discovery, and Alma for management of those e-resources. We would like to learn, in particular, how Alma handles the delivery issues: authentication of library patrons, permanent download or loan (according to suppliers limits), and transfer of content to various devices (computers, e-readers, mobile phones, etc.).

Please specify whether your solutions are presently relevant/applicable and what are your plans, proposals for the future.

Oren stated that there are plans to address issues in this area, e.g. Patron driven acquisition of ebooks. There would be advantages within Alma to support patron driven acquisition (PDA) by utilising embedded orders. However new models such as rental are developing so these would need to be incorporated into Alma.

QUESTION 29

OCLC bought German ILS company Bond

In April 2011, the German ILS company Bond was acquired by OCLC. Its ILS system BIBLIOTHECA 2000 is widely spread in German speaking countries, especially in public libraries. Was Ex Libris not interested? Or did you consider Bond to be too expensive?

Matti noted that the acquisition of Endeavor was funded through private equity. All companies that are for sale ask Ex Libris to have a look at them, and make an assessment about purchase or not. Pricing was not the only choice and as Ex Libris has relatively good access to additional funding if the right company was identified, they could buy it after making the relevant judgment about the company. The specific company was a Public library focused company so an assessment needed to be made about expanding this type of user.