

EX LIBRIS OPERATIONS HIGHLIGHTS

IGELU | September 2016

Yair Amsterdam | COO, Ex Libris

Ex Libris Joins ProQuest



INTEGRATION PRINCIPLES

DO NO HARM

**MEET ALL
CUSTOMER
COMMITMENTS**

**ECONOMIES
OF SCALE**

**COMMUNICATE
TRANSPARENTLY ONCE
DECISIONS ARE MADE**

Integrating Customer Experience



Alignment of customer support

Streamline implementation and training

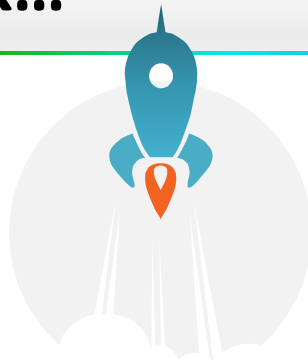
Unifying Cloud management

Knowledgebase enrichment

Ease migration to Alma

Consolidate customer facing systems

Going Live Next Week...



Opening Customer Knowledge Center for all Workflow Solutions products

Documentation and Support Articles

Open and free for all

Consolidated search functionality

Consolidating Customer Support Portal

Summon, 360 Suite, Intota, Aquabrowser,
Ulrichsweb - moving to Ex Libris Portal

Migrating ~1,400 Articles, ~4,000 accounts and
~100,000 cases

Tight integration with PQ Support Portal

GO LIVE PLANNED FOR SEPTEMBER 12

2016 Global Operations



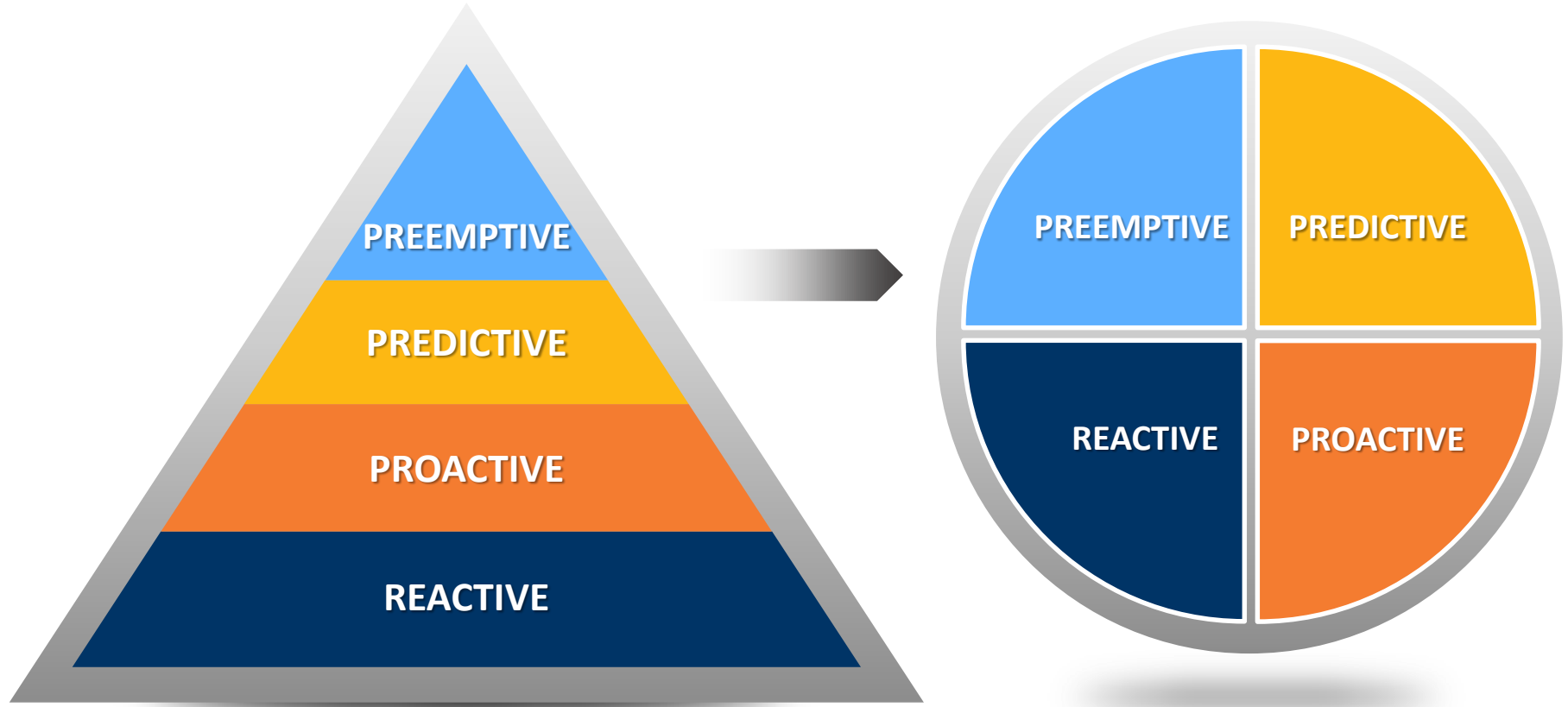


Customer Success

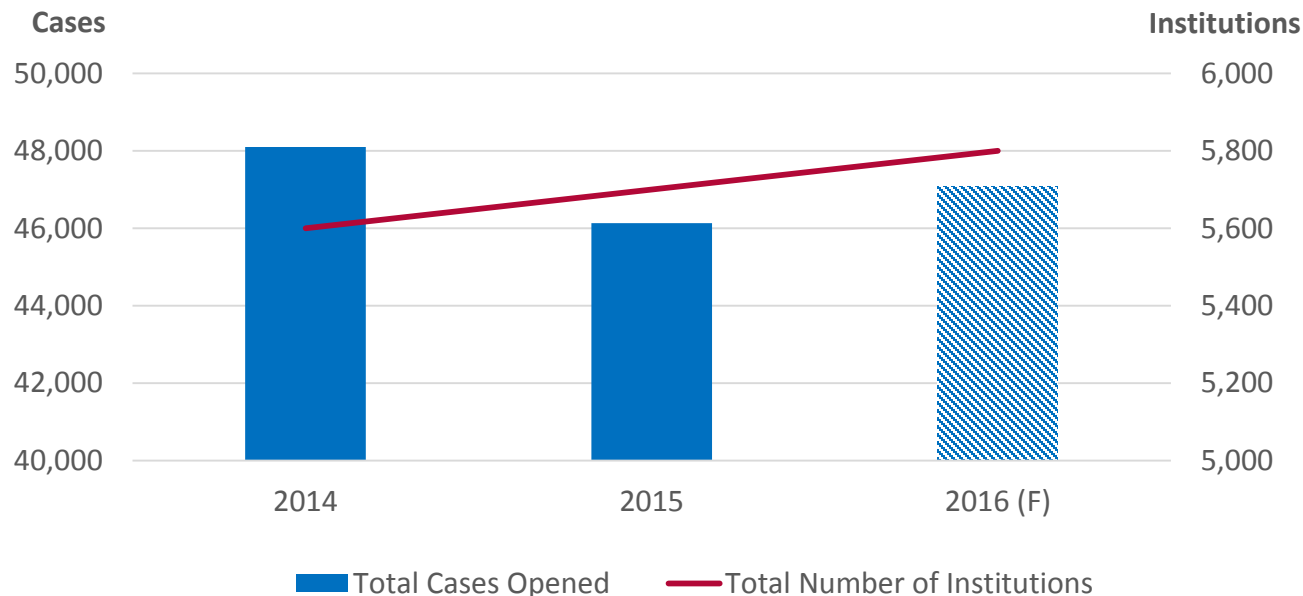
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Customer Service Evolution



Overall Customer Support Volume



OVER 2% DECREASE IN
CASES OPENED

STEADY GROWTH IN
NO. OF INSTITUTIONS

1/3 OF ALL CASES
RELATED TO CONTENT

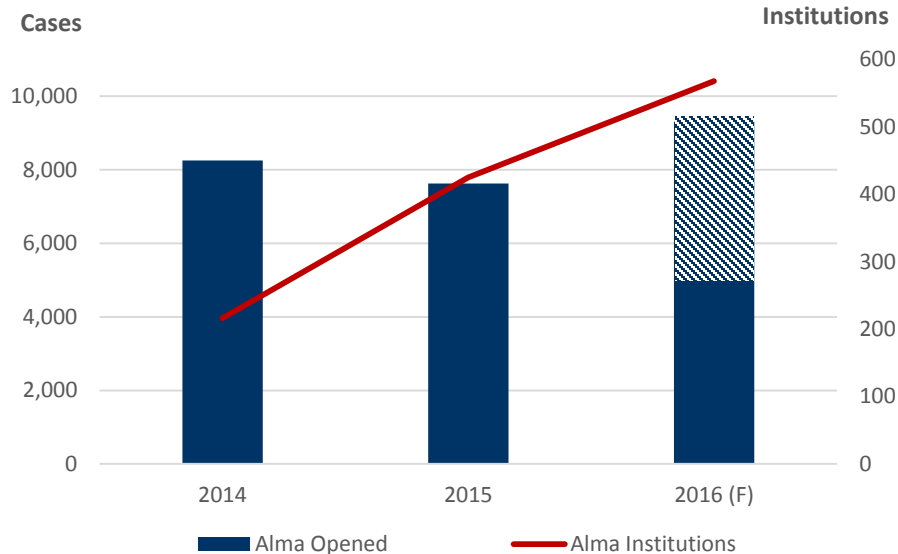
15% DECREASE IN
SFX, VOYAGER AND ALEPH
CASES

Customer Support: Operational Excellence

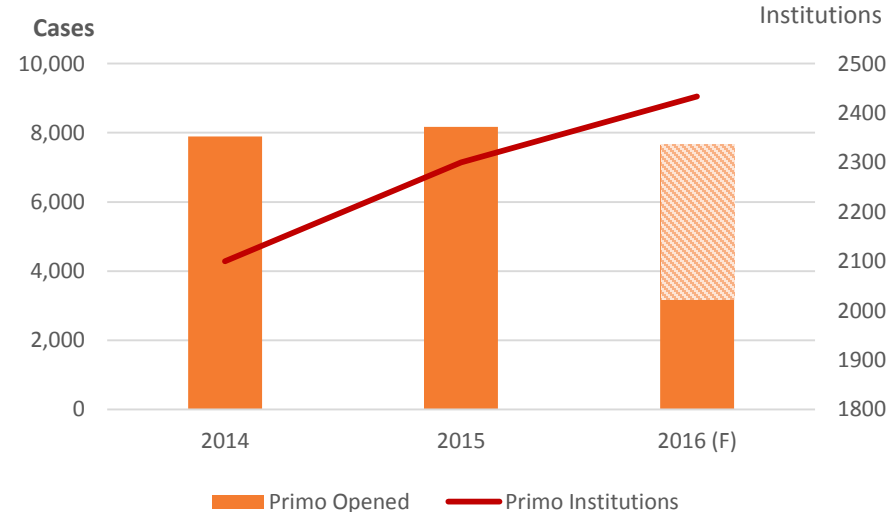
Overall product quality improvement

Increased deflection with proliferation of knowledge articles

ALMA SUPPORT VOLUME

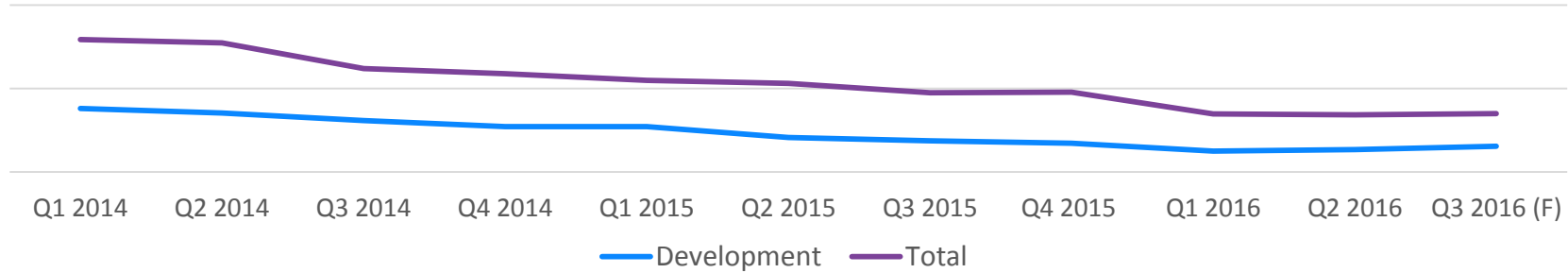


PRIMO SUPPORT VOLUME

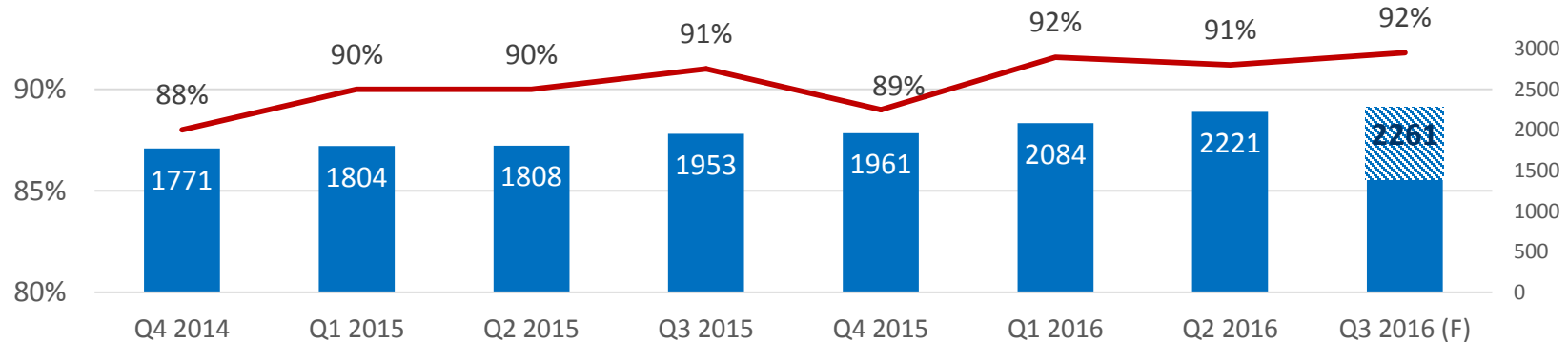


Support Trends

"HIGH" PRIORITY BACKLOG



CASE SURVEYS SATISFACTION RATE



Implementations Since Last IGELU



257

New institutions live on
Alma

116

New institutions live on
Primo

14

Rosetta implementations

55%

Alma migrations from
non-Ex Libris ILS

22

Different source systems
supported by Alma
migration engine

727

Product certifications
completed by
customers (568) & staff (159)

Project's Customer Satisfaction Surveys



Dear

Please take a moment to complete this four question survey on the implementation project: New Alma implementation.

Your feedback will help us to improve our implementation Projects.

How satisfied are you with the implementation project overall?



Very Satisfied



Satisfied



Dissatisfied



Very Dissatisfied

Thank you,
Ex Libris



USE

ty
part of project

ANCE JULY 3rd,



Thank You

Your rating has been successfully recorded as



How satisfied are you with the knowledge and expertise of the Ex Libris project team?



Very Satisfied



Satisfied



Dissatisfied



Very Dissatisfied

Please elaborate

How satisfied are you with the Ex Libris project team's communication and responsiveness during the implementation project?



Very Satisfied



Satisfied



Dissatisfied



Very Dissatisfied

Please elaborate

Cohort Implementation Model



WHAT IS COHORT IMPLEMENTATION?

A faster, more cost-effective, and collaborative implementation

PEER SUPPORT – PEERS HELPING PEERS

- Learn from fellow cohort institutions
- Gain community to continue work with

WHAT HAVE WE DONE SO FAR?

- 4 cohorts in NA
- 14 Live Customers by Aug 2016
- Launch in EU – April 2016

DELIVER MORE BENEFITS FOR SMALL INSTITUTIONS:

- Reduced implementation service cost
- Simplified implementation process

New Global Education Team



Global Education organization is responsible for customer education and training across all Ex Libris business unit product lines



Introducing **Audrey Ho** as Global Education Manager



GOALS

DEFINE GLOBAL STRATEGY
FOR PRODUCT TRAINING

IMPROVE CUSTOMER
OUTCOMES

INCREASE SCALABILITY,
EFFICIENCY AND
CONSISTENCY

PROMOTE POST-
IMPLEMENTATION
TRAINING
PROGRAMS

Global Education Team Plans

Enhance existing recorded training kits with new content



- Primo for Reference Librarians
- Primo New UI
- Alma Collaborative Networks
- Alma New UI

Expand portfolio of recorded training kits for new products



- Summon and Link
- Summon over Alma
- CampusM
- Rosetta
- Leganto



Expand certification programs

- Primo Administration Certification rollout



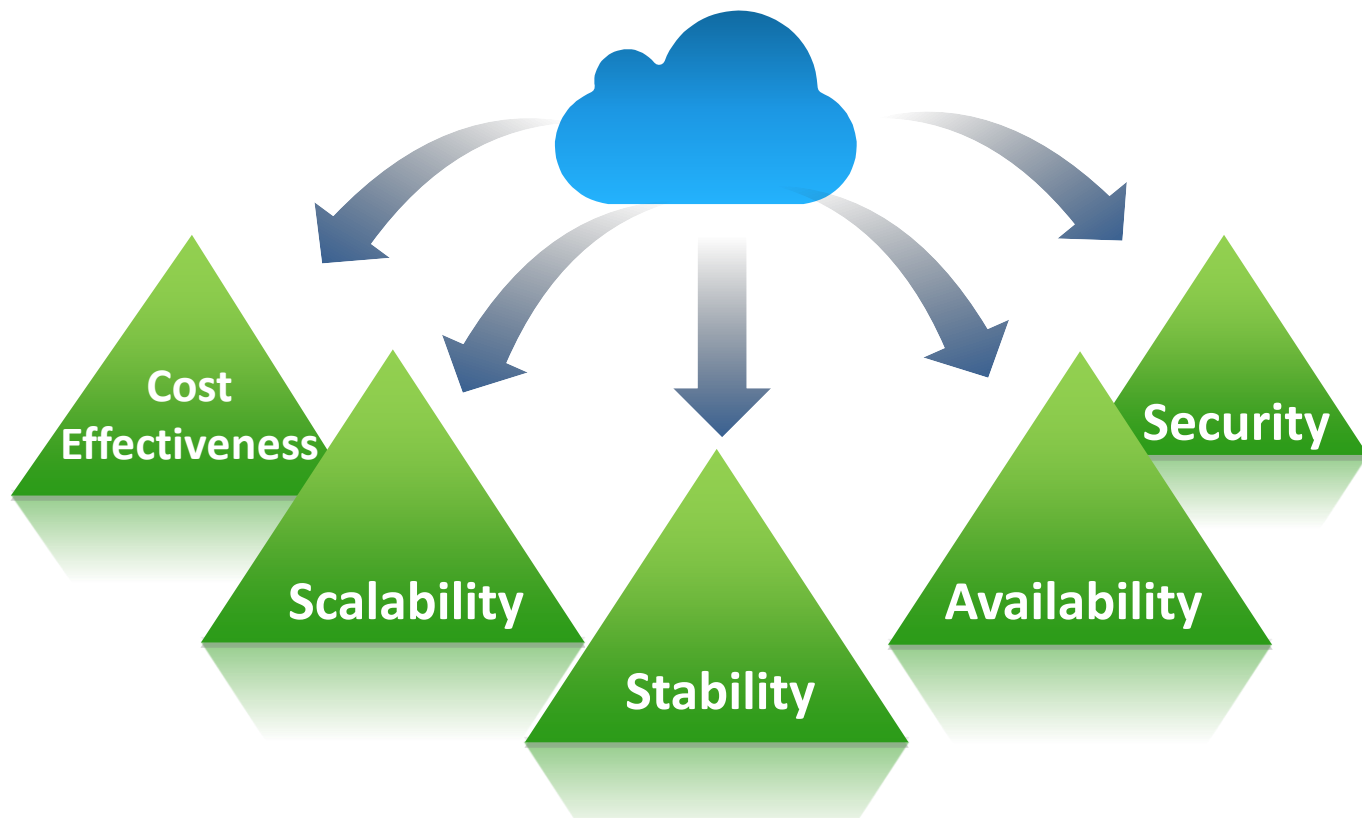
Build out a robust portfolio of post-implementation training services across next-generation products

A hand holding a dartboard with three blue darts hitting the bullseye. The background is a blurred image of a person in a white shirt.

Operational Excellence



Ex Libris Cloud Requirements



Cloud in Numbers



+5,500

**SaaS/Hosted
Institutions**

Alma, Primo, Summon, Intota, Aleph, 360, SFX, Voyager, MetaLib, MetaLib+, Verde, PC, bX, Ulrich's

4 M

Daily Primo Searches

2 M

Daily Summon Searches

3.5 M

Daily Alma Transactions

80

Racks in 10 private DCs and 3 AWS locations

1,625

Physical servers

2,373

Terabytes of storage

Cloud Uptime 2015 – 2016

	# Live Institutions	% Customers Meeting Contractual SLA (99.5)	% Customer Meeting Internal SLA (99.85%)
ExLibris Alma	500+	100%	100%
ExLibris Primo	1000+	99.88%	99.88%
ExLibris Primo Central	1700	Yearly uptime 99.93%	
ExLibris SFX	452	99.83%	89.59%
ExLibris Voyager	165	100%	100%
ExLibris Aleph	94	100%	52.88%
bx	500	Yearly uptime 99.97%	
		>99.9% CUSTOMERS MEET CONTRACTUAL SLA	>96% CUSTOMERS MEET INTERNAL SLA

Certified with the Most Rigid Security Standards

MAINTAIN EXISTING CERTIFICATIONS

ISO/IEC 27001:2013

The most rigorous global security standard



Data centers are SSAE-16 certified (formerly SAS-70)



ICO Registered (UK Data Protection Act)



PLAN FOR NEW CERTIFICATIONS IN 2016:

US Federal - FedRAMP (Alma/Primo)



CSA STAR – Self assessment



ISO 27018:2014 Privacy standard





CHRISTMAS IN AMSTERDAM



Quality of Content

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Data Services – Vision & Mission



VISION

Provide best in class content services to academic libraries



MISSION

Improve customers satisfaction by allowing libraries to fulfill their content related needs for both administrative and end-user aspects

ADMINISTRATIVE ASPECTS

END-USER ASPECTS



Working with the Community



Authorities



Bib Records Enrichment



SFX Contributions



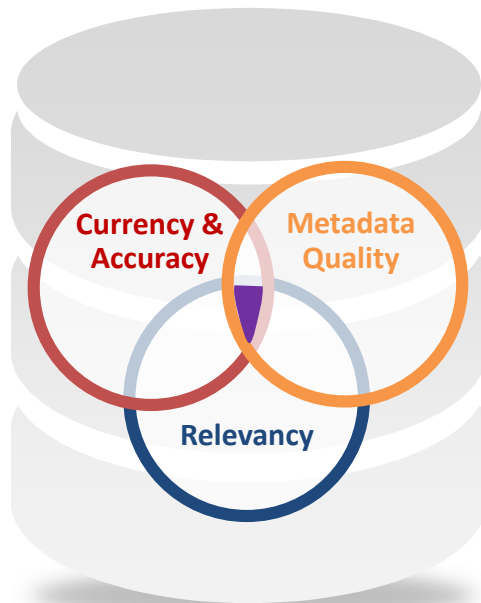
PWG (NERS)



Tailored Collections



Community Voting



Alma CZ Contributions



Support Surveys



KB Advisory Board



Alma CZ Mgmt. Group

Re-instatement of KBAB



KBAB (KB Advisory Board)

Reinstated in March 2016

Customer collaboration with Ex Libris

Ensuring the highest quality data stored in the knowledge base

Comprised of IGeLU and ELUNA members

Representing Alma, SFX, Primo and PCI e-resource managers

Established regular communication channel

Monthly calls

Representatives from Ex Libris departments

Content Operations, Product Management and Workflow Solutions

Prioritized 2 major topics

- Assistance in communication with providers on operational needs
- Alignment of resource types between Summon & Primo Central

Content Integration



PRIMO CENTRAL

- Increase collections relevancy by adding new content from Summon
- Added over 20K new Peer Review indication entries using Ulrich's web
- Improve availability indication accuracy by enriching SFX/Alma objects



ALMA COMMUNITY ZONE

- Improve Alma CZ catalogue quality using New KB enriched Bib records
- Improve match routine accuracy using Ulrich's web enriched titles
- Support Summon over Alma by mapping 360L CKB databases to Alma collections



SFX KB

- Improve match routine accuracy using Ulrich's web enriched titles
- Improve A-Z list search capabilities using Ulrich's web comprehensive categories



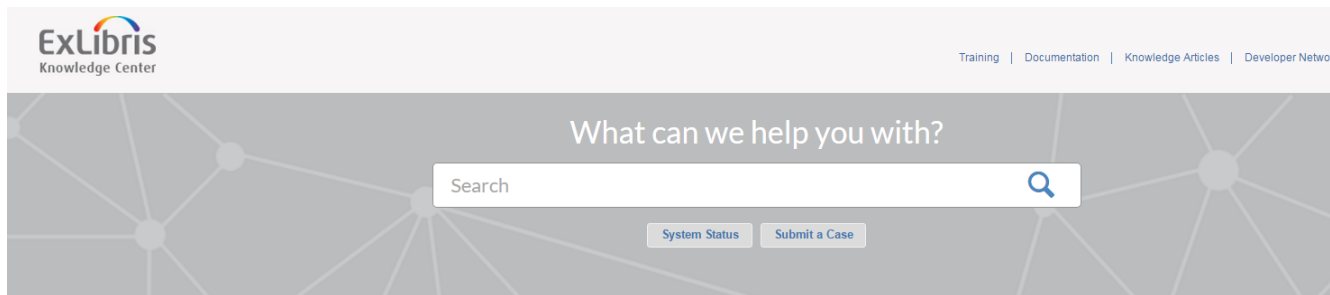


Easy to Do Business

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Introducing the Ex Libris Knowledge Center



KNOWLEDGE ARTICLES,
DOCUMENTATION &
TRAINING UNDER A
UNIFIED PLATFORM


SINGLE SEARCH FOR
ALL CONTENT

MODERN CUSTOMER
EXPERIENCE


FREE AND OPEN
TO ALL

Browse by product:


Alma Primo Rosetta SFX Aleph Voyager Metalib Verde DigiTool campusM Leganto +

**Search Knowledge Articles**


Search our extensive knowledge base for answers to commonly raised questions

**Find Product Documentation**

Access the latest documentation for Ex Libris products

**Take Training**

Learn new skills and get certified with our tutorials, recorded training and other materials

**Understand Products and Services**

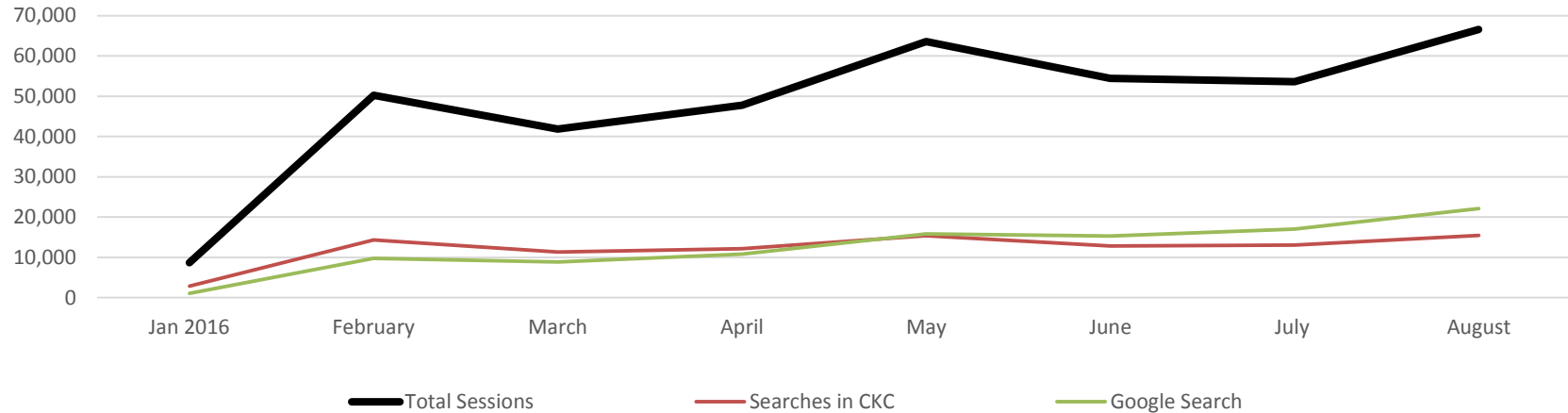
Learn more about our product offerings, and how they can serve your needs

Featured Topics

- Introduction to the Knowledge Center
- Knowledge Center Questions and Answers
- Problems with Knowledge Center, Developer Network, On Line Help etc.
- How to apply additional script to correct issue with derivative copies in SP 4.2.1 installation
- Enhancement Process - Common Q&A
- What is the URL to Provide Vendors for Alma ViewIt Window Link and Resolver Icon?
- Add an IP Address to Access Ex Libris Products Through Hosted Server Firewall

Customer Usage Goes Up

KNOWLEDGE CENTER TRAFFIC



Was this article helpful?



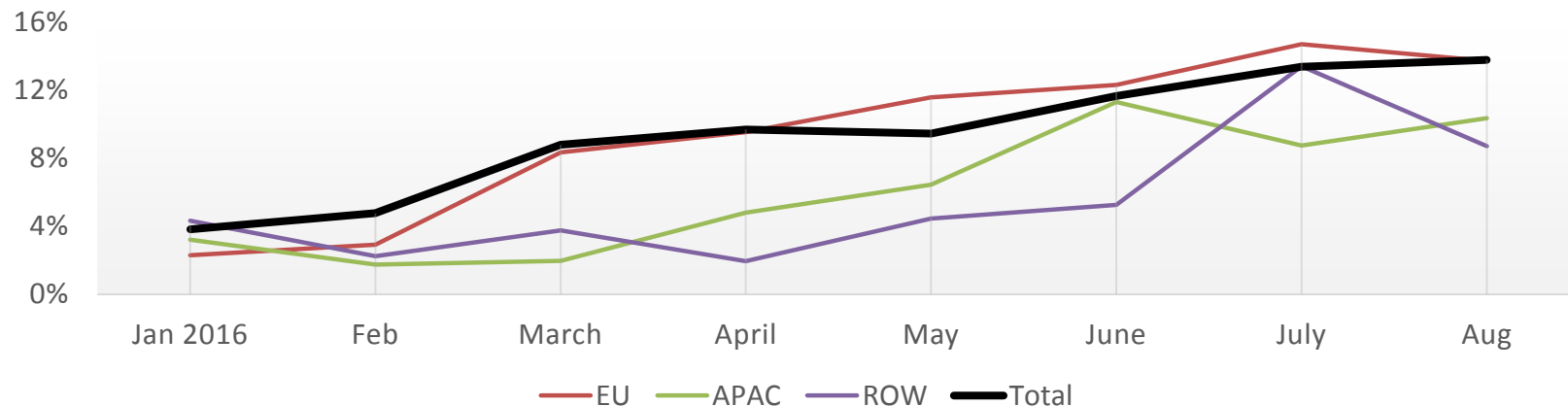
Yes



No

Closely Integrated with Global Support

% CASES CLOSED WITH KNOWLEDGE ARTICLES



CUSTOMER CASE SATISFACTION INCREASES

LOOKING TO DECREASE TIME TO RESOLUTION

Email Preferences: Streamlined Communications



Logged in as [REDACTED]

Cases Search Cases KB Items Publish Account Assets **Email Preferences**

Messages and Alerts

[Link to Salesforce documentation](#)

[Escalation policy](#)

[Contact us](#)

Welcome, [REDACTED]
My Profile | Logout

Search

Search All

Go!

[Advanced Search...](#)

Find Articles (Old)

Go!

Recent Items

No records to display

WalkMe for Salesforce

Email Preferences

Dear [REDACTED]
In this page you can manage your email preferences and subscribe to relevant mailing lists. Personal details, such as email address, can be edited under [My Profile](#).

Available Mailing Lists

☐ Select All

Product Specific Support Messages

- ☐ Aleph
- ☐ Alephino
- ☐ Alma
- ☐ Alma Data Services
- ☐ bX
- ☐ CampusM
- ☐ DigiTool
- ☐ MetaLib
- ☐ MetaLib KB
- ☐ Metalib+ (Includes subscription to corresponding System Status Page notifications)
- ☐ Primo
- ☐ Primo Central
- ☐ Rosetta
- ☐ SFX
- ☐ SFX KB
- ☐ Verde
- ☐ Voyager

Ex Libris News and Information

- ☐ Articles
- ☐ Messages for Ex Libris customers (e.g. availability of local offices during)

Save

STREAMLINED
COMMUNICATION

PERSONALIZED CUSTOMER
PREFERENCES

VEHICLE FOR PROACTIVE
AND PREDICTIVE SUPPORT

OVER 3,000 SUBSCRIBERS,
45% SUBSCRIBED FOR
ARTICLE UPDATES

Predictive Support



Better Customer Experience

Ex Libris is All About Open Platforms...



ExLibris
Knowledge Center

[Training](#) | [Documentation](#) | [Knowledge Articles](#) | [Developer Network](#) | [Libraries](#)

What can we help you with?

Search

[System Status](#) [Submit](#)

Browse by product

Alma [Primo](#) [Rosetta](#) [SFX](#) [Aleph](#) [Voyager](#) [Metalib](#)



Search
Knowledge Articles



Find Product
Documentation

ExLibris
IdeasExchange

Ex Libris Knowledge Center

Have an
idea for Ex
Libris?



Share
your ideas



Support your
favorite ideas



Get feedback
on popular ideas

Welcome to Ex Libris Idea Exchange! We'd love to hear your ideas for us.
To suggest an idea, please select one of the following forums

Alma



campusM



Primo



Rosetta



ExLibris

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Search



[Leganto](#) [bX](#) [SFX](#) [Aleph](#) [Voyager](#)

Apps

Find items, location, item status,
material and barcode

Get Help

Got Questions?
The Ex Libris Developer Network Forum is the
place to go. Search the forum for instant help,
or ask a question and get help from:

[Privacy Policy](#) | [Security](#)

The Ex Libris System Status page presents the latest information on the availability of all multi-tenant Ex Libris instances. You may check this page at any time to see the current status information, or subscribe to be notified via email of interruptions to any individual service. If you are experiencing a real-time operational issue that is not indicated below, please inform us by opening a customer support request.

System: [All](#)

Region: [All](#)

[Remember my instances](#) [Reset](#)

	Instances	Email Alerts	Current Status	Apr-11	Apr-10	Apr-09	Apr-08	Apr-07	Scheduled Maintenance
<input type="checkbox"/>	Alma NAO1								2016-Apr-10

Ex Libris Employees: Our Biggest Asset



SATISFIED EMPLOYEES ARE THE FOUNDATION FOR HAPPY CUSTOMERS

THANK YOU
yair.amsterdam@exlibrisgroup.com