

Notes from the SFX and MetaLib break-out session

I am extremely excited to be the new product strand coordinator for SFX and MetaLib. I'm hoping to coordinate interesting and informative presentations and discussions for future sessions. If you have any ideas for discussion or need to contact me for any reason then my email address and twitter alias are:

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I'd just like to start by saying thank-you to Stephen Graham and Andrew Brown for helping me with the SFX4 Q&A session, and to Jeremy Acland for his impromptu presentation on Primo-Central.

Q&A session on 'Living with SFX4'

There were a number of questions asked prior to the AGM and during the session. Unfortunately Christine Stohn was absent on the day due to ill health, so we missed out on her technical knowledge. The questions that were raised prior to the session have now been sent to Christine so hopefully we can get some technical feedback from Ex Libris. A quick summary the advice given on the day:

1. Ensure that SFX3 is up to date with revisions before you attempt the upgrade. Also ensure that Verde is up to date and synchronised with SFX3 if you are using Verde as well.
2. The log files are bigger in SFX4 so make sure that you have plenty of disk space and perform clean-up regularly.
3. If you use bX, be sure that you have published data in SFX3 before moving over as there is an issue with loading bX data from SFX3 into SFX4
4. There are no issues with loading local journals in SFX4, but it will increase the amount of SFX administration you will need to do in the long term
5. The consensus was that automating the update process (or at least doing it very regularly) was the best approach. The update process was also reported to be a lot faster, only taking around 15 mins to complete.

There were also some questions that needed some follow-up:

There seemed to be some confusion from the floor about the purpose of AutoUpdate and AutoActive within SFX. The documentation for both these processes is within the SFX General User's Guide (Chapter 11). I have asked Ex Libris if we can clarify what these processes are and how they work with some real world examples.

Issues were raised concerning intermittent problems with SFX and IE with pages not refreshing properly or sessions hanging. It was suggested that the problems may have something to do with bugs detected with SFX and IE8. The best advice is to report these issues to Ex Libris using Pivotal and then submit the issue to the mailing list. This method of problem sharing on the mailing list gives other institutions the chance to use the 'me too' feature of Pivotal and also helps to build a picture of when and how these problems occur.

Primo Central Demonstration

The demonstration of Primo Central was extremely interesting, especially being able to see how quick searches are in Primo-Central compared to those in federated search systems, such as MetaLib. Another nice comparison was looking at Primo-Central and Primo side-by-side. However, it was clear that there is still some confusion as to the differences between Primo-Central and Primo and what the primary functions are of the two systems. I'll try and summarise both systems here as best I can:

Primo

Primo is Ex Libris discovery platform. This tool allows institutions to harvest and index data about the resources they own or subscribe to. This aggregated index can then be searched by users very quickly to get a combined result set.

Primo Central

Primo Central is a version of Primo that is hosted and managed by Ex Libris. Rather than having an index of data comprising an institution's resources, the Primo Central index comprises a huge aggregation of data about journals, e-books, reviews, etc, available from multiple online resources. Users can search this huge index within Primo-Central and quickly find relevant information regarding online resources.

Looking toward future discussion

The issue of 'cloud based Ex Libris software' was identified as a potential topic for the autumn conference. It appears as though many institutions either want more information about this topic or are actively engaged in implementing cloud based systems.

There was also a suggestion that EPAD could include a new parameter by each software product indicating if the product is hosted by Ex Libris or installed locally.