



Ex Libris Cloud Service Packages

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Ex Libris Cloud Services: Overview

Recent global economic trends, technological advances such as the availability of high-speed Internet and cloud-computing environments, and, specifically in the library domain, the evolving needs of students and researchers—are driving libraries to explore new operating models. Libraries across the globe are now considering the benefits of hosted services of various kinds. While some libraries prefer to continue configuring and managing their own systems, other libraries prefer to subscribe to a fully cloud-based offering in which the vendor is responsible for delivering all aspects of the solution.

Besides the considerable savings in total cost of ownership involved in the implementation of software solutions, the use of a cloud-based service enables libraries to easily leverage the collaborative efforts of the library community to provide yet better services for their users.

Ex Libris offers its customer community of over 5,000 academic, national, and research library the ability to choose the most appropriate deployment for their individual needs. In an accelerating trend, large numbers of customers are choosing the company's cloud-based implementations, which significantly reduce the technical burden while offering a level of flexibility that suits the library. In use at over 1100 institutions in North America, Europe and Asia, Ex Libris cloud services provide efficient, streamlined product upgrades and round-the-clock, library-focused technical support.

Ex Libris offers a range of cloud service models:

Direct

The Ex Libris Direct service is an application hosting offering. The application is installed and hosted on a server located at the Ex Libris Data Center. Direct access to the customer's environment is provided to the customer, enabling the customer to independently perform application-related administration tasks.

TotalCare

The Ex Libris TotalCare offering adds application-specific services on top of the benefits of the Direct services package. Ex Libris performs all system-level functions for the customer.

AlephPlus and VoyagerPlus

The AlephPlus and VoyagerPlus upgrade programs enable existing Aleph or Voyager customers to migrate to one of the hosted deployments and add Primo and SFX as a TotalCare service. For example, AlephPlus means hosted Aleph (either Direct or TotalCare) with Primo and SFX in TotalCare .

MetaLib+

MetaLib+ is a cloud-based Primo service for electronic material discovery, providing a Primo user interface and instant access to the Primo Central Index. All MetaLib customers are eligible for MetaLib+ regardless of their service type (local, Direct, TotalCare).

Ex Libris World-Class Cloud Environment

All Ex Libris cloud-based solutions are provided in the world-class Ex Libris Cloud environment, backed by the following services:

- Production-level hardware
- Hardware maintenance
- 24x7 professional operators
- Centralized backup facilities
- Redundant environmental systems for power, cooling, and humidity control
- Uninterruptible power supply (UPS)
- Power generators
- At least 3 load balanced Internet Service Providers (ISP) providing redundant fiber Ethernet connectivity to the facility
- Redundant routers
- Backup tapes are stored at the data center, with separate offsite long-term retention.

In addition, all cloud services from Ex Libris include the following ongoing services:

- Disk backups to tape
- Server monitoring
- Hardware and operating system upgrades, patches, and maintenance
- System security
- High availability

This introduction to Ex Libris cloud services presents the features and services that are provided with each deployment—Direct, TotalCare, Aleph, Voyager and MetaLib, the Plus upgrade program.

ExLibris currently have three main data-centers

1. *Amsterdam, Netherlands – ISO/IEC 27001:2005 Certified; served with a fiber Ethernet active/standby connection*
2. *Elk Grove, IL, USA – SSAE16 -SOC1 Certified; served with a fiber Ethernet active/standby connection*
3. *Chicago IL, USA - SSAE16 -SOC1 Certified; served with OC-3 active/standby connection*

Important Notes:

- **The comparison matrixes describe the principal differences between the hosting packages, but do not present the complete list of features and functions for each product**
- **The services listed in this document may be subject to change**
- Where applicable, checkmark means that Ex Libris performs the monitoring/service as described in the relevant line. In cases where Ex Libris allow performing an operation while customer is the one to actually perform it, a note by (BC) meaning "By Customer" in the matrix is added.

The products covered are:

- [The Aleph integrated library system](#)
- [The Voyager integrated library system](#)
- [The Primo discovery and delivery solution](#)
- [The MetaLib federated search system](#)
- [The SFX OpenURL link resolver](#)

Aleph Cloud Services

The table below lists the different services provided for each **Aleph cloud-based offering**. Please note that the exact setup services are determined by the purchased Aleph module (e.g.: Acquisition, ILL, ARC)

	Direct	TotalCare	Plus
Cloud Infrastructure			
Direct Server Access to Aleph	✓		With Aleph Direct
Hosted in the Ex Libris Cloud	✓	✓	✓
Production hardware platform with hardware maintenance	✓	✓	✓
Centralized backup system	✓	✓	✓
Redundant environmental systems (power, cooling and humidity)	✓	✓	✓
Uninterruptible power supply (UPS)	✓	✓	✓
Power generators (independent power plant)	✓	✓	✓
At least 3 load balanced Internet Service Providers (ISP) providing redundant fiber Ethernet connectivity to the facility	✓	✓	✓
Redundant routers	✓	✓	✓
Cloud Services (Ongoing)			
Disk backups to tape	✓	✓	✓
Offsite storage of backup tapes	✓	✓	✓
Recovery from backup	✓	✓	✓
Server Monitoring	✓	✓	✓
Monitor background processes	✓	✓	✓
Monitor Oracle disk and tablespace	✓	✓	✓
Hardware system upgrades, patches and maintenance	✓	✓	✓
Operating system upgrades, patches and maintenance	✓	✓	✓
System security	✓	✓	✓

	Direct	TotalCare	Plus
Implementation Services (Setup)			
Aleph Setup			
Set up standard daily jobs that are run via CRON		✓	With Aleph TotalCare
Ex Libris configures PDS with LDAP and Ex Libris Products	✓(with Customer)	✓	✓
Primo Setup			
Primo integration with Aleph (including initial full data extraction and setup of ongoing data extraction), including:			
<i>Primo integration with two OAI-compliant digital repositories</i>			✓
<i>A single view with up to two tabs</i>			
<i>Basic branding in Primo (customer logo, color scheme, selection from standard design templates)</i>			
<i>Authentication via direct calls to Aleph or to LDAP</i>			
Basic web-based training (user interface)			✓
Activate Primo Central			✓
SFX Setup			
Primo Integration with SFX			✓
Activation of user-licensed electronic journals in the SFX KnowledgeBase			✓
<i>Customer is responsible for providing a single comprehensive title list of electronic subscriptions</i>			
Activation of user-requested free electronic journals in the SFX KnowledgeBase			✓
Loading of print journals, if desired			✓
SFX Menu with appropriate services			✓
A-Z list of electronic journals			✓
Basic branding in SFX			✓
SFX integration with an existing proxy server			✓(BC)
SFX integration with a supported ILL service			✓

	Direct	TotalCare	Plus
Ongoing Services			
Ex Libris performs service pack installation	✓	✓	✓
Ex Libris performs product version upgrades	✓	✓	✓
Aleph Ongoing Services			
Ex Libris monitors regular jobs and interfaces		✓	With Aleph TotalCare
Ex Libris implements new features and functions following an upgrade <i>(at the customer's request)</i>		✓	With Aleph TotalCare
Ex Libris monitors ARC, if used		✓	With Aleph TotalCare
Ongoing process monitoring		✓	
Ex Libris performs file system, log file, temp file and scratch cleanup		✓	
Primo Ongoing Services			
Ex Libris performs monitoring of ongoing data sources (e.g. Aleph, Digital Repositories)			✓
Ex Libris provides weekly Primo search statistics and performance reports			✓
Ex Libris performs Primo changes annually upon request, including:			
<i>Update static HTML/CSS files</i>			
<i>Customize existing data sources to create additional indexes</i>			
<i>Display local fields</i>			✓
<i>Change the order of Display fields</i>			
<i>Change field captions and labels</i>			
<i>Perform updates to MetaLib quicksets/remote scope configurations[if applicable]</i>			
Ex Libris creates links to customer-defined HTML/CSS files			✓
SFX Ongoing Services			
Ex Libris applies regular SFX KnowledgeBase updates and makes required changes			✓
Ex Libris performs SFX KnowledgeBase changes upon request (additions, deletions)			✓
Ex Libris performs regular file cleanup (log files, temp files, etc.)			✓
Ex Libris provides statistics for SFX			✓

Voyager Cloud Services

The table below lists the different services provided for each of **Voyager cloud-based offering**:

	Direct	TotalCare	Plus
Cloud Infrastructure			
Direct Server Access	✓		With Voyager Direct
Hosted in the Ex Libris Cloud	✓	✓	✓
Production hardware platform with hardware maintenance	✓	✓	✓
Centralized backup system	✓	✓	✓
Redundant environmental systems (power, cooling and humidity)	✓	✓	✓
Uninterruptible power supply (UPS)	✓	✓	✓
Power generators (independent power plant)	✓	✓	✓
At least 3 load balanced Internet Service Providers (ISP) providing redundant fiber Ethernet connectivity to the facility	✓	✓	✓
Redundant routers	✓	✓	✓
Cloud Services (Ongoing)			
Disk backups to tape	✓	✓	✓
Offsite storage of backup tapes	✓	✓	✓
Recovery from backup	✓	✓	✓
Server Monitoring	✓	✓	✓
Monitor background processes	✓	✓	✓
Monitor Oracle disk and tablespace	✓	✓	✓
Hardware system upgrades, patches and maintenance	✓	✓	✓
Operating system upgrades, patches and maintenance	✓	✓	✓
System security	✓	✓	✓

Implementation Services (Setup)

	Direct	TotalCare	Plus
Voyager Setup			
Set up standard daily jobs that are run via CRON		✓	With Voyager TotalCare
Set up WebAdmin interface that enables customers to perform the following: <i>Web Usage Reports/Statistics</i> <i>EDI file transfer</i> <i>Download/Upload of files to and from server</i> <i>Edit server configuration/HTML files</i> <i>Configure z39.50 connections</i>		✓	With Voyager TotalCare
Configure initial OPAC design (based on Ex Libris templates), including: <i>Colors & fonts, customer's logo</i> <i>Standard searches</i> <i>Email & print options</i>		✓	
Primo Setup			
Ex Libris configures PDS with LDAP and Ex Libris Products	✓	✓	✓
Primo integration with Voyager (initial full data extraction and setup of ongoing data extraction), including: <i>Primo integration with up to two OAI-compliant digital repositories</i> <i>A single view with up to two tabs</i> <i>Basic branding in Primo (customer logo, color scheme, selection from standard design templates)</i> <i>Authentication via direct calls to Voyager or to LDAP</i>			✓
Activate Primo Central			✓
Basic web-based training			✓
SFX Setup			
Primo integration with SFX			✓
Activation of user-licensed electronic journals in the SFX KnowledgeBase <i>Customer is responsible for providing a single comprehensive title list of electronic subscriptions</i>			✓
Activation of user-requested free electronic journals in the SFX KnowledgeBase			✓
Loading of print journals, if desired			✓

Direct TotalCare Plus

SFX Menu with appropriate services			✓
A-Z list of electronic journals			✓
Basic branding in SFX			✓
SFX integration with an existing proxy server			✓
SFX integration with a supported ILL service			✓

Ongoing Services

Ex Libris performs service pack installation	✓	✓	✓
Ex Libris performs product version upgrades	✓	✓	✓

Voyager Ongoing Services

Ex Libris performs Patron Update		✓	With Voyager TotalCare
Ex Libris performs Fiscal Period Close		✓	With Voyager TotalCare
Ex Libris conducts annual keyword regeneration		✓	✓
Ex Libris conducts annual system optimization		✓	✓
Ex Libris conducts annual training webinar <i>(selected from the Voyager training schedule)</i>		✓	✓

Primo Ongoing Services

Ex Libris performs monitoring of ongoing data sources (e.g. Voyager, Digital Repositories)			✓
Ex Libris provides monthly Primo search statistics and performance reports			✓
Ex Libris performs Primo changes annually upon request, including: <i>Update static HTML/CSS files</i> <i>Customize existing data sources to create additional indexes</i> <i>Display local fields</i> <i>Change the order of display fields</i> <i>Change field captions and labels</i> <i>Perform updates to MetaLib quicksets/remote scope configurations[if applicable]</i>			✓
Ex Libris creates links to customer-defined HTML/CSS files			✓

Direct TotalCare Plus

SFX Ongoing Services

Ex Libris applies the regular SFX KnowledgeBase updates	✓
Ex Libris performs SFX KnowledgeBase changes upon request (additions, deletions)	✓
Ex Libris performs regular file cleanup (log files, temp files, etc.)	✓
Ex Libris provides statistics for SFX	✓

Primo Cloud Services

The table below lists the different services provided for each of Primo cloud-based offering. For more information on the different services please contact your account manager:

Direct – Dedicated Environment Direct – Standard Environment TotalCare

Cloud Infrastructure

Hosted in the Ex Libris Cloud	✓	✓	✓
Direct Server Access	✓	Back office only	
Production hardware platform with hardware maintenance	✓	✓	✓
Centralized backup system	✓	✓	✓
Redundant environmental systems (power, cooling and humidity)	✓	✓	✓
Uninterruptible power supply (UPS)	✓	✓	✓
Power generators (independent power plant)	✓	✓	✓
At least 3 load balanced Internet Service Providers (ISP) providing redundant fiber Ethernet connectivity to the facility	✓	✓	✓
Redundant routers	✓	✓	✓

Cloud Services (Ongoing)

Disk backups to tape	✓	✓	✓
Offsite storage of backup tapes	✓	✓	✓
Recovery from backup	✓	✓	✓
Server Monitoring	✓	✓	✓
Monitor background processes	✓	✓	✓
Monitor Oracle disk and tablespace	✓	✓	✓
Hardware system upgrades, patches and maintenance	✓	✓	✓
Operating system upgrades, patches and maintenance	✓	✓	✓
System security	✓	✓	✓
	Direct – Dedicated Environment	Direct – Standard Environment	TotalCare

Implementation Services (Setup)

Integration with a supported ILS, including: <i>A single view with up to two tabs</i> <i>Basic branding in Primo (customer logo, color scheme, selection from standard design templates)</i> <i>Authentication via LDAP or with Ex Libris products</i> <i>For Aleph and Voyager, Ex Libris provides initial full data extraction and setup of ongoing data extraction;</i> For other supported ILS systems, the customer is responsible for initial data extraction and setup of ongoing data extraction	✓	✓	✓
Activate Primo Central	✓	✓	✓
Primo integration with up to two OAI-compliant digital repositories	✓	✓	✓
Primo integration with existing standard link resolver	✓	✓	✓
Configuration of Deep Search	✓	Limited to out of the box adaptors	Limited to out of the box adaptors
Training	✓	✓	
Per request facets configuration	✓	✓	✓
Normalization rules	✓	✓	✓

Ongoing Services

Ex Libris performs service pack installation	✓	✓	✓
Ex Libris performs product version upgrades	✓	✓	✓
Ex Libris is responsible for Indexing		✓	✓
Ex Libris performs regular file cleanup (log files, temp files, etc.)		✓	✓
Ex Libris provides weekly search statistics and performance reports			✓
Basic branding (customer logo, color scheme)			✓
Homepage customization (based on template: text, images, links)			✓

	Direct – Dedicated Environment	Direct – Standard Environment	TotalCare
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Normalization rules			✓
Service Pack mandatory implementation notes			✓
Ex Libris monitor the pipes			✓
Ex Libris creates link to customer-defined HTML/CSS files			✓
Ex Libris performs annual changes upon request, including:			
<i>Update static HTML/CSS files</i>			
<i>Customize existing data sources to create additional indexes</i>			
<i>Display local fields</i>			✓
<i>Change order of display fields</i>			
<i>Change field captions and labels</i>			

MetaLib Cloud Services

MetaLib+ is a cloud-based Primo service for electronic material discovery, providing a Primo user interface and instant access to the Primo Central Index. All MetaLib customers are eligible for MetaLib+ regardless of their service type (local, Direct, TotalCare).

The table below lists the different services provided for each **MetaLib cloud-based offering**:

	Direct	TotalCare	MetaLib+
Cloud Infrastructure			
Hosted in the Ex Libris Cloud	✓	✓	✓
Direct Server Access	Back office only		
Production hardware platform with hardware maintenance	✓	✓	✓
Centralized backup system	✓	✓	✓
Redundant environmental systems (power, cooling and humidity)	✓	✓	✓
Uninterruptible power supply (UPS)	✓	✓	✓
Power generators (independent power plant)	✓	✓	✓
At least 3 load balanced Internet Service Providers (ISP) providing redundant fiber Ethernet connectivity to the facility	✓	✓	✓
Redundant routers	✓	✓	✓
Cloud Services (Ongoing)			
Disk backups to tape	✓	✓	✓
Offsite storage of backup tapes	✓	✓	✓
Recovery from backup	✓	✓	✓
Server Monitoring	✓	✓	✓
Monitor background processes	✓	✓	✓
Monitor Oracle disk and tablespace	✓	✓	✓

	Direct	TotalCare	MetaLib+
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Hardware system upgrades, patches and maintenance	✓	✓	✓
Operating system upgrades, patches and maintenance	✓	✓	✓
System security	✓	✓	✓

Implementation Services (Setup)

MetaLib Setup

Ex Libris activates licensed electronic databases from the MetaLib Central KnowledgeBase <i>Customer is responsible for providing a single comprehensive title list of electronic subscriptions</i>	✓	✓	
Ex Libris provides basic customization of MetaLib user interface	✓	✓	
Ex Libris provides training for the MetaLib back office	✓		
Ex Libris performs integration with Primo and SFX [if applicable]	✓	✓	✓
Creating QuickSets (remote search scopes)	✓(BC)	✓	✓
Creating subject categories	✓(BC)	✓	✓

Primo Setup

Ex Libris sets up Primo Central subscription	✓	✓	✓
Ex Libris provides basic customization of Primo user interface			✓

Ongoing Services

Ex Libris performs service pack installation	✓	✓	✓
Ex Libris performs product version upgrades	✓	✓	✓
Ex Libris performs regular file cleanup (log files, temp files, etc.)	✓	✓	✓
Service Pack mandatory implementation notes		✓	Per case
Ex Libris performs changes to the KnowledgeBase <i>(additions, deletions)</i>		✓	With TotalCare only
Ex Libris applies KnowledgeBase updates		✓	With TotalCare only

SFX Cloud Services

The table below lists the different services provided for each of **SFX cloud-based offering**:

	Direct	TotalCare
Cloud Infrastructure		
Direct Server Access	✓	
Hosted in the Ex Libris Cloud	✓	✓
Production hardware platform with hardware maintenance	✓	✓
Centralized backup system	✓	✓
Redundant environmental systems (power, cooling and humidity)	✓	✓
Uninterruptible power supply (UPS)	✓	✓
Power generators (independent power plant)	✓	✓
At least 3 load balanced Internet Service Providers (ISP) providing redundant fiber Ethernet connectivity to the facility	✓	✓
Redundant routers	✓	✓
Cloud Services (Ongoing)		
Disk backups to tape	✓	✓
Offsite storage of backup tapes	✓	✓
Recovery from backup	✓	✓
Server Monitoring	✓	✓
Monitor background processes	✓	✓
Monitor Oracle disk and tablespace	✓	✓
Hardware system upgrades, patches and maintenance	✓	✓
Operating system upgrades, patches and maintenance	✓	✓
System security	✓	✓

	Direct	TotalCare
Implementation Services (Setup)		
Ex Libris loads print journals, if desired	✓	✓
Ex Libris activates user-licensed electronic journals in the SFX KnowledgeBase <i>The customer is responsible for providing a single comprehensive title list of electronic subscriptions</i>	✓	✓
Ex Libris activates customer-requested free electronic journals in the SFX KnowledgeBase	✓	✓
Ex Libris configures SFX menu with appropriate services	✓	✓
Ex Libris configures A-Z list of electronic journals	✓	✓
Ex Libris performs basic branding	✓	✓
Ex Libris provides integration with an existing proxy server	✓	✓
Ex Libris provides integration with a supported ILL service	✓	✓
Ex Libris provides training	✓	✓
Ongoing Services		
Ex Libris performs service pack installation	✓	✓
Ex Libris performs product version upgrades	✓	✓
Ex Libris applies weekly KnowledgeBase updates	✓	✓
Statistics sent directly to the customer via CRON	✓(BC)	✓
Ex Libris performs changes to the KnowledgeBase upon request (activations, deletions, and changes)		✓
Ex Libris performs regular file cleanup (log files, temp files, etc.)		✓
Ex Libris provides administrative configurations		✓