NAAUG 2005

North American ALEPH Users Group
Sixth Annual Meeting

June 5-7, 2005
University of Maryland
College Park, MD

Current URL— http://www.conferences.umd.edu/naaug/Default.htm
NAAUG 2005 Registration Website

Upcoming URL— http://www.naaug.org/archives/2005/
This is the URL of the NAAUG 2005 Conference Proceedings. Publication will be announced on
ALEPH-NA but is expected in August.   User name:beantown Password: windycity

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*The North American ALEPH Users Group thanks Ex Libris
for its generous contributions and sponsorship for the
NAAUG 2005 meeting.*

Sunday, June 5, 2005

2:00-5:00   ALEPH 101
McKeldin Library Room 6107
Claudia Balby, ALEPH Training Manager, Ex Libris US

This is your session if you are new to ALEPH administration, if you missed basic ALEPH administration training, or if you need a recap on basic concepts and tools.

Agenda: Basic ALEPH jargon. The a and u trees. Directories and their aliases. Basic troubleshooting tools: Utils C/E/F/W, log files, and running servers online.

4:00-5:00   Shared Systems Discussion Group
McKeldin Library Room 7121
Maureen Zajkowski (SUNY Office of Library and Information Services), moderator

6:00-8:00   Reception
Stamp Union Room 1209 (Grand Ballroom Lounge)

6:00-8:00   Registration
Stamp Union Room 1209 (Grand Ballroom Lounge)

Monday, June 6, 2005

8:15-9:00   Registration; Continental Breakfast
Stamp Union Room 1210 (Prince George's)

9:00-9:30   Opening Session [plenary]
Stamp Union Room 0126 (Hoff Theater)
Thomas Wilson (University of Maryland), moderator

University Welcome – Charles Lowry, Dean of Libraries, University of Maryland
Steering Committee Welcome – Donna Hirst (University of Iowa), Chair, NAAUG Steering Committee
Conference Co-Chair Welcome – Carlen Ruschoff (University of Maryland), Nina Davis-Millis (MIT)

9:30-10:30 Ex Libris Welcome and Management Update [plenary]
Stamp Union Room 0126 (Hoff Theater)
Carlen Ruschoff (University of Maryland), moderator
Matti Shem-Tov, President and CEO, Ex Libris; Dan Trajman, President of Ex Libris, Inc.

10:30-11:00 Ex Libris User Group Organizational Structure [plenary]
Stamp Union Room 0126 (Hoff Theater)
Christina Meyer (University of Minnesota)

11:00-11:30 Break
Stamp Union Room 1210 (Prince George's)

11:30-12:30 Ex Libris Presentation of ALEPH Developments [plenary]
Stamp Union Room 0126 (Hoff Theater)

Monday, June 6, 2005 (continued)

Version 17, 18 and NAAUG Enhancement Demos
Susan Pastore, V.P., Sales, Ex Libris U.S.; Barbara Rad-El, Sales Support Manager, Ex Libris; Larry Woods (University of Iowa), moderator

12:30-2:00 Lunch
Stamp Union Room 1206 (Grand Ballroom)
Awards Program

2:00-3:00 Concurrent Sessions

Contributed Papers:

ALEPH GenLoad: the One-Stop Dataload Client
McKeldin Room 6101
Mary Ann O'Daniel and Jean Moises (Florida Center for Library Automation); Christine Moulen (MIT), moderator

FCLA supports a centrally managed ALEPH installation for eleven public universities in Florida. Running all dataloads through the ALEPH batch loaders would be a scheduling and support challenge. In conjunction with library staff, FCLA developed a flexible dataload client for use by FCLA and, more importantly, library staff. This session will include a demonstration of the client and a discussion of the design and training considerations involved in its development and deployment. Version: 15.5

Yours + Mine = Ours : Sharing Resources in the USMAI
Stamp Union Room 2208 (Jiménez)
Lea M. Messman-Mandicott (Frostburg State University), Jamie Bush and Jean Phillips (University of Maryland); Beth Guay (University of Maryland), moderator

The sixteen institutions of the University System of Maryland and Affiliated Institutions (USMAI) consortium have been sharing a variety of resources for over 15 years. The ALEPH Patron Placed Holds (PPH) function developed for the USMAI is the linchpin from which our unique collaborative spirit and many of our resource sharing practices have evolved. By using the Request feature of the web PAC, eligible students, faculty and staff can borrow monographs located in any USMAI library by placing electronic requests to have the items sent to the pick-up library of their choice where they are charged out as easily as any item in the pick-up site's own collection. This collaborative program significantly enhances the print resources available to USMAI. Version:15.2+

Course Reserve Implementation : Lessons from Those That Learned the Hard Way
McKeldin Library Room 6107
Christopher Rose (University of Minnesota Twin-Cities); Kathleen Issacson (Lawrence University), moderator

Tips on implementing ALEPH Course Reserve from the experiences at the University of Minnesota. Topics will include: making decisions on standard formatting rules for courses and readings, supporting readings used by multiple courses, managing the end of one semester and the start of another. Version: 14.2.6+

Planning and Implementing ALEPH System Purges
Stamp Union Room 2108 (Pyon Su)
Donna Hirst, John Osborn, and Sydney J. Gussman (University of Iowa); Jonathan Rothman (University of Michigan), moderator

This session will cover strategies and lessons learned during the planning, system preparation, and implementation for purging budget, invoice, order records, order log entries, and vendor data from the ExLibris ALEPH product. The three person panel will provide administrative, financial, and technical insights into these processes. Version:15.2

2

Bringing up ALEPH, MetaLib and SFX in 13 Months… Don't Try This at Home
McKeldin Library Room 6103
Edward D. Gomes, Jr., John Little, and Gwyneth Duncan (Duke University); Nina Davis-Millis (MIT), moderator

Duke University implemented ALEPH, MetaLib, and SFX over a thirteen-month schedule from start to STP. The implementation required integration of these systems with other campus systems including SAP R/3, LDAP, offsite storage (GFA), student systems (PeopleSoft), and the campus portal (uPortal). This presentation will describe the implementation process and highlight the positive and negative aspects of bringing up three Ex Libris systems within a thirteen-month time frame. Version:16.2

Introduction to Global Changes
Stamp Union Room 2112 (Brent)
Sandy Card (Binghamton University, SUNY); Virginia Howard (Binghamton University, SUNY), moderator

Global changes in the ALEPH catalog can be an efficient way of cleaning up problem records or making changes that effect multiple records. This session is designed to introduce and give examples of some of the simple and more complex ways you can use the ALEPH "Correct" feature and ALEPH "Services" to create those changes.   Version: 14.2-16

Topical Discussions:

Server Tuning and Best Practices
McKeldin Room 7121
Timothy Prettyman (University of Michigan), moderator

Large Research Libraries
Stamp Union Room 2212 (Banneker)
Jim Corey (University of Florida), moderator

3:00-3:30   Break
McKeldin Library Room 6137

3:30-4:30   Functional Group Discussions

One of the benefits of attending NAAUG is the opportunity to share information with your counterparts from other ALEPH sites. These discussion groups will focus on the functional modules as defined by the 2004-2005 enhancement groups. Bring your questions or concerns about the modules themselves as well as comments regarding the enhancement process itself. Feedback from these groups will be communicated to the enhancement chairs for 2005-2006.

Acquisitions
Stamp Union Room 2208 (Jiménez)
Kathleen Anderson (Harvard University), moderator

Cataloging/Authorities/Non-Roman Scripts
Stamp Union Room 2108 (Pyon Su)
Martin Knott (University of Michigan), moderator

Circulation/Reserves
McKeldin Library Room 6103
Gail Nichols (University of California at Davis), moderator

OPAC
McKeldin Library Room 7121
James Ghaphery (Virginia Commonwealth University Libraries), moderator

Serials
McKeldin Library Room 6101
Pamela Bluh (University of Maryland, Marshall Law Library), moderator

System Administration/Reports
Stamp Union Room 2112 (Brent)
Dan Cromwell (Florida Consortium of Library Automation), moderator

3:30-4:30 Escrow Task Group Discussion (Closed Session)
McKeldin Library Room 2234

4:30-5:30 Ad Hoc Authorities Group (Closed Session)
McKeldin Library Room 2234
Sandy Card (Binghamton University), moderator

4:30-6:30 Ex Libris Product/Support Room
McKeldin Library Room 6107
Customer Support: James Steenbergen, Luis Lacayo, Jerry Specht, Randy Menakes;
Product Information: Susan Pastore, Chris Holly, Maruta Skujina, Michael Kaplan, Claudia Balby

Do you have an ALEPH question that's bugging you? Have you wondered how much flexibility you can build into your security table? Did you miss the last half hour of one of your ALEPH training sessions? Take your questions, screen prints, batch products, etc., to the Ex Libris Product/Support Room. Staff from Ex Libris's Customer Support Division is present to give you advice.

Ex Libris is also providing an opportunity to view and learn about their new products. Software to be demonstrated includes:
> ALEPH Release 17 (the most recent sub-release)
> ALEPH Monitor
> ALEPH Reporting Center
> DigiTool, Version 3
> Verde

If you would like to see new developments at the conference, just stop by. If you want to insure that an Ex Libris staff member with a particular expertise is available, or to arrange demonstrations for groups, please schedule an appointment during this time slot.

This event will be repeated on Tuesday, June 7, 11AM-12PM and 1:30-2:30PM.

4:45-5:45 The Ex Libris System Seminar, April 2005 in Kos
Stamp Union Room 2212 (Banneker)
Suzanne Julich (University of Iowa) and Laura Morse (Harvard University); Margaret B. Kelly (University of Michigan), moderator

Not everyone is able to attend Ex Libris's bi-annual system seminars. Here is a chance to hear what happened at this year's seminar. Also included will be a recap of the meeting of the ICAU Focus Group on the Client Interface.

6:30 Dinner
Stamp Union Room 1206 (Grand Ballroom)

Tuesday, June 7, 2005

8:15-9:00   Continental Breakfast
Stamp Union Room 1210 (Prince George's)

9:00-10:30   Ex Libris Answer Panel [plenary]
Stamp Union Room 0126 (Hoff Theater)
Dale Flecker (Harvard University), moderator

10:30-11:00 Break
Stamp Union Room 1210 (Prince George's)

11:00-12:00 NAAUG Business [plenary]
Stamp Union Room 0126 (Hoff Theater)
Donna Hirst (University of Iowa), Chair, NAAUG

Election and Reports
Proposal to Reorganize North American Ex Libris User Groups
Panelists: Donna Hirst (University of Iowa, Christina Meyer (University of Minnesota),
Carlen Ruschoff (University of Maryland), Larry Woods (University of Iowa)

11:00-12:00 Ex Libris Product/Support Room
McKeldin Library Room 6107

Repeat of event on Monday, June 6, 4:30-6:30PM; event will be repeated at 1:30-2:30PM.

12:15-1:15   Lunch
Stamp Union Room 1206 (Grand Ballroom)

1:30-2:30   NAAUG Enhancement Report [plenary]
Stamp Union Room 0126 (Hoff Theater)
Patty Hatch (Harvard University), Enhancement Coordinator, NAAUG

1:30-2:30   Ex Libris Product/Support Room
McKeldin Library Room 6107
Repeat of event on Monday, June 6, 4:30-6:30PM.

2:45-3:45   Concurrent Sessions

Contributed Papers:

Early Experiences with ALEPH v. 17 Implementation : A Panel Discussion
Stamp Union Room 2212 (Banneker)
Brian Thompson and Suzanne Julich (University of Iowa Libraries) and Becky Bell
(MnSCU/PALS); Andy Keck (Duke University), moderator

General overview discussion of release 17. Panelists will discuss initial experiences, both
good and bad, they have had while implementing this release. Attendees should bring
their questions.

Encouraging Efficiency : Macros at Work
Stamp Union Room 2208 (Jiménez)
Elizabeth Eggleston, Linda Moss, and Minna Popkin (Harvard University); Julia Allen,
Jason Fleming, and Doug Kiker (University of Florida); Virginia Howard (Binghamton
University, SUNY), moderator

A panel of representatives from Harvard and the University of Florida will discuss and demonstrate how they have incorporated macro software into their technical services workflow. The session will emphasize good practices in macro creation for ALEPH, but will also identify important issues to consider in creating an infrastructure for distribution and maintenance. Members from each institution will describe successful techniques for applying macros to the goal of increasing efficiency. Comparing and contrasting common experiences will guide the presentation. Version: the presentation will provide a basis for macros of any ALEPH version, but the examples will be for 15.5 or 16.

Delivering ALEPH XML Reports Via the Web
McKeldin Library Room 6107
Jeannie Dixon and Mike Ryan (CCLA); An Liu (Virginia Commonwealth University), moderator

CCLA administers ALEPH for the 28 Florida community colleges (73 campuses) from a central site. CCLA developed a web-based delivery mechanism for our previous LMS and have recreated it for use with ALEPH. Each college's reports and their documentation are delivered in PDF and zip formats. We will demo and describe our processes. Version: 15.5

Some Useful SQL
Stamp Union Room 2112 (Brent)
Jerry Specht (Ex Libris USA;) Christina Meyer (University of Minnesota), moderator

The SQL INSERT command can be used to create and load records, and copy records to temporary copies of tables. SQL commands can also be used to join a table to itself to locate/correct certain duplicate conditions. This session will explain how INSERT and other useful SQL commands work and give examples of some practical applications in the ALEPH system. Ample time will be given for questions and discussion, and you are encouraged to bring SQL tips of your own to share.

How to Go Beyond Daily and Weekly Job Scheduling
McKeldin Room 7121
Eric Djiva Kamal (Stony Brook University Health Sciences Center); Nell Chenault (Virginia Commonwealth University), moderator

Job_list.conf gives only options for daily or weekly task scheduling. Instead of creating "cron" jobs, SUNY Stony Brook implemented a homegrown shell script based on the calendar date for bimonthly, monthly, and atypical tasks. The script itself is scheduled to run daily using the ALEPH joblist. Come share the code. Version: 14.2+, 16 (See PRB 8336)

Topical Discussions:

Authorities
McKeldin Library Room 6101
Stephen Hearn (University of Minnesota), moderator

Ask the Experts
Stamp Union Room 2108 (Pyon Su)
Panelists: Sasha Jerabek, McGill, (OPAC, Web); Gail Nichols, UC Davis (Circulation); Pam Nicholas, Notre Dame, (Acquisitions, Serials); Wendy Robertson, University of Iowa (Cataloging, Electronic Resources); Laura Morse, Harvard (SysAdmin/Client); Caitlin Robinson (University of Iowa Law Library), moderator

Join your colleagues for a peer-to-peer session where staff from other libraries will discuss questions that have been submitted in advance. Questions may also be submitted from the floor. While all participants will share their expertise, these folks have agreed to wear the "expert" hat to get us started.

Serials and Related Issues
McKeldin Library Room 6103
Pamela Bluh (University Maryland, Marshall Law Library), moderator

2:45-4:45   Enhancement Chairs (Closed Session)
McKeldin Library Room 2234

3:45-4:15   Break
McKeldin Library Room 6137

4:15-5:15   Concurrent Sessions

Contributed Papers:

Designing Opening Interfaces : Process and Results of a Usability Study of the Duke University ALEPH Catalog
McKeldin Library Room 6101
John Little and Emily Brassell (Duke University); Kathleen Isaacson (Lawrence University), moderator

During the summer of 2004 Duke University launched a usability study to help determine the layout of the OPAC. Relevant data was generated to augment OPAC development and served as an additional component of the decision management process. Results of the study will be presented with video footage. Version: 16.2

Automation of Electronic Resource Management
Stamp Union Room 2208 (Jiménez)
Philip Doesschate, Fang Peng, and Eric Djiva Kamal (Stony Brook University); Denise Branch (Virginia Commonwealth University), moderator

For those libraries having large e-journal collections, the work required to maintain the URLs stored in the MARC record using ALEPH delivered methods can be substantial. Stony Brook has developed a method that takes advantage of the MARC structure, SQL, and the ALEPH procedure p_manage_21 to automate global updates. Version: 14.2+

Database Architecture for Consortia : How It Effects Your Use of ALEPH
McKeldin Library Room 6103
Jean Phillips and Marlene Vikor (University of Maryland Libraries), Maureen Zajkowski (SUNY Office of Library and Information Services), and Michele Newberry (Florida Center for Library Automation); Pascal Calarco (University Libraries of Notre Dame / Michiana Academic Library Consortium), moderator

This presentation will outline some of the intended and unintended consequences of database architecture choices (one/multiple ADM, one/multiple BIB, etc.). Representatives of three consortia will describe their systems' architecture and their pros and cons. Areas that will be explored are: functionality, staffing, scalability, and so on. How much do their members share versus keep separate? Version: all

In-House Statistics for Journals : Collecting Usage Statistics, Using a Handheld Scanning Device and ALEPH's Inhouse Use Feature
Stamp Union Room 2112 (Brent)
Jamie Bush (USMAI) and Jan Siar (University of Maryland Libraries); Nell Chenault (Virginia Commonwealth University), moderator

In September 2004, the University of Maryland, College Park launched an ongoing data collection workflow designed to capture the usage of the Libraries' bound and unbound print journal

Tuesday, June 7, 2005 (continued)

collections. This presentation describes the methods used to develop and implement UMCP's Journal Usage Study utilizing ALEPH's In-house Use functionality in conjunction with handheld portable terminals. Version: Developed on 15.2, migrated to 16.02

The New SUNY Web Table Editor
McKeldin Library Room 6107
Nathan Fixler and Ben Follis (SUNY Office of Library and Information Services); Marianne Foley (SUNY College at Buffalo), moderator

SUNY is developing a new web editor as a replacement for both the ALEPH GUI and Unix-based table editing methods. It allows effective division of labor via fine-grained file access control, provides a significantly improved user interface, and is usable with *any* version of ALEPH, in any configuration. Version: all

Discussions:

You want me to do WHAT?! Communication, Governance and Distributed Responsibility
Stamp Union Room 2108 (Pyon Su)
Panelists: Phyllis Valentine (University of Michigan); Christy Ryan (Texas Tech Law Library); Caitlin Robinson (University of Iowa Law Library); Mary Ann O'Daniel (FCLA); Nina Davis-Millis (MIT), moderator

Participate in a free-wheeling discussion on issues related to system governance and shared responsibility for system support. Panel members will make brief presentations describing challenges encountered and the strategies employed in their own institutions.

Reports and Reporting (Including ARC)
Stamp Union Room 2212 (Banneker)
Jeannie Dixon (CCLA), moderator

Upgrade Express
McKeldin Library Room 7121
Betsy Friesen (University of Minnesota), moderator

5:15-6:00   **Closing Session: Looking to the Future** [plenary]
Stamp Union Room 0126 (Hoff Theater)
Carlen Ruschoff (University of Maryland), Nina Davis-Millis (MIT), and Oren Beit-Arie (Chief Strategy Officer, Ex Libris, Inc.)

6:15-6:45   **NAAUG Steering Committee** (Closed Session)
McKeldin Library Room 6131 (Dean's Conference Room)

7:15-10:00   **Ex Libris – NAAUG Steering Committee Meeting** (Closed Session)
Garden Restaurant, UMUC Inn & Conference Center

Wednesday, June 8, 2005

7:30-9:30am **NAAUG and SMUG Steering Committees, Joint Meeting** (Closed Session)
McKeldin Library Room 6131 (Dean's Conference Room)