



ELUNA Steering Committee

Bob Trotter (University of Georgia) became the 2010-2011 ELUNA Steering Committee chair at the end of the ELUNA conference in Fort Worth, Texas in May. Bob succeeds Pascal Calarco (University of Notre Dame) as chair, and Laura Morse (Harvard University) is the new Vice-chair/Chair elect. Pascal will serve another year on the Steering Committee as Past Chair. Edward Corrado (Binghamton University), Gary Johnson (CCLA Florida), Suzanne Julich (University of Iowa), and Janet Lute (Princeton University) were all re-elected and are starting their new terms, which will now run three years under the newly adopted bylaws changes. Kristine Hammerstrand (CARLI) is a continuing member and John Greer (University of Montana) is newly elected to the Steering Committee this year. Wil Frost (University of Hawaii) ended his long term of service to ELUNA (and previously End User) this year.

ELUNA Membership

Our membership is growing! We now have 261 single institution memberships, of which 67 are also members of a consortium. There are 35 consortia memberships whose constituencies include 916 libraries. Our members are from the United States, Canada, the West Indies, and Brazil. The state with the highest membership count is New York –75. Georgia has the most libraries covered by a consorcial membership – 171. Thank you for your support!

A Word from the Chair

Bob Trotter

First of all I would like to say what a great Conference we had in Fort Worth. It was very well attended, with lots of interesting sessions. I would like to thank some of the key people responsible for making this such a great conference. The Local Arrangements group was lead by Walter Betts with lots of help from James

Lutz and the rest of their crew from Texas Christian University – what a great job they did putting on ELUNA with a Texas flavor. The Program Committee Chair, Sherrie Kristin, and all the product reps did a fantastic job of collecting a record number of presenters. Our past Chair and event coordinator, Pascal Calarco, made sure all the pieces fell into place. And last, but not least, I would like to thank Ex Libris for their participation and support, and a wonderful Texas style reception.

I would also like to thank Pascal for giving me this opportunity to help steer ELUNA through the coming year. I hope I can be as successful as he was, leading us through tough times and ending with such a great conference.

There are a lot of things that will be keeping us busy this year. Of course there is the URM looming ever larger on the horizon. The development partners have received their first ‘Drop’ and are testing away. And the newly combined Focus Group is on its way to learning more about the design and development process, so they can provide feedback to Ex Libris as development progresses. Then there is NERS, our Enhancement Request System that debuted last December, and just went through its first round of CKB voting.

Our Product Working Groups will continue to bring the word of the user community to Ex Libris, and help guide the development of their products. This year will also involve some consideration on how best to handle the changes in the product suite, such as DigiTool merging with Rosetta, and the new relationship between MetaLib and Primo.

And there will also be another conference to plan, in the great city of Milwaukee, Wisconsin.

ELUNA 2010 Conference



Conference registration desk

Texas Christian University served as the host institution for the 2010 ELUNA Conference held in Fort Worth, Texas, May 11-13, 2010. Ex Libris hosted their two day Technical Seminar immediately preceding the conference and the two events brought in a combined total of 477 registrants.



Armadillo races were a feature of the opening night reception!

The conference offered 121 sessions presented by ELUNA members along with sessions presented by the Ex Libris staff including a URM update as well as the traditional product update sessions. Member presentations are now available on the ELUNA document repository at <http://documents.el-una.org/>



Question & Answer session by Ex Libris



Attentive audience in a breakout session

Look elsewhere in this issue of the ELUNA newsletter for more conference photos.

Upcoming Events:

August-September 2010

IGeLU Conference

August 29-September 1, Ghent, Belgium. The international counterpart of ELUNA, IGeLU, the International Group of Ex Libris Users, will meet in Ghent, Belgium August 29-September 1, 2010. Herbert Van de Sompel, whose Ph.D. work developed the initial concepts that led to OpenURL standard, will present the keynote. Conference information is at <http://igelu2010.org/>

May 2011

ELUNA 2011

The 2011 ELUNA Conference will be held in Milwaukee, Wisconsin on May 10-13, 2011. The University of Wisconsin-Milwaukee will be our host with assistance from the University of Wisconsin-Madison. The conference hotel will be the Hilton Milwaukee City Center. Please mark your calendars and start thinking about a presentation proposal. This is sure to be another great ELUNA meeting combining informative programs, networking opportunities, and a lot of fun in a beautiful setting.

**Progress on the URM
from a partner perspective**

Janet Lute, Princeton University

At the end of June the URM development partners met with Ex Libris staff for the final face to face meeting that had covered Solution and Design Reviews for the four tracks: Selection & Acquisitions, Metadata, Fulfillment and Digital Collections. This particular meeting covered the Design Review for Digital Collections. Since June 2009 the partners and Ex Libris staff met face to face for a total of 20 days on six separate occasions in Boston (twice), Princeton, Leuven, Chicago and Washington D.C. In addition we had more conference calls than I can count, many email messages and 'homework' assignments.

In the last six weeks our focus has shifted to data migration, and system configurations. Two partners are now seeing data in drop 1 and the others will follow soon. July 8th was a very exciting day as staff from Princeton were able to log into the URM for the first time and see a subset of our own data.



Welcome to Princeton, Please Log In:

User Name	<input type="text"/>
Password	<input type="password"/>
Institution	<input type="text" value="Princeton"/>

Much of drop 1 testing is focused on data migration and overall navigation and basic functionality especially in Acquisitions. In August all of our bibliographic data from Voyager will be loaded into drop 1 and currently we are busy testing.

Product Group Reports:

Aleph:

Jean Phillips, Chair Aleph PWG

There was a lot to learn about at the Fort Worth meeting with 12 Aleph presentations from ELUNA members; updates from Ex Libris; and the Product Working Group (PWG) update. The presentation from Ex Libris Aleph Product Manager, Carmit Marcus, is on the Ex Libris documentation portal (under Cross Product/Seminars/ELUNA Conf. (2010)/Aleph Update). Member presentations can be found on the ELUNA website documentation repository. The PWG update from Chair Linda Allbee gives a good overview of the work of the group.

The PWG meets monthly. In addition, the PWG leadership and their IGeLU counterparts meet with the Ex Libris product manager to review plans and issues.

The next versions of Aleph are “minor releases”. Version 20.2 was just released (August 2010) and version 20.3 is scheduled for release in March 2011. Collaborative testing is done only for major releases. So once the schedule for version 21 is

announced, the PWG will begin working on that testing process.

We are at the midpoint in the 2010 ELUNA Aleph enhancement process. We have gathered over 60 enhancement ideas from Aleph users and the module coordinators have worked with their groups to identify the top 5 from each module. On June 1, the top 30 Aleph enhancement requests were submitted to Ex Libris for review and assignment of development points. All of the information about the process and the list of 30 can be see here:
<http://www.exlibrisgroup.org/display/Aleph/Enhancement+Process+2010>

Ex Libris' response is expected by the end of this summer, and a final vote will take place in September. We hope to be able to use NERS for our final voting.

The 2009 enhancement process resulted in six enhancements receiving the highest vote counts. Five will be included in version 20.2 and one (Circ-03) will be included in version 21.

Voyager:

Ted Schwitzner, chair Voyager PWG

The Voyager Product Group was pleased with the conference in Fort Worth. There were more Voyager-oriented sessions than any other product. Attendance was good and feedback has been positive so far. Hot programs appeared to be "Creating a Mobile Catalog Interface with Voyager 7" by Denise Dunham and Stephen O'Connor of the University of Rochester, and "Tricked Out OPAC" by Todd King of Eastern Kentucky University. We thank the program committee, which included Voyager PWG members Sherrie Kristin, Jean Vik, Melissa Wisner, and several folks from the Voyager community, for developing a robust conference program.

The primary focus of the Voyager PWG for the next several months will be preparation for an enhancement election. The PWG is working with Bob Trotter (ELUNA SC Chair) and Mike Dicus (Ex Libris) to load enhancement request data from

Ex Libris' Pivotal system into NERS. Over the next six to eight weeks, the PWG will be reviewing requests and preparing the ballot. Updates on the voting process will be shared soon.

MetaLib:

Bennett Ponsford, Chair MetaLib PWG

A great conference was held in Fort Worth, with MetaLib sessions on: "Extending MetaLib to Meet Our Users: Making MetaLib Available at the Point of Need", "LibX, iGoogle, Facebook and Custom Ad Hoc Deep Linking", "Optimizing Metadata in MetaLib for Quality OpenURLs", "The Interface is the System: Update on the Xerxes Project", and "You Can Get There from Here: Evaluating Effectiveness of Website Links to SFX and MetaLib". The presentations from these sessions will be available on the ELUNA website soon.

Later this summer, ELUNA members will be able to vote on which databases should be added to the MetaLib Central Knowledge Base. You will be able to add databases that you'd like to see in the CKB into the NERS and then vote for the ones you think Ex Libris should prioritize. The ELUNA and IGeLU product groups will coordinate the voting and send the results to Ex Libris. Ex Libris will then reply back letting us know what they can do and the next round of voting will begin. More details will be coming once the system is available.

As we look forward to the next generation of MetaLib, Ex Libris has established a Primo MetaSearch Advisory Group made up of 6 MetaLib customers – three who have Primo and three who have MetaLib. Lauren Fancher from GALILEO and vice-chair of the PWG is a member of the advisory group and will be keeping the ELUNA membership informed about their progress. The advisory group began meeting soon after ELUNA.

Primo:

Dale Poulter, Chair PRIMO PWG

The past year has been busy for the Primo Product Working Group. Primo was the first group to utilize the new NERS system for enhancement voting. Laura Akerman, the 2009-2010 enhancement coordinator, reported that the top 10 enhancement requests were:

1. Option to control the preferred record selection/display of FRBR and De-duplication groups. For example, the ability to define the preferred type, date (newest or oldest) and the fields that are displayed (377 votes)
2. Add the option to jump to a specific page in the result set for example: Previous 1 2 3 4 5 Next (303 votes)
3. Option to add comments to the normalization rules (254) : Ex Libris plans to implement in 3.1
4. Option to compare two sets of normalization rules to determine the differences (252)
5. Option to define the fields included in the printed format of items. For example when printing a list of items from the e-shelf (251).
6. Provide user with the option to add a complete page of results to the e-shelf without having to add each result individually (232). Ex Libris plans to implement in 3.1
7. Add timestamp (date and time) when normalization rules have been updated (223). Ex Libris plans to implement in 3.1
8. Additional sort in the brief display by ascending date (215).
9. Option to define the fields that appear when a record is e-mailed from Primo (211)
10. Shorten the Primo URL (194).

In addition, Dale Wann and Alison Hitchens participated in collaborative testing for Primo version 3 with Ex Libris . Primo version 3 is now

available for general release, please contact support if you are interested in upgrading.

During the coming year, your ELUNA Primo PWG encourages you to actively participate in the PRIMO-DISCUSS-L list. Primo is still a young product with great possibilities. Let's work together with Ex Libris to share ideas and help improve the product.

The Primo PWG met at the ELUNA conference in Fort Worth. The leadership officers were elected. Michael North, from Northwestern University, will be the Vice-Chair/Chair Elect.

SFX:

Mark Needleman, Chair SFX PWG

A full set of sessions on SFX were held at the ELUNA meeting in Fort Worth. Among them were sessions titled "You Can Get There from Here: Evaluating Effectiveness of Web Site Links to SFX and MetaLib", "Providing Access to the Hathi Trust Titles Without Adding Millions of Objects to the SFX Knowledge Base", "Where has All the Cataloging Gone: An Analysis of MARCIt Service Records", "Integration of SFX and Evergreen Open Source ILS", and "User Testing of an SFX Menu Redesign – Is your SFX A-Z List Functionality Accessible? Steps Toward Making It More So".

The SFX Product Working Group met and Ex Libris provided an update on SFX version 4 and on bX.

Another significant news item: ELUNA and IGeLU nominated 4 representatives (2 from each group) to participate in SFX Version 4 collaborative testing with Ex Libris at their headquarters in Jerusalem. Testing was done from March 7 to 11, 2010. The testers represented different types of SFX installations, ranging from consortia to single institutions. Each site had a particular testing focus – some tested the upgrade process and others a new SFX v.4 installation. Here are some of the conclusions:

1. Generally speaking, the testers felt the release was impressive. A fair number of defects were found, but given the scope of the changes the testers were a little surprised they did not encounter more problems.
2. Before arrival, Ex Libris had conducted extensive testing, mostly on the use of KBmanager. In retrospect, the testers wished they had talked more with the Quality Assurance group on their work on v.4. SFX development was actively fixing defects while the testers provided feedback. Development was working very quickly to fix defects, and testers were asked to test the fixes. Test plans were fairly thorough, and it was clear that Ex Libris staff cared very much about getting things right.
3. As a whole, the collaborative testing was very useful. The testers left with the impression that their testing will result in significant improvements to the initial release.
4. It might have helped if the testers had been able to review the test plans before arriving at Ex Libris.
5. It might have been helpful if the time between selection of participants and the actual testing had been a bit longer. More preparation time would have been desirable.

Verde:

Abigail Bordeaux, Chair Verde PWG

Barb Weir, the Verde program chair, and the Program Committee put together a strong program for ELUNA in Fort Worth this year. Attendees learned about using Verde to manage big deals, strategies for managing locally-added products, and using Verde data in an external ILL permissions application, among other topics. If you missed the conference this year, you can find presentations from this and previous ELUNA meetings in the ELUNA document repository (<http://documents.el-una.org/>) Instructions for access are included on the site. Please look for updates from the Verde PWG on the VERDE-L discussion list (<https://listserv.nd.edu/cgi-bin/wa?A0=VERDE-L>).



Conference attendees enjoying a break between sessions



One of several excellent meals during the conference



A cowboy, southwestern theme was prevalent in the convention center and outside

Join **ELUNA** now!

***Become a new member of ELUNA or
renew your existing membership so
you can take advantage of everything
that ELUNA has to offer.***

Bob Trotter
Chair, ELUNA Steering Committee

Summer 2010

ELUNA is an independent not for profit organization; we do not receive funds from the Ex Libris corporation. We exist to educate, support, and advocate for the Ex Libris user community. There are many opportunities to participate in ELUNA. For more information about ELUNA membership and activities, visit our website at <http://el-una.org/>.



Cow girl



Flags outside of the hotel