



# ELUNA

## Ex Libris Users of North America

### **Newsletter**

Winter 2011-2012

This is the ELUNA Newsletter for winter 2011-2012. We hope that you had a wonderful and relaxing holiday season.

Planning for the ELUNA 2012 conference in Salt Lake City is in high gear. People who proposed presentations have been notified of their acceptance, the program is being finalized, and meeting registration will open soon. Hotel registration for the Hilton Salt Lake City Center is now open.

See below for an article with more information.

Tech Seminar: **May 7-8, 2012**  
ELUNA 2012: **May 8-11, 2012**

#### **ELUNA Membership Update**

Sue Julich, ELUNA Treasurer

With registration for ELUNA 2012 in Salt Lake City, UT just around the corner, membership renewals are proceeding nicely. As of mid-February, 242 institutions and/or consortia have renewed their memberships. Thank you. Sixty-four institutions who were members in 2011 have not returned their renewal application and payment. If you have not renewed your membership yet and you need another invoice to do so, please contact the ELUNA Treasurer, Sue Julich at: [Suzanne-julich@uiowa.edu](mailto:Suzanne-julich@uiowa.edu). Just before the annual conference (May 8-11, 2012) an election will be held to fill one position on the ELUNA Steering Committee. New leadership roles will be selected for the various Product Working Groups at the conference. In order to be a candidate or vote for any of these positions, your institution or consortia must be a paid 2012 member of ELUNA.

#### **A Word from the Chair**

Laura Morse, ELUNA Steering Committee Chair

I hope this message finds all ELUNA members ready for a productive 2012! We would love to highlight recent success stories at your institution on the ELUNA website. Please share your story with the Steering Committee at [eluna-sc@listserv.nd.edu](mailto:eluna-sc@listserv.nd.edu).

The Steering Committee and Product Working groups continue to work on your behalf to advise Ex Libris on matters related to individual products and cross-product issues. For example, the Steering Committee recently provided feedback to Ex Libris on new security guidelines. This important work needs participation from ELUNA members. Please consider participating in ELUNA initiatives by submitting your candidacy for a position on the Steering Committee or one of the Product Working Groups. New officers will be elected this spring. Contact the ELUNA Steering Committee or Product Working Group leaders for more information. The PWG leaders' contact information can be found on the ELUNA website (<http://el-una.org/product-groups/>).

I was able to personally experience, during a planning visit in December 2011, many of the wonderful opportunities that await attendees of the ELUNA 2012 meeting in Salt Lake City. In addition to a great program by Ex Libris and ELUNA members, attendees will have opportunities to see, taste, and hear many of the unique attractions, local cuisine, and local music. We hope to see you in Salt Lake City, May 8 – 11, 2012.

## Upcoming Events:

**May 7-8, 2012**

Ex Libris Tech Seminar  
Salt Lake City, UT



**May 8-11, 2012**

ELUNA 2012 Conference  
Salt Lake City, UT



**May 17, 2012**

Georgia Users Group Meeting (GUGM)  
Macon State College, Macon GA

**September 11-13, 2012**

IGeLU Conference, Zürich Switzerland

**IGeLU 2012**

**igelu**  
International  
Group of Ex Libris Users

The 2011 IGeLU Conference will be held in Zürich Switzerland on September 11-13, 2012. The host for the meeting will be ETH Zürich.

**October 18-19, 2012**

Ex Libris Northeast User Group – ENUG, Ithaca, NY  
<http://emausers.org/>

**ELUNA 2012**

Kristine Hammerstrand, ELUNA Steering Committee  
Conference Planning Committee

Join us in Salt Lake City this May 8-11 for ELUNA 2012! Salt Lake City will be a great site for ELUNA. The city is situated in the Salt Lake Valley with the gorgeous Wasatch Range to its east (Wasatch is from the Ute word for “mountain pass”) and the Oquirrh Mountains to its west (Oquirrh is from the Ute word

for “shining”). While the area is an outdoor activities paradise, Salt Lake City is also the largest city in the Intermountain West (between the Rockies and Sierras) and offers urban amenities such as a light rail system called Trax and wonderful museums, libraries, restaurants, shopping and more. One could visit Salt Lake just for its attractions, but you can combine all of this with a great opportunity for your professional development when you register for ELUNA 2012.

Conference registration will open on or about February 29, 2012. Full conference registration is only \$25 more this year than last: individuals from ELUNA (or IGeLU) member institutions can register for the full conference for \$375, if they register by April 13. People from institutions that are not ELUNA (or IGeLU) members are of course welcome, too at \$525 (but why not think about joining ELUNA and save money on your registration?) The conference hotel is the Hilton Salt Lake City Center, which is offering ELUNA attendees a conference rate of \$139 per night. You can reserve your hotel room now here:

[http://www.hilton.com/en/hi/groups/personalized/S/SLCCCHH-EXL-20120505/index.jhtml?WT.mc\\_id=POG](http://www.hilton.com/en/hi/groups/personalized/S/SLCCCHH-EXL-20120505/index.jhtml?WT.mc_id=POG)

The Hilton is less than a block away from the Salt Palace Convention Center, and all ELUNA meetings will be in either the Hilton or the Salt Palace.



As always the conference will include presentations by Ex Libris customers and staff. This is a great

opportunity for you to learn from your peers and get a heads up from the Ex Libris staff on what's coming next in the various products they offer.

Be sure to arrive in Salt Lake City in time to attend the Tuesday, May 8 opening reception (included in your conference registration) that will be held at the lovely and historic Union Pacific building. It will be a great way to meet and catch up with your ELUNA colleagues.

We have two great events planned for the evening of Thursday, May 10 and you can chose to attend either, neither or both. The famed Mormon Tabernacle Choir rehearses on Thursdays and ELUNA attendees are invited to the Tabernacle (just three blocks from the Hilton) to hear the Choir and Orchestra perform a piece exclusively for ELUNA attendees. Also on Thursday evening, we will again this year offer a networking dinner event. If you enjoyed attending (or wish you had attended) the event at the Milwaukee Ale House last year, be sure to join us at Gracie's this year. Gracie's is also less than a block from the Hilton. This will be an optional ticketed event, and you will be able to buy tickets when you register, or in Salt Lake City.

The conference will run through Friday afternoon when we will end ELUNA 2012 with a kickoff presentation on ELUNA 2013.

The Ex Libris Tech Seminar on May 7 and 8 will again precede ELUNA. Ex Libris is finalizing the details on the Tech Seminar at this time, so watch for an announcement on its content and the special reduced "combo" registration rate for people who register to attend both the Tech Seminar and ELUNA.

### **Ex Libris Goes Audiovisual**

Tamar Sadeh  
Director of Marketing, Ex Libris

Ex Libris has recently introduced a series of short "plain and simple" videos that describe the company's technologies. Through this light, humorous approach, we hope to draw your attention to our new initiatives. You can use these videos to help explain to staff, faculty, and students the solutions that you are implementing or are considering implementing. More detailed materials about our solutions are available on

the Ex Libris documentation portal for those who seek an in-depth understanding.

The following videos are available on [YouTube](#) and the [Ex Libris Web site](#), and more are in the works:

- [Primo Central Plain and Simple](#)
- [Primo ScholarRank Plain and Simple](#) (the basics of the Primo relevance ranking algorithm)
- [bX Article Recommender Plain and Simple](#)
- [Rosetta Plain and Simple](#) (the role and capabilities of the Rosetta digital preservation system)

You are most welcome to embed these videos in your library pages or to distribute them in any way you like.

Enjoy!



World-famous Mormon Tabernacle Choir and Orchestra – Salt Lake City

### **A Partner Update on Alma**

Janet Lute, Princeton University



The Alma Partner Release 5 (PR5) was made available to the partners in early December and Princeton University had four days of on-site training and evaluation. This is by far the largest release so far and is divided into a number of iterations. Princeton has just received the code for the second iteration and we expect to see a new data load at the end of January.

As in previous releases there are few critical defects, that is functionality that did not work at all. But a lot of our comments still focus on navigation, screen layout and searching functionality. Now that we have much more end to end functionality available to us we are able to better test complete workflows and make recommendations on further changes. We are also beginning to look at our current workflows and evaluate them in light of Alma functionality. We will be seeing a second 'version' of Primo linked to Alma very shortly; we saw the first version back in the summer.



Hilton Salt Lake City Center  
Conference hotel for ELUNA 2012

Photo Credit: Jack Ryser

Princeton is currently working with a full copy of Voyager data including purchase orders, invoices and current circulation transactions at the time that the copy was made. The next data migration will include a more recent data extract along with SFX and data

from Meridian, our ERM system. Part of our testing is also to test the migration of data.

The Ex Libris development team continues to be extremely responsive to our comments, issues and questions. With the release of PR5 it is exciting to see a lot of functionality come together for the first time.

### **Regional User Groups**

ELUNA Regional User Groups (RUGs) are officially sanctioned groups that encompass a defined geographic territory and represent a significant number of ELUNA member sites. RUG meetings are a good alternative for those who are not able to attend the annual North American ELUNA conference. For more information about the RUGs and the regions they encompass, go to the ELUNA web site: <http://el-una.org/rugs/>

### **CKB Agreement Signed**

At the IGeLU Conference in September 2011, representatives of ELUNA, IGeLU, and Ex Libris signed an agreement defining the process for adding resources to the Central Knowledge Bases (CKB) for SFX, Verde, and MetaLib. Laura Morse, as chair, represented ELUNA. For the text of the agreement see: <http://documents.el-una.org/815/>

### **Product Working Group Reports:**

#### **Aleph:**

Steve Thomas, Chair Aleph PWG

Let me share with you several tasks undertaken by the Aleph PWG since our report in the last newsletter. On November 8, 2011, the ELUNA Aleph PWG completed our review of the first round of balloting for the current NERS cycle. During this cycle, ELUNA members had the opportunity to consider enhancement requests submitted by either ELUNA or IGeLU sites; a few proposals from IGeLU sites were among those garnering the most interest from ELUNA sites. Ex Libris is in the process of assigning development points to these proposals, prior to the second round of balloting. We will share more information with you as the time approaches for the second round of balloting.

Also on November 8<sup>th</sup>, the PWG unanimously endorsed Carrie L Curie, of the Minnesota State Community and Technical College, as the Aleph Track Coordinator for ELUNA 2012 in Salt Lake City. About two weeks earlier, the ELUNA Steering Committee formally accepted the PWG's recommendation that Ellen Jones of the University of Iowa and Michael Edwards of Hampshire College be our representatives for collaborative testing of Aleph, which took place January 8-12, 2012. The PWG would like to take this opportunity to thank these individuals again for volunteering for these assignments. When you get a chance, please let Carrie, Ellen and Michael know that you appreciate them, too.

Between July 7, 2011 and October 31, 2011, the PWG discussed seven Functional Specification Design (FSD) documents prepared by Ex Libris for pending enhancements. Six of these documents were for enhancements selected during the 2010 cycle and one was carried over from the 2009 cycle. My files contain well over one hundred e-mail messages exchanged between the PWG and Ex Libris concerning these proposals. While the PWG was able to accept some of these FSDs with only minor revisions, a few were more problematic. We are working with Ex Libris to clarify the proposals.

## Voyager:

Ted Schwitzner, Chair Voyager PWG

- Voyager Enhancements Election – March 2012

The members of both the ELUNA and IGeLU Voyager Product Working Groups are hard at work developing a ballot for enhancements voting, which will take place in March 2012. This year's enhancements election will provide direction to Ex Libris on priority upgrades to be included in the next major release of Voyager, version 9.0. So far, the working group members are evaluating the clarity of requests and considering what specifications might be. The ballot is expected to include around 200 items covering every aspect of the Voyager system.

The enhancements election will once again be staged on the NERS platform, <http://ners.igelu.org/>, which is available to the primary contact for each ELUNA or IGeLU member institution. The VPWGs plan to release a preliminary ballot by mid-February so that members can prepare how they would like to place their votes. As members can also preview enhancement requests in NERS directly, now may be

a good time to test your access. If your institution is an ELUNA or IGeLU member, and you do not have a NERS account, contact [ners@igelu.org](mailto:ners@igelu.org). If your institution is not yet an ELUNA member, and you would like to vote, check the ELUNA web site, <http://el-una.org/>, for details on joining.

- Join the Voyager Product Working Group

The current membership of the VPWG wants to remind you that this is a good time to consider running for a seat on the working group. Our annual election of new members will take place in the spring, and new terms begin at the close of the ELUNA Conference. A call for nominees will come by early February. We hope you'll be ready to answer that call.

## MetaLib:

Mark Needleman, Chair MetaLib PWG

The ELUNA Metalib Product Working group had 2 joint conference calls with the IGeLU Metalib Product Working group and the Ex Libris Metalib Product Manager in the last several Months. Among the topics of discussion were:

- Metalib 4.5 minor release

Metalib 4.5 has been released and contains a variety of bug fixes, and upgrade to Apache httpd 2.2.20, multiple PDS support for consortia, and facilities for exporting personal e-shelves to Metalib+ and Primo. It also contains support for Oracle 11. Oracle 11 is not required for Metalib 4.5 but is supported for sites that have a requirement to go to Oracle 11. For more details, contact your Ex Libris customer support person.

- The Metalib+ survey and the Metalib Advisory Group

Metalib+ Customers (non-Primo customers with the Primo Central Index) and Metalib via the Primo interface were surveyed in September for desired enhancement requests.

These requests are under active consideration by Ex Libris and the Metalib Advisory Group is in the process of being reconvened to consider the survey results and Metalib Next Generation

- The 8<sup>th</sup> round of Metalib NERS voting has concluded.

The winning resources for this and past (and future) voting cycles can be found on

<http://customercenter.exlibrisgroup.com>  
in the EL Commons Section in EL Commons Wiki.  
Click on Cross Product; then on  
NERS- New Enhancement Request System

- Relationship between resource in Primo Central and the Metalib CKB

There was a discussion of what was the relationship between resources added to Primo Central and those same resources being added to the Metalib CKB. Ex Libris stated that there was no hard and fast rule about this but that resources that could not be added to Primo Central definitely had priority in being added to the Metalib CKB. They did not preclude resources that could be added to Primo Central from also being added to the Metalib CKB but would make that decision on a case by case basis.

- Metalib+ test web page

A test view of Metalib+ is available on which customers can test changes to stylesheets and static web pages before uploading them to production. Customers need only ask during implementation or via Pivotal for a test view be made available to them



Salt Palace Convention Center

Photo Credit: Steve Greenwood

## Primo:

Michael North, Chair PRIMO PWG

The Primo Product Working Group (PPWG) is working with Ex Libris and the Primo community on several key issues relating to Primo and its development.

Primo v4 will be released late Q1 to early adopters and early Q2 to the Primo community. There are

significant enhancements and the Release Notes for v4 will be issued by Ex Libris shortly. This is an eagerly awaited upgrade to Primo and the enhancements will be welcomed.

To further support the enhancement requests made by the Primo community, the Primo v4.1 upgrade will be issued shortly after v4 is released. It is Ex Libris's policy to release an update shortly after an upgrade so long periods of time do not go between enhancement upgrades.

We are starting to setup our Primo NERS Enhancement Reporting system and will be taking enhancement requests for consideration by Ex Libris for the next round of Primo development. When it is announced, please submit your enhancement requests into the NERS system. Due to the high number of previous enhancement requests (over 300), and the time required to sort through them and remove duplicates, remove old version-related requests, remove fulfilled requests (due to normal development changes), and combine similar requests, we will be removing all enhancement requests that were not in the TOP 50 last year. Please resubmit any removed requests if they are deemed desirable.

ELUNA 2012 is shaping up to be a great one and Primo is extremely well represented. We have 24 presentations so far ranging from User End Interfaces, Statistics, Development, Faceting/Scoping, Usability Studies, interfacing with Web2.0 apps, Normalization rules development, working with Primo/Rosetta, Primo Central API's with VUFind, etc. All aspects of the Primo product are covered this year, making it a very exciting conference for those of us who want to know "all things Primo!"

The Primo PWG continues to work to open communications with both the ELUNA Metalib PWG and the IGeLU Primo PWG (which now encompasses the former IGeLU Metalib group). Last year, the IGeLU Primo and Metalib working groups merged. The ELUNA PWG's are not looking at doing this at this time.

Another area that the Primo PWG is looking to concentrate on is the further development of the EL Commons website. Many institutions are willingly sharing their development work on EL Commons and

we are looking at different ways these developments could be marketed to the Primo community to better communicate the wonderful work other institutions are doing with Primo.

This past year has seen much advancement with Primo and the next year promises even more development. The Primo PWG looks forward to seeing people at ELUNA 2012 (do not forget the ELUNA Primo PWG meeting). This next year will be most exciting as the Primo Discovery application continues to improve and provide a better service to the library community.

## SFX:

Marina Oliver, Chair SFX PWG

- Software Enhancements

The planning for the first ever SFX software enhancement process cycle began at the end of June with the setting of an initial schedule. Christine Stohn, then SFX Product Manager, provided 30 enhancement requests from the Ex Libris Support System (Pivotal) which were entered into NERS. On 21 July 2011, a general message about the SFX software enhancement process was sent to the [SFX-DISCUSS-L@listserv.nd.edu](mailto:SFX-DISCUSS-L@listserv.nd.edu) by the chairs of the IGeLU and ELUNA SFX PWG, Mark Dehmlow and Marina Oliver. On July 22 NERS was opened for the direct submission of enhancement requests by IGeLU and ELUNA member sites. Over 90 requests were processed, with 85 requests on the ballot. The voting period ran from 24 August 2011 through 30 September 2011. The list of winners was sent to the SFX-DISCUSS-L on 19 December 2011. Sixty-four member institutions voted, utilizing a total of 6002 votes.

A final report, including a "lessons learned" section, such as, to include about a week between the request submission period and the beginning of voting, still needs to be done.

The SFX Software Enhancement Coordinators were Inga Overkamp for IGeLU and Janet Arth for ELUNA. As the first ever IGeLU/ELUNA SFX software enhancement cycle, the enhancement process progressed quite well, in spite of encountering a few surprises along the way. Though a bit delayed, here are the results of this fall's voting for SFX software

enhancements by 64 different user group member sites.

Enhancements were chosen for development by Ex Libris based on a number of considerations including:

- i) the number of votes received by the users
- ii) how many can be done in a given time (inversely proportional to the complexity and effort required)
- iii) what effect an enhancement may have on other components
- iv) the alignment of an enhancement with the existing product roadmap

Based on these considerations here are the top vote getters which will be implemented in the next year, most expected in the SFX 4.3 release:

- | (Rank) | Brief Description                                                                                       |
|--------|---------------------------------------------------------------------------------------------------------|
| (2)    | Export Tool: SFX export to Primo - enable incremental export of records                                 |
| (4)    | Mobile use: mobile version of A-Z list                                                                  |
| (5)    | KBManager, Search objects: display indication of titles that have active portfolios after object search |
| (7)    | KBManager, Search objects: make object search screen configurable                                       |
| (11)   | KBManager, Search objects: display more options on "Search objects" screen, not just Title              |
| (13)   | A-Z list: display information if a journal is peer reviewed                                             |

SFX 4.3 release is scheduled for Q2 2012.

The complete list of enhancement requests with voting results can be found here:

<http://www.exlibrisgroup.org/display/CrossProduct/NE RS+Results+from+the+SFX+Software+Enhancement+Process+2011>

You will need your EL Commons login to see this report. Thanks to everyone for your participation and for your patience.

Reported by: Janet Arth  
ELUNA Software Enhancement Coordinator  
arth@umn.edu

Inga Overkamp  
IGeLU Software Enhancement Coordinator  
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- **CKB Enhancements**

The SFX CKB enhancements process has been going for a year and a half now, and has completed 9 rounds of voting using the NERS system. Requests for new resources are added, sites enter their votes at any time, and every two months a snapshot is taken. The top 6 resources are then sent to Ex Libris; the four with the most votes overall, and the two with the most votes from specific regions. So far we have had 22 of our submitted resources added, 13 pulled because they could not be implemented or were otherwise covered; 15 are in progress, and 6 more were just sent this week. Note that CKB requests can also be submitted in Pivotal, but there are a great many requests in Pivotal. The voting process in NERS prioritizes requests for Ex Libris and helps ensure that the resources we most care about get attention. Thanks to everyone who has participated, and keep those requests coming.

Reported by Kathy Varjabedian  
CKB Enhancement Coordinator

## Verde:

Betsy Friesen, Chair Verde PWG

The Verde Product Group is working with Ex Libris staff on an announcement that accurately conveys what options Verde customers have in moving forward with management of electronic resources. No 'end-of-life' has been announced for Verde, although development on the product ceased by 2010. Alma provides Verde users with an integrated option for control of e-resources. We expect to have worked out an announcement in the next month.

- **UStat Enhancements**

UStat has been a product without a working group since its inception, so there was no mechanism for moving enhancements through the system similar to other Ex Libris products. This past fall, Ex Libris

agreed to let the Verde group shepherd the enhancement process for UStat. Details about the cycle still need to be worked out.

- **Sushi**

The following additions to SUSHI compliant vendors in UStat were made in October:

- American Society of Agronomy (ASA)
- Guilford Press
- Journal Usage Statistics Portal (JUSP)
- New England Journal of Medicine
- Oldenbourg
- Swetswise (Important note: in order to harvest from this vendor you should contact the vendor and receive a unique Requester ID (dedicated to USTAT only)).
- Taylor & Francis

Other vendors, such as JSTOR, Newsbank and LexisNexis continue to be problematic. Verde and SFX customers are encouraged to work with their publishers to add their names to the SUSHI registry.

- **Cost Usage Focus Group**

The following US and UK UStat users worked with Ex Libris on a Cost Usage Focus group.

- Anita Foster (Illinois State University)
- Betsy Friesen (University of Minnesota, Twin Cities)
- Sunshine Carter (University of Minnesota, Duluth)
- Marcia Stockham (Kansas State University)
- Nick Wooley (King's College London)

The group finished its work on cost-per-use-analysis in UStat in November.



Laura Morse  
Chair, ELUNA Steering Committee

ELUNA is an independent not for profit organization; we are not funded by 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/>.

**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.***



Salt Lake City Skyline with Wasatch Range in the background

Photo Credit: Eric Schramm