



# ELUNA

## Ex Libris Users of North America

### Newsletter

Summer 2012

This is the Summer ELUNA Newsletter. For those of you who attended ELUNA 2012 in Salt Lake City, we hope this issue brings back some good memories. If you were not able to attend this conference, you will see a little bit of what you missed.

Juan Antonio Samaranch was the President of the International Olympic Committee from 1980 to 2001. He started a tradition to describe successive Olympic Games as “the best ever” Games. ELUNA 2012 in Salt Lake City was a wonderful event, and in this tradition, it deserves to be described as the “best ever” ELUNA Conference! We thank the Program Committee, the Local Hosts, the Product Working Groups, and all of the presenters for their work to make ELUNA 2012 successful.

Read below the Report from the Chair, a report about the conference, an update about NERS, and reports from the various Product Working Groups.



Salt Lake City Hilton, site of most ELUNA 2012 sessions

#### A Word from the Chair

Laura Morse, ELUNA Steering Committee Chair

I enjoyed the opportunity to reconnect and learn with so many of you at the ELUNA 2012 Meeting in Salt Lake City! I hope to see all of you (and more) at ELUNA 2013, which will be held in late April 2013 in Athens, GA. More information on the 2013 meeting will be available soon -- please keep your eye on the ELUNA 2013 page for updates: (<http://el-una.org/meetings/eluna-2013/>).

Thank you to all who took the post-conference survey. The response was overwhelmingly positive, and we appreciate comments for areas we can improve next year. This successful meeting would not have been possible without the efforts of a large number of ELUNA members. I am especially grateful for the work of the [Local Arrangements Committee](#), co-chaired by Shelley Neville and Kenning Arlitsch; the Program Committee, chaired by Ellen Jones; the Liaison to ELUNA 2012, Kristine Hammerstrand; the [ELUNA 2011 - 2012 Steering Committee](#); SIG leaders; RUG leaders; and ELUNA 2012 speakers. I would also like to extend immense gratitude to Ex Libris for their participation in the meeting and for their generous sponsorship which enabled us to kick off the meeting with a fabulous reception at the Union Pacific depot. Many thanks as well to our Gold Level sponsors, YBP Library Services and Boopsie, and to our Silver Level sponsors, Backstage Library Works, Bibliotheca, and Marcive, Inc. for their support of the meeting.

I wanted to highlight some ELUNA Steering Committee leadership changes for the coming year,

in case you missed the ELUNA Announce list message. After 8 years of service to ELUNA and its predecessor Aleph user group, NAAUG, Gary Johnson is retiring and at the end of June will be resigning from the ELUNA Steering Committee. We wish him well in his next endeavors, and want to acknowledge his contributions to ELUNA as both a committed Product Working Group Liaison and Communications Officer. In addition to recent work with the Primo PWG, Gary edited the ELUNA newsletter and recently coordinated an update of the ELUNA membership brochure.

Melissa Wisner, from Yale University Library, will be joining the Steering Committee to serve out the remainder of Gary's term that runs through May, 2013. Melissa was invited to join the Steering Committee as she received the next highest number of votes as a candidate in the recent 2012 ELUNA Steering Committee election. We appreciate her willingness to join the Steering Committee for the next year. Melissa will serve as the Steering Committee Liaison to the SFX Product Working Group.

ELUNA Steering Committee roles change each year - please see the ELUNA Website for other role changes for 2012 - 2013 (<http://el-una.org/eluna-2012-2013-steering-committee/>).

We have an exciting year planned for ELUNA. Further information about ELUNA activities will appear in this column in upcoming issues of the newsletter.

## **ELUNA 2012 Conference Recap**

Kristine Hammerstrand, ELUNA Steering Committee

If you were among the 494 people who attended ELUNA 2012 in Salt Lake City in May, we hope you found the meeting to be helpful, informative and fun. If you could not attend or would like to review the content of some of this year's sessions, most of the breakout session slides are now available in the ELUNA Document Repository at <http://documents.el-una.org/view/divisions/eluna=5Fconf/2012.html>. (Reminder: the ELUNA Document Repository, an ELUNA membership benefit, is available to people from ELUNA member institutions and is password



protected.) Ex Libris also makes their ELUNA product update sessions available in the Documentation Center of the Ex Libris Customer Center.

Thanks to the nearly 200 of you who filled out the post-conference survey, we have a pretty good idea of how attendees found ELUNA 2012. Here's some of what we have learned from your responses:

You liked having the meeting agenda available on the new Boopsie mobile app (56% of survey respondents said they used it, when wifi permitted) but you also still like having print programs.



Boopsie, a Gold level sponsor for ELUNA 2012

The great majority of you thought there was a good mix of presentations on the various Ex Libris products (except for DigiTool.)

Use of the new Power Lounge (room to charge and use your mobile device) was relatively low and the new laptop checkout service was lightly used, but many folks did not know about these new options.

People who attended the Mormon Tabernacle Choir rehearsal were delighted to have this unique opportunity, but wished it had not been on Thursday night. (Sorry, but that's the night the Choir does its weekly rehearsals.)

Of the survey respondents answering the question, "Overall, do you think that the ELUNA conference is a good value?" 96.4% responded **Yes**.

Here's some more comments from the post-conference survey:

- Primo Polish: User Study Findings and Implementations was really terrific.
- The most informative for me was the Online Aleph Tutorials handled by the folks from Harvard.
- It's a Global Lifestyle by Ellen Kotrba Ellen had some great tips!
- Consortia Systems SIG is always informative
- Making Primo Normalization rules work for our library - before this session I didn't understand normalization rules at all ... I am so glad that I attended this session.
- Adam Zimmerman's session on the VIK and UTIL on Friday was especially useful, and informative for me. I found that I don't need certification to use them.
- My best session was the unofficial SIG for Hosted libraries ... hosted by Lesli Moore. It was great meeting others having some of the same problems as me and getting suggestions.
- Hosted Customers Meeting. I am glad to see this may become a SIG. Ex Libris product demos, updates, and Oren Beit-Arie session were most helpful.
- The session on "Using Apache to redirect mobile devices" was cool not just for Ex Libris products, but for any web app.
- Patron-Oriented Purchasing of E-books with Ted Schwitzner, since we are just starting a similar project, it was super-useful to compare notes and make the contact.
- Michael Doran's shelflister was awesome!
- I enjoyed the posters, particularly the one put together by PALNI (Private Academic Library Network of Indiana)
- The Voyager product update session is always a winner.
- Heads in the Cloud: an Alma Panel Presentation was hands down the best session of the whole conference;
- SUNY-Binghamton was useful due to the fact that they implemented Rosetta with few customizations, so it was easier to learn more about what Rosetta can do straight "out of the box"
- I felt there was a good mix of Voyager stuff throughout the program. Not dead yet!
- ELUNA business meeting was good (brief, informative).
- I learned a lot about what is coming down the road.
- This year there was very little that wasn't of interest. I usually only have one or two sessions

that are really useful and the rest are not so much -- this year it was the reverse. :-)

- This is our library's first year on Ex Libris products. The conference was a great way to learn more about them.
- ELUNA is very valuable. It allows us to talk with other users, attend sessions on our Ex Libris product, gives us ideas on how to improve what we are doing or do it more efficiently, get a glimpse of the future, and see a little bit of the country in the process.
- Thank you! This conference is one of the most useful and comfortable that I attend.

Again, thanks to all the conference planners, speakers, sponsors, volunteers and Ex Libris staff who helped us pull off another ELUNA Annual Meeting! We look forward to seeing many of you in Georgia for ELUNA 2013!



Backstage, a Silver level sponsor for ELUNA 2012

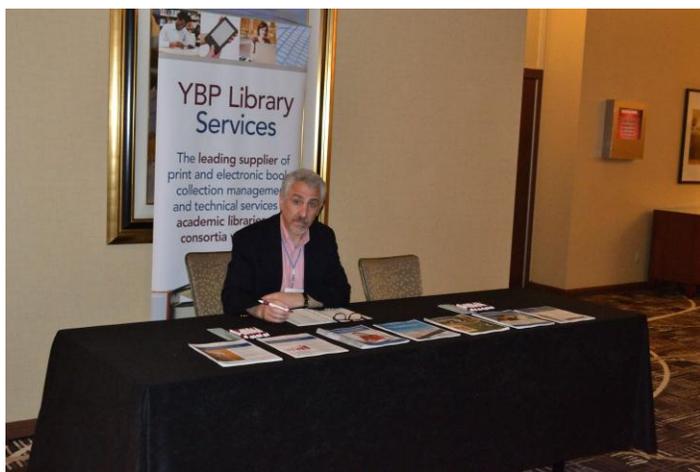
### Ex Libris Site Visit at Harvard University

Corinna Baksik, Systems Librarian, Harvard University

Two Alma developers, Shiri Katz and Zvika Aharony, from Ex Libris' Israel office recently spent a week shadowing Harvard Library staff. The visit began with an introduction by Tracey Robinson, head of Library Technology Services, followed by an overview of Harvard's Aleph environment and library organization. The visit proceeded with shadowing at the primary technical services processing unit located off-campus, where acquisitions and cataloging of both print and electronic resources were covered.

Katz and Aharony shadowed at numerous library locations on campus, including the Widener, Lamont, and Law School libraries. Staff demonstrated processes and procedures in selection, reserves, resource sharing, circulation, among other areas. The agenda also included e-resource licensing and management, as well as the needs of area studies units, such as the Judaica Division. Katz noted that staff showed a "passion to share their knowledge and experience," and that it gave Ex Libris a chance to witness first-hand the application of library theories.

Note from the Chair - The Ex Libris Users of North America Steering Committee and Ex Libris are planning for additional Alma Developer visits in North America in the fall of 2012. If you are interested in hosting, please send a message to the ELUNA Steering Committee ([eluna-sc@listserv.nd.edu](mailto:eluna-sc@listserv.nd.edu)).



YBP Library Services, a Gold level sponsor for ELUNA 2012

## **NERS Update**

Habib Tabatabai, ELUNA Steering Committee

NERS is the means by which ELUNA and IGeLU members submit requests to enhance the products we use – and subsequently to vote on our favorite enhancements. Requests can be entered at any time. Voting takes place on a cycle determined by each Product Working Group (PWG). NERS stands for New Enhancement Request System (NERS). Your participation in NERS activities and by casting your votes are the most direct ways that the users of Ex Libris products worldwide have to influence the future enhancement and developments of product development cycles.

**Access to NERS is limited to ELUNA and IGeLU members.** NERS can be accessed via <https://ners.igelu.org>. If you have questions about the use of NERS – or if you encounter problems - you should contact NERS via [ners@igelu.org](mailto:ners@igelu.org). Primary contact(s) or their designees in each member library have received NERS login information. Note that the person with the login information may not be the person responsible for voting at your institution, in which event you should contact your administrator or [ners@igelu.org](mailto:ners@igelu.org).

ELUNA and IGeLU have an agreement with Ex Libris that a certain amount of the development capacity per product and development cycle is dedicated to the enhancements that have garnered the highest priority by the user community vote in NERS. You can see this agreement from this web page: <http://el-una.org/product-groups/product-development-collaboration-agreement/>. Or you can go directly to: [http://documents.el-una.org/8/1/2008\\_pdc\\_agreement\\_final.pdf](http://documents.el-una.org/8/1/2008_pdc_agreement_final.pdf)

The PWGs work with the Ex Libris product managers to ensure that the voting cycles fit with the schedule of upcoming releases. Note that if you enter enhancement requests through eService (Pivotal), it is not always possible for those requests to be transferred to NERS. If in doubt, make an inquiry to the appropriate PWG. When you enter your request in NERS, you can be assured that it will be considered for voting.

If you see ways that NERS itself can be improved, it is also possible to use NERS to submit enhancement requests for NERS.

When you submit an inquiry to [ners@igelu.org](mailto:ners@igelu.org), your response may come from any one of a number of volunteers who support NERS. We are coordinating with ELUNA and IGeLU contacts to ensure that we would respond to your questions or requests in a timely manner. We are also working with Product Working Group leaders to improve this process. But we want to hear from you and about your experience ([ners@igelu.org](mailto:ners@igelu.org)). PWGs have access to NERS and follow up with enhancements that are submitted.

If you missed the following presentation at ELUNA 2012, you may want to see it now: Moore, Lesli M. and Kristin, Sherrie (2012) [\*Enhance Your Request – Tips for better enhancement\*](#)

[requests](#). An overview is also available on the [EL Commons Wiki](#).

**We ask that you keep the followings in mind when making NERS inquiries:**

- Because we all have sometimes conflicting priorities, please allow ample time for us to respond to your needs. If something is urgent, please advise.
- If the primary contact for your institution has changed, please let us know.
- Save your NERS credentials in a safe but memorable place.
- Be patient!



Salt Palace Convention Center, Salt Lake City



The former Union Pacific Depot, Gateway Center, site of the reception

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

See: <http://el-una.org/product-groups/>

### **Aleph:**

Steve Thomas, Chair Aleph PWG (2011-12)  
Bill Slauenwhite, Chair Aleph PWG (2012-13)

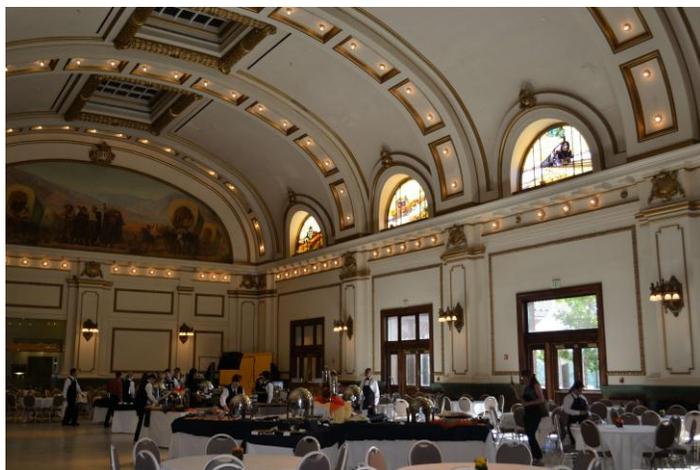
The Aleph Product Working Group met twice at ELUNA this year. An open meeting for all ELUNA members was convened by APWG Chair Steve Thomas, who gave an update on the past year's activities to the dozen or so attendees that was both informative and highly entertaining. Be sure to come to next year's open meeting to see if Steve can match or exceed this year's closing "amusing anecdote".

Members of the product working group also attended a business meeting over lunch on Thursday, where Steve passed the reigns off to Bill. We discussed the



Bibliotheca, a Silver level sponsor for ELUNA 2012

current enhancement voting cycle with Carmit Marcus, from Ex Libris. More news on that from our Enhancement Coordinator, Bill Jones, NYU, will follow soon. The annual report for 2011-12 can be found in the ELUNA document repository.



Interior of the former Union Pacific depot, Gateway Center, with beautiful murals and stained glass windows



Alma Early Adopters Panel, prepare for their presentation

## Voyager:

Ted Schwitzner, Chair Voyager PWG (2011-12)

## ELUNA Conference Update

Salt Lake City was a wonderful site for ELUNA. The hotel was exceptional, the weather pleasant and the scenery beautiful, but if you are like most of us, ELUNA is never long enough to see all the sessions we want or need to. This year was no different, there

were thirty plus Voyager related sessions, all interesting, informative and exceptional.

Unfortunately, in three days you cannot attend them all. Maybe, you wanted to see Tari Keller's *Moving a Voyager Consortium Up to the Cloud*, the collective experience of 19 libraries, the processes, procedures and lessons learned; or Michael Doran's *Shelflister 3.0 for iPad*, generating real-time shelflists; or Todd King's *Library Express - Using Document Delivery of ILLiad in the Voyager Catalog*, using a "Get It" button next to the status to send ILL requests directly from Voyager to ILLiad. We realize that with so much to choose from and so little time to fit them all in, attendees want access to all presentations. So, regardless of the track or session, over the next couple of weeks the entire wealth of presentations will be available on the Document Repository website. As a member of ELUNA you may visit the site and download the presentations and all of the associated documentation with them, thanks to the generosity of the presenters and the hard work of Tracy Farmer who is responsible for collecting the presentations and posting them to the website.

## A Look Ahead: 2012-2013

In the coming year, the VPWG, under new Chairperson Sherrie Kristin, expects to continue improving the enhancement process, both the means by which enhancements are prepared for voting and the means of voting. Discussions have begun with other product working group chairs to look for ways to develop best practices for enhancements balloting. The VPWG also hopes to find approaches that reduce barriers to voting participation and to improve the clarity of priorities. For a list of PWG members, see: <http://el-una.org/product-groups/voyager/voyager-product-group-leaders/>

The continued development of Alma, and the expectation that some Voyager libraries may migrate in that route has revealed a need to inventory the use of customer- and membership-developed add-on tools for Voyager. In consultation with the product manager, the PWG will identify the different tools that have been developed, and then survey the number of customers and the breadth of uses. The goal will be to begin exploring how or whether the tools can continue to be developed and supported, either by Ex Libris or by the community.

Lastly, in serving its role as a conduit between the membership and Ex Libris, the VPWG will continue to improve its visibility among customers. Visibility-raising efforts will include the improvement of the VPWG space on the ELUNA website, helping to identify programming themes for the Voyager track at the ELUNA 2013 Conference, and participating as requested at regional user group meetings.



The Tabernacle, site of choir rehearsal with ELUNA attendees as guests



ELUNA 2012 reception at Gateway Center



ELUNA 2012 attendees picking up their registration packets

### **MetaLib / MetaLib+:**

Mark Needleman, Chair MetaLib/MetaLib+ PWG

At the recent ELUNA meeting in Salt Lake City the MetaLib Product Working Group made the decision to become the MetaLib/MetaLib+ Product Working Group.

We felt that this was an important direction for the MetaLib Product Working Group to move towards given the fact that MetaLib+ is becoming a strategic product for Ex Libris and it was important for the customer base to begin to have input into the future direction the product took. Up until now MetaLib+ had no official place in the ELUNA organizational structure.

Because MetaLib+ is not simply MetaLib but contains part of Primo we recognize that coordination and collaboration is an import of the Product Working Group's mission. Collaboration with both the ELINA Primo Product Working Group and with our colleagues at IGELU is a vital function of the MetaLib/MetaLib+ Product Working Group.

We would like to encourage anyone in ELUNA who uses MetaLib+ or MetaLib to volunteer to become a part of the Metalib Product Working Group, and help do the work of the group.

If you want more information or wish to volunteer for a leadership role in the MetaLib/MetaLib+ Product Working Group (and I encourage everyone with any interest to do so) you can contact either me or Kate Montgomery, the Vice Chair/Chair-Elect of the ELUNA MetaLib/MetaLib+ Product Working Group.

We need your help! For a list of current members of the PWG, see: <http://el-una.org/product-groups/metalib-product-group/>

As always, we encourage you to subscribe to the Matalib discussion list. To subscribe, send an email to [LISTSERV@LISTSERV.ND.EDU](mailto:LISTSERV@LISTSERV.ND.EDU) with the text

subscribe metalib-discuss-l <your name>



Gracies, site of networking event at ELUNA 2012

## Primo:

Michael North, Chair PRIMO PWG

We had another successful ELUNA conference in May 2012. There were 21 Primo sessions delivered by Primo users in addition to the Primo PWG meeting, and the Primo product update, Primo demos, and a session on ScholarRank given by Ex Libris staff. Attendees commented on having to choose between sessions because so many interesting ones were on offer! A good problem to have! The topics included implementation, normalization, searching, facets, adding content, custom interfaces, reporting and usability testing. Users also had a chance to find out the differences between local implementation, Primo Direct and Primo TotalCare. Many Ex Libris staff were on hand to help with the question and answer portion of sessions and to chat with users as break. As we begin to look towards 2013 in Georgia, any suggestions for improvement are welcome!

During the ELUNA 2012 Primo PWG meeting, new officers were elected. Alison Hitchens (University of Waterloo) started a 4 year term and starts by filling the "chair-elect" position this year, followed by a 2-

term as "chair" and then 1-year as "past-chair. The full Primo PWG leadership can be found at <http://el-una.org/product-groups/primo-group/primo-product-group-leaders/>

Currently ongoing Primo activities: Primo Enhancement Voting is recently concluded, with the most popular requested enhancements submitted to Ex Libris in mid-June. Primo v4.0 was released early in June and was much anticipated. The topic of "Deep Linking" is still ongoing as the Primo PWG and Ex Libris strive to clearly define the issues involved.

The next year for the Primo PWG promises to be a busy one as the number of institutions using Primo continues to rise and more issues come to the forefront for the PPWG to address.



ELUNA attendees enjoying conversation at Gracies

## SFX:

Marina Oliver, Chair SFX PWG

It's hard to believe that another year has come and gone. We had a great turn-out for the SFX Product Working Group (PWG) meeting in Salt Lake City. It was good to see so many SFX users participating in ELUNA. Thanks goes to Sunshine Carter, our 2011-2012 SFX ELUNA Program Chair, we had a great set of presentations again this year. For those of you new to ELUNA the SFX PWG holds a meeting each year at the conference which is open to all SFX ELUNA members. The PWG is responsible for organizing the enhancement process for SFX, developing SFX sessions for the annual conference in conjunction with the ELUNA Program Planning Committee and representing SFX users to Ex Libris. Each year at the meeting we elect officers (we also

welcome volunteers). I'm happy to say that most of our PWG volunteers wanted to continue their work for the group. See the SFX PWG web site for a list of all of the PWG leaders.

Janet Arth continues as our Software Enhancement Coordinator. Last year was the first year for the membership to vote on software enhancements. Another round of voting will take place this year, and the process will be reviewed and refined. We will also address the issue of vendors that are not SFX (Open URL) compliant. You'll soon see emails on the listserv from Sunshine Carter, Director at Large, regarding this issue. And of course the CKB enhancement process continues throughout the year.

The SFX Product Working Group is here to serve SFX users. We monitor the SFX List and are involved w/many of the issues discussed. Please feel free to contact us on any on these matters or other problems you may be having. For a list of the current PWG members, see: <http://el-una.org/product-groups/sfx-product-group/sfx-product-group-leaders/>



Mormon Tabernacle Choir and Orchestra – Salt Lake City  
The Choir presented a selection to ELUNA attendees

## Verde:

Allison Erhardt, Chair Verde PWG (2012-13)

One Verde focused session was offered at ELUNA this past May. It was a session focusing on Best Practices with an opportunity to ask questions of the Verde community in attendance. The session went well and best practices relating to One Time Purchases and Prevailing Terms in licenses were discussed.

## Alma-E

Over the last year there has been much discussion about Alma-E and what it would mean to Verde users. It has been discovered that the key benefits of the ERM functionality of Alma can only be realized when the ILS data and functionality of Alma is merged in. As a result, Verde customers will receive the "e" functionality for no additional licensing fees, as the current maintenance payments are converted to the Alma "e" subscription. However, there will be additional subscription costs for the cloud services and a migration service cost. If you are interested in migrating to Alma-E, you will need to contact Ex Libris directly for a cost quotation. Verde will continue to exist as a stand-alone ERM, as Ex Libris has no plans to discontinue support for Verde any time in the near future.

## UStat

Additions to SUSHI compliant vendors in UStat have been added by Ex Libris over the past year as well as new Cost per Use functionality. A Focus Group consisting of members of the Verde community listed below worked on a Cost Per Use analysis tool. The first phase of this tool requires a manual load of invoices to UStat.

### Focus group members:

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)

### SUSHI compliant vendors added in Oct. 2011:

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

A new Verde Product Manager has been selected by Ex Libris. She is Sharona Sagi.

Allison Erhardt is the new chair of the Verde PWG. For a complete list of the PWG leaders, see the

[Verde PWG web site](#). The PWG is looking for new members. If users are interested in joining the group, they may contact Allison Erhardt at [Allison.Erhardt@ad.umanitoba.ca](mailto:Allison.Erhardt@ad.umanitoba.ca).



View of Olympic Legacy Plaza from the Gateway, Salt Lake City

### **Upcoming Events:**

**September 11-13, 2012**

IGeLU 2012 Conference, Zürich Switzerland



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 15-16, 2012**

Ex Libris South-Central User Group – ELSUG, Oklahoma City, OK

**October 18-19, 2012**

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

### **ELUNA Needs You!**

Gary Johnson, ELUNA Steering Committee

As you know, ELUNA is an organization of users. We exist to help our users learn more about the software that we use - and to help each other with that software. We have no paid employees, but depend on volunteers for everything we do. This is a reminder that we can use your help! One of the best ways to help is to be a part of a Product Working Group (PWG). Each group works to help make that product work better for you. ELUNA members have the opportunity to vote on enhancements for most products, but there is a lot of work to organize the voting process. Members of the PWGs also work to organize useful sessions at our annual conference.

If you have the interest and some time to devote to a PWG, we want you to make that known to the appropriate PWG leader. PWGs have meetings at our annual conferences – including the next conference in Georgia. For some of the groups, that will be a good place to volunteer. But I encourage you not to wait. Contact a PWG leader now!

For more information, check this out:

<http://el-una.org/product-groups/>

We are looking forward to hearing from you.



Some of the beautiful landscaping at Temple Square, Salt Lake City

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