Ex Libris Users of North America
ELUNA NEWS
Spring 2014
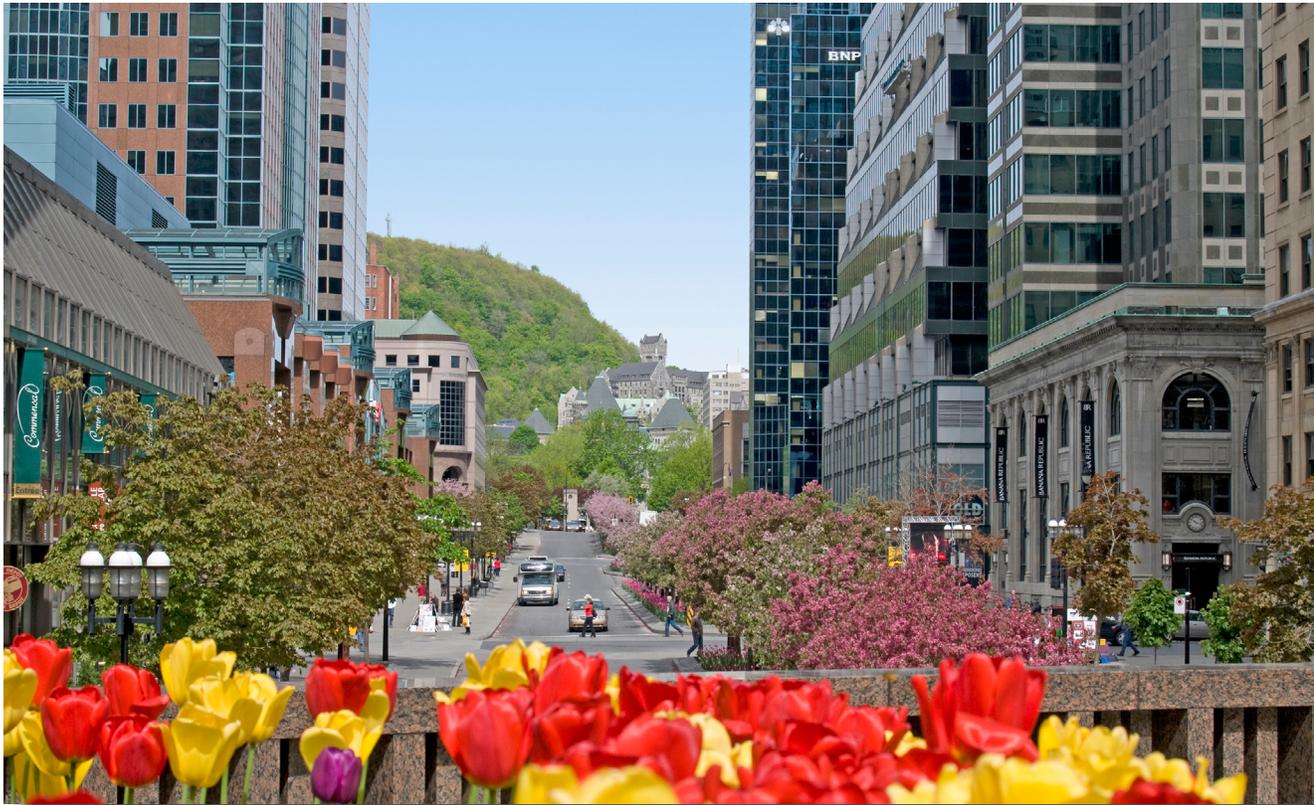
Oh Montreal! ELUNA 2014 April 29–May 2

Come and experience a city whose passion, *joie de vivre*, and rich cultural heritage are legendary. *Les Montréalais* love to greet visitors and show off their city's charms, so expect a very warm welcome. It's like a taste of Europe right in North America.

The ELUNA 2014 Annual Meeting will be held at the Fairmont the Queen Elizabeth Hotel in Montréal, Canada. Local hosts include McGill University, Université de Montréal, and du Québec à Montréal.

Register Today

The Ex Libris Technical Seminar will again be held before the ELUNA Annual Meeting on April 28 and 29, 2014.

http://el-una.org/ meetings/eluna-2014

A Word from the Chair John Greer, 2013-2014

The first year of my term as the ELUNA Steering Committee Chair has been one that I have found both challenging and rewarding. Following the conclusion of ELUNA 2013 in Athens, GA the Steering Committee spent a full day on Saturday working through a conference debrief, orienting the new members to the group, outlining roles for 2013/2014, and prioritizing tasks for our upcoming year. I am happy to say that we were successful in several large initiatives over the year. We worked with IGeLU and Ex Libris to come up with a new commitment for a Primo enhancement process that covered both Primo in general, and a parallel one for OVP in particular. This first year of the new process has not been without hiccups and we will continue to work together to improve the process. 2013 also saw the retirement of the old Pivotal support system and the migration to Salesforce. The new support system does offer greatly expanded features, and the first round of enhancement voting for system improvements has already been completed; visit the Doc Repository to see the results. Finally the recent release of a Cloud Status page that allows for push notifications of system status and a instant view of system status was the result of many back and forth communications between ELUNA, IGeLU, and Ex Libris over the past year.

The upcoming ELUNA 2014 annual meeting in Montreal on April 29–May 2 promises to be a great meeting, with more than 175 sessions and 160 speakers! Special thanks go out to our local arrangements committee; Jane Aitkens, Pierre Roberge, and Martin Sévigny; our conference program planning committee chaired by Kris Hammerstrand; and our conference logistics coordinator, Laura Morse. The meeting could not happen without the knowledge and many hours that each and every one of the above contributed to the planning tasks. I also want to thank Ex Libris, who supports the annual meeting by sponsoring the opening reception, providing updates from Ex Libris staff on their products and company strategy, and holding the Technical Seminar prior to the meeting allowing customers to receive in depth training on a wide variety of the products.

I look forward to seeing you all in wonderful Montreal!

Credit: Tourisme Montréal

John and Yoko Stayed Here

They staged their second bed-in at the Fairmont The Queen Elizabeth Hotel in Montreal, the same hotel where ELUNA 2014 will take place. To see John and Yoko in person, visit the Grévin Museum.

www.grevin-montreal.com

ALMA Product Working Group Betsy Friesen, Chair 2013-2014

The joint ELUNA/IGeLU Alma Product Working Group (PWG) continues to meet monthly. Almost all of the PWG member institutions are now live, which makes for even more rousing conversation on our calls. Through ALMA-L, nearly 1300 subscribers from 27 countries share questions, answers, and experiences with each other.

Alma Issues
At last year's IGeLU meeting, Ex Libris recommitted to better monitoring of the list for repeat issues. Additionally, Alma PWG members monitor Alma-L for issues reported by five or more respondents. After IGeLU, Ex Libris responded more often to the list regarding these types of problems. Additionally, issues raised by several users are often discussed with Alma product managers during monthly calls.

Community Zone Advisory Group
Members of the PWG, as well as other Alma users, participated in Community Zone Advisory Group calls with Ex Libris staff. The group was on hiatus for several months. The CZAG primarily discussed ebook record population of the CZ as well as governance of the Zone. A report is expected soon.

ELUNA and IGeLU Program Updates
Approximately thirty Alma presentations are planned for ELUNA 2014. Many thanks to those of you who contributed Alma program proposals. The Alma Product update and Alma PWG meeting will run consecutively from 1:30-3:25 on Wednesday, April 30. A call for proposals was issued for IGeLU. More Alma sessions are needed. ELUNA Alma presenters are invited to submit their presentation proposals for IGeLU 2014 in Oxford.

Interoperability Group Participation
A IGeLU/ELUNA Special Interest Working Group on Interoperability was formed following IGeLU 2013. Masud Khokar from Lancaster University leads the group. The Interoperability SIWG focuses on Ex Libris systems working together and on Ex Libris systems working together with third party systems, whether these are from other vendors or built by customers. Kevin Kidd, Boston College, will be representing the Alma PWG.

Alma Special Interest Groups
During PWG meetings and other informal gatherings, two areas of functionality have come up repeatedly: analytics and licensing. Other areas of ongoing interest are EDI, ILL, and user interface. The licensing group was announced to the list in early April.

ALMA Product Working Group, Continued

The PWG felt licensing was an area where a focus group approach would be valuable to help organize users' needs to discuss with Ex Libris. Janet Morrow, Northeastern University, volunteered to convene a group of approximately five members, from live Alma sites, to work on this topic. The group will work for approximately 3 months from the time of the first meeting. The PWG hopes to recruit customers from around the world so that a variety of viewpoints and needs are included. Feedback will also be solicited through the list and through a network of contacts to make sure that a broad base of Alma users and institutions is represented. Interested parties may gather at ELUNA on Friday, at 9:00 a.m. in Hochelaga 5.

Enhancement Process
Because Alma was a brand new product, an active enhancement process was embargoed for two years from the time the Alma PWG was formed in 2012. While it may be too early to start an actual process, the PWG and Steering Committees are actively working on a possible process to collect enhancement ideas from the Alma community.

ELUNA Steering Committee Members, 2013-2014

John Greer – *Chair;*
Webmaster; Liaison to Support;
Mailing List Manager; Liaison to IGeLU
University of Montana
Term: 2010-2016

Pascal Calarco – *Secretary;*
Liaison to SFX Product Working Group
University of Waterloo/Tri University Group
Term: 2013-2016

Edward M. Corrado – *Webmaster;*
Document Repository Manager;
Digitool PWG Liaison; Rosetta
Advisory Committee Liaison;
Mailing List Manager
Binghamton University
Term: 2013-2016

F. Tracy Farmer – *Voyager PWG Liaison*
Arkansas State University – Jonesboro
Term: 2013-2016

Lauren Fancher – *Communications Officer;*
Metalib PWG Liaison
GALILEO/Board of Regents of the
University System of Georgia
Term: 2011-2014

Kristine Hammerstrand – *Webmaster;*
SIGS/RUGS Liaison;
Mailing List Manager
Consortium of Academic and
Research Libraries in Illinois (CARLI)
Term: 2011-2014

Suzanne Julich – *Treasurer*
University of Iowa
Ex Officio

Laura Morse – *Past Chair;*
Aleph PWG Liaison; Verde PWG Liaison;
Harvard University
Term: 2009-2014

Michael North – *Alma PWG Liaison*
Northwestern University
Term: 2013-2016

Habib Tabatabai – *Primo PWG Liaison;*
NERS Liaison
University of Central Oklahoma
Term: 2012-2015

Aleph Product Working Group Steve Bischof, Chair 2013-2014

This year's PWG team met for the first time during ELUNA 2013 in Athens, GA. At that meeting new members Corinna Baksik, Felicity Walsh, and Terri Winchcombe were welcomed to the APWG. Bill Jones and Steve Thomas completed their terms on the working group, and were thanked for their service.

Members and positions for 2013/14 are:
- Steve Bischof (Five Colleges) - Chair
- Bill Slauenwhite (Novanet) - Past Chair
- Jeffery Sowder (Emory) - Enhancement Coordinator
- Felicity Walsh (Emory) - Chair Elect/Vice Chair
- Corinna Baksik (Harvard) - Enhancement Coordinator-Elect
- Terri Winchcombe (Saint Mary's) - Member
- Shelley Neville (Church of LDS) - Secretary

The PWG spent the first part of the year organizing and conducting this year's ALEPH enhancement voting cycle. Much of this was made possible by Corrina Baksik, who was able to step up and take the lead on this year's enhancement cycle. We actually built on last year's changes to the voting cycle and we were able to deliver this year's requests to Ex Libris for pointing by the end of August. This allowed us to have the second round of voting during the late fall and we were able to deliver the final lists of enhancement requests to Ex Libris by January. We are continuing to work with our counterpart group in IGeLU to ensure that both voting cycles are the most efficient they can be while at the same time making sure that the shared NERS voting system is available to each group when they need it. This last year each IGeLU voting round followed shortly after the ELUNA round.

The PWG provided feedback to the Ex Libris product development team on the following enhancement design specifications, which were the result of this year's (2013-14) voting cycle:
- ELUNA-2984 Circ - Link out to item from Circ log entry
- ELUNA-2999 Cat - Long Item History lists are difficult to work with
- ELUNA-3016 ILL - Override Check-in "Item Record not found"
- ELUNA-3046 Circ - Defaults buttons on Course Info form
- ELUNA-3051 Circ - Item on hold shelf reminders
- ELUNA-3055 OPAC - Send Due Time not just due date to Primo Locations tab

We were privileged once again to have Carrie Curie (PALS) volunteer to be the ELUNA 2014 Aleph Program Track Coordinator. Carrie is doing a wonderful job and the proposed track looks excellent. Carrie has notified the PWG that 2014 will be her last year as Program Track Coordinator, so the ALEPH PWG will need to find a new coordinator for ELUNA 2015. We would like to thank Carrie for her excellent work organizing the ALEPH track at ELUNA over the past few years.

Finally, I would like to thank the Product Working Group members and the Steering Committee for making this a very productive year. I look forward to participating as Past-Chair for 2014-2015.

Voyager Product Working Group Sherrie Kristin, Chair 2013-2014

During the cold winter months the Voyager Product Working Group has been keeping warm with project work. Certainly, one of the most visible is the one that Judy Brink-Drescher and Kathryn Frederick have been working on, the Voyager Track for ELUNA 2014. They have solicited, reviewed and accepted a large array of presentation proposals that cover all aspects and modules of Voyager. The presentations are sure to be of use to the Voyager attendees at ELUNA 2014 in Montreal.

Our main project has been Voyager enhancements. This year we again reviewed all Voyager enhancement submissions past and present. After the initial review we decided that it was time to "clip the tail" on the enhancements as many referred to unsupported versions of Voyager. Working with our Voyager manager at Ex Libris we notified the submitters of enhancement requests that fell between the years 2004-2008, that the enhancement request was being closed but if they felt it was still a valid enhancement request they should submit a new request.   In all this removed 113 old enhancement requests which left us with 165 enhancement requests to review. After culling through them, combining duplicates and making sure descriptions were accurate, we put forth 59 items for vote.

The enhancement requests with the most number of votes were discussed on weekly phone calls, requirements were written, points were assigned, and by the end we had 12 enhancement requests for Voyager release 9.1.

Members of the group are involved in recruiting new members for the committee. The term for new members begins at the ELUNA Conference.

Lastly, we are working on the VPWG presentation for ELUNA 2014 and hope to see all of you there.

Did You Know...?

"Habitat 67 was built as a pavilion for the Montreal World's Fair, Expo 67. Conceived by architect Moshe Safdie it is one of the most recognizable buildings in Montreal. It is comprised of 354 identical prefabricated concrete forms arranged in various combinations up to 12 stories high. There are now 156 residences – many with multiple forms – and all with at least one private terrace."

Source: http://www.hikebiketravel.com/26148/30-fun-weird-interesting-facts-montreal-quebec/

Credit: Taxiarchos228 at the German language Wikipedia

Verde Product Working Group Allison Erhardt, Chair 2013-2014

This year's PWG team was unable to all meet in person at ELUNA 2013 in Athen, GA. However, we did gain a new responsibility for the upcoming 2014-15 year in UStat. At the end of the 2013/14 year, we were able to speak with our Ex Libris representative and gain approval for a voting cycle to take place to add new SUSHI Compliant COUNTER Statistics Vendors via NERS. This will enable those who use USTAT to vote on which SUSHI compliant vendors they would like to see in place sooner rather than later.

For 2014/2015, the PWG will be working with members from the SFX and ALMA communities to develop a voting cycle for SUSHI Compliant COUNTER statistics report vendors that we would like to see made available for use with USTAT. To facilitate this, a call for members was put out in April of 2014. There has been much interest in this topic so far, and members will begin to meet to discuss next steps after the ELUNA 2014 meeting in May.

Fun Around Montreal

- Check out Cirque du Soleil KURIOS - Cabinet of Curiosities. Step into the curio cabinet of an ambitious inventor who defies the laws of time, space and dimension in order to reinvent everything around him. Tickets from $45 to $290. At Jacques-Cartier Pier. http://www.cirquedusoleil.com/kurios
- Visit one of Montreal's many museums, including the Montreal Museum of Fine Arts (Musée des beaux-arts) or the Museum of Contemporary Art (Musée d'art contemporain).
- If you are interested in Montréal's history, be sure to visit the spectacular Montréal Museum of Archeology and History (Pointe-à-Callières) or the Château Ramezay, both in Old Montréal, or the McCord Museum on Sherbrooke Street right across from McGill.
- Luxury shopping (or just window shopping) on Crescent Street. North of De Maisonneuve Boulevard, the Street's sumptuous Victorian architecture housing luxury boutiques, haute couture showrooms and art galleries has been carefully showcased, giving the Street a distinctive touch of elegance. To the south, nightclubs, restaurants, bars, outdoor cafés and pubs add frivolity and excitement.

Montreal

ELUNA 2014

Credits: Tourisme Montréal

SFX Product Working Group Maribeth Manoff, Chair 2013-2014

Many thanks to the members of the ELUNA SFX Product Working Group for 2013-14. And to the IGELU SFX PWG, our partners in what we were able to accomplish this year. One of our new efforts was the formation and launch of the SFX KnowledgeBase Advisory Board (KBAB). The goal of the SFX KBAB is to promote first class quality of the data stored in the SFX KnowledgeBase by reviewing quality assurance policies and processes together with Ex Libris. The SFX KBAB may either endorse the current policies and processes on behalf of the user community or make suggestions for possible improvements. Ex Libris has agreed to share detailed information on currently implemented policies and processes.

In the long run the aim of the SFX KBAB is to:
- Create its own ideas for new KB policies and/or processes and propose them to Ex Libris.
- Receive, review, and forward to Ex Libris any such ideas submitted from the SFX user community.
- Provide feedback and advice to Ex Libris on intended extensions or changes of KB policies and/or processes.

The group got underway in September of 2013 with membership from IGELU and ELUNA listed below. After working out the details of a non-disclosure agreement with Ex Libris, the group put together a list of KB issues for response from Ex Libris. The PWGs are still working on details of communications out from the KBAB to the wider user community. Look for more soon!

Yosef Branse, Haifa University, Israel, IGELU
Ann Ercelawn, Vanderbilt University, USA, ELUNA
Erika Banski, University of Alberta, Canada, ELUNA
Xiaotian Chen, Bradley University, USA, ELUNA
Francois Renaville, Université de Liège, Belgium, IGELU
Mark Needleman, Florida Virtual Campus, USA, IGELU, ELUNA
Stephanie Aken, University of Kentucky, USA, ELUNA
Holly Thomason, Liaison for IGELU PWG
Marina Oliver, Liaison for ELUNA PWG

The KnowledgeBase enhancement efforts have continued on the established quarterly cycle, ably led this year on the ELUNA side by Marina Oliver, working with Holly Thomason from IGELU. Remember that you ELUNA members, along with IGELU member institutions, are the ones who make the CKB enhancement process work. By entering new resources needed in the KnowledgeBase into the NERS system and by voting when the quarterly snapshot is taken and the reminder sent out, you can ensure that the most important enhancements are given attention by Ex Libris. See the latest results in the EL Commons.

SFX Product Working Group, Continued

The software enhancements for SFX also had an excellent ELUNA leader this year, Margery Tibbets; she was joined by Michelangelo Viana from IGELU. Despite a glitch in the NERS system in the middle of the voting cycle, nine enhancements to the KB manager, including a tool for export in the KBART format, were voted in and accepted by Ex Libris. Margery and Michelangelo also followed up on last year's software enhancements, and were able to obtain explanations from Ex Libris for enhancements they would not be able to work on. Details can be found in the EL Commons.

We hope to see many of you at the ELUNA conference in Montreal! There are six SFX sessions and one poster session on a wide range of topics, including a panel to gather your input on user customizations, a view on e-book discovery using SFX, and a behind-the-scenes look at developing local plugins and target parsers. Don't forget the SFX Product Update from our Product Manager, Christine Stohn, also the Product Working Group meeting where we'll discuss together where our PWG efforts are heading. Sunshine Carter and your current chair Maribeth Manoff will be rotating off the PWG this year - look for your chance to volunteer to join up and help out.

MetaLib / MetaLib+ Product Working Group
Kate Montgomery, Chair 2013-2014

The MetaLib Product Working Group continues to work with the IGELU Primo/MetaLib Product Working group and Ex Libris Metalib Product Manager Rachel Kessler to develop functionality and add new resources to the MetaLib CKB. While application enhancements are only being considered for Primo/MetaLib+, MetaLib standalone continues to be supported and improved via the CKB. There are 1,756 MetaLib customers with 375 having made the move to MetaLib+.

Enhancements are divided into requests for Primo/MetaLib+ functionality, co-ordinated via the Primo Enhancement process, and joint efforts with IGELU for requests of additions to the CKB. To date for 2014 there have been 61 new resources added and 48 updated or rewritten resources. It is important to remember to consider submitting requests for CKB enhancements in NERS. PWG members, in close collaboration with our IGeLU colleagues, cross-referenced a list of CKB requests submitted to Pivotal, to discover over 150 resources that were never submitted to NERS or added directly to the CKB. We circulated this list on the MetaLib discussion list, asking the community to submit any resources still of active interest to NERS. 22 of these resources are now votable in NERS.

The group continues to consider whether a merger of the MetaLib/MetaLib+ PWG with the Primo group would be beneficial; the IGELU merged counterpart has observed that their merger has been quite successful.

Primo Product Working Group Alison Hitchens, Chair 2013-2014

We are really looking forward to a great conference in Montréal this year with over 30 sessions either in the Primo track or related to Primo interoperability with other products. These sessions cover a wide range of topics including statistics, customizations, normalization rules, adding new data sources, searching, implementation, usability, and even linked data! Those of you who are new to Primo may be especially interested in Vanderbilt's session on the progress of Primo over the past 6 years. Be sure to also check out the strong Primo track that Ex Libris has organized for the Technical Seminar. While you're attending ELUNA don't forget to drop in to the Primo PWG business meeting where you can meet the members of the product working group, get an update on our activities over the past year, let us know your ideas for the coming year and vote in new members. All are welcome! If you are interested in running for one of the two open positions on the PWG, please contact us by April 25th, 2014. We would really like to hear from a TotalCare customer so that the full range of Primo customers is represented.

Can't make it to ELUNA or want to know how to get in touch? You can find us online. The Primo PWG section of the ELUNA site gives you access to the PWG members, the Primo mailing lists and a list of Primo sites. Primo customers can send us their information if they would like to be included on the list; this year we sent out a call for updates and received a great response! The list is very helpful if you are trying to find customers with a similar setup or using the same ILS with Primo.

In 2013 we worked with IGeLU on two enhancement voting cycles for Primo and Metalib+. The general enhancement cycle was completed in summer 2013; we sent Ex Libris a list of the top 25 enhancements but also highlighted for them the top 3 enhancements related to Metalib+, Primo Central Index configurations, and the Primo Back Office. You can view the results list in the EL Commons Wiki. So far Ex Libris has developed a virtual bookshelf browse feature (version 4.5) and citation functionality (version 4.6) and has committed to scheduling at least 8 more enhancements from the list. In December we ran the OPAC via Primo (OvP) enhancement cycle and sent the results of the vote to Ex Libris. We are still waiting to find out which enhancements will be developed. The PWGs and the Steering Committees are working together to ensure that enhancements will continue to be developed.

This year we pursued accessibility issues in Primo and received a completed Voluntary Product Accessibility Template (VPAT) from Ex Libris. This document can be found in the Documentation Center in the General Information folder for Version 4. We have also worked in collaboration with Ex Libris staff and IGeLU on requirements for some of the outstanding 2012 OvP ballot issues including ILL requests, and provided feedback to Ex Libris on documentation and training for service pack upgrades. Ex Libris also scheduled several Primo developer visits with North American customers to talk about agile development, quality assurance tools, infrastructure changes, and to listen to customer ideas and comments. These personal visits were much appreciated.

The Primo PWG is committed to working with our IGeLU counterparts and Ex Libris staff on all things Primo! Some of the suggested projects for the coming year include the creation of a Primo Central Index content enhancement cycle (similar to the Metalib or SFX knowledgbase enhancement request cycles), a survey from the IGeLU group on usability of the Primo interface, and continued pursuit of enhancements to deep linking. Your comments and questions are always welcome so don't hesitate to drop us a line!

NERS Habib Tabatabai, ELUNA Steering Committee NERS Liaison

Since our last update, NERS continues to be an important medium for the user community to make their enhancement requests known and eventually vote on them. Requests can be entered in NERS at any time. Voting takes place on a cycle determined by each Product Working Group (PWG). This is the most direct way that the users of Ex Libris products worldwide have to influence the future enhancement and developments of product development cycles.

- Aleph – (ELUNA and IGeLU) in 2013 and 2014
- MetaLib – Ongoing
- NERS – Enhancement Cycle in 2013-2014
- Primo – Annual and OvP Additional Functionality requests in 2013
- SalesForce – Voting on most desired features and enhancements to Ex Libris Customer Support services in 2014
- SFX – Ongoing
- Voyager – Vote on enhancements for v9.1 in 2013

NERS enhancements that are being developed currently include:
- Ability to export data from NERS in more flexible formats;
- Ability to Add attachments to NERS requests;
- Preventing successful edits from creating duplicate requests;
- Add a mandatory field for Aleph – "Why request is needed?";
- Do not offer editable fields or a submit button in view-only mode.
- In addition a single sign on capability is under review.

Access to NERS is limited to ELUNA and IGeLU members. NERS can be accessed via https://ners.igelu.org. Send your questions or comments to ners@igelu.org. The PWGs work with Ex Libris product managers to ensure that the voting cycles fit with the schedule of upcoming releases. We ask that you keep the following 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 the primary/NERS contact for your institution has changed, please let us know.
- Save your NERS credentials in a safe but memorable place.
- Be patient!

Did You Know...?
The first European to reach the Montreal area was Jacques Cartier on October 2, 1535. Cartier visited the village of Hochelaga, which inhabited by the St. Lawrence Iroquoians, a discrete and distinct group of Iroquoian-speaking indigenous people. Seventy years later, explorer Samuel de Champlain tried to go to Hochelaga, but it had disappeared completely, and there was no sign of anyone having lived in the area.

Image Source: National Archives of Canada
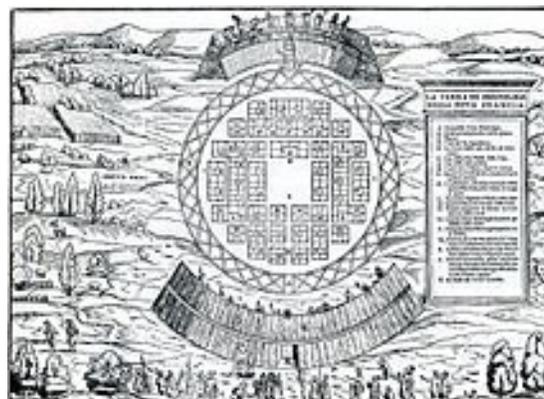
Woodcut engraving of Hochelaga published in Venice by Ramusio between 1556 and 1606. Based on account of Jacques Cartier.

RUG Regional User Group
SIG Special Interest Group
PWG Product Working Group

Get Involved In ELUNA

Get Involved in ELUNA

Not an ELUNA member? Please apply for membership to enable your institution to benefit from all the organization has to offer.

Looking for opportunities to contribute to ELUNA?   Attend a PWG session at ELUNA 2014 to learn more about opportunities, or contact a RUG, SIG or PWG Leader to see what needs to be done in the coming year.

Do you like to plan for events early? Keep an eye on the ELUNA mailing lists for upcoming RUG meeting announcements, and start thinking about your proposal to present at ELUNA 2015.   Attend the ELUNA 2014 closing session (Friday, May 3, 3:00 - 3:45 in the Le Grand Salon) for more details about the E-LOON-A 2015 meeting.

Want to show off your institution or city?   Please consider volunteering to be local hosts for ELUNA 2016.

Conference Membership

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.

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

Spring 2014

Come to the closing session for more details

E-LOON-A

2015

Friday, May 2, 3:00-3:45 in Le Grand Salon