ELUNA

Ex Libris Users of North America

Newsletter

Spring is in the air, so the annual ELUNA Conference must be happening soon! The Conference will be held in Milwaukee May 10-13. The Technical Seminar will be May 9-10. This issue of the newsletter highlights the conference throughout.

The conference in May will be important from the perspective that we expect it is the last conference before general release of Ex Libris' next generation system, "Alma". Read the article below from Susan Stearns describing the company's plans at the conference.

Below, you will see more information about the Conference from Kristine Hammerstrand, the ELUNA Steering Committee liaison to the planning committee. The product working groups (PWGs) have reports in this newsletter, each of which tells you some of the important content you can expect at the conference.

We hope to see all of you in Milwaukee

ELUNA Membership Update
Sue Julich, ELUNA Treasurer

As of March 15th, we have 275 memberships in ELUNA for 2011. When consortia affiliations are added in, we have a community of 1,112 institutions with whom we can share information. Thanks to all who have renewed their memberships and made the commitment to support our user community.

This year, many of our ELUNA membership renewal payments were sent to Ex Libris (USA) in Chicago, IL instead of to us – Ex Libris Users of North America, in

Iowa City, IA. Likewise, it is not uncommon for payments intended for Ex Libris (USA) to be mailed to us. Please confirm when sending payments that they are sent to the correct vendor address – Ex Libris (USA) versus Ex Libris Users of North America (ELUNA).

Milwaukee lake shore featuring the art museum
Photographs by Dori, Milwaukee, Wisconsin

A Word from the Chair
Bob Trotter, ELUNA Steering Committee Chair

I can't believe it is almost conference time again, it seems like we were just in Fort Worth wrestling with Armadillos. But it is almost here, and the Program Planning Committee, Local Arrangements Group, and some SC folks have been working real hard, and have put together what looks to be a fantastic ELUNA 2011 Conference.

Sherrie Kristin and her Planning Committee went above and beyond to pull together a fantastic slate of user presented sessions for this conference. Ewa

Barczyk and the Local Group have orchestrated registration, food and beverage, audio visual, and have even pulled together a Thursday night social event at the Milwaukee Ale House, with dinner and drinks and great conversation.

Of course, all of this comes after the Tuesday night Opening Reception at the Milwaukee Public Museum. Loralynne Evans and her Ex Libris compatriots have arranged for a surprise filled evening while wandering through Old Town Milwaukee and other museum highlights.

Besides the conference coming up, we also have an election going on. There are six very qualified candidates running for the two open positions on the Steering Committee. And again this year we have a change in the Constitution and ByLaws that needs your approval. You can find out more information about both of these, as well as everything you wanted to know about the conference at the ELUNA web site

The Ale House, site of Thursday evening event at ELUNA 2011.

Upcoming Events:

April 1, 2011
Last day to get the joint registration discount for the ELUNA conference and the Ex Libris Tech Seminar

April 15, 2011
Last day the availability of the conference hotel rate is guaranteed.

April 30, 2011
Last day for advance conference registration.

May 9-10, 2011
Ex Libris Technical Seminar

May 10-13, 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 to attend. This is sure to be another great ELUNA meeting, combining informative programs, networking opportunities, and a lot of fun in a beautiful setting. See article below.

September 2011

IGeLU 2011

The 2011 IGeLU Conference will be held in Haifa Israel on September 11-13, 2011. The University of Haifa will be the host for the meeting. The ExLibris System Seminar will be held on the days immediately following the Conference: September 14-16, 2011.
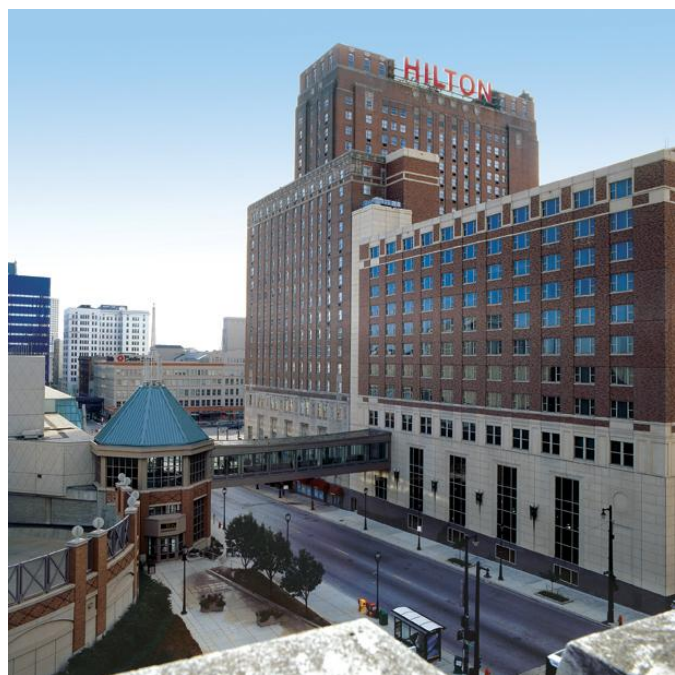
ELUNA 2011
Kristine Hammerstrand, ELUNA Steering Committee
Conference Planning Committee

The 2011 ELUNA Conference and Ex Libris Tech Seminar are just a few weeks away! If you are still undecided about attending, how about taking another look at the expanded program information that is now available on the conference website http://eluna2011.library.wisconsin.edu. You can now view the program sorted by track, by date, or download it for your own annotation. The conference website is also your gateway to the online registration system.

We've really got a great conference this year. There are over 130 separate sessions planned. Of course the Aleph and Voyager tracks are both well stocked with content, but there are sessions on every product and a dozen sessions in the "General" track that are not product-specific. As usual, there are product

updates from Ex Libris and sessions hosted by the ELUNA Product Working Groups. Once again this year we will have the popular Ex Libris Q & A session where you can anonymously submit questions to the Ex Libris management team.

Are you looking to meet people you can collaborate with? You can meet colleagues from your geographic region in the Regional User Group (RUG) meetings on Wednesday, and meet people with similar interests as you in the Special Interest Group (SIG) meetings held throughout the conference. And don't miss the opening night reception at the Milwaukee Public Museum on Tuesday May 10, and the Thursday night event at the Milwaukee Ale House. These events will provide you opportunities to quench your thirst for knowledge and satisfy your hunger for networking with colleagues.

Hilton Milwaukee City Center, site of ELUNA 2011

We also have some new conference features this year. We're working with the Ex Libris staff to offer six Alma (the URM) demo sessions that will be a chance for you to see Alma in action. Alma will also be featured in a no-conflict plenary session. (Read more about Alma in Susan Stearns' article below.) There are also opportunities to participate in a NERS (our enhancement request system) focus group or usability session. Also new this year is the Thursday night event at the Milwaukee Ale House. We hope that having a social event in the middle of the

conference allows you the chance to spend time talking with people you may have just met at the conference as well as with your long time friends. Also new this year is the closing plenary session on Friday. This will be an opportunity to recap the conference highlights and to learn more about ELUNA 2012.

ELUNA advance registration closes April 30, but the conference hotel rate of $129 (plus tax) is only guaranteed through April 15, so don't delay registering and making your hotel registration. Also, the last day to receive the special combination rate for those attending both the Ex Libris Tech Seminar and the ELUNA conference is April 1, no fooling. We hope to see you in Milwaukee in May!

Progress on ALMA
from a partner perspective

<div align="right">Janet Lute, Princeton University</div>

The four development partners (Boston, Leuven, Princeton, Purdue) just wrapped up testing of partner release two of Alma. Testing started in early January and ran for two and half months. This release had functionality in Metadata, Acquisitions and Fulfillment and partners worked with full data loads from their current ILS's.

Princeton University had about 15 testers who did the bulk of this testing and this number will be increased for PR3. There were very few critical defects, that is, functionality that did not work at all. A lot of our comments focused on the look and feel of Alma including navigation, screen layout and, above all, searching functionality. Early on in the testing Ex Libris realized that the staff search was inadequate for back office operations. As a result of comments from all partners a new interface prototype and staff searching structure has been presented and we will start to see this in place in PR3.

The Ex Libris development team has been extremely responsive to our comments, issues and questions. Lines of communication have been excellent and the partners felt that we were being heard. There is a lot of work still to be done but the basic framework is beginning to take shape.

Some preliminary work on fulfillment policies and other system administration decisions for PR3 has already begun. Additional functionality in PR3 includes manual invoicing, improved staff searching, inventory editing, circulation policies, and digitization on demand. For PR3 and beyond Ex Libris are sending staff to the partner sites to do initial training instead of relying on webinars. We are all looking forward to this as it should get us started much more quickly and enable us to tap into expert knowledge in real time.

Ex Libris Alma at the ELUNA Conference

Susan Stearns
Vice President of Strategic Relationships
ExLibris

In January Ex Libris announced the formal name of "Ex Libris Alma" for the first deliverable in our Unified Resource Management [URM] framework. At the upcoming ELUNA conference, we are pleased to offer a number of sessions which will highlight the progress we have made over the last year in developing our next generation library service for unified resource management.

We have worked with the ELUNA planning committee to ensure that we can provide two plenary sessions on Alma to best ensure that all customers have the opportunity to participate in Alma discussions. The first will be a presentation by Bar Veinstein that focuses on a status update on the development of Ex Libris Alma. Bar joined Ex Libris in late 2010 and has overall responsibility for the Resource Management business unit, of which Alma is a part. During this status update Bar will share information on the more detailed schedule for our delivery of Alma. Because Alma is being developed using an agile development methodology, Ex Libris is able to deliver incremental Partner Releases of the Alma software to our four Development Partners – Boston College, Princeton University, Purdue University and KU Leuven/LIBIS in Belgium – for testing using the Partners' own migrated data. We are now actively testing Partner Release 2 [PR2] with our Partners and will have PR3 available by ELUNA.

The second plenary session will focus on demonstrating the workflows and functionality of Alma. John Larson, Alma Product Manager, will be the lead on this presentation. Many of you have already had an opportunity to see Alma in action as we are now actively demonstrating the service at conferences [such as the American Library Association Midwinter conference in San Diego] and at major users' group meetings. John and Susan Stearns recently returned from Australia where they provided numerous demonstrations of PR2 to both individual customers and to the ANZREG regional users' meetings.

In addition to these plenary sessions, we will be doing a separate breakout session that provides an update from our Development Partners on their experiences with Alma. And, although not exclusively focused on Ex Libris Alma, there are two additional breakout sessions planned for ELUNA that will likely be of interest: the first is a presentation on Ex Libris' growing suite of cloud-based offerings led by Dvir Hoffman, Director of Product Management; the second is a look to the future of e-resource management with a focus on the consolidated Alma environment which will be co-led by John Larson and Nettie Lagace.

Finally, we will be offering further opportunities for customers to see Alma by providing two demonstrations of the new service on each day of ELUNA. These will be scheduled and announced in advance, so keep an eye on the program to make sure you add an Alma demo to your personal ELUNA itinerary.

As you can see, ELUNA 2011 will offer many opportunities for customers to learn more about Alma, get first-hand feedback from Development Partners who are testing the live software, and provide numerous chances to see Alma in action. We hope you will join us in Milwaukee to get a glimpse of the future of next generation library services.
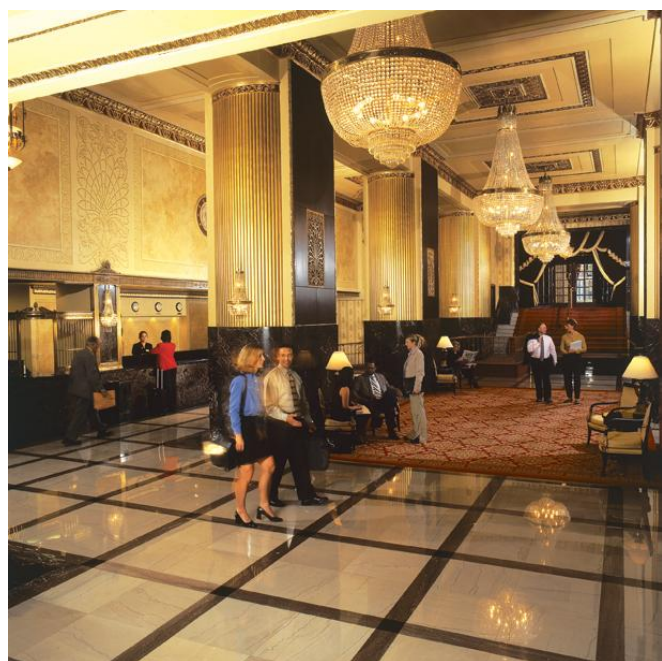
Product Working Group Reports:

Aleph:

Jean Phillips, Chair Aleph PWG

The Aleph PWG has been busy working toward the annual enhancement vote, which was held from February 14 to March 4. The top voted requests are expected to be developed by Ex Libris for delivery in Version 21, which is due near the end of 2011. This

Aleph vote is being done using the new NERS voting software which was jointly developed by IGeLU and ELUNA.

We're also excited about the upcoming ELUNA annual meeting, and hope to see you there. Some Aleph related session topics include: loading e-book packages, adding SFX buttons to the Aleph OPAC, special interest groups, enhancement updates, and more.

Finally, we will soon be looking for candidates to replace our outgoing members. Watch the discussion lists for details.

Lobby of Hilton Milwaukee

Voyager:

Ted Schwitzner, Chair Voyager PWG

Voyager @ ELUNA 2011

In just a little over two short months, ELUNA 2011 will kick off in Milwaukee, Wisconsin. This year, Voyagers can expect 20 Voyager sessions, to accompany plenary sessions, product updates, RUGs and the Voyager Product Working Group annual meeting. Included among these, you will find several sessions on reporting whether you are using Access or Analyzer. Interested in customizing your OPAC using Web Voyage or maybe you want to manage how the data is displayed, we've got a presentation for that. There are presentations on acquisitions, add-on's and cataloging. We have the "how I did this," the "how to do that," "why we chose that one" and the "lessons learned."

At ELUNA 2011 you will find some new faces, some old familiar faces and friends and the opportunity to network with colleagues who have the same products you use daily or may be looking to purchase in the near future. Please join us and share in the experience.

Enhancement Balloting Update

Voyager Product Working Groups for ELUNA and IGeLU are joining forces again to complete the work of the enhancements balloting process. Both PWGs have been working with Mike Dicus to clarify specifications for the top priority enhancements, making sure that we get them right for you.

Contact Us!

The ELUNA Voyager Product Working Group is here to represent you, the Voyager user, in any part of North America. Do you have a concern, an idea, an information need, or an aspiration? Please let us know. We would love to hear more of your perspectives, whether those be functional, technical, or regional.

Some details on the group and its efforts are visible on the ELUNA web site: (http://el-una.org/product-groups/voyager/). Contact information for PWG members is available there as well. Also feel free to contact the PWG Chair, Ted Schwitzner, tcschwi@ilstu.edu.

The Milwaukee Public Museum will be the site of the May 10 ELUNA reception
By Sulfur at en.wikipedia [GFDL (www.gnu.org/copyleft/fdl.html)], from Wikimedia Commons

MetaLib:

Bennett Ponsford, Chair MetaLib PWG

The MetaLib and Primo PWG chairs have discussed how to best coordinate our work, initially in relationship to adding content to the Primo Central index, but for additional projects as well. We will be meeting at ELUNA to talk through the possibilities further.

If you have ideas or suggestions, please come to the MetaLib Product Working Group meeting at ELUNA (Friday, May 13th, at 8:45am) or email any of the MetaLib Product Working Group leader http://el-una.org/product-groups/metalib-product-group/metalib-product-group-leaders/.

ELUNA 2011

We're looking forward to a great conference in Milwaukee. As you make your plans, don't forget the MetaLib Product Working Group meeting on Friday, May 13th at 8:45am. The members of the Product Working Group will report on the planned merger with the Primo Product Working Group. Please attend and make your voice heard.

We also have several MetaLib sessions planned. Be sure to include in your schedule:

Wednesday
   1:15-2:15pm - Metalib Product Update
   The latest from Ex Libris on MetaLib development.

Thursday
   9:35-10:05am - User Behavior: An Analysis of MetaLib Search Queries
   Guy Leach and Matthew Frizzell of the Georgia Institute of Technology will describe how an analysis of MetaLib search query statistics provides insight into user needs and search behavior. This study evaluated over six months of MetaLib use data from Georgia Institute of Technology. A variety of search queries and features will be assessed to determine user preferences and practices. The relative effectiveness of the search queries will be analyzed and the results will be used to guide improvements in interface development and user instruction for information retrieval. The MetaLib results will be compared to native database usage data to investigate possible correlations.

3:50-4:50pm - Improving resource discovery and access with Xerxes open source software at the University of Wisconsin-Madison
Todd Bruns, formerly at University of Wisconsin-Madison, will discuss UW-Madison Libraries' implementation of Xerxes software, an open-source interface for MetaLib. This presentation describes the decision for acquiring Xerxes and the process of implementation at the UW-Madison campus, including UW-Madison additions to Xerxes such as a "value added" area which highlights resources/librarians and programming code that improves the Xerxes "By Title" search.

5:00-5:30pm - Meta-Searching in MetaLib: the Primo Central pilot at the University of Auckland Library
Nicole Mustatea of the University of Auckland Library, New Zealand will discuss their experiences including testing, feedback, and implementation in production as a development partner with ExLibris for a pilot of the metasearch index Primo Central using the federated search software MetaLib. This presentation will be of interest to those MetaLib customers who are not considering Primo as a resource discovery tool.

METALIB CKB ENHANCEMENTS

The MLPWG has also been working closely with the IGeLU MLPWG on the CKB enhancements process. We've had two rounds of voting and are now working on coordinating election cycles with the SFX PWGs and streamlining the process. An announcement about a third round of voting should be sent out some time in March.
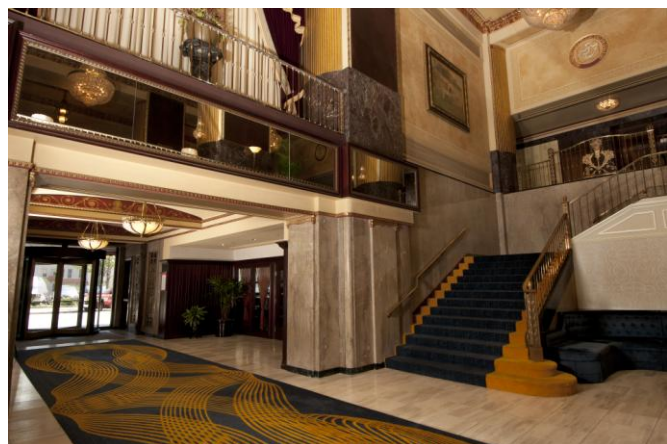
See y'all in Milwaukee,

Primo:

Dale Poulter, Chair PRIMO PWG

We continue to work with the IGeLU Primo Product Working Group to complete the enhancements ballot. This has been a large task requiring a great deal of time and focus on details. The ELUNA Product Working Group has been well represented by Kent Holaday our Enhancements Coordinator. We expect the first round of voting to take place in March, so watch for the announcement in your mail!

We are also planning for the ELUNA conference in Milwaukee May 9-13 2011. Brian Thompson, Program Coordinator, has been working with the ELUNA Planning committee to assure that Primo is well represented. Primo Presentations in Milwaukee will cover many aspects of Primo and Primo Central including planning, implementation, and evaluation. During the Primo Product Working Group meeting at ELUNA we will also have our election for several leadership positions. This is a great way to get involved with ELUNA.

As interoperability between Ex Libris products continue to increase, so does the need for the Product Working Groups to coordinate activities. In order to facilitate this coordination the Metalib and Primo working groups have increased discussions about the future of the two separate groups and ways to coordinate goals. We look forward to broadening this discussion with the full product working groups during the business meetings at ELUNA.

The Primo Product Working group has also been working on additional ways to help Primo sites communicate about successes and shared issues. We have added some information to the website available at http://el-una.org/product-groups/primo-group/ . If you have suggestions please let us know.

Hilton Milwaukee, Lower Lobby

SFX:

Mark Needleman, Chair SFX PWG

ELUNA 2011 is just about upon us in Milwaukee Wisconsin, May 11-13, 2011. The SFX Product Working Group (PWG) hopes to see as many of you as possible there.

We have an exciting set of presentations on SFX including ones on a user experience with converting from SFX V3 to SFX V4,testing SFX V4 and Verde, Interaction between SFX and Aleph, implementing the bX recommender service in SFX, the USTAT statistics service in SFX and a presentation on setting up an SFX failover environment and the issues that arose in doing so.

There will also be a meeting of the SFX Product Working Group and an update from Ex Libris on SFX Version 4 and plans for its future development

Besides the ELUNA meeting preparation the SFX PWG has been actively working with the IGELU SFX PWG on the NERS Enhancement System. We have just completed the 4th round of voting on SFX target addition requests and have submitted the winners to Ex Libris

If anyone has any questions or there is anything the SFX PWG can do to help you you can just send me email at

mneedlem@ufl.edu

A good place to pose discussions and get involved in discussions about SFX is the SFX Discussion List

SFX-DISCUSS-L@LISTSERV.ND.EDU

you can subscribe to it at

https://listserv.nd.edu/cgi-bin/wa?SUBED1=SFX-DISCUSS-L&A=1&X=-

Note: You must be an SFX customer to join this list

Looking forward to seeing you in Milwaukee in May

Verde:

Abigail Bordeaux, Chair Verde PWG

The Verde PWG has been working with Ex Libris on system feedback and developments, most notably for the SFX 4.1 release and resulting changes to interoperability with Verde. We are fortunate that University of Minnesota was one of the sites that beta-tested the upgrade process and interoperability. Janet Arth and the PWG's Betsy Friesen will present about their testing and implementation of the changes at ELUNA in Milwaukee this spring. Also in Milwaukee

will be a presentation and discussion of the "next-generation ERMI" NISO work that is currently in progress. (More information at http://www.niso.org/workrooms/ermreview) Don't miss the chance for an up-the-minute report on this important work!

The Ale House – Party Room.

Other recent and current PWG activities include review of training materials and documentation for the SFX 4.1/Verde 2 SP release; provision of general documentation feedback as part of a Steering Committee initiative; and assisting Ex Libris with SUSHI configuration details for some of the vendors most recently added to UStat.

DigiTool:

Pascal Calarco, ELUNA SC liaison to DigiTool PWG

With the current DigiTool Product Manager, Yuval Richter, moving to the Primo team, Ex Libris let the DigiTool PWG know that the new Product Manager will be Sarit Kozokin, Alma & DigiTool Product Manager in its February conference call. Ex Libris is preparing to engage the DigiTool customer base with DigiTool to "Alma Digital" migration discussion over the next year. We also talked briefly about another round of NERS voting for DigiTool coming up, and there is a desire to keep information about those enhancements that Ex Libris has vetted and deemed out of scope or otherwise will not be developed somewhere so that customer sites can refer to them in subsequent voting, so they do not suggest something close to them in the future. Pat Hults, the

DigiTool enhancement coordinator for ELUNA, did not think that NERS currently provided this functionality; Pascal Calarco suggested that it could be added to the EL Commons, perhaps, and that seemed to have consensus as a good idea. !

The Ale House – MAH bar

Pascal suggested that ELUNA should include Rosetta in with DigiTool as a PWG for now, since there is a lot of overlap in interest and functionality between DigiTool's Digital Asset Management and Rosetta's Digital Preservation. Yuval Richter and Sarit will take this to the Rosetta Product Manager for input, but they thought this was a reasonable idea and there was consensus from customers on the call that this was a good suggestion.

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

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/.