



# ELUNA

## Ex Libris Users of North America

### Newsletter

Spring 2012

This is the Spring ELUNA Newsletter which anticipates the ELUNA 2012 conference in Salt Lake City. We are excited about this conference. We expect it will be the “best one ever”!!

Read below the Report from the Chair, and the various Product Working Group reports for more information about the conference. Each of the Product Working Groups has worked to enhance the program in their area. We thank them for all of their work, as well as the Program Committee and the Local Hosts.

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

Laura Morse, ELUNA Steering Committee Chair

I'm writing this message from my hotel room in the ELUNA 2012 conference hotel, the Hilton Salt Lake City Center, at the tail end of a busy and productive final site visit before the ELUNA 2012 Meeting, May 8 - 11, 2012. It takes a village to plan for a successful meeting, and the on-site meetings this week included Steering Committee Liaison Kris Hammerstrand and our local hosts Kenning Arlitsch, Shelley Neville, and Karren Nichols. We were also joined by Ex Libris colleagues, Tony Zanders and Shelley Hostetler, to finalize the details shared across the ELUNA Meeting and the Technical Seminar. We had productive meetings with our conference hotel event planner, AV contractor, Salt Palace Convention Center staff, reception caterer, and networking dinner event staff. It is an exciting



time in the planning process, as we are able to see the pieces from over a year of planning fall into place for these two wonderful events in May!

Ellen Jones and the Program Planning Committee have outdone themselves this year in building a dynamic program. We have 89 user contributed breakout sessions and 6 poster sessions covering all Ex Libris products, including:

#### **Primo Central trial, usability testing, and implementation options**

Randy Oldham (University of Guelph)  
Alison Hitchens (University of Waterloo)  
Dillon Moore (Wilfrid Laurier University)

The Tri-University Group (TUG) [University of Guelph, University of Waterloo and Wilfrid Laurier University] has recently completed a trial of Primo Central. This session will explore the steps our institutions went through for this trial: planning; implementation options and processes; user testing; focus groups; staff consultations; and user feedback. After this session, attendees will have a better understanding of steps to consider when embarking on a trial of Primo Central.

#### **Online Aleph Training at Harvard Using Adobe Captivate**

Hank Sway (Harvard University)  
Alison Thornton (Harvard University)

Harvard University has undertaken a long-term project to create online tutorials for each Aleph module using Adobe Captivate. The goal of this project is improve access to Aleph training for a large

library staff with differing levels of experience, while reducing the number of in-person training sessions offered. In this session, we will outline our process for creating the online tutorials, from scripting to production and deployment. We will also share a number of best practices we have discovered, and address some software quirks rising from the interaction between Aleph and Captivate. Our session will focus on the Cataloging module, but the lessons learned can be applied to creating online tutorials for any Aleph module, or even other Ex Libris products.

### **Reporting your Aleph Data**

Billy Rawles (LDS Church History Library)

Jeff Baird (LDS Church History Library)

We will do a side by side comparison of the data in Aleph with the structure of the data in the reporting tool. We will discuss how data is extracted from Aleph to be input into the reporting tool. We will discuss the structure of the data in the reporting tool and demonstrate how reports can be created.

### **Using a Click Tracker to Record Electronic Resource Usage**

Liza Weisbrod (Auburn University Libraries)

Clint Bellanger (Auburn University Libraries)

Jeremy Goslin (Auburn University Libraries)

Auburn University Libraries uses a click tracker to record usage of electronic resources through its Voyager catalog. The program currently tracks clicks in the VuFind discovery layer catalog, Tomcat WebVoyage, and Classic WebVoyage. This presentation will include an overview of the click tracker, along with possible uses for the data.

Please take a moment to review the complete set of [abstracts](#) for the user contributed breakout sessions. I had the opportunity to review these abstracts in more detail when confirming session rooms, and I am incredibly impressed with the depth and breadth of content that will be shared by our fellow library professionals at the ELUNA 2012 Meeting.

In addition to the Ex Libris company and strategy updates and product updates and demonstrations, Ex Libris colleagues are offering the following breakout sessions:

### **ScholarRank, the Primo Relevance Ranking**

Technology Tamar Sadeh PhD

Director of Marketing

The greatest challenge for discovery systems is providing users with the most relevant search results out of the immense landscape of content. Similar to human interaction between two parties, where people adjust in tone, language, and subject matter, discovery systems need to "understand" the user's context as well as the materials' scholarly value. The session will describe Ex Libris Primo's approach to relevance ranking. In addition to employing traditional information-retrieval methods that have been adapted to scholarly data, ScholarRank takes into account the intrinsic academic value of materials along with information about the user and the user's research needs.

### **Alma Analytics:**

#### **Making the most of your library's data**

Asaf Kline, Software Architect

Increasingly under pressure to demonstrate their value to the objectives of the institution or consortium, libraries are looking for ever more creative ways to improve efficiency and productivity. Powerful analytic capabilities enable libraries to put numbers on their value and to expose tangible evidence of their leading role in the academic lifecycle. From usage data and onwards, analytics shed light on the inner workings of the entire institution, as well as those of the library. Valuable insight into libraries' operation can be gained via purchasing trends, comparative analysis, and even predictive analysis-helping managers to better to plan their daily operation. During this session will explore ways in which Alma Analytics can take libraries into the next generation.

### **Libraries on Demand: Building a user-driven collection with Ex Libris Alma**

Dana Sharvit

Track Leader and Business Analyst

As budgets tighten, ensuring maximum usage of the collection is more important now than ever. Libraries are increasingly supplementing their collection development policies with "just-in-time" models of collection development-purchasing and delivering resources at the point of need. Ex Libris' next-generation library management service, Alma, is

designed to allow libraries to shift toward user-driven models of purchasing for both print and electronic resources, in order to increase usage and decrease the overall cost of their collections. Come see how Alma will help libraries build out their collections just in time, rather than just in case.

### **bX Usage-Based Services: Hot Articles, Article Recommender and more**

Christine Stohn  
bX Product Manager

In an overwhelmingly competitive information landscape, the library is forced to find creative ways to showcase its value and prove its relevancy within its user community. Now, the library can reach users wherever they are on the web. This session will introduce the new suite of services based on bX technology, including Hot Articles for your subject, use analytics and data-mining of raw usage data to enrich and expand the researcher's discovery experience.

### **The VIK and UTIL: "Vroom" Your Voyager Upgrade and Service Packs**

Adam Zimmerman  
Product Integration and Packaging Team Lead

The Voyager Installation Kit (VIK) provides libraries with a fast and easy way to perform their own upgrades to the latest release of Voyager on the day and time of their choosing. Starting in Voyager 8.1.0, the UTIL menu provides menu-driven tools to perform service-pack installation, basic Voyager server administration including keyword regens, as well as basic Oracle administration. Audience members will learn what both the VIK and UTIL menus do and how they work together. You will also gain an understanding of what you should know when you run these tools yourself. Adam will give a live demonstration of both menus.

### **Managing the Transition: Alma as a Catalyst for Change and Growth**

John Larson  
Project Consultant

As a platform for next-generation library services, Alma challenges libraries to improve existing workflows. To this end, Ex Libris is developing a new change management program to support libraries' transition to the new environment. Come for a

discussion of how Ex Libris is paving the way for managing staff transitions to maximize the opportunities for improvement with Alma.



The Grand Hall at the former Union Pacific Depot, Gateway Center, will be the site of the Tuesday night reception.

Our robust program provides a plethora of educational opportunities in Salt Lake City, but there also will be many chances to meet with colleagues and build relationships at the opening reception and networking dinner. The opening night reception on Tuesday, May 8 will be held at the historic former Union Pacific train depot at the Gateway Center, and includes an incredible menu and the opportunity to sample many local beers and wines. On Thursday evening, a networking dinner at Gracie's provides a casual atmosphere for making connections, as well as enjoying some of the wonderful food they have planned for you. The conference also includes the opportunity to see the Mormon Tabernacle Choir rehearse for free!



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



Please don't miss the 2012 ELUNA Meeting! **Early registration discounts and the reduced hotel rate of \$139.00 at the conference hotel end April 13, 2012.** Also, please don't forget to review the Ex Libris Technical Seminar [agenda](#) – and consider extending your visit to beautiful Salt Lake City and take advantage of the combination Tech Seminar/ELUNA registration discount (available only to ELUNA members through April 13, 2012)?

I look forward to seeing you in Salt Lake City!

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

Janet Lute, Princeton University



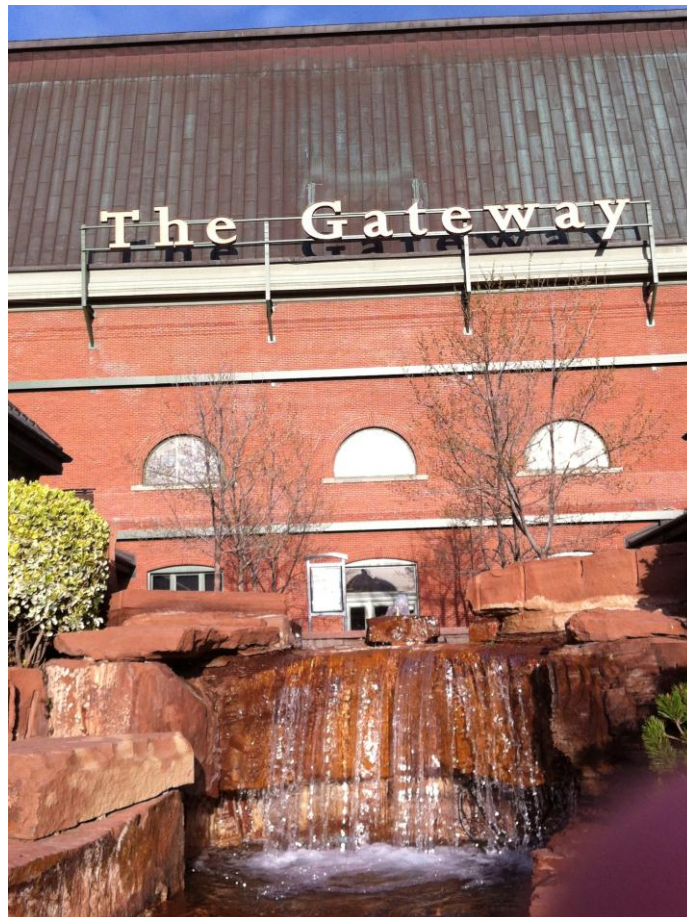
The four development partners (Boston, Leuven, Princeton, and Purdue) are extremely busy working on Partner Release 5 and all of the new functionality that this is introducing. But we are also looking beyond testing to what is next. Data migration is playing a much bigger role and that has to be tested too but it is also causing us to look at potential data cleanup projects that we may want to consider doing locally. The really big mind shift is in the direction of implementation and how this will affect our staffs; what new workflows do we need to be considering; what training needs to be put in place; what conversations do we need to have with our external data providers and consumers, etc., etc.

The various early adopters in North America and around the world are also looking at implementation and training issues and in many ways they are ahead of the partners in this respect. If you are interested in what is going then consider attending a session at the upcoming [ELUNA 2012 Conference](#) in May, called “**Heads in the Cloud: an Alma Panel Presentation**”. Learn why various Early Adopter institutions have committed to Ex Libris' cloud-based next-generation library management service and how they are preparing for implementation. The panelists will also discuss how Alma implementations may impact the organizational culture of their libraries. The panel members are:

- Amira Aaron (Northeastern University);
- Jack Ammerman (Boston University);
- Betsy Friesen (University of Minnesota, Twin Cities);

- Jimmy Ghaphery (Virginia Commonwealth University); and
- Michele Reid (North Dakota State University).

I will be facilitating the panel discussion and we look forward to seeing you there.



The Grand Hall opens into the Gateway Center mall and fountains

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

#### **Aleph:**

Steve Thomas, Chair Aleph PWG

During early January, 2012, **Ellen Jones** of the University of Iowa and **Michael Edwards** of Hampshire College represented us during the final round of collaborative testing of Aleph, Version 21. By all reports that the PWG has received, this process went very smoothly. Very few problems with the new functionality were found. In fact, our two representatives were actually able to spend some time helping to correct the documentation that had been prepared to describe these new features of the system.

Preparations for ELUNA 2012 in Salt Lake City are underway. **Carrie L Curie**, of the Minnesota State Community and Technical College is serving us well as the Aleph Track Coordinator. We are all looking forward to an interesting and informative conference.

However, the biggest news I have to share is that, on March 22<sup>nd</sup>, we completed our first full enhancement cycle using NERS. True, NERS was used last year for voting on enhancement requests, but this year was the first time such requests were added to NERS by individual sites and available within NERS for both the preliminary and final balloting. We learned during this cycle that some modifications are needed still in the process. For example, the information within NERS, in some cases, was insufficient for Ex Libris to assign development points to the requests that were selected during the preliminary ballot. The request from Ex Libris for additional information on several requests came to us in mid-December. Our enhancement coordinator and module coordinators worked hard to get the needed information from the individuals who submitted the original requests, but the unavoidable delay was costly. The start of the final round of balloting had to be postponed to allow NERS to be updated when the pointing information was finally received from Ex Libris. More importantly, there was no time for the PWG to review or evaluate the pointing assignments made by Ex Libris before opening NERS for the final round of voting.

In spite of all the problems, we were able to return to Ex Libris five enhancement requests for coding work to begin. In the most general terms, three enhancements related to CIRC, one to ILL, and one to Systems. None of these changes need major database changes, so they should all be available for the version of Aleph scheduled for release in December 2012. I am sorry that I am forced to be so vague, but, for more information, you will need to attend the Aleph PWG Meeting at ELUNA in May.

Let me close with a reminder that you could experience the work of this committee firsthand! We are looking for three individuals to replace members who will rotate off the committee in May, following the ELUNA conference. If you wish to volunteer or to nominate someone, please e-mail Bill Slauenwhite ([bill.slauenwhite@novanet.ns.ca](mailto:bill.slauenwhite@novanet.ns.ca)) ASAP.

## Voyager:

Ted Schwitzner, Chair Voyager PWG

Thanks to an enthusiastic group of volunteers and current members, the Voyager Product Working Group is ready to announce its membership for 2012-2013. Sherrie Kristin, Purdue University Calumet, will be the Chairperson for 2012-2014. For a complete list of PWG members, check out the ELUNA Voyager PWG web site after the conference.

## ELUNA 2012 in Salt Lake City

Programming for Voyager audiences is always strong at the annual ELUNA Conference, and this year is no exception with 30 sessions on the agenda. Attendees will have the chance to get new information on reporting, automating processes, using new and updated tools for better productivity, and ways to improve services overall. Also, in the wake of our most recent balloting cycle, the VPWG has sponsored a session on how Voyager customers can help improve the enhancement process through better enhancement requests.

Conference attendees are also reminded to watch the program for the Voyager Product Working Group session. In addition to presenting the members of the group for the current and coming year, this session will allow time for discussion on the recent enhancements voting process. We also encourage members to identify any areas where the VPWG can improve its service to the Voyager community. As of this writing, this session is tentatively scheduled for 5:15 on Wednesday, May 9.

## Voyager Enhancements

At the time of this writing, the voting for Voyager 9.0 Enhancements is in its final days. Once the voting concludes, the Voyager Product Working Groups of both ELUNA and IGeLU will review the results, highlight the enhancements with the most votes that will go forward for consideration, and then submit all of the results to Ex Libris for further evaluation. The VPWGs may also recommend specifications for successfully implementing specific enhancements.



## MetaLib:

Mark Needleman, Chair MetaLib PWG

The NERS CKB enhancement process continues to operate smoothly. The current cycle for voting on enhancements closes on April 15, 2012 (you can submit your taxes and cast your enhancement votes on the same day – but it would be better if you cast your enhancement votes as soon as possible)

MetaLib 4.5 was released in 2011 and contains a number of bug fixes and an upgrade to Apache 2.2.20. It also contains multiple PDS support for consortia, and the ability to export personal e-shelves to MetaLib+ and Primo. MetaLib 4.5 now supports Oracle 11. Oracle 11 is not required for MetaLib 4.5 but support for it is provided for sites that have a requirement to go to Oracle 11. For more details, contact your Ex Libris customer support representative.

The major upcoming event is ELUNA 2012 in Salt Lake City from May 8-11, 2012. The agenda for the meeting has not yet been published but we are expecting a couple of exciting sessions on MetaLib, including an update on MetaLib from Ex Libris. There will be a meeting of the MetaLib Product Working Group at the ELUNA 2012 meeting. One of the major activities will be to elect a new chair. If we get only 1 volunteer, that person will be elected by acclamation. If there is more than one volunteer, we will have a real election. If there are no volunteers, we will have to make a decision on the future of the MetaLib Product Working Group. One option (which the IGELU MetaLib Product Working Group has already taken) would be to merge with the Primo Working Group.

I encourage everyone who is interested in the future of the MetaLib Product Working Group and especially anyone who might be interested in becoming its new chair to attend the meeting at ELUNA.

If anyone has any comments or question you can contact me at [mneedlem@ufl.edu](mailto:mneedlem@ufl.edu)  
(352) 392-9020 x337

I look forward to seeing as many of you as possible in Salt Lake City.

## Primo:

Michael North, Chair PRIMO PWG

The Primo Product Working Group (Primo PWG) is excited about ELUNA 2012 in Salt Lake City, Utah. It is looking to be a great conference and Primo is extremely well represented. The Technical Seminars (May 7-8) will have two "tracks" dedicated to Primo and the General Conference (May 8-11) has 21 Primo sessions planned. As Primo becomes a more mature product, the sessions are more wide ranging in topics. Many more sessions reflect the development work institutions are putting into Primo to get it to do what they need in order to better serve their patrons.



Temple Square, Salt Lake City

There will be a Primo PWG meeting at ELUNA 2012 that all Primo users are welcome to attend. We will be electing a Chair-Elect and a Member-At-Large during that meeting. Details will be forthcoming to the Primo discussion list shortly. We will also be covering highlights of important work we will be tackling during the upcoming year. If you have ideas or suggestions,

please come to the Primo PWG meeting at ELUNA or email any of the Primo PWG leaders <http://el-una.org/product-groups/primogroup/primogroup-product-group-leaders/>.

Another exciting development is the upcoming release of Primo v4. In early April, four institutions will be upgrading to Primo v4 as part of an early adopters program. General release is planned for June. The Ex Libris Documentation Center has the "Primo Version 4 Highlights" document which provides information on the new features that are coming. Stand by for more information at ELUNA !

Primo enhancement submittals and voting (via NERS) is about to begin again. More information will be released shortly detailing what enhancements were migrated from last year, how to submit new enhancements, and when the voting will occur so that we can submit them to Ex Libris in time for the next development cycle.



Beer, wine, veggie or meat sliders, shrimp, and more will be included in your \$20 ticket to Gracie's on Thursday night of ELUNA 2012.

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)!

### **SFX:**

Marina Oliver, Chair SFX PWG

In our final newsletter update for the 2011/2012 SFX PWG I'd like to thank our members for their hard work. They are all listed on the ELUNA web site under the SFX PWG.

This year both the ELUNA and IGeLU PWGs ventured into new territory with the implementation of the SFX software enhancement process. Shortly after the 2011 ELUNA meeting Janet Arth (ELUNA) and Inga Overkamp (IGeLU) began the task of coordinating the process for the PWGs. Submission of software enhancements began in July 2011. Ninety requests were submitted with eighty-five making it to the ballot. Voting took place the end of August through September with the 13 elected enhancements sent to Ex Libris in December. Ex Libris accepted six of the top 13. Janet and Inga drove the entire process and worked tirelessly to make each deadline.

The CKB enhancement process began its second year. The SFX PWG was fortunate to have Kathy Varjabedian as our Enhancement Coordinator once again. In February 2012 the tenth round of CKB enhancements voting concluded. With the top four elected resources going forward to Ex Libris along with two regional resources. Since this is a continuous process round eleven began immediately with new votes being reviewed in mid-March. As of February 2012: 23 submitted resources had been added to the CKB, 15 were in progress and 6 more sent forward to Ex Libris (one of which was added w/update 20120900). Kathy's dedication to coordinating the process for our ELUNA members goes "above and beyond" expectations. The ELUNA 2012 conference is just around the corner. Sunshine Carter is this year's SFX Program Chair. Everyone should be familiar with SFX program updates sent to the user group. Sunshine has done a wonderful job soliciting presentations and wading through the proposals. All the SFXers are looking forward to a great program. The PWG meeting will be held directly following the product

update. Please stay for the PWG meeting, you'll find there are plenty of opportunities to get involved! The SFX PWG looks forward to seeing you in Salt Lake City.

### **Verde:**

Betsy Friesen, Chair Verde PWG

The Verde Product Working Group (PWG) continues to work with the IGeLU Verde Group and Ex Libris to communicate with Verde users concerning electronic resource management in Alma. The Groups have been assigned responsibility for the UStat. As such, they are moving ahead to set up an enhancement process for recommending vendors for SUSHI set up and needed COUNTER usage report formats.

A 60-minute "Best Practices for Verde" discussion will be presented at ELUNA by Allison Erhardt, University of Manitoba. Allison has also graciously consented to be the incoming chair for the Verde/UStat Product Working Group.

### **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 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 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. 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 will have meetings at the conference in Salt Lake City. 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. And we look forward to seeing you in 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