



## ELUNA 2013 User Contributed Program Sessions

This year's exciting ELUNA program offers over 80 user contributed breakout sessions, listed below, as well as company and product update sessions by Ex Libris, ELUNA Steering Committee updates, and ELUNA Product Working Group and Special Interest Group meetings!

*The online schedule for the ELUNA 2013 Meeting, with session timeslots, will be available in March.*

- [Aleph](#)
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### ALEPH

#### **Aleph Upgrades and Releases - Client Installation Perspective**

*Kevin Collins (City University of New York); Bill Slauenwhite (Novanet); Felicity Walsh (Emory School of Law); Jane Aitkins (McGill University); Erik Biever (University of Minnesota)*

This talk will discuss the differences between a major release, a minor version, and a service pack, the amounts of work, etc. Our panelists are from different backgrounds / environments which enriches the content. Time will be set aside to allow for a Q&A with the panelists.

#### **Batch processing Serials Solutions records in Aleph, and related activities**

*Vicki Dillon (University of Michigan); Connie McGuire (University of Michigan); Ash Brown (University of Michigan)*

The presentation will describe: merge policy - why journal records are merged, book records are not preload mechanism - locally developed procedures that identify and address recurring known problems, as well as identify potential new problems, with the purpose of minimizing bad loads and post-load clean-up reports - identify situations where records for unsubscribed databases are received; identify records that loaded with issues and so need attention; identify rejected records, with reason for rejection workflow management - use of FootPrints tickets to track progress of monthly loads, and to record and maintain information about activated databases and special parameter files communications with vendor - what kinds of problems are regularly reported to vendor, and how these problems are resolved/addressed pass 2 mechanism - routine by which some records rejected during the initial load pass are successfully reprocessed.

#### **Configuring Your Aleph Bib Loaders to Run Automatically**

*Mike Rogers (University of Tennessee)*

Loading bibliographic records in Aleph can be very time-consuming, especially if one's site handles a number of different record sets from a variety of vendors and sub-accounts. This presentation will describe the steps we use to automate the vast majority of our bib record loads without any intervention by staff. I will explain the process from start to finish including FTP from the vendor server, record modifications, loading, holdings and items creation, file renaming and archiving on the server, and the reporting component that staff use to monitor the loads.

#### **Creation and loading of XML invoices based on acquisitions data in MARC records**



*Corina Baksik (Harvard University)*

Some vendors cannot supply EDI invoices and staff at Harvard University have created a workaround so that electronic invoices are created without the need for EDI. For these vendors, when we receive and load MARC records, we create XML invoices based on the invoice and price data supplied in 9XX fields, bypassing the need for an EDI invoice. This session will review the process for creating the XML invoices, including the perl script used, and a discussion of both the pros and cons to using this workaround.

## **Enabling non-university library patrons to self-register their Shibboleth identities for personalization services in Aleph**

*Rich Wenger (Massachusetts Institute of Technology)*

When an external authentication system like Shibboleth is used for patron authentication, the patron's Shibboleth identifier must be made known to Aleph in addition to his/her Aleph id number, barcode, and/or other identifiers. Doing this manually while respecting privacy of passwords and without requiring the patron to come to a service desk for the purpose is problematic and inconvenient. This session will present a scripted method for enabling the patron to self-register his/her Shibboleth identifier in Aleph at a time and place of the patron's choosing with minimal involvement of staff.

## **Error-mining In Your Aleph-Oracle Database**

*Lawrence Deck (Université du Québec à Montréal)*

Errors and inconsistencies can creep into your Aleph data through the initial conversion process, staff inattention, and other routes. Many are innocuous, but some can cause problems with retrieval or even with functionality. We will look at ways to use SQL to discover and list errors and inconsistencies in order to correct them before they cause trouble. Simple queries on both administrative records (items, orders, patrons) and bibliographic records can identify potential errors. More complex queries can find inconsistencies and create input for Aleph batch services like manage-62 and the patron loader, to correct errors once they're found. I present a rapid tour of such techniques with a focus on practical problem-solving.

## **Out of the Vault and Onto the World Wide Web: Making Scanned Resources Available in the Digital Age**

*Linda Behrand (Research Library, Oak Ridge National Laboratory)*

Want to make your library's online catalog a user-friendly gateway to electronic versions of the materials you are scanning for today's digital world? Come hear how Oak Ridge National Laboratory's Research Library is converting catalog records for print resources into records providing seamless access to PDFs of scanned technical reports. The process could also be used for many other types of materials.

## **Retrieval and delivery using Aleph (and Primo): Three libraries share their approach**

*Brian Thompson (University of Iowa); Ellen Jones (University of Iowa); Jane Aitkins (McGill University); Aaron Bales (University of Notre Dame)*

McGill, Notre Dame and the University of Iowa have all set up requesting in Aleph to allow patrons to make requests through the OPAC that can then be delivered to their offices or to a library for pick up. We will discuss the different approaches and choices we made.

## **Seamless Circulation in a Joint Library using Aleph and Symphony**

*Jacque Dessino (Tidewater Community College)*

Our Joint Library is set to open in May 2013 and our patrons will be able to check out materials using Tidewater Community College's Aleph system and the Virginia Beach Public Library's Symphony system at the same time using either card and a custom self-check interface. Hear about the challenges trying to work across these two systems as we get down to the wire on this project and find out if it is going to work!



## The omniscient reporting system

*Dror Berger (The National Library of Israel)*

In ALEPH, data can be retrieved for viewing or manipulation either via the ALEPH GUI, or via Oracle SQL. The main problems are that the existing ALEPH reports contain limited and unlinked data, while using SQL is complex and inflexible. For example, consider extracting information that will combine both HOL and ACQ data (linked correctly), which is a task ranging from difficult to impossible using conventional ways. The National Library of Israel has created an easy to use and easy to configure reporting mechanism that extracts and combines data from the different schemes/modules of ALEPH (BIB, HOL, ITEMS and ACQ). The output is an XML file which is easily manipulated and viewed via tools as Excel, or as HTML using CSS. This session will demonstrate the reporting system, including its installation and configuration. No programming knowledge is necessary for understanding, and system librarian's skills will suffice. The code will be available freely on EL Commons.

## ALMA

### Alma Connect and Reflect

*Betsy Friesen (University of Minnesota, Twin Cities); Helen Loosli (UNILINC Limited)*

Join us for an open session to connect with your Alma colleagues. Plan on reflecting on where Alma libraries might work together to identify mutual areas of concern and new ideas for potential development. This session is limited to current Alma customers and those in contract negotiations for Alma.

### Alma OpenURL Migration Strategies

*Jimmy Ghaphery (VCU Libraries)*

VCU Libraries fully migrated from SFX to Alma OpenURL in January 2013. This presentation will discuss the challenges and opportunities of that migration. In addition a number of local migration tools and processes will be shared that proved beneficial to VCU in efficiently making the leap from SFX to Alma OpenURL.

### Analytics in an Alma world - how to write your favorite reports

*Janet Lute (Princeton University)*

Oracle Business Intelligence is a cloud based analytics tool that comes packaged with Alma. The presenter will talk about using this tool to write reports based on Alma data. OBI hints will be included as well as some examples of Voyager reports and how they can be written in the new environment. In addition, the presenter will cover other ways of extracting data from Alma using Set Management.

### Don't move your junk, clean out the closets!

*David Schuster (Texas Woman's University); Leah Hamrick (Texas Woman's University)*

Texas Woman's University was an ALMA early adopter. We kept hearing "clean up your data as best you can"... Well what does that mean? We will talk about what Texas Woman's University experienced in their migration in regards to Voyager Data cleanup with specific items to be aware of. Things we discovered PRE migration and POST migration.



## From Tab16 to Tabbed Browsing - Taking the FU out Fulfillment Units

*Thomas McNulty (Virginia Commonwealth University); Emily Owens (Virginia Commonwealth University)*

Fulfillment units are one of the most complex aspects of Alma and migrating from an item driven policy to a location driven policy can be an exercise in frustration. The systems librarians at Virginia Commonwealth University are here to make things a little more understandable and share their experience in making the change. Fulfillment Unit rules, override policies terms of use and exceptions will all be covered. Thinking caps required for admission.

## Migrating to Alma: the Changing Role of the Systems Librarian

*Ping Fu (Central Washington University)*

This session will discuss how the roles of systems librarians are expected to change in migrating to Alma from other ILS systems such as Voyager or Aleph. Since Alma is deployed via cloud computing, Ex Libris will centrally implement applications, upgrades, enhancements, etc. Consequently, the roles and responsibilities of systems librarians will be changing, and systems librarians should re-engineer themselves accordingly so that they will be able to support more critical issues in the library.

## Migratory Patterns - A Discussion on Migrating to Alma

*Thomas McNulty (Virginia Commonwealth University); Betsy Friesen (University of Minnesota); Michele Reid (North Dakota State University); David Schuster (Texas Woman's University)*

Members from the University of Minnesota, North Dakota State University, Texas Woman's University, and VCU will briefly discuss key issues in their migration to Alma and have an open floor for questions from the audience. Panelists have migrated from a variety of systems including Millenium, Aleph and Voyager and hope that others can benefit from their experience as early adopters.

## Monographic Acquisitions Workflow Integration – YBP and Alma

*Diane Baden (Boston College)*

As an Alma development partner and the first customer to implement Alma, Boston College wanted to ensure that our streamlined and automated workflows for monographic acquisitions would make a smooth transition without loss of functionality. This presentation will focus on the integration of services from our primary vendor, YBP, and Alma. We will describe approval, firm order, and demand-driven workflows for print and e-books and share the Alma import profiles and normalization routines that support them. We will also identify some ideas for additional workflows, along with suggested areas for improvement as Alma continues to develop.

## Next-Generation Workflows: Managing Inventory in Alma

*Roger Brisson (Boston University)*

Alma provides a multi-faceted infrastructure for managing the flow of library materials through technical services processing. Unlike traditional Integrated Library Systems, the approach Alma takes is to avoid using permanent records (bibliographic, holdings, items, etc.) in setting temporary work statuses, requests, or process indicators. Rather, Alma can set processes statuses automatically or manually at the end of specific work activities such as ordering, receiving, and copy cataloging externally to actual discovery and inventory records. These statuses can be set to expire after a certain date, thus providing the capability to set alerts. These statuses can be reviewed in queues as well to be searched independently. The Alma workflow management system also provides the capability for assigning tasks to particular staff, as well as to initiate work order requests. The same work order system is used to initiate patron-generated fulfillment request such as digitizing library materials, and these requests are also integrated into the library's workflows. Possessing a full understanding of its workflow management system is critical in best making use of Alma's sophisticated capabilities. At the same time, Alma is flexible enough to handle the varying approaches that currently exist in libraries in managing its inventory. This presentation will



focus on how Boston University has implemented Alma's workflow management system to its own local needs, and in so doing highlighting the various approaches libraries can take to maximize their use of Alma.

## **When are my books due back???** How the University of Minnesota has utilized Alma Implementation to simplify circulation policies.

*Christopher Rose (University of Minnesota - Twin Cities)*

By adding a new set of circulation policies for a new collection or a special set of items, the University of Minnesota has allowed the list of circulation policies in Aleph grow to a number that is close to unmanageable. System-wide, the five campuses have over 4,000 active circulation rules in effect. Many of these rules are for just a handful of items in a system that has over 10 million items in total. The sheer number of rules have made it impossible to fully post policies to patrons and have also made the system maintenance overly complex. As the University of Minnesota is going through the process of migrating to Alma, a conscious effort has been made to dramatically simplify the process. While not yet live with Alma at Minnesota, it is anticipated that the 4,000 different circulation rules will be consolidated to approximately 25. This presentation will look at the challenges involved making such sweeping changes and how Alma can facilitate such a change.

## **DigiTool**

### **Partnerships: Two archives, five collections, two DigiTool sites, one portal**

*Naomi Steinberger (Library of the Jewish Theological Seminary); Laura Leone (Center for Jewish History)*

The Library of The Jewish Theological Seminary partnered with the American Jewish Historical Society and the Center for Jewish History to digitize documents and create a web portal for five archival collections of early (pre-20th century) synagogue archives in New York City. This presentation will focus on how we brought the two DigiTool installations together in a shared web portal for searching and presentation of these documents.

### **Putting the Pieces Together: Creating Access to Collections Using Many Resources**

*Laura Leone and Lauren Bradley (Center for Jewish History)*

For this presentation, we will discuss the process by which we make our collections accessible online, including talking about ancillary endeavors we undertake to enhance records and facilitate user research. We will talk about how we use Aleph for our main library/archives OPAC, whose bib records provide links out to related resources and surrogates; DigiTool for our finding aids and other digital assets; Primo for our discovery layer; and other dedicated web portals. In addition, we use other tools such as Wikipedia, social media and internal initiatives to bring together resources and encourage outreach to our users.

## **Ex Libris...coming soon!**

## **General/Strategic**

### **An introduction to Vufind 2.0**

*Sean Purcell (GIL, University System of GA)*

VuFind, the popular open source OPAC, is currently undergoing a major overhaul which should be released later this year as VuFind 2.0. This session will offer a brief overview of these changes and improvements. And if technology cooperates (and his schedule permits), at the end of the session we'll do a remote Q&A session with Demian Katz, VuFind's lead developer.



## Dealing with E-Resource Bibs from Multiple Vendors

*Janice Christopher (University of Connecticut)*

As library e-resource purchases grow, libraries may find themselves acquiring bib records from their e-resource vendors, instead of OCLC, out of a need for immediacy, coverage or cost savings. Come to this presentation for ideas about how to integrate multiple-source vendor records into your library's workflow in a way that keeps the public display clean but allows for targeted retrieval via Access. Examples are Voyager-based but may be applicable to other systems.

## Dirty data : cleaning up your act for system migration

*Betsy Friesen (University of Minnesota, Twin Cities)*

The University of Minnesota will migrate to Alma in December 2013, giving us nearly two years to clean up dirty data. Find out what data we cleaned-up or purged and what difference we think it will make.

## ELUNA 101

*Edward Corrado (Binghamton University Libraries); John Greer (University of Montana)*

ELUNA Steering Committee members provide an overview of the organization including the ELUNA Document Repository and Website.

## Format Designation in MARC Records: A Look under the Hood

*Michael Doran (University of Texas at Arlington)*

MARC format designation has ramifications for search and retrieval, limits, and facets, both in Voyager and further downstream when the MARC data is extracted for ingest into discovery tools such as Primo, Summon, and VuFind. To the uninitiated, the "format" of the item being described is a seemingly simple data point. In reality, parsing a MARC record to determine the format is full of complexities and challenges. This presentation will touch on abstract vs. concrete forms; format designation in the Leader, 006, 007, and 008 fixed fields as well as the 245 and 300 variable fields; pseudo-formats; what is mandatory vs. optional in cataloging practice; and the differences between cataloging theory and practice as observed via format-related data mining of a mid-size academic library collection.

## Linked-data interest group formation discussion

*Laura Akerman (Emory University); Daniel Lovins (New York University)*

Emory is interested in linked data and has been doing some experiments recently, and is interested in potential ways to connect our Ex Libris products (Primo, Aleph, SFX, Metalib) to the broader world of open linked data to deliver services in new ways or do new things. We've been following the presentations of some of the European libraries at the IGeLU Linked Open Data SIWG and thinking, it's about time ELUNA has its own interest group on this topic.

## Local Hosting of Ex Libris Services - UCO Library Experience

*Habib Tabatabai (University of Central Oklahoma)*

At University of Central Oklahoma, we host Primo and Voyager locally. This was a strategic decision on our part. This presentation is an overview of how we came to this decision, what we considered, and what influenced our decision.



## **Oracle SQL: A Longtime and Faithful Friend**

*Mike Rogers (University of Tennessee)*

This presentation will cover a number of useful tips and tricks for using Oracle SQL to report and manage data. I will quickly cover some SQL basics and then present a number of helpful functions, techniques, and means to extract and manipulate data. Some of these include SUBSTR, INSTR, DECODE, UNION, REPLACE, COMPUTE, “successive” queries, the use of TEMP tables, Oracle SQL Loader, and so forth. There should be some time for attendees to share their own SQL tips and tricks as well as ask any questions they might have. An electronic copy of my SQL documentation will be e-mailed to all attendees who request it. The presentation should benefit both Aleph and Voyager users.

## **Preparing for RDA implementation**

*Cathy Weng and Yuji Tosaka (The College of New Jersey)*

RDA: Resource Description and Access, a new cataloging code, has been developed to replace AACR2. RDA provides a set of guidelines and instructions on formulating well-formed metadata to support resource discovery and access. The Library of Congress has decided to fully implement RDA on March 31, 2013. It is expected that many other U.S. libraries will begin to implement RDA at the same time or soon after LC RDA implementation. As the new descriptive standard is adopted in the shared cataloging environment, well-planned preparation is essential for cataloging departments to manage RDA implementation. With LC and many other large libraries choosing to move to RDA, The College of New Jersey (TCNJ) Library, a medium-sized Voyager library and a NACO funnel member, had decided to implement RDA in March 2013. However, implementing RDA at the local level is a tremendous undertaking, especially for a smaller institution with limited time and resources. For a smooth transition, TCNJ Library has taken a series of actions to gradually and systematically train the cataloging staff (both professional and paraprofessional) to ease their way into the new RDA workflow. Tasks include training classes on learning FRBR, using the RDA Toolkit, identifying RDA records and new RDA data elements, learning differences between AACR2 and RDA, learning to create RDA bibliographic and authority records, updating Voyager tag tables and OPAC display for RDA records. This presentation will begin with a discussion of recent online survey data to illustrate an overview of RDA training issues in various libraries and then describe TCNJ Library's journey toward full RDA implementation.

## **Project Management 101: Surviving a major implementation, upgrade, transition, etc without going totally insane**

*Julia McGinnis (California University of Pennsylvania)*

This session will demonstrate how to break down a major (or minor) project into manageable steps, how to plan for worse case scenarios and how to maintain your sanity. While project management is discussed in a broad sense, the concepts covered may be translated for use with any product or project.

## **So that's how it's done here! Comparing and contrasting strategic planning in two different institutional library contexts**

*Pascal Calarco (University of Waterloo - Tri-University Group)*

Many of us have participated in strategic planning, but fewer have experienced in back to back in two different institutional settings, with an opportunity to compare and contrast these. This presentation will detail experience leading two strategic planning processes in a private US institution and a public Canadian institution, in 2010-2011 and 2012-2013, respectively. Approaches to strategic planning are governed by institutional context, experience, norms and leadership. There will be some time for audience participation as well, sharing your experiences with library strategic planning, to provide further insight on things to consider for your next strategic planning exercise!



## Tips on implementing an EZProxy server

*Doris Munson (Eastern Washington University)*

Eastern Washington University migrated from Ill's WAM product to EZProxy for authentication in 2009. This presentation focuses on what a library needs to know when it implements an EZProxy server and some hints on how to create the initial configuration file, how to work with IP address conflicts, what firewall issues to expect, and some security settings that will help protect against hackers. A list of helpful websites will be given.

## Version Control in Managing Local Scripts

*Clinton Graham (University of Texas at San Antonio)*

Real world examples of the benefits of version control, such as Subversion and Git, in managing local programming (CGI and shell scripts) and customization (WebVoyage skins). Live demonstration of managing local and vendor code, with merging, branching, and upgrading.

## Voyager, Bibliotheca and RFID Security

*Dale Burke (Edmonds Community College)*

During the summer of 2012 Edmonds Community College migrated from a 3M magnetic security strip system to a new Bibliotheca RFID security system. The session will cover steps involved in the process, a functional look at how Voyager Circulation has changed and lessons learned from the experience.

## We all thought it would be straightforward: OCLC reclamation of pre-UNICODE records in ALEPH. Not so simple!

*Naomi Steinberger (Library of the Jewish Theological Seminary)*

After hearing Sandy card's session about OCLC reclamation at ELUNA we decided to embark on a similar project. However, our ALEPH records, half of which are in Hebrew characters, were input directly into ALEPH200, ALEPH300, earlier iterations of ALEPH500 and RLIN. Working with OCLC and with ExLibris we are creating a clean file of Hebrew language cataloging records that can be checked against our holdings on the OCLC database.

## What to Expect When Moving to a Hosted Environment

*Lynne Edgar (Texas Tech University); Justin Daniel (Texas Tech University)*

Are you wondering what the process is like to move to a hosted environment with Ex Libris products in an academic environment? This presentation will introduce the implementation process and the responsibilities of Ex Libris and Texas Tech University Libraries before, during and after the move. We will also discuss issues encountered, hindsights and testing that was conducted by Texas Tech University during the implementation.

## You Are Here: Integrated Mapping for the Catalog, Web, and Building

*Dan Taylor (Ithaca College); Ron Gilmour (Ithaca College)*

Library patrons often have difficulty navigating a library, particularly finding materials by call number. We will describe the integrated approach we used to create a consistent set of maps and signs, including signage for the stacks/floors, online maps, and dynamic call number mapping in our OPAC. We will discuss our design considerations, data collection, and catalog integration using HTML5 canvases.





## MetaLib

### MetaLib vs. MetaLib+: Case Studies from Université du Québec à Montréal (UQAM) and Harvard University

*Hank Sway (Harvard University) and Alexander (Sacha) Jerabek (Université du Québec à Montréal)*

During the implementation of Primo version 3 that included MetaLib+, the UQAM libraries' implementation committee evaluated the utility of this new functionality. Due to enough significant problems and missing functionality when compared to normal MetaLib we made the decision not to implement MetaLib+ until the bugs could be ironed out and it could be more fully developed. This presentation will describe the use of MetaLib within the libraries' context and explain in detail why we could not implement MetaLib+. Harvard University currently is running both MetaLib and MetaLib+ in parallel. Although we would like to offer our users a single solution for aggregated searching of licensed electronic resources, we have found that MetaLib+ lacks certain features present in MetaLib, and therefore offer both options. This presentation will discuss these features and their importance to our research community.

## Primo

### A Portrait of the User as a Young Graduate Student: A Review of the Search Habits of Graduate and Professional Students Using Ex Libris Products

*Meredith Hammons (Emory University (Pitts Theology Library)); Malisa Anderson-Strait (Emory University (Goizueta Business Library)); Alain St. Pierre (Emory University (Robert W. Woodruff Library)); Thomas Sneed (Emory University (MacMillan Law Library))*

In large research university, we have a variety of types of users: faculty, graduate and professional students, undergraduates, and community users. All of these types of researchers look for information differently, so it is a challenge for any discovery system for work for them all. As subject specialists in business, history and philosophy, law, and theology, we examined how the graduate and professional students with whom we work look for information and how Primo and the Aleph OPAC respond to these types of searches. In this session, we will discuss the information seeking strategies and needs of our user groups and the benefits and challenges these researchers find when using Primo and the Aleph OPAC. We will offer specific examples of information needs we have encountered in our work with students and their use of Primo and the OPAC, and suggest ways to best use these tools to help graduate and professional students find the resources they need.

### Applying Blending in Primo & brief review of additional ranking settings

*Eric Nord (Brigham Young University)*

There is a bit of confusion and perhaps superstition that surrounds blending results in Primo. Our goal is to help those who would like to implement blending of local and Primo Central results by sharing common and recommended settings, and also share blending results we are seeing from our production (3.1.3) and development (4.1.1) environments. We will also provide a dialogue on other ranking settings in Primo – users successes and failures.

### Displaying Thumbnail Images for Films

*Curtis Thacker and Charles Draper (Brigham Young University)*

Finding correct film images online for use in Primo is a challenge due to the lack of a unique film identifier such as an ISBN. Instead you are left with ambiguous attributes such as titles, dates, etc for looking up film images. Brigham Young University has devised a method for tying cataloged films to online film databases such as IMDb and The Movie Database. High quality images from such online databases are then captured and displayed in Primo's search results and details pages.



## Enhancing Primo for users: viewing videos, indexing PDFs, displaying XML and more

*Tom Ruthven (University of New South Wales)*

UNSW Library has an active development program to utilize the features of Primo to deliver improved searching and usability to users. This paper will discuss five developments over the past year: Creating a video tab in the Primo detailed view for users to play videos using an external streaming media server, or users can opt to play the videos in a new window. Collection-specific drop-down lists for advanced search. Enhanced searching and display using file-splitter to include information about objects stored in a repository such as their mimetype and file size; displaying a citation in the Detailed view using an external citation builder application for a user to cut-and-paste; and indexing text extracted from PDFs stored in a repository. Links to access detailed records in multiple formats, including RDF and XML 5. Record-specific thumbnails based on record/resource type.

## Hathi Trust: Record Loads vs. Primo Central

*Aaron Bales (University of Notre Dame); Mark Dehmlow (University of Notre Dame)*

What are the advantages and disadvantages of loading Hathi Trust records, compared to using the records available on Primo Central? Some of the issues we considered were record level, quality and integration with the local collection, as well as the technical issues involved in harvesting and loading the records.

## Implementing Primo in the Wisconsin Consortium: Challenges and Lessons Learned

*Marlys Brunsting (University of Wisconsin-Green Bay) and Bryan Vogh (University of Wisconsin-Eau Claire)*

This multi-perspective presentation will highlight the challenges that were faced at the consortia level as well as the local level when implementing Primo for our state consortium. We will discuss decisions at the consortium level and the effects at the library level. Site specific issues related to cataloging practice and location naming will also be discussed. Attendees will learn what worked well and what we might do differently based on our experience. Marlys is co-chair of the UW System Task Force for Resource Discovery and Bryan is a task force member and local implementation leader so multiple views of the process will be presented.

## Local Implementation or Primo TotalCare: making the right choice for your institution

*Bennett Ponsford (Texas A&M); David Podboy (PNNL Technical Library); Alan Ng (Chinese University of Hong Kong); Marc Keeper (Ex Libris)*

This panel presentation will discuss the various options for implementing Primo at your institution, from full-scale local implementations to totally hosted solutions. Hear about experiences from Primo customers representing 3 different implementation options and from Ex Libris

## Making Sense of Primo Ranking

*Eric Nord (Brigham Young University)*

Primo is a powerful tool for metadata aggregation. We originally supported a limited 14 item types between our different data sources. In the last year we have added 51 item types and the list continues to grow. We'll show some of the work we've done to identify and target item types in ContentDM (OAI DC based), MARCXML (Symphony), and welcome you to bring sets of example records from your library to inspect. The new item types have driven more useful application of facet\prefilter and facet\rsrctype. Our search dropdown has changed significantly, moving from a collection based search to a format based search, due in part to this work. <http://search.lib.byu.edu/byu/>



## **MetaLib is dead, long live Primo?**

*Anne Highsmith (Texas A&M Univeristy)*

Texas A&M University has been a Voyager user since 2000, a MetaLib user since 2006 and a Primo user since summer 2012. When Primo was implemented in production, the library changed the default search type on its website from a Voyager search to a Primo “bucket” search. This presentation will review statistics to determine if usage of the various systems has significantly changed in response to the Primo implementation. Questions to be examined include: 1) based on SFX requests, are users finding more and/or more diverse materials in Primo than they did in MetaLib; 2) MetaLib is still available as the listed “Articles” search – how has the pattern of usage changed; and 3) now that the default search is based on Primo rather than Voyager, has Voyager usage declined or has there been a noticeable change in the types of searches performed.

## **People, Resources, Investment, Maintenance + Organization: The Software Lifecycle and Your Institution**

*Peter Hornsby, Jon Bodnar, and Alain St. Pierre (Emery University)*

The successful implementation of Primo is just the beginning of your “search and discovery” journey. You need to apply a constant mix of people, resources, investment, maintenance, and organization. Staff will wear various hats as they chart your journey to a better user experience. As members of the Emory University Libraries' Search and Discovery Team, we'll share our recent experiences with Primo, discussing the strategies, relationships, and technologies we've found helpful to our work. Our big picture conversation will focus on the functional waypoints our work revolves around, including the user interface, maintenance, datasources, and search functionality.

## **Primo at Northwestern – Story of Local Development**

*Michael North, Geoff Morse, and Karen Miller (Northwestern University)*

The Northwestern Primo environment includes numerous locally created developments, as well as utilizing the developments posted on ELCommons by other Primo developers. We will demonstrate what “development enhancements” we have created ourselves, and then show what developments we have implemented that we obtained from ELCommons. Some of the local developments we will demonstrate include our Blackboard/Primo integration environment, our local Primo web interface (not using the Primo default interface), our unique solution to further enhance FRBR-ization, Metadata Object Description Schema (MODS) harvesting development with our Fedora-based repositories and Encoded Archival Description (EAD) development with our archival finding aids, harvesting of non-Northwestern collections, and our mobile Primo environment. We will conclude with discussing how our institution uses ELCommons to further enhance their Library Primo environment.

## **Primo User Studies**

*Shelley Neville (LDS Church History Library), Ken Jensen (LDS Church History Library)*

Since staff are a huge part of our user group for Primo we have encountered heated discussions between a Primo view for staff and a view for patrons. Based on earlier user studies we came up with a view for patrons which was very different than the staff view. This caused problems with staff because they were confused as to which view they should be using. So, how do we create a common view for all when the needs can be very different.

## **Push To Plugins for a custom Java Citation Library**

*Hannan Butt (New York University)*

Implementation of a series of push-to plugins in Primo that are based on and leverage a custom Java library for formatting citations and exporting to various tools.



## Resource Discovery at the British Library - some interesting challenges

*Mandy Stewart (British Library)*

The British Library implemented Primo initially in 2008 and since then has built up the content and developed the interface to provide access to over 63million records for items in the British Library collections. One of the current tasks is to move the entire newspaper collection out of Colindale in North London to storage in the main St Pancras building in London and a new purpose built storage building in Yorkshire. A new News Reading Room will open in October this year and Primo will be central in providing access to the physical and digital collections as well as linking to other collections such as the BBC archive.

## Semi-Advanced Primo Customizations

*Randy Oldham (University of Guelph)*

In this session we'll look at a few of the more advanced customizations applied to Primo at the Tri-University Group (TUG). We'll look at: how to dynamically hide a tab in the Primo interface; how to add a "New Search Button" to the Primo interface; how to inject a 'where is it?' link into the brief results view for physical items; how to change the colour of the VERSIONS tab; how to hide the EXPAND BEYOND link when using Primo Central. We'll see how they work, I'll explain how we did it, and show you how you can do it at home. This will require relatively limited understanding of codey-bits.

## Trouble-shooting tips for Primo

*Alison Hitchens (TUG (University of Waterloo))*

Come and learn some tips for trouble-shooting when things don't seem to be working as expected in Primo! Questions include: I updated the Back Office tables, why isn't it showing in the front end? why isn't SFX finding this online resource? I can't see my search term anywhere in the display, why is this record appearing? etc.

## Using usability studies to enhance Primo: A panel discussion

*Erin Rushton & Molly O'Brien (Binghamton University Libraries), Lynne Edgar (Texas Tech University), Aaron Nichols & Amber Billey (University of Vermont), Miloche Kottman & Scott Hanrath (University of Kansas)*

Is the Primo interface intuitive for the average user? How do users interact with Primo? Can the interface be modified to improve the user experience? Join us for a panel presentation on Primo usability studies conducted in 2012 at four academic institutions to address those questions and more. Some of the unique features of the studies include the application of heuristics, methodologies, task mash-ups, and comparison of study results to actual usage statistics.

## Utilizing Primo's Custom Tile: Providing search assistance and recommender services to Library users

*Michael Norman (University of Illinois at Urbana-Champaign); William Mischo (University of Illinois at Urbana-Champaign); William Weathers (University of Illinois at Urbana-Champaign)*

Utilizing the recently released custom tile in Primo, the Illinois team has incorporated search assistance and recommender elements into the web-scale aggregation of search results. These search assistance mechanisms can offer users suggestive prompts, guided and adaptive help, reformulation suggestions, and added links to additional sources all within the context of the user's specific searches. The University of Illinois at Urbana-Champaign Library's Primo custom tile provides direct link suggestions for frequent searches, searches where the user may want to be redirected to a different site (LibGuides topics), providing a link to e-journal title matches for searches that match on a journal title, and access to searches against the Illinois Consortia Statewide Online Catalog. This presentation will describe how UIUC Library incorporated the Primo custom tile into providing context-specific search assistance into our web-scale discovery service.



## Product Working Groups...coming soon!

### Rosetta

#### Creating Metadata Best Practices for Implementation with Rosetta

*Molly O'Brien (Binghamton University)*

In this presentation I will explain the importance of devising metadata best practices while implementing Rosetta. Thinking about metadata from the beginning, ensures a smoother workflow and greater consistency across projects. Metadata has shaped the way we use, customize, and continue to grow our digital repository. I will discuss our process of creating and updating our best practices and demonstrate the Metadata Portal we built to display them.

#### Digital Preservation Policy and Procedures

*Edward Corrado and Sandy Card (Binghamton University)*

With Rosetta, Binghamton University Libraries has a robust long-term digital preservation technological solution. However, digital preservation is not just about technology. Sure, having a proper technological solution such as Rosetta is an important piece of the puzzle, but there are many other decisions that need to be made and policies and procedures that need to be implemented that are not necessarily technical in nature. This presentation will look at how Binghamton University Libraries has addressed some of these challenges. While Rosetta is the software Binghamton uses, it is hoped that this presentation will be useful to anyone who has or is considering a digital preservation program at their institution.

#### Lessons learned from implementing Rosetta in the BYU library

*Chris Erickson (BYU)*

The BYU Library installed Rosetta digital preservation software in 2012 as a pilot project. The purpose of the project was to: 1. Determine the suitability of Rosetta as a digital preservation solution; 2. Identify the people needed for digital preservation; 3. Recommend policies that need to be created or updated and 4. Outline procedures for staff to follow in order to ingest into Rosetta. This presentation looks at each of these items, the documents we created, as well as other lessons learned from the training and implementation. Our final project evaluation included recommendations to our library administration. The information about our project may be helpful for other institutions considering or implementing Rosetta.

#### Rosetta: Long Term Storage and Digital Content Management System. How does this integrate with Primo, Aleph, and a homegrown EAD System.

*Shelley Neville and Ken Jensen (LDS Church History Library)*

Our library has put together a digitization workflow based on patron requests and other staff priorities. This session will cover how we work with a variety of Ex Libris products to make this happen.



## Regional User Groups...coming soon!

### SFX/bX

#### Fill 'er up! Automated loading of external data into SFX.

*Rich Wenger (Massachusetts Institute of Technology)*

We regularly load data from Aleph and other external sources into SFX as local objects. While SFX contains interactive tools for data loading, there is considerable value in scripting the entire process. This session will describe the processes we are running and the scripts that drive them; scripts that can be run either in fully automated mode, or in an interactive step-at-a-time mode from the command line.

#### How do you maintain multiple knowledge bases?

*Margery Tibbetts (California Digital Library)*

This session is a discussion session to figure out if there are any best practices in the community for dealing with multiple KB. The CDL has acquired multiple products with e-resource knowledge bases. All of the knowledge bases are slightly different in arrangement. We would like to update in one knowledge base and push the changes to the other knowledge bases.

#### Improving the user experience: Adding print holding to the SFX Menu using Aleph X-Services and custom portfolios.

*Steven Bischof (Five Colleges) and Sara Colglazier (Mount Holyoke)*

For some time we have wanted users to be able to see a journal title's print holdings display alongside its online accessibility. We have also wanted that users be able to perform a journal title search—whether for electronic or print-only held—in one place; that is, we do not use MARCIt! and consequently the SFX A-Z is our only complete access point for our electronic-journal holdings. So, how to get SFX to talk to Aleph X-server (in our case) and display print-holding details in the SFX Menu? How to have the SFX A-Z also retrieve print-only-held journal titles? How to handle journal titles without ISSNs? In our presentation we would like to share with you how we have gone about bringing our users a more complete experience via SFX by setting up different Targets and Target Services utilizing their own Parsers, Parse Params, Displayers, and Thresholds, as well as Local Objects with and without jkeys.

#### SFX and ADA compliance: the CDL's efforts after an external review

*Margery Tibbitts and Lena Zentall (California Digital Library)*

In 2012 the University of California libraries had an ADA evaluation of the library websites. Some of the problem areas identified were with the SFX menu. We will discuss the ADA evaluation report, tools used to determine ADA compliance and changes CDL made to come into compliance.

#### Using Primo with SFX: interactions and implications

*Kathy Varjabedian (Los Alamos National Laboratory Research Library)*

Primo relies heavily on link resolver data to provide delivery information for users. What impact does the use of Primo have on managing SFX--on activations, delivery, interface, statistics? This session will review the impacts of using both Primo and SFX and ways to maximize the interaction.



## Using SFX usage-data to build a real-time “popular resources” series for the Library web site

*Fengzhi Fan (University of Medicine and Dentistry New Jersey)*

Over the past two years, we have seen some institute's efforts in extracting data directly from SFX statistics tables, to generate customized reports for security management or collection development. What about using this “big data” for other purpose? This presentation will showcase a new ‘most popular’ series that features our university’s most accessed databases, journals as well as daily popular articles. The service which directly get access data from SFX stat\_object and stat\_offline tables is refreshed in real-time. Although Ex Libris provides its “hot articles” service for general audience, our version is based upon our local usage data and targets a specialized health sciences university. These highly demanded resources are being given priority and presented on the library’s front page so that our users can quickly and easily go to the resources. Implementation detail of the project will be presented.

## Special Interest Groups...coming soon!

### Verde

#### Verde Round Table: Licenses and more

*Allison Erhardt (University of Manitoba)*

Bring your questions about Verde Best Practices for an open discussion. We will start with a demonstration of the licensing attribute, and move into discussion topics from the attendees.

### Voyager

#### CARLI’s SysAdmin Settings Reports

*Cathy Salika (CARLI)*

I’ve written a set of queries using SQLPLUS (not Access) to provide a listing of a library’s settings in SysAdmin, formatted to look much as they do in the client. We’ll look at the results, and how they might be used. We’ll consider some of the techniques that were used. And we’ll see how to read the queries to find the table and column that corresponds to a setting that you may be interested in.

#### Data Clean Up Reports Using Analyzer

*Lesli Moore (Texas Health Science Libraries Consortium)*

While writing one report for correcting data in our MARC records, I came across other fields with invalid data. The first report snowballed into a (nearly) complete set of reports with observations on problems associated with cleaning up the Voyager database. This presentation reviews the reports created and the challenges to cleaning (and keeping clean) MARC data.

#### Global Data Change: Overview, Tips, and Tricks

*Julene Jones (University of Kentucky)*

Global Data Change allows for batch reviewing and editing of MARC records that are already saved in your catalog. This session will provide an overview and demonstration of the relatively new Global Data Change Voyager 8.0 client, including a description of GDC workflow as well as a few best practices and tips used by the University of Kentucky Libraries.



## **Integrating Electronic Resources in the Voyager Catalog with Other Library Systems**

*Janetta Waterhouse (University of Illinois Springfield)*

Use of a discovery system shed light on problems with electronic resources in our Voyager catalog and related knowledge bases (SFX, 360 Resource Manager, and WCKB) and research guides. This session will outline the steps taken by Brookens Library to identify, update or delete, organize and complete the electronic resources records in the catalog so that they enhance, not detract, from electronic resource discovery from the catalog and other discovery systems.

## **It Takes a Village II: More Stories from the Field**

*Judy Brink-Drescher (Molloy College)*

With so many available resources, the real trick is in understanding who or where to go to for what. Presented are tips and recommendations on navigating the abundant waters of the Voyager community, including how and when to leverage ExLibris Support, The Community-At-Large, Documentation Center, Pivotal eService/Knowledge Base, ElCommons, Voyager-L, etc. and keeping it all organized. The target audience is new ILS Administrators, or those that want a better understanding of where to find help. Updated from 2011.

## **ODBC: How not to pull your hair out**

*Sherrie Kristin (Purdue University Calumet) and Laura Guy (Colorado School of Mines)*

Oracle ODBC driver installs will be discussed on different platforms with different versions of Office. Peculiarities, little setting changes and issues will be addressed with solutions noted that have worked. If the network connection works we will be able to do a live demo on the install. Documentation will be provided for all tested platforms.

## **Playing with Voyager reports**

*Alan Waugh (Mount Royal University)*

Fast track custom Voyager reports with gestalt-like templating techniques in Access. Adapting a concept described by Neri Oxman in Rapid Gestalt.

## **Providing Voyager catalog data in a custom, open source web application**

*Michael Cummings (George Washington University)*

This presentation will discuss a custom, open source web application developed by the George Washington University. The application displays standard bibliographic and holding data, real-time availability from the Voyager catalog and custom information about items. We also provide links to external resources, including holdings from two other library catalogs, and links to full text for books available from the Internet Archive. Detailed technical information about the application will be provided.

## **Shove, dig, fix and delete : dealing with large vendor files in Voyager**

*Julia McGinnis (California University of Pennsylvania)*

In the era of vendor supplied MARC records of varying quality the ability to mass load, extract, edit and/or delete records efficiently reduces pressure on limited staff. This session will demonstrate the use of external free software including MarcEdit, and Gary Strawn's Location Changer, and Voyager Select, as well as Voyager Webadmin to work with large files of bibliographical and/or holdings records. Topics will also include decisions to make regarding vendor records and locations, bulk loading profiles and documentation.





## The Reality of Hosted Voyager

*Laura Guy (Colorado School of Mines); Lesli Moore (Texas Health Science Libraries Consortium)*

While there are presentations on getting to the hosted environment, we are going to talk "living" in the hosted environment. We will discuss our experiences working with Voyager in the cloud.

## Using Global Data Change to Make Changes to Large Batches of Voyager Records

*Wendy Crist and Tracy Farmer (Arkansas State University)*

The release of Voyager 8 brought the long-awaited Global Data Change functionality to Voyager libraries. We first tested the Global Data Change module by making mass changes to bibliographic records in preparation for RDA. For example, we changed abbreviations such as "col" to "color" and "fold." to "folded" in the description (300 tag). Subsequent projects included bulk URL changes (856 links needed to be changed due to a change in our EZproxy URL). We now rely on GDC as a powerful tool for controlling the quality of our catalog.

## Using Make-Table Queries in Access

*Janice Christopher (Univ. of Connecticut)*

Access queries can be complex, with many joins; less complex but with large result sets; simple but built on the BLOB [\*shudder\*]. In addition, remotely hosted Voyager customers can find that the "Access slowdown" can put a crimp in their normal querying habits. Using make-table queries in Access can help you regain some of that lost time (and provide proof of effort). This presentation covers the basics of make-table queries and gives attendees an idea of ways to use them. Some experience creating Access queries is assumed.

## Voyager Bulk Import: bibliographic record with multiple holding records

*Peter Zhang (UT Arlington Library)*

Discuss limitations and options in Voyager Bulk Import regarding bibliographic record with multiple holding records.

## Voyager Queries with Backbone

*Cathy Salika (CARLI)*

There are a few sets of tables that form the backbone of many queries. By linking them together correctly and adding on a few other tables, you can write many useful queries and be more confident that they are accurate. We'll look at a few of these backbones, and also consider how to use the Data Dictionary and Class Diagrams to understand table relationships.

## WebVoyage skins: What, Why, When, How???

*Tari Keller (University of Kentucky)*

What are WebVoyage skins? Why would you want to use them and when? How do you go about making a new skin? At the University of Kentucky we've been using the Tomcat WebVoyage for several years now. We've made use of multiple skins for a number of reasons. We have three skins that we share with the public: browser accessible, mobile (not an app) and locked down OPAC. I will explain a bit about working with skins, as I share what we do with them.

## Writing macros and programs for Voyager cataloging

*Kathryn Lybarger (University of Kentucky)*

Editing individual records in Voyager is easy and convenient, but repetitive processes can be slow and tedious without automation. Voyager's built-in features such as Pick and Scan, and Global Data Change are great, especially when combined with external macro programs to drive the interface in a simple repetitive fashion, or with external programs directly querying Voyager's Oracle database. In this presentation, I will describe some of these techniques and share my web site of open source code for extending Voyager.