ELUNA 2012 Program Sessions

This year's exciting ELUNA program offers over 90 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!

- **Aleph**
- **Ex Libris**
- **General/Strategic**
- **Metalib**

- **Posters**
- **Primo**
- **Product Working Groups**

- **Rosetta**
- **Regional User Groups**

- **SFX**
- **Special Interest Groups**

- **Verde**
- **Voyager**

ALEPH

Aleph Deployment Process: Why you need multiple Aleph environments

Nelson Sandberg (LDS Church History Library); Brian Romrell (LDS Church History Library)

Session Number: B.11.01   5/11/2012 1/11/1900 11:00 AM-12:00 PM

This session highlights the benefits on running multiple Aleph environments in development, test, and production. We will discuss how quality assurance and application testing guarantees successful change control. Our session includes a demo on rolling up Aleph configurations through the different environments.
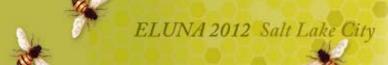
Creating custom ALEPH services to help manage patron records

Steven Bischof (Five Colleges Inc.)

Session Number: B.10.04   5/11/2012 9:00 AM-10:30 AM

This presentation will discuss the construction of custom services to select and edit patron records, which helps streamline the management of patron data. These services use a combination of SQL and shell scripting to extract and then edit the patron records. Another custom circulation service is a customization of cash_05, which allows the user to select specific patron statuses and specific transactions to be included in the output of the report. This custom service uses SQL to select a list of transactions and then passes this information on to standard Aleph COBOL routines to complete the service.

Embedding RSS Feeds from Aleph into Library Research Guides

Mike Rogers (University of Tennessee)

Session Number: B.8.06   5/10/2012 1:30 PM-2:30 PM

Library Research Guides are a popular tool for connecting students and faculty with research materials. This presentation will explain how we created a customized set of "new item" RSS feeds from Aleph and subsequently embedded those feeds into subject librarians' Research Guide pages. I will review the process and steps for creating the RSS feeds using the SQL-to-XML method and explain the mechanics behind how the feeds work. Then I will show a couple different examples of how our subject librarians have opted to display the RSS feeds in their LibGuide webpages. Finally, I will explain how we integrated a deep link to our Primo instance with the "dlSearch.do" syntax as part of the feed so that users can click on an item and be taken immediately to the record in Primo.

It's a Global Lifestyle : Embrace the Change

Ellen Kotrba (ODIN / Online Dakota Information Network)

Session Number: B.2.05   5/9/2012 2:30 PM-3:30 PM

North Dakota is a consortia of academic, public, school and special libraries who rely on global services to save staff time. Learn how to determine which global services to use, how those services work and alternative SQL options to keep up with librarian decisions. The Excel "concatenate" function (used to create input files) and importing large Aleph reports into Excel enhance the global experience.   Live the lifestyle, embrace the change!

Loading Records using Aleph Services

Betsy Friesen (University of Minnesota, Twin Cities); Jane Aitkens (McGill University); William Jones (New York University)

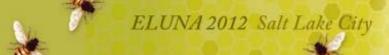Session Number: B.9.08   5/10/2012 4:15 PM-5:15 PM

Several loaders are available for staff use in Aleph. P-file-96 has been used for years to load records with embedded order data. Some institutions use it to create holdings, while others use different services for this purpose. In the last few years, Aleph libraries have utilized p-file-90, the advanced loader, to do more complex holdings, items, and order creation. Join us to learn about these and other services, their tables, and use of scripts to join multiple services together.

One-Step Record Loading: Creating a Single Aleph Service to Load Electronic Books

Mike Rogers (University of Tennessee)

Session Number: B.6.06   5/10/2012 9:00 AM-10:00 AM

This presentation will explain how we created a single custom service in Aleph that prepares and loads new files of electronic book records having different loading conditions and from a variety of vendors. Prior to this, our staff performed a couple dozen steps and ran numerous individual Aleph services in order to prepare and load one record file, which sometimes took hours to complete. Over time the backlog of electronic book files grew larger as our e-book purchasing expanded, since the record loading could not keep pace. I will briefly cover the various steps that our staff followed for loading e-books into Aleph, then explain in detail how the new loader incorporates the various steps in a flexible, much more efficient manner. Features highlighted will include the use of system variables, different fix routines based on the presence of a call number, whether or not to run character conversion on the records, whether to perform global updates, file renaming and archiving, etc. This presentation will be formatted as a "how to" guide that explains how each step in the loader works and the rationale for configuring it the way we did.

Primo: traversing the patron puzzle

Sue Harmer (University of NSW)

Session Number: B.9.13   5/10/2012 4:15 PM-5:15 PM

UNSW's goal is to provide patrons with a single Primo user interface to all Ex Libris applications. We want our patrons to confidently access all aspects of their account from one place.   Additionally the Library wants to streamline the analysis of usage data for an holistic view of application use and trends.   The main challenge has been to migrate patron data from Aleph and Metalib to Primo. A second challenge has been the coordinated deletion of expired patron data from Aleph, Metalib and Primo.   In this presentation we will outline UNSW's methodology for patron management across the 3 applications and the degree to which it meets our goals.

Reporting your Aleph Data

Billy Rawles (LDS Church History Library); Jeff Baird (LDS Church History Library)

Session Number: B.1.09   5/9/2012 1:15 PM-2:15 PM

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.
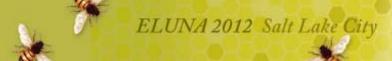
'Seamless Circulation' Step 1: Setting up Aleph and CircIT

Jacque Dessino (VCCS/Tidewater Community College)

Session Number: B.12.04   5/11/2012 1:00 PM-1:30 PM

Tidewater Community College and the city of Virginia Beach are building a joint library to serve as a branch of both organizations. The first step to a 'seamless' circulation experience between Aleph and Sirsi/Dynix's Symphony was to

implement TechLogic's CircIT self check system. This presentation discusses the problems encountered and lessons learned as we work to become the first Aleph implementation of CircIT.

Standardizing "old" local Aleph records to reflect current practice: or clean up time!

Naomi Steinberger (Library of The Jewish Theological Seminary)

Session Number: B.2.08   5/9/2012 2:30 PM-3:30 PM

This presentation will focus on a project to convert "old" local Aleph fields, particularly those describing manuscript codices, into MARC21 format. The "clean up" project deals with records that we creating locally in Aleph. They are being upgraded so that they can be contributed to the OCLC database. The records will be used as the metadata for a manuscript digitization project that is being loaded to DigiTool.

Using Aleph's Search / Retrieve via URL (SRU) to keep metadata in synch between Aleph and Rosetta

Beck Locey (LDS Church History Library)

Session Number: B.7.15   5/10/2012 10:30 AM-12:00 PM

In this session, we will do a high level overview of setting up and using the using the Aleph SRU Server to keep metadata synchronized between Aleph and Rosetta. As part of this session, we will also review (at a high level) both the Aleph and Rosetta configuration and associated processes to accomplish this goal

Ex Libris
Aleph Product Update

Carmit Marcus (Ex Libris Aleph Product Manager)

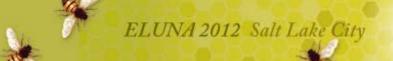Session Number: B.3.01   5/9/2012 4:00 PM-5:00 PM

Alma Analytics: Making the Most of Your Library's Data

Asaf Kline (Ex Libris Software Architect)

Session Number: B.3.02   5/9/2012 4:00 PM-5:00 PM

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.

Alma Demo

Christopher Spalding (Ex Libris Solution Architect)

Session Number: B.3.03   5/9/2012 4:00 PM-5:00 PM

Alma Demo

Christopher Spalding (Ex Libris Solution Architect)

Session Number: B.6.01   5/10/2012 9:00 AM-10:00 AM

Alma Demo

Christopher Spalding (Ex Libris Solution Architect)

Session Number: B.8.03   5/10/2012 1:30 PM-2:30 PM

Alma Demo

Andrew French (Ex Libris Solution Architect)

Session Number: B.9.02   5/10/2012 4:15 PM-5:15 PM

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Session Number: B.11.03   5/11/2012 1/11/1900 11:00 AM-12:00 PM

Alma Product Update

Bar Veinstein (Ex Libris VP, Resource Management)

Session Number: B.2.01   5/9/2012 2:30 PM-3:30 PM

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

Christine Stohn (Ex Libris bX Product Manager)

Session Number: B.3.04   5/9/2012 4:00 PM-5:00 PM

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.

Ex Libris Management Q&A

Ex Libris Management

Session Number: P.2   5/10/2012 3:00 PM-4:00 PM

Libraries on Demand: Building a User-Driven Collection with Ex Libris Alma

Dana Sharvit (Ex Libris Track Leader and Business Analyst)

Session Number: B.1.07   5/9/2012 1:15 PM-2:15 PM

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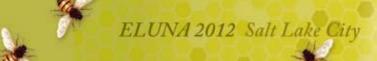
Managing the Transition: Alma as a Catalyst for Change and Growth

John Larson (Ex Libris Project Consultant)

Session Number: B.10.07   5/11/2012 9:00 AM-10:30 AM

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.

MetaLib Product Update

Yisrael Kuchar (Ex Libris MetaLib Product Manager)

Session Number: B.9.10   5/10/2012 4:15 PM-5:15 PM

Primo Product Demo

Ido Peled (Ex Libris Product Manager)

Session Number: B.7.07   5/10/2012 10:30 AM-11:00 AM

Primo Product Demo

Sean Crosbie (Ex Libris Senior Account Manager)

Session Number: B.12.03   5/11/2012 1:00 PM-1:30 PM

Primo Product Update

Ido Peled (Ex Libris Product Manager)

Session Number: B.1.08   5/9/2012 1:15 PM-2:15 PM

Rosetta Product Demo

Ido Peled (Ex Libris Product Manager)

Session Number: B.4.05   5/9/2012 5:15 PM-5:45:00 PM

Rosetta Product Demo

Sean Crosbie (Ex Libris Senior Account Manager)

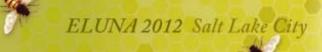Session Number: B.7.11   5/10/2012 11:15 AM-11:45:00 AM

Rosetta Product Update

Ido Peled (Ex Libris Product Manager)

Session Number: B.8.12   5/10/2012 1:30 PM-2:30 PM

ScholarRank, The Primo Relevance Ranking Technology

Tamar Sadeh, PhD (Ex Libris Director of Marketing)

Session Number: B.7.12   5/10/2012 10:30 AM-12:00 PM

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.

SFX Product Update

Yisrael Kuchar (Ex Libris SFX Product Manager), Ron Lozinsky (Ex Libris SFX KnowledgeBase Manager)

Session Number: B.6.08   5/10/2012 9:00 AM-10:00 AM

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

Adam Zimmerman (Ex Libris Product Integration and Packaging Team Lead)

Session Number: B.11.12   5/11/2012 1/11/1900 11:00 AM-12:00 PM

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.

Voyager Product Update
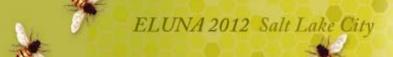
Mike Dicus (Ex Libris Voyager Product Manager)

Session Number: B.3.11   5/9/2012 4:00 PM-5:00 PM

GENERAL/STRATEGIC
Challenges and Issues When Implementing an Open Source ERM System

Jia Mi (The College of New Jersey Library); Yongming Wang (The College of New Jersey Library)

Session Number: B.1.04   5/9/2012 1:15 PM-2:15 PM

The growing need to efficiently and effectively manage the vast and complex electronic resources has posed many challenges to the library. A flexible, powerful, and also affordable ERM system is much needed. This presentation will talk about our implementation of an open source ERM system (CORAL) and the applications of its different modules, focusing on the decision-making process, as well as its impact upon the local library workflow customization and staffing issues, consistent information of our individual as well as multi-level consortium purchase, and interoperability issues.

EAD Tool and Rosetta/Primo Integration: What we've done and where we're going

Max Evans (LDS Church History Library)

Session Number: B.3.05   5/9/2012 4:00 PM-5:00 PM

Encoded Archival Description (EAD) is an xml standard for archival finding aids. It is used to describe archives and manuscript collections at the collection level and at each of several nested component levels. The Church History Department has developed an EAD tool for the production of EAD finding aids and for the public delivering of each. Our challenge is to integrate EAD with Primo and with Rosetta. We must be able allow the researcher to (1) discover and display the finding aid using Aleph and Primo; (2) discover each EAD component and display it in context; and use collections by (3) initiating paging calls for physical manifestations of their parts, or by requesting digital manifestations by either (4) placing a digitization-on-demand call or (5) viewing any existing digital in Rosetta. We will demonstrate how this will work once we complete the integration.

ELUNA 101

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

Session Number: B.6.04   5/10/2012 9:00 AM-10:00 AM

ELUNA Steering Committee members provide an overview of the organization including the ELUNA Document Repository and Website.
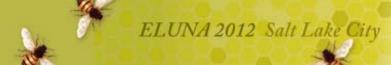
From the ground to the cloud - Emory Libraries' integrated core technologies implementation

Heather Williams (Emory University); Mike Mitchell (Emory University)

Session Number: B.11.07   5/11/2012 1/11/1900 11:00 AM-12:00 PM

In an effort to provide a seamless interface to the richness of Emory's resources, the Libraries began migrating its core services "from the ground to the cloud" in the Fall of 2010. Over a 12 month period, we upgraded our SFX and Primo instances, migrated our ILS system from Sirsi Symphony to Aleph, and moved them all to ExLibris hosting. We will share our motivation, the details of our experience, and the many lessons-learned.

Heads in the Cloud: an Alma Panel Presentation

Betsy Friesen (University of Minnesota, Twin Cities); Amira Aaron (Northeastern University); Jack Ammerman (Boston University); Jimmy Ghaphery (Virginia Commonwealth University); Michele Reid (North Dakota State University); Facilitator: Janet Lute (Princ

Session Number: B.7.03   5/10/2012 10:30 AM-12:00 PM

Join us for a panel presentation by members of Alma Early Adopter institutions and facilitated by one of the Development Partners. Learn why these 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.

Hosted Customers Meeting

Lesli Moore (Texas Health Science Libraries Consortium)

Session Number: B.10.05   5/11/2012 9:00 AM-10:30 AM

I used data to prove book theft but . . .

Jan Sung (University of Hawaii at Manoa)

Session Number: B.3.06   5/9/2012 4:00 PM-5:00 PM

Last summer, 200+ books were stolen from the UH at Manoa Library. The theft was discovered after an antiquarian bookdealer inquired about books offered to him for sale. Circulation records could not be used as evidence because the theft went unwitnessed. However, we believe the theft was the result of a flaw in our service, which led to several questions including whether the service should be kept, knowing that it could lead to more thefts.
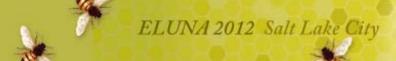
Integrating Primo with Discovery and Fulfillment Systems

Kevin Reiss (Princeton University Library); Antonio Barrera (Princeton University Library); Janet Lute (Princeton University)

Session Number: B.8.10   5/10/2012 1:30 PM-2:30 PM

We will discuss our efforts to customize Primo in order to better integrate with our other library systems and services. Techniques discussed will include how to use AJAX to embed new services within the Primo UI, using Jquery and Back Office changes to override the default behavior of the Primo UI, and how to construct "intelligent" links from within Primo to external systems. The presenters will discuss the integration of external systems for article discovery, consortial borrowing, and a delivery system that services a remote storage facility.

Online Aleph Training at Harvard Using Adobe Captivate

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

Session Number: B.9.12   5/10/2012 4:15 PM-5:15 PM

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.

Preparing a Special Collections Library for a temporary move to remote storage.

Gwyneth Duncan (Duke University)

Session Number: B.6.07   5/10/2012 9:00 AM-10:00 AM

Our Special Collections Library unexpectedly was given funding for a complete renovation. We have a bit more than a year to get the existing facility emptied. Most of the collection needs to be moved to off-site storage, which requires all items have barcodes. A fair amount of the collection isn't even in the online catalog, let alone barcoded. This talk will address the effort to get the material ready to move and the Aleph support that is involved in the process.

Research Data Management: Issues and Strategies

Laura Guy (Colorado School of Mines); Edward Corrado (Binghamton University)
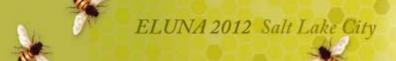
Session Number: B.7.10   5/10/2012 10:30 AM-12:00 PM

Research data management is a core area being addressed by the NSF, DHHS, NEH, and other public and private funders. It's an important, complex issue affecting many if not most University researchers, their departments, and other campus organizations. Laura Guy presents a general discussion of data management issues and policies. Edward M. Corrado presents current and future plans Binghamton University has regarding preserving faculty research and data sets in their digital preservation system, Rosetta.

The Consortium as a Cloud

Ted Schwitzner (Illinois State University); Carlos Melian (Northeastern Illinois University); Thomas Goetz (William Rainey Harper College)

Session Number: B.8.05   5/10/2012 1:30 PM-2:30 PM

Consortial environments exhibit similar features to cloud-based library systems. Members of CARLI's I-Share Users Group will provide insights into the ways that libraries support their own autonomy while collaborating towards the growth and development of their systems. The presenters will identify potential opportunities and challenges to working in the cloud environment, and they will demonstrate how the partnerships available in the cloud offer advantages for both consistent service to our patrons and for innovation.

Virtualization: How's it working for you?

Erik Biever (University of Minnesota - Twin Cities)

Session Number: B.12.08   5/11/2012 1:00 PM-1:30 PM

By the time ELUNA begins, we will have migrated Verde and Primo (possibly also MetaLib and SFX) from physical servers to virtual machines at the University of Minnesota. This presentation will focus on performance issues (real and perceived) and anything else that is unique to the VM experience. It will not be a technical presentation on VMware configuration. Please bring your own virtualization stories and questions.

Voyager's Request Promotion: A Paradigm for Consortial Resource Sharing

Mary Ellen Farrell (CARLI)

Session Number: B.4.08   5/9/2012 5:15 PM-6:15 PM

CARLI's implementation of Universal Borrowing with Request Promotion will be explored. We'll go through its original design inception, configuration in the library database, local enhancements, and workflows. We'll see why it is a good model for providing service to patrons in a resource sharing consortium.

What's the forecast? How to avoid downpours when moving services to the cloud.

Kate Montgomery (Tulane University); Gena George (Tulane University); Jeannette Thompson (Tulane University)

Session Number: B.6.12   5/10/2012 9:00 AM-10:00 AM

In 2011, Tulane University was still running Voyager on a 2004 server. Needing to upgrade and replace our server, we were planning a summer upgrade when we investigated moving to the cloud rather than continuing to host our own server. The decision was made to move not only our ILS, but also our other Ex Libris products to hosted services, so during the summer of 2011, Tulane University moved Voyager, SFX, and MetaLib products to the cloud – all under Ex Libris's Direct Care level of service. These moves had to be at least partially complete prior to our implementation of Primo, so we were on an accelerated schedule and were handling multiple projects at the same time. In the presentation, we will discuss the process involved in moving each of these services, how we organized each of the moves, what worked and what didn't, issues we are still trying to resolve, and our suggestions on planning for those interested in moving to the cloud.

METALIB

Enriching Your Search Results in a Parallel Manner

Charles Draper (Brigham Young University)

Session Number: B.8.08 5/10/2012 1:30 PM-2:30 PM

Search result quality and response time is greatly improved by using external services, performing all enriching processes in parallel, and temporarily caching results. With Primo as a back-end search tool and custom software enriching its search response, we are providing rapid and rich search results to the end user.

There's a Map for That: Discovering Discovery Tools

Lauren Fancher (GALILEO, USG); Bob Trotter (GALILEO, USG, UGA); Ken Henslee (GALILEO, USG)

Session Number: B.11.11 5/11/2012 1/11/1900 11:00 AM-12:00 PM

GALILEO, Georgia's Virtual Library, has been collaborating with its member institutions on a number of discovery tool implementations, including EBSCO Discovery Service, Summon, Primo, and MetaLib Plus. Each product has strengths and weaknesses, including different tools for both mapping sources of metadata into the central index and also shaping the results. Join staff members of the GALILEO initiative in this review of their experiences and findings of these rapidly evolving products.

POSTERS

Closed Stacks – Accessible to All

Dror Berger (The National Library of Israel)

5/9/2012 11:45:00 AM-1:15 PM

OPAC via Primo for Office Delivery

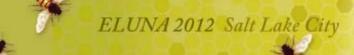Brian Thompson (The University of Iowa Libraries)

5/9/2012 11:45:00 AM-1:15 PM

Primo: Outside the (Search) Box

Lauren Magnuson (Trine University); Noah Brubaker (University of Indianapolis)

5/10/2012 12:00 PM-1:30 PM

Suppressed in Voyager ≠ (does not equal) Removed from Summon

Martha Gunnarson (Worcester Polytechnic Institute)

5/9/2012 11:45:00 AM-1:15 PM

University Partners for Alma Implementation

Jimmy Ghaphery (VCU Libraries)

5/9/2012 11:45:00 AM-1:15 PM

Voyager Mobile Skin Developed Using the jQuery Mobile Web Framework

Denise Dunham (University of Rochester Libraries)

5/9/2012 11:45:00 AM-1:15 PM

PRIMO

Bringing it all together in Primo: Discovery across disparate types of digital content

Sandra McIntyre (Utah Academic Library Consortium); Tracy Medley (University of Utah); Ian Godfrey (University of Utah)

Session Number: B.4.02   5/9/2012 5:15 PM-6:15 PM

The Primo implementation at the University of Utah has created successful unified discovery for a wide range of digital content types: bibliographic records (Aleph), e-resources (SFX), Primo Central, Course Reserves, and digital collections from consortial partners (CONTENTdm, BEPress, ArchivalWare, and others). Bringing together these disparate content types has required adaptations to vocabulary, normalization rules, display options, and workflows. This process has forged a new understanding of how best to serve today's university students and faculty with integrated discovery.

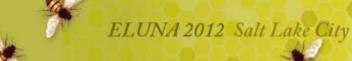**BYU's Custom Search Interface**

Curtis Thacker (Brigham Young University)

Session Number: B.9.03   5/10/2012 4:15 PM-5:15 PM

A presentation on BYU's new frontend search interface. We'll share why we decided to replace the native interface, and the decisions we made in the custom interface. We will also show off our new responsive design.

Changing the Channel: Bringing Primo Central API Content into VuFind

Spencer Lamm (Swarthmore College/TriCollege Consortium); Chelsea Lobdell (TriCollege Consortium)

Session Number: B.12.01   5/11/2012   1:00 PM-1:30 PM

Beginning in June of 2010, the TriCollege Consortium of Bryn Mawr, Haverford and Swarthmore worked to select, design and implement a channeled discovery layer modeled after those implemented at Villanova, BYU, NCSU, and the National Library of Australia and which is set to launch in spring 2012. We selected VuFind as the solution for the overall discovery layer and the library catalog channel and the Primo Central Index for the channel devoted to article content. VuFind is designed to work with the Summon API so implementation required that we extensively modify VuFind's code so that it could integrate and display content from the PCI API. Our talk will cover why we choose this solution, a tutorial on how we integrated and displayed PCI content via the X-Services Brief Search API, and lessons learned from the process of integrating a new content source into an existing discovery layer product.

Discovery verses Precision: A Comparison of Known Item Searching in Primo and Aleph

Steve R. Thomas (Univ. of Tennessee, Knoxville)

Session Number: B.11.06   5/11/2012   1/11/1900 11:00 AM-12:00 PM

Anecdotal reports from our public services librarians suggest that searching within our new discovery system (Primo) is not as effective – for known items - as searching in our traditional catalog (Aleph). This project prepares a list of titles (from the MARC 245 field) for a randomly selected set of records and then compares the results searching these titles in Aleph using (1) title browse, (2) title keyword, and (3) general keyword with searching Primo using (1) my exact phrase in title, (2) my query words in title, and (3) my query words anywhere in the record.

Enhancing Primo facets and scopes

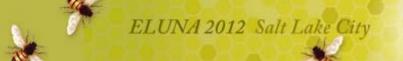Anne L. Highsmith (Texas A&M University)

Session Number: B.4.04   5/9/2012   5:15 PM-6:15 PM

The session will present some tips on how to use Primo normalization rules and mapping tables to enhance Primo facets and scoping. The presentation will include: 1) ways to modify the top-level facet so that the "Available" facet can be re-defined; 2) creating a local scope for life sciences-related material based on LC call number ranges; 3) modifying the SFX normalization rules and dedup matching algorithm to improve deduping between SFX records and ejournals records from the library's catalog. The audience will learn how to make the normalization rules changes described as well as how to create locally-defined mapping tables to support the custom norm rules.

Implementation of a discovery layer: the Franklin College experience

Susan Leach-Murray (Franklin College); Jessica Mahoney (Franklin College)

Session Number: B.10.06   5/11/2012   9:00 AM-10:30 AM

Franklin College implemented Primo in the fall semester of 2011. Two librarians will share their experience and findings in regards to this process. The discussion will focus on interface design and functionality, as well as usage statistics to evaluate the discovery layer.

Implementing Primo and SFX in One Shot as a Total Care Customer

Regina Koury (Idaho State University Library); Cheryl Sebold (Idaho State University Library); Janet Warnke (Idaho State University Library)

Session Number: B.11.08 5/11/2012 1/11/1900 11:00 AM-12:00 PM

Step one, step two, step three... done! Not that easy! At Idaho State University we switched from EBSCO A-Z and link resolver to SFX. We also replaced our Voyager server, upgraded from 6.5.1 to 8.1, and implemented Primo. This presentation will discuss our workflow, what we wished we knew before the switch, and lessons learned.

Implementing Primo: a Holistic Approach

Kate Montgomery (Tulane University); Gena George (Tulane University)

Session Number: B.9.06 5/10/2012 4:15 PM-5:15 PM

During the summer of 2011, Tulane University moved its ILS, OpenURL link resolver, and federated search servers to the cloud. While we were working on the move to the cloud, we also started our implementation of Primo. With so many projects going on at the same time, we had to involve a large group from across the library in order to get Primo live by the start of the fall semester. In this presentation we will talk about how we organized the overall project in coordination with the move of our other systems, the tasks involved, our customizations for the user interface and the Back Office, marketing and publicity considerations, training, and what we've learned from usability testing. We will also discuss what proceeded as planned, problems and issues that arose, and give suggestions so others can learn from our experiences.
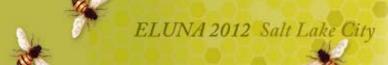
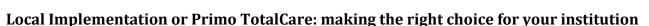## Importing Finding Aids into Primo at the University of Iowa Libraries

John Osborn (University of Iowa Libraries); Sue Julich (University of Iowa Libraries); Ellen Jones (University of Iowa Libraries)

Session Number: B.6.05 5/10/2012 9:00 AM-10:00 AM

At the University of Iowa Libraries, we've undertaken a project to convert all of our Finding Aids from web pages to Archon. The data requires quite a bit of manipulation -- from HTML to Archon to EAD to Dublin Core before it is ingested into Primo. We'll talk about some the issues we faced and the solutions we've found.

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

Michael North (Northwestern University); Bennett Ponsford (Texas A&M University); David Podboy (Pacific Northwest National Laboratory Technical Library); Michael Tartaglione (Ex Libris)

Session Number: B.7.05   5/10/2012 10:30 AM-12:00 PM

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 three different implementation options and from Ex Libris.

Making Primo Normalization rules work for our library

Chris Erickson (BYU)

Session Number: B.3.07   5/9/2012 4:00 PM-5:00 PM

A discussion of the Normalization Rules review process that we have established to help library staff understand Primo displays and the rules behind them and why that may be different from the ILS system. Primo support staff and librarians from several different areas meet regularly to review the normalization rules, mapping tables, and displays in order to understand the design implications and explore possible changes. This helps staff and patrons locate materials effectively.

Primo at Northwestern - Story of Local Development and ELCommons

Michael North (Northwestern University); Geoff Morse (Northwestern University)

Session Number: B.10.09   5/11/2012 9:00 AM-10:30 AM

Development of the Northwestern Primo environment has been the result of "out of the box" installation, combined with our own local development, as well as utilizing the developments posted on ELCommons by other Primo developers. We will share our initial installation of Primo, show what "development enhancements" we have performed ourselves, and then show what developments we have implemented that we obtained from ELCommons. Our local developments will include our Blackboard/Primo integration environment, our two different Primo User Interfaces (Primo App provided and our Locally Developed Interfaces), our unique solution to further enhance FRBR-ization, and our mobile Primo environment. We will conclude with a tour of ELCommons and demonstrate how an institution can use ELCommons to further enhance their Library Primo environment. Audience: beginning to moderate Primo sites.

Primo Central trial, usability testing, and implementation options

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

Session Number: B.8.11   5/10/2012 1:30 PM-2:30 PM

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.

Primo Implementation at the University of Kansas

Scott Hanrath (University of Kansas Libraries)

Session Number: B.3.08   5/9/2012 4:00 PM-5:00 PM

I will share mid-stream lessons learned from our implementation of Primo at the University of Kansas. In particular I will highlight (with moderate technical detail) how we: harvested data from a not-quite compliant OAI-PHM source, automated institutional holdings updates from a non-SFX link resolver, ported UI add-ons from our catalog interface to Primo (e.g., stacks maps and locations, a request link for our Aeon special collections request system), made grateful use of and modified code from EL Commons CodeShare, and reached out to our Libraries Instructional Services staff to help our Libraries staff engage with Primo and provide our implementation team with feedback.

Primo Polish: User Study Findings and Implementations

Colt Pini (The Church of Jesus Christ of Latter-day Saints); Josh Parry (The Church of Jesus Christ of Latter-day Saints)

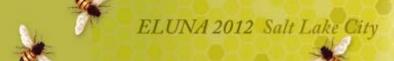Session Number: B.10.10   5/11/2012 9:00 AM-10:30 AM

We performed a user study that returned very interesting and informative results. We will be presenting on (briefly) the methods of the user study and (in detail) on the findings and the way we implemented the results. This study resulted in a dramatic paradigm shift in the way the media was presented to the user to streamline work flow and minimize disruption and includes making Primo a responsive (mobile supported) web application.

Primo Realness: Implementing Course Reserves

Tracy Medley (University of Utah); Ian Godfrey (University of Utah)

Session Number: B.7.08   5/10/2012 10:30 AM-12:00 PM

This session will outline the implementation of Course Reserves discovery via Primo at the University of Utah Libraries. Configuration, interoperability, testing, obstacles, achievements, feedback from patrons and ongoing workflow will be discussed.

Primo Reporting: using 3rd party software to create Primo reports and analyze Primo statistics

Alison Hitchens (University of Waterloo Library)

Session Number: B.3.09   5/9/2012 4:00 PM-5:00 PM

Learn how we used Primo's RPT00 views to create reports with IBM Cognos Impromptu and an OLAP cube (On-line Analytical Processing) with IBM Cognos PowerPlay. See how the data in the cube can be analyzed and examples of the Impromptu reports. We will discuss how we configured the cube and how we worked with Ex Libris Support to determine the meaning of some RPT00 data. This presentation will also cover using Google Analytics to supplement Cognos.

Pulling back the curtain: What really happens when you perform a search in Primo.

Dale Poulter (Vanderbilt)

Session Number: B.9.14   5/10/2012 4:15 PM-5:15 PM

Searching in Primo is a simple process for users, but what actually happens when the search button is clicked. The presentation will discuss searching Primo Central, the local index, Metalib, and SFX (with umlaut). The focus will be on the search process and the processing of the results to the user. Several questions will be answered including why does Primo Central not dedup with local resources. The target audience for this session will be staff that utilize and teach Primo. This will be a general discussion of Primo and not focused on configuration.

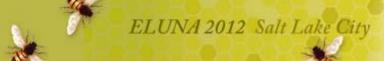## User Testing of Primo at Tulane

Dave Comeaux (Tulane University); Kate Montgomery (Tulane University)

Session Number: B.12.06   5/11/2012 1:00 PM-1:30 PM

Tulane University implemented the Primo web-scale discovery system for the Fall 2011 semester. Part of the implementation strategy was to evaluate the system's usability and patron satisfaction. To accomplish these goals, a user assessment committee was formed. This committee developed, implemented and analyzed a both a usability test and online survey. 20 patrons participated in our usability testing, and over 200 responded to our survey. Wonder what they said? Let us tell you!

Using Rosetta and Primo as a public digital collections management and delivery system

Jon Morley (LDS Church History Library); Colt Pini (LDS Church History Library)

Session Number: B.6.10   5/10/2012 9:00 AM-10:00 AM

This class will discuss the successes and challenges of using Rosetta as a digital asset management tool to build our library collections. We will show how we utilized the integration of Primo to create solutions that discover and deliver digital content in a thoughtful and effective method. Discussion will include the implementation and the crucial lessons learned which include: asset workflow, metadata utilization, multiple institution capabilities, systems integration, digital asset rights management and others. We will discuss the improvements that were made in the delivery system through modifying the image viewers to accommodate the needs of the institutions and specific digital collections."

View Management for multiple visual identities

Colt Pini (LDS Church History Library); Josh Parry (LDS Church History Library)

Session Number: B.8.14   5/10/2012 1:30 PM-2:30 PM

We have had to tackle the problem of having multiple visual identities. Several of the tackled issues are CSS management, branding management, and login screens. We will be diving into the solution for each hurdle we have had to tackle in allowing multiple libraries to use our instance of Primo, while maintaining unique visual identities. This will include what we did, and how we did it.

PRODUCT WORKING GROUPS

Aleph Product Working Group (PWG)

Steve Thomas (University of Tennessee)

Session Number: B.4.01   5/9/2012 5:15 PM-6:15 PM

Metalib Product Working Group (PWG)

Mark Needleman (University of Florida)

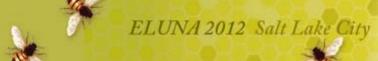Session Number: B.10.08   5/11/2012 9:00 AM-10:30 AM

Primo Product Working Group (PWG)

Michael North (Northwestern University)

Session Number: B.2.06   5/9/2012 2:30 PM-3:30 PM

SFX Product Working Group (PWG)

Marina Oliver (Texax Tech University)

Session Number: B.7.13   5/10/2012   10:30 AM-12:00 PM

Verde Product Working Group (PWG)

Betsy Friesen (University of Minnesota, Twin Cities)

Session Number: B.4.06   5/9/2012   5:15 PM-6:15 PM

Voyager Product Working Group (PWG)

Ted Schwitzner (Illinois State University)

Session Number: B.4.07   5/9/2012   5:15 PM-6:15 PM

ROSETTA

Rosetta: One year later

Edward M. Corrado (Binghamton University Libraries); Sandy Card (Binghamton University Libraries)

Session Number: B.10.12   5/11/2012   9:00 AM-10:30 AM

Librarians from Binghamton University will talk about their experience using the Rosetta Digital Preservation System. Last year, Binghamton presented about their first 5 months using the software. In 2012, they will follow up on last years presentation and share some of the things that they learned that will help librarians who are or may be considering implementing Rosetta. Although this session is geared towards Rosetta, much of the content will be useful for anyone considering a digital preservation solution.

Using Rosetta, StorageGRID, and new IBM tape solutions to implement state-of-the-art digital preservation

Gary Wright (The Church of Jesus Christ of Latter-day Saints)

Session Number: B.2.09   5/9/2012   2:30 PM-3:30 PM

The Church of Jesus Christ of Latter-day Saints is implementing a world-class digital preservation system based on Ex Libris Rosetta, NetApp StorageGRID, and new, advanced IBM tape solutions. The archive may reach 100 petabytes this decade. Sophisticated technologies that continuously ensure integrity of the archive will be presented. A tool to help Rosetta customers extract technical metadata from files within MXF wrappers will be introduced, and plans for state-of-the-art digital preservation facilities will be previewed.

REGIONAL USER GROUPS

DC Ex Libris User Group (Washington DC)RUG

Suzanne Picken (WRLC)

Session Number: B.5.01   5/9/2012 6:15 PM-7:15 PM

Eastern Canada RUG

Pascal Calarco (University of Waterloo Library)

Session Number: B.5.02   5/9/2012 6:15 PM-7:15 PM

Ex Libris Northeast User Group (ENUG)RUG

Kevin Collins (SUNY Stony Brook)

Session Number: B.5.03   5/9/2012 6:15 PM-7:15 PM

Ex Libris Southwest User Group (eSWUG)RUG

Chris Lincoln (The Aerospace Corporation)

Session Number: B.5.04   5/9/2012 6:15 PM-7:15 PM

Great Lakes Users Group (GLUG)RUG

Sherrie Kristin (Purdue University Calumet)

Session Number: B.5.05   5/9/2012 6:15 PM-7:15 PM

Upper Midwest Users Group (UMWUG)RUG

Ellen Kotrba (ODIN - Online Dakota Information Network)

Session Number: B.5.06   5/9/2012 6:15 PM-7:15 PM

SFX

E-books in SFX

Grace Liu (University of Windsor)

Session Number: B.4.03   5/9/2012 5:15 PM-6:15 PM

In 2011, the University of Windsor Leddy Library started an e-book project that aimed to address the issues related to bibliographic control and access to this type of resources. In this project, e-books have been activated or created as local records as appropriate in SFX and a link to their associated records in SFX have been established in the library catalogue, the Conifer (the Canadian version of Evergreen ILS) OPAC. This presentation will share our experience and approaches to issues and challenges that we encountered in this project.

eJournal Navigator - Extensive Customization of SFX Search Interface at Georgia Health

Hiu-Shan "Christina" Yau (Georgia Health Sciences University)

Session Number: B.2.04   5/9/2012 2:30 PM-3:30 PM

The Georgia Health Sciences University (GHSU) library's eJournal Navigator is the SFX interface which has been customized and enhanced extensively to provide better access.   All the SFX pages including: the A-Z list, search page, search results, and the SFX Menu, get different styles and look. Many vendor-provided features were enabled and customized, including: direct linking, enhanced left mixed menu, feedback, and bX. Useful links to Impact Factor from Journal Citation Reports are also included. The presentation will share the work and experience gained during the customization work. The audience will have a better idea of how to localize and customize their own SFX instances.

Fun with SFX and stat_object_offline

Carol Ou (Sandia National Laboratories Technical Library)

Session Number: B.1.05   5/9/2012 1:15 PM-2:15 PM

SFX's built-in statistical reports can be handy, but sometimes you might want to slice and dice SFX statistics a little more closely than those reports allow. This session will discuss some preliminary efforts to use the data in SFX's stat_object_offline table to learn more about our users and how they use SFX.
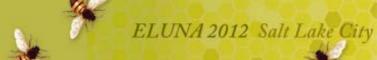
How to use SFX raw data and other data sources to build applications for end users

Fengzhi Fan (Robert Wood Johnson Library of Health Sciences, UMDNJ)

Session Number: B.8.09   5/10/2012 1:30 PM-2:30 PM

This presentation will demonstrate some unique home-grown applications which include a simplified version of A-Z e-journal listing and a quick search toolkit which is a single search box for all e-resources such as subject guides, e-databases, e-books, e-journals and e-articles. The applications not only expose their data directly from SFX data tables, but also from various local and external data sources. This presentation will focus on design considerations, implementation details, code snippets, and useful experiences.

KB update reports including conversion to Excel format

Rich Wenger (MIT)

Session Number: B.11.09   5/11/2012 1/11/1900 11:00 AM-12:00 PM

The KB Update Reports generated by SFX do not include all the information that we require. We are developing some scripts that enhance the reports in various ways: by SQL lookup, by reading and cross-referencing other spreadsheets, by introducing color in strategic ways, and by converting the enhanced report records to Excel format so librarians do not need to import text files into Excel. This session will explain the processing of the reports and show examples.

Processing MARCIt! file: the "Single Record" approach at UT Arlington Library

Haoyang "Peter" Zhang (UT Arlington Library)

Session Number: B.10.11   5/11/2012 9:00 AM-10:30 AM

MARCIt! provides enhanced MARC records for electronic journals in SFX. While some libraries choose to have multiple bibliographic records by format for a journal, UT Arlington Library has been using the "Single Record" approach where each journal has a single bibliographic record regardless of format. Both electronic and print holdings are attached to the same bibliographic record. This presentation discusses how the MARCIt file is processed, bulk imported to Voyager, and reviewed under such approach.

The enhancements to SFX Citation Linker

Fei Xu (South Dakota State University)

Session Number: B.9.04   5/10/2012 4:15 PM-5:15 PM

This presentation discusses how to implement and enhance the SFX citation linker that facilitates citation search with minimal but sufficient citation metadata. The future endeavors to enhance the citation linker for Ex Libris will be also addressed. The South Dakota State University Libraries' implementation experience should be useful for libraries implementing their citation linkers.
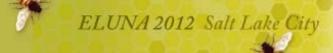
The SFX knowledgebase: techniques, problems, solutions

Kathy Varjabedian (Los Alamos National Laboratory Research Library)

Session Number: B.3.10   5/9/2012 4:00 PM-5:00 PM

Managing the SFX knowledgebase update reports is essential to keep access current for what is published and how it is available online. I will explain techniques and tips we have developed for handling the weekly reports in SFX4, and

beyond that, the overall problems and issues in working with the knowledgebase, such as title changes, multiple packages, subscription vs. open access, data quality, and the wider environment of publishers.

SPECIAL INTEREST GROUPS

Aleph Acq/Serials Special Interest Group (SIG)

Laura Morse (Harvard University)

Session Number: B.9.01   5/10/2012 4:15 PM-5:15 PM

Aleph ARC Special Interest Group (SIG)

Steve Bischof (Five Colleges Inc.)

Session Number: B.8.01   5/10/2012 1:30 PM-2:30 PM

Aleph Cat & Authority Special Interest Group (SIG)

Gwyneth Duncan (Duke University, Perkins Library)

Session Number: B.10.01   5/11/2012 9:00 AM-10:30 AM

Aleph Circ/Reserve Special Interest Group (SIG)

Ellen Jones (University of Iowa)

Session Number: B.8.02   5/10/2012 1:30 PM-2:30 PM

Aleph EDI Special Interest Group (SIG)

Steven Bischof (Five Colleges Inc.); KJ Collins (Stony Brook University)

Session Number: B.1.02   5/9/2012 1:15 PM-2:15 PM

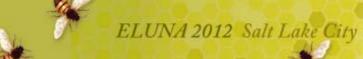### Aleph ILL Special Interest Group (SIG)

Linda Allbee (ODIN)

Session Number: B.7.02   5/10/2012 10:30 AM-12:00 PM

Aleph Systems & Reporting Special Interest Group (SIG)

Jeannie Dixon (CCLA)

Session Number: B.11.02   5/11/2012 1/11/1900 11:00 AM-12:00 PM

Aleph X -Server Special Interest Group (SIG)

Laura Morse (Harvard University)

Session Number: B.1.03   5/9/2012   1:15 PM-2:15 PM

Consortia Systems Special Interest Group (SIG)

Kristine Hammerstrand (CARLI)

Session Number: B.11.04   5/11/2012   1/11/1900 11:00 AM-12:00 PM

Large Research Libraries Special Interest Group (SIG)

Tracey Robinson (Harvard University)

Session Number: B.1.06   5/9/2012   1:15 PM-2:15 PM

Voyager Circ/Res Special Interest Group (SIG)

Viki Timian (University of Georgia Libraries)

Session Number: B.2.11   5/9/2012   2:30 PM-3:30 PM

Voyager Law Libraries Special Interest Group (SIG)

Ruth Funabiki (University of Idaho Law Library)

Session Number: 5/10/2012   12:00 PM-1:30 PM

Voyager Serials Special Interest Group (SIG)

Sherrie Kristin (Purdue University Calumet)

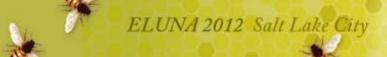Session Number: B.6.11   5/10/2012   9:00 AM-10:00 AM

VERDE

Verde - A Sharing Session

Allison Erhardt (University of Manitoba)

Session Number: B.2.10   5/9/2012   2:30 PM-3:30 PM

Come and join a discussion on all things Verde. Share your secrets for manipulating the General Report of eProducts or for inputting data.   Presenter will bring a list of topics to be discussed, but bring your ideas and trade secrets as well!

VOYAGER

Access Queries for Decision-Making

Cathy Salika (CARLI)

Session Number: B.1.01   5/9/2012 1:15 PM-2:15 PM

You've probably used queries to show how much your library is doing, but have you considered using them to help you make decisions for your library? We'll look at some Access queries that can help you think about staffing levels, find snags in your workflows, and evaluate your circulation policies. If you're a query writer, we may be looking at some tables that you haven't considered before and you just might see an Access technique or two that is new to you.   If you're not a query writer, you might still be interested in the potential for queries like these.

Adding QR Codes to the Library Catalog

Benjamin Rawlins (Georgetown College)

Session Number: B.7.01   5/10/2012 10:30 AM-12:00 PM

In addition to implementing a mobile catalog, our library was interested in other ways that we could make our catalog more mobile friendly. To do that we decided to add two QR code features to our catalog. This session will give a brief history behind the technology, how QR codes are being used outside of libraries, and how our library has implemented them in our online catalog.

Authority Control in Voyager

Stephen O'Connor (University of Rochester Libraries)

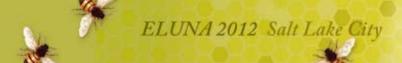Session Number: B.8.04   5/10/2012 1:30 PM-2:30 PM

Basic Authority Control in Voyager with a focus on using Global Headings Change to automate the process. The client-side processes will be discussed as well as the associated server-side jobs.

Auto-loading book vendor's MARC records to Voyager database

Yongming Wang (The College of New Jersey Library)

Session Number: B.2.02   5/9/2012 2:30 PM-3:30 PM

The GOBI book ordering system of Yankee will have MARC records ready for library-ordered items. This Perl program will login to the vendor server, ftp the newly available MARC records to the local Voyager server, and bulk-import the records, and inform the librarians of the result by email. By setting up a cron job, all these tedious jobs are done automatically.

Banner and Bursar: A match made in … somewhere!

F. Tracy Farmer (Arkansas State University)

Session Number: B.10.03   5/11/2012 9:00 AM-10:30 AM

A few years ago our library was allowed to collect fines/fees at our circulation points. Then the campus experienced a series of misappropriations of money. The required campus money collection procedures to be changed; all money now has to be collected at the campus cashier window. Because of this we had to develop a way to process our fines/fees electronically to be loaded into the campus' ERP system, Banner, to be charged to our students.

Building a Tabbed Search for the Library

Zoe Friedlander (Margaret Herrick Library)

Session Number: B.6.02   5/10/2012 9:00 AM-10:00 AM

Do you have multiple electronic resources but no way to search across them? Are your patrons confused about their search options? One way to give an "at-a-glance" view of your library's resources is to present patrons with a tabbed search box. Though they may still need to search different resources, you can provide them with a clear view of just what your resources are. Our library uses Voyager from Ex Libris, Inmagic DBTextWorks for SQL, and CONTENTdm; we also want to let users search our Web site. Rather than throw search boxes all around the page, we are building a tabbed search to present all the options together. This presentation shows you how to do the same.

Creating customizable financial reports using Microsoft Access

Denita Hampton (Georgia State University); Stella Richardson (Georgia Tech Institute)

Session Number: B.11.05   5/11/2012 1/11/1900 11:00 AM-12:00 PM

Creating useful fines and fees reports can be challenging. Georgia Tech Library uses a standard server report that runs automatically and cannot be edited. Georgia State University Library developed a report using Access queries. Their final report displays in an Excel spreadsheet that can be easily edited. In this session, we will compare these two different processes and discuss pros and cons of each.

Display new materials from Voyager in Libguides with a RESTful interface.

Andy Taylor (University of North Alabama)

Session Number: B.12.02   5/11/2012 1:00 PM-1:30 PM

I developed a Perl script that searches recent additions to Voyager and displays it so that it can be RESTfully queried and easily displayed in a libguide. So, for example, a subject guide on Biology could have a customized, automatically updated list of materials from the catalog displayed by simply incorporating a URL like http://www.myvoyager.com/vwebv/?q=qh+qk+ql for the LCSH areas QH, QK, and QL.

Ebookmobile: Delivering Subject-Specific Ebooks to Your Inbox

Kathryn Lybarger (University of Kentucky)

Session Number: B.6.03   5/10/2012 9:00 AM-10:00 AM

Today's users are overloaded by the massive amount of information available to them, even within their own library's collection. Ebooks cataloged in batches of hundreds (or thousands) make a generic new ebook shelf prohibitively large and mostly uninteresting to a subject researcher. The Ebookmobile helps researchers become aware of new ebooks in the library collection in their specific area of interest, so they can start using them immediately. Ebookmobile checks the Voyager database daily for newly cataloged ebooks and creates feeds for ranges in a classification scheme. Researchers can choose to receive a daily e-mail or subscribe to an RSS feed using their e-mail client or feed reader. Subject librarians may include such feeds on LibGuides as self-updating new ebook shelves.

Empower Library Staff (just a little) with Voyager's WebAdmin

Janice Christopher (Univ. of Connecticut)

Session Number: B.8.07   5/10/2012 1:30 PM-2:30 PM

Do you need Voyager batch jobs on demand? Do you harbor a secret desire to "do stuff" that only your systems librarian does? Voyager provides an easy-to-use web interface, WebAdmin, that allows library staff to run server batch jobs for Acq, Cat, Circ, and OPAC; load and extract bibs; and view job output, all without the need for command-line access to the server. Busy systems staff can benefit, too. Come find out how!

Enhance Your Request – Tips for better enhancement requests

Lesli Moore (Texas Health Science Libraries Consortium); Sherrie Kristin (Purdue University Calumet)

Session Number: B.2.03   5/9/2012 2:30 PM-3:30 PM

When Voyager (or any Ex Libris product) does not have a desired feature, you need to request an enhancement. Where do you start? What should you write? How much detail is too much or not enough? This session is designed to answer those questions. Learn what makes an enhancement request well-written and the difference between an enhancement and bug.

From Voyager to your website: Using Linux Shell scripts and Oracle SQL*Plus to generate web pages.

Michael Cummings (George Washington University); James O. Austin (Washington Research Library Consortium)

Session Number: B.9.05   5/10/2012   4:15 PM-5:15 PM

Learn how to generate web pages on your library web site based on ExLibris Voyager data. The George Washington University Library generates a "New Books Shelf" list, and other pages on our website, using simple Shell scripts and Oracle Instant Client / SQL*Plus for Linux on a server hosted by the Washington Research Library Consortium (WRLC). We will share our scripts and explain how to configure them for reuse.

Implementing Voyager in a Corporate Library

Bee Bornheimer (Qualcomm Inc.)

Session Number: B.9.07   5/10/2012   4:15 PM-5:15 PM

The Qualcomm Library supports a Fortune 500 company with a global population base of around 20,000 employees. We launched on Voyager 8 in the fall of 2011. This presentation will review the various challenges and opportunities that we faced in mapping our particular workflows to the Voyager system.

Library Express - Using Document Delivery of ILLiad in the Voyager Catalog

Todd King (Eastern Kentucky University Libraries)

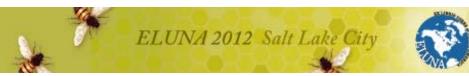Session Number: B.7.04   5/10/2012   10:30 AM-12:00 PM

In the Voyager Catalog at Eastern Kentucky University, we have added a button, called "Get It," next to the item status that gives patrons the option to request that particular item. When clicked, the item's Open URL information is sent to ILLiad for the user to place a request. To the user, it is a quick and seamless process; for our staff, it is an involved process to complete the request and get the item to a pickup location for the patron to get. But, using ILLiad helps us track the requests and communicate with the patron. By placing the service in the catalog, we can offer the delivery of books to the patron, even if the item is there on the shelf already. With help from shared code, we are able to offer this new and exciting service for our patrons. This presentation will cover not only the code setup and how it works in the catalog and with ILLiad, but also some behind-the-scenes looks at how we deal with the requests once they come in. If you've ever thought about offering such a service at your library, then we can share what we've done to help you get started with your own, "Library Express."

Managing bulk loads of records for electronic materials in a consortial environment

Shelley Ramberg (The University of Montana); Teressa Keenan (The University of Montana)

Session Number: B.9.09   5/10/2012   4:15 PM-5:15 PM

Our consortia started bulk loading electronic resources when those collections were small and simple. Since then, the collections (and processes) have become increasingly complex. This session will cover some of the problems we've encountered, some of the decisions we wish we'd made earlier (or made differently), some of the tools we've found invaluable, and the methods we've used for cleanup and ongoing maintenance of our electronic resource collection/s.

Moving a Voyager Consortium up to the Cloud

Tari Keller (University of Kentucky)

Session Number: B.9.11   5/10/2012   4:15 PM-5:15 PM

In December 2011-January 2012 the Kentucky Voyager Consortium moved to the Ex Libris Voyager Direct hosting environment from their hub servers in Lexington and Louisville. This presentation will cover the migration preparation, process and experiences of the 19 institutions.   What information do you need to gather for the move? What happens during the migration? What should be tested during the move? What was learned during the process?   Was the move worth it? Come find out!

Navigating the Workflows of Shelf-Ready, Embedded Order-Data, and EDI Invoicing: A Comparison of How to Make Vendors' Unique Online Ordering Systems Play Nice with Voyager

Felicity Brown (American University Library)

Session Number: B.11.10   5/11/2012   1/11/1900 11:00 AM-12:00 PM

American University has transitioned from Blackwell, to Coutts, and most recently to Yankee Book Peddler in setting up shelf-ready workflows, using EOD and EDI through vendors' online ordering systems. In Acquisitions, streamlining workflows is critical to controlling would-be chaos. This presentation will demonstrate how we've navigated these different vendors' online ordering systems, and have convinced the vendors to adapt to our workflows, rather than having to tailor our workflows to them.
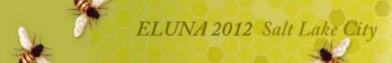
Patron-Oriented Purchasing of E-Books in Voyager

Ted Schwitzner (Illinois State University); Chad Buckley (Illinois State University); Julie Murphy (Illinois State University); Kristine Hammerstrand (Consortium of Academic and Research Libraries in Illinois)

Session Number: B.7.06   5/10/2012   10:30 AM-12:00 PM

Patron-driven acquisition (PDA) models represent different workflows than those seen with firm and approval orders. These differences affect budgeting, planning, order tracking and catalog record maintenance. Consortium-level application of PDA adds additional complexities. The presenters will share lessons learned from pilot projects involving different vendors and models, and at the local and consortium levels. Emphasis is on the vendor and Voyager implementations for acquisitions, cataloging and discovery, along with some collection development aspects.

Queries that Really Count: Understanding Totals in Access

Cathy Salika (CARLI)

Session Number: B.7.09   5/10/2012 10:30 AM-12:00 PM

The more you know about how Access counts things, the more accurate and useful your queries will be. We'll take a look at the basics of counting, ways to handle date ranges, and crosstabs. This session, for beginning and intermediate query writers, is an update of a session given at ELUNA 2010.

Real-time web-based LSMS (Library Stacks Management System)

Nackil Sung (University of Hawaii at Manoa)

Session Number: B.2.07   5/9/2012 2:30 PM-3:30 PM

In 2004, Sung and Sung developed Library Stacks Management System (LSMS) while they were in Eastern Illinois University.   The developers, now in University of Hawaii at Manoa, improved the system by rewriting the program under the web environment. The back-end is based on MySQL-Apache-PHP and the front-end requires only a web-browser. The web-based inventory system supports real-time access to Voyager and allows multi-user scanning processes.

ShelfLister 3.0 for the iPad

Michael Doran (University of Texas at Arlington)

Session Number: B.8.13   5/10/2012 1:30 PM-2:30 PM

This presentation will cover the new iPad/tablet version of ShelfLister, the Voyager client for generating real-time shelf lists. In this new version 3.0, the user interface has been optimized for touch navigation and the larger screen size allows for more, and better, information display. This version 3.0 will also include enhancements such as Call Number entry for the Dewey Decimal classification and multilingual interface capability. Also covered will be using iPad-compatible, Bluetooth-enabled barcode scanners to make a truly mobile platform combination for staff working in the stacks. For more information on previous versions of ShelfLister, see http://rocky.uta.edu/doran/shelflister/.

Show Time: An easy way to publish your library hours and events

Jingshan Xiao (University of Texas at San Antonio)

Session Number: B.1.10   5/9/2012 1:15 PM-2:15 PM

Spending much time to update your library day-by-day library hours web page? The presentation will show you how to do it in seconds. The presentation will discuss how to leverage data from voyager oracle database to generate a

descriptive iCalendar date file, then publish to most popular web-based, desktop, and mobile calendar applications using different programming languages . In addition, the presentation will talk about how to integrate library event information, such as for html-based library event and instruction course schedule, to your library day-by-day calendar.

Text messaging: a new way to enhance your library services

Stella Richardson (Georgia Tech Library); Larry Hansard (Georgia Tech Library); Denita Hampton (Georgia State University Libraries)

Session Number: B.1.11   5/9/2012 1:15 PM-2:15 PM

Text messaging is a way to communicate instantly with your users. Georgia Tech Library is in the process of creating a texting system that will allow staff to send quick message alerts to patrons regarding availability and status of short loan items, such as Reserves. In our talk we'll discuss how we've modified VuFind code to set up a texting service.

To The Stacks!: Inventory Using Voyager

Julie Kabelac (Wells College)

Session Number: B.12.05   5/11/2012 1:00 PM-1:30 PM

After combing Voy-L for inventory processes and extracting the least technology-intense pieces, we created a workflow using Voyager (7.2.2) Circulation, Cataloging, and Access Reports, a laptop, and a Bluetooth scanner. I will talk about our SysAdmin preparation, the process itself (applies to call number ranges or locations) and the periodic follow up, including the use of Pick and Scan, various tables and queries, and unexpected issues encountered.

Using a Click Tracker to Record Electronic Resource Usage

Liza Weisbrod (Auburn University Libraries); Clint Bellanger (Auburn University Libraries); Jeremy Goslin (Auburn University Libraries)

Session Number: B.7.14   5/10/2012 10:30 AM-12:00 PM

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.

Using Apache's mod_rewrite to Redirect Mobile Devices to your Mobile Site

Ralph Arbelo (University of Rochester)

Session Number: B.6.09   5/10/2012 9:00 AM-10:00 AM

This session describes how to use Apache's mod_rewrite to redirect mobile devices to their mobile Tomcat site. The presentation will cover the prerequisites required for using mod_rewrite, explain how rewrite rules work, how to use them and how to troubleshoot if they don't work. Handouts will include details, examples and links to other resources. Also, information will be provided on how to obtain a mobile skin for those who don't have one.

Using JavaScript to Customize your Voyager tomcat interface

Denise Dunham (University of Rochester)

Session Number: B.9.15   5/10/2012 4:15 PM-5:15 PM

This session will introduce attendees to the basics of using JavaScript to customize the Voyager tomcat interface, including how and when to use JavaScript to make customizations. Several examples will be described from the basics of installing and modifying available shared code to more advanced techniques including JavaScript libraries such as jQuery. Code and instructions will be made available for attendees to implement and customize examples in their own catalogs.

Using on-shelf holds instead of callslips for branch to branch lending

John Greer (Mansfield Library/University of Montana)

Session Number: B.12.07   5/11/2012 1:00 PM-1:30 PM

The University of Montana Libraries' goal was to make the process of requesting material from the OPAC as easy as possible. This meant that we didn't want the user to have to decide between placing a hold or placing a call slip to request any item that was desired. One choice- one result was the goal. This presentation will show how the library setup the voyager on-shelf holds feature to be used as a request mechanism for branch to branch material requests, on-shelf requests, in library requests and others. I will show the reports that are used to pull items from the shelves, go over the circulation process, show how each branch responds, and cover the pros and cons of serving your patrons in this manner.

Voyager ILL, Ariel, Rapid, and DCB Data Unified on the My Account Page

Ken Herold (Hamilton College)

Session Number: B.11.13   5/11/2012 1/11/1900 11:00 AM-12:00 PM

Hamilton College combines data from Voyager ILL, Ariel Document Delivery, RAPID ILL, and ConnectNY, a consortial union catalog using INN-Reach, into a single reporting section of requests and direct PDF delivery on the My account page in Tomcat Web Voyage. Not a how-to for others to emulate exactly, the demonstration illustrates the power of open architecture for personalized services in Voyager. We employ XSLT, PHP, and Perl using our own Apache 2 instance to integrate data from Oracle, MS Access, and web services.