



ELUNA 2013 Program Sessions

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ALEPH

Aleph EDI roundtable

Friday 5/3/2013 | 1:00-2:00pm | Classic Center - Athena B | Aleph Track | B.14.07

Kevin Collins (City University of New York)

Aleph EDI Special Interest Group (SIG) is a chance to discuss all aspects of EDI with friendly people. Automation is critical for any organization trying to improve work flow efficiency in an ever changing world. (For example, RDA's impact on automated bib record loading.) This includes current issues anyone in the group is having, or possible proposals for future enhancements.

Aleph-to-Go: How CUNY adapted Aleph for a mobile population

Wednesday 5/1/2013 | 4:00-5:00pm | Classic Center - Grand 4 | Aleph Track | B.5.10

Kevin Collins (City University of New York); Alevtina Verbovetskaya (City University of New York)

New York City is the place that never sleeps and being mobile is critical: greater than 50% of the students at the 21 colleges of the City University of New York carry some type of mobile device. We have developed a mobile-friendly interface for our Aleph web OPAC, are developing texting from the catalog, and are investigating the use of tablet/laptop (running Windows 8) for library staff work (e.g., mobile reference with the full GUI application, collection development and inventories, circulation desk 'line busting,' and other professional librarian uses.) The audience will hear about our experiences, learn how to accomplish similar tasks on their campuses, and participate in a discussion about the challenges and rewards of providing mobile Aleph services to students, staff, and faculty.

Aleph Upgrades and Releases - Client Installation Perspective

Thursday 5/2/2013 | 3:45-4:45pm | Classic Center - Grand 2 | Aleph Track | B.10.07

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.

Configuring Your Aleph Bib Loaders to Run Automatically

Thursday 5/2/2013 | 1:30-2:30pm | Classic Center - Athena B | Aleph Track | B.9.05

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

Wednesday 5/1/2013 | 4:00-4:30pm | Classic Center - Grand 3 | Aleph Track | B.5.07

Corinna 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

Wednesday 5/1/2013 | 4:00-5:00pm | Classic Center - Grand 5 | Aleph Track | B.5.09

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**

Friday 5/3/2013 | 10:00-10:30am | Classic Center - Athena G | Aleph Track | B.12.13

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.

Fiscal Year Close in Aleph Acquisitions

Thursday 5/2/2013 | 11:00am-12:00pm | Classic Center - Athena B | Aleph Track | B.7.04

Christine Moulén (Massachusetts Institute of Technology)

I will walk through the Aleph fiscal year closing process, with particular emphasis on preparations for year end. We use several custom SQL reports in the weeks leading up to year end to ensure our acquisitions data is clean and ready to roll into the new year. I'll also go through the Aleph fiscal closing services and the built-in reports to review before and after the process. Assuming we have it ready before the conference, I may show a web page/form we've been discussing since last year's closing to use as a timeline and check off that everyone involved has completed their part of the process.

Implementing OCLC Bibliographic Notification Service at a Large Research Library

Wednesday 5/1/2013 | 5:15-5:45pm | Classic Center - Athena B | Aleph Track | B.6.03

Corinna Baksik (Harvard University)

By the end of March 2013, the Harvard Library will be implementing OCLC's Bibliographic Notification Service to enhance the HOLLIS Catalog. This presentation will cover the details of our implementation process and expected outcome. We will be using a sequence of Aleph procedures with advanced merge routines, in combination with perl scripting to implement the service. The scope of the project includes all monographic items in our database for which we have holdings in WorldCat.

The Omniscient reporting system

Thursday 5/2/2013 | 1:30-2:00pm | Classic Center - Athena C | Aleph Track | B.9.12

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.

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

Friday 5/3/2013 | 11:00-11:30am | Classic Center - Grand 4 | Aleph Track | B.13.05

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.

Processing Serials Solutions Records in Aleph; Balancing Quality and Timeliness

Friday 5/3/2013 | 11:00am-12:00pm | Classic Center - Grand 3 | Aleph Track | B.13.13

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

This session will provide an overview of the process we use to track, validate and load monthly files of Serials Solutions records for e-journals and ebooks into Aleph. It will include descriptions of policy, pre-load error detection and reporting, pre-load review and problem resolution, post-load reporting and follow-up, workflow management, and communications with Serials Solutions.

Seamless Circulation in a Joint Library using Aleph and Symphony

Friday 5/3/2013 | 1:00-1:30pm | Classic Center - Athena C | Aleph Track | B.14.08

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!

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

Thursday 5/2/2013 | 11:00am-11:30am | Classic Center - Grand 4 | Aleph Track | B.7.06

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 Ex Libris we are creating a clean file of Hebrew language cataloging records that can be checked against our holdings on the OCLC database.

Why go to the library? Office delivery and Aleph requests

Friday 5/3/2013 | 9:00-10:30am | Classic Center - Olympia 1 | Aleph Track | B.12.09

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

Notre Dame, McGill and the University of Iowa all use Aleph's hold/recall feature to provide delivery of library materials between their campus libraries and also beyond, to campus offices. The session will cover our various implementations including Note Dame's transition from an ILLiad-based service, University of Iowa's handling of request from closed storage. Primo is used by Notre Dame and Iowa; McGill's implementation is vanilla Aleph. Reports and notices will also be covered.

Alma

Alma Connect and Reflect

Friday 5/3/2013 | 1:00-2:00pm | Classic Center - Athena A | Alma Track | B.14.06

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

Wednesday 5/1/2013 | 5:15-5:45pm | Classic Center - Grand 1 | Alma Track | B.6.04

Jimmy Ghaphery (Virginia Commonwealth University 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.

Dirty data : cleaning up your act for system migration

Friday 5/3/2013 | 11:00am-12:00pm | Classic Center - Athena A | Alma Track | B.13.10

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.

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

Thursday 5/2/2013 | 3:45-4:45pm | Classic Center - Grand 1 | Alma Track | B.10.05

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

Wednesday 5/1/2013 | 5:15-5:45pm | Classic Center - Parthenon 2 | Alma Track | B.6.11

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

Thursday 5/2/2013 | 3:45-4:45pm | Classic Center – Grand 3 | Alma Track | B.10.08

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

Wednesday 5/1/2013 | 4:00-5:00pm | Classic Center – Athena C | Alma Track | B.5.11

Thomas McNulty (Virginia Commonwealth University); Betsy Friesen (University of Minnesota); Michele Reid (North Dakota State University); David Schuster (Texas Woman's University); Betty Anderson (Virginia Commonwealth 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 Millennium, Aleph and Voyager and hope that others can benefit from their experience as early adopters.

Monographic Acquisitions Workflow Integration – YBP and Alma

Friday 5/3/2013 | 11:00am-12:00pm | Classic Center – Athena C | Alma Track | B.13.07

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

Friday 5/3/2013 | 9:30-10:30am | Classic Center – Grand 1 | Alma Track | B.12.11

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.

Friday 5/3/2013 | 9:00-10:00am | Classic Center – Grand 5 | Alma Track | B.12.03

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 has 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

Thursday 5/2/2013 | 3:45-4:45pm | Classic Center – Grand 5 | DigiTool Track | B.10.10

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

Wednesday 5/1/2013 | 1:15-2:15pm | Classic Center – Athena B | DigiTool Track | B.3.11

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

Aleph Product Update

Wednesday 5/1/2013 | 1:15-2:15pm | Classic Center – Parthenon 1 | Ex Libris | B.3.02

Carmit Marcus (Ex Libris)

Alma Analytics

Thursday 5/2/2013 | 3:45-4:45pm | Classic Center – Athena H | Ex Libris | B.10.06

Asaf Kline (Ex Libris)

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, we will review Alma's strategy to leverage library data and integrate seamlessly day-to-day workflows.

Alma Demo 1

Wednesday 5/1/2013 | 1:15-2:15pm | Classic Center – Athena C | Ex Libris | B.3.03

Barbara Radel (Ex Libris)

Alma Demo 2

Wednesday 5/1/2013 | 4:00-5:00pm | Classic Center – Olympia 1 | Ex Libris | B.5.04

Amanda Schmidt (Ex Libris)

Alma Demo 3

Thursday 5/2/2013 | 11:00am-12:00pm | Classic Center – Parthenon 1 | Ex Libris | B.7.01

Barbara Radel (Ex Libris)

Alma Demo 4

Thursday 5/2/2013 | 3:45-4:45pm | Classic Center – Olympia 2 | Ex Libris | B.10.02

Andrew French (Ex Libris)

Alma Demo 5

Friday 5/3/2013 | 9:00-10:00am | Classic Center – Grand 4 | Ex Libris | B.12.05

Andrew French (Ex Libris)

Alma Demo 6

Friday 5/3/2013 | 11:00am-12:00pm | Classic Center – Grand 1 | Ex Libris | B.13.09

Laurie Welling (Ex Libris)

**Alma Developers Platform**

Wednesday 5/1/2013 | 4:00-5:00pm | Classic Center – Parthenon 2 | Ex Libris | B.5.12

Moshe Shechter (Ex Libris)

Today's libraries are managing increasingly complex workflows, offering dramatically enhanced services—both in quantity and quality—to users and researchers, and using large numbers of systems and databases to provide these services. Accordingly, simple and easy-to-implement integrations are becoming a key component in the library's success in meeting its internal goals, as well critical for its contribution to the organization's mission. Alma Developers makes extending Alma easy and fast. This new platform enables Alma to seamlessly integrate with any system that interacts with library workflows, making extending library workflows and services a snap, and enabling smooth interaction with other organizational systems. As a result, the library becomes integrated with important institutional processes. In this session we will describe the Alma Developers platform. We will detail Alma's existing and planned API extensions, present options for internal extensions in Alma, and wrap up after becoming well acquainted with the Alma tools that make this happen, including some of our roadmap plans in this area.

Alma in a Collaborative Network

Thursday 5/2/2013 | 11:00am-12:00pm | Classic Center – Olympia 2 | Ex Libris | B.7.09

Dana Sharvit (Ex Libris)

In today's cash-strapped economic environment, libraries are under increasing pressure to reduce costs, improve library services, and remain relevant to their institutions and users. These combined pressures are encouraging libraries to collaborate more and in more effective ways. Alma Collaborative Network enables consortia—as well as groups of individual institutions—to collaborate in new and streamlined ways and to manage their processes more efficiently. Using Collaborative Networks, institutions can partner with a number of different peer institutions to achieve defined and distinct goals—resulting in a dynamic network of collaborations. This session will focus on Collaborative Network functionality across the different types of collaborative network.

Alma Product Update

Wednesday 5/1/2013 | 1:15-2:15pm | Classic Center – Olympia 1 | Ex Libris | B.3.10

*Dvir Hoffman (Ex Libris)***DigiTool Product Update**

Friday 5/3/2013 | 9:00-10:00am | Classic Center – Parthenon 1 | Ex Libris | B.12.04

*Asaf Kline (Ex Libris)***Ex Libris Management Q&A**

Thursday 5/2/2013 | 2:45-3:15pm | Classic Center – Theater | P.3

*Moderated by: Pascal Calarco (University of Waterloo – Tri-University Group)***Getting the Most out of Primo**

Wednesday 5/1/2013 | 4:00-5:00pm | Classic Center – Olympia 2 | Ex Libris | B.5.05

Ido Peled (Ex Libris)

In June 2012 Primo version 4.0 was released and since then several additional releases have been issued providing Primo customers with more features than ever before, including: subject heading, call number, author and title browsing available, FRBR group display, institutional search engine configuration, Facebook “like” button and more. Join this session to learn about the new features of Primo 4.3 as well as how to leverage and best use other functions and features of the system.

Key Findings from Ithaka S+R's 2012 Faculty Survey

Thursday 5/2/2013 | 11:00am-12:00pm | Classic Center – Parthenon 2 | Ex Libris | B.7.02

Roger Schonfeld (Ithaka S+R) and Susan Stearns (Ex Libris)

Ithaka S+R's Faculty Survey has tracked attitudes and behaviors of faculty members in US higher education institutions in response to technological and environmental change on a triennial basis since 2000. Its Faculty Survey has helped the community understand changing faculty member needs on key issues such as discovery processes, collecting and collections, the value of the library, and publishing needs. In this session, Ithaka S+R's Roger Schonfeld will share key findings from the Faculty Survey 2012 US, which is sponsored in part by Ex Libris. For the 2012 survey cycle, working with an advisory board of librarians, publishers, and a scholarly society executive, Ithaka S+R has updated the questionnaire to include topics of current and emerging interest, including support service needs associated with changing research methods, data preservation, research dissemination, and undergraduate instruction, as well as the role of the ebook, in addition to continuing to track issues of ongoing interest. These findings will be of interest to libraries and campus IT organizations, publishers, scholarly societies, and others who support faculty members in the research, teaching, and authorship roles.

**The New Ex Libris Central Repository: Bibliographic, Vendor and Linking Information for E-Resources**

Thursday 5/2/2013 | 1:30-2:30pm | Classic Center - Parthenon 2 | Ex Libris | B.9.04

Sharona Sagi and Alma Product Management Team

In this session we will review Ex Libris forward looking strategy for data services. We will focus on the first two major data related initiatives – item level linking and the new Alma Community Zone – collaborative metadata management providing high quality, shared metadata into the resource management environment in a unique, hybrid model that balances global sharing with local needs.

Open Access in Primo Central

Friday 5/3/2013 | 11:00am-12:00pm | Classic Center - Parthenon 2 | Ex Libris | B.13.14

Christine Stohn, Rachel Kessler (Ex Libris)

Support for Open Access material in all contexts and forms plays an important part for our discovery and delivery product suite, especially for Primo Central. We aspire to provide users with the best access to all scholarly material, regardless of whether the institution pays for a subscription or the item is freely available. The session will describe our current initiatives, including enabling the discovery of open access articles in subscription (hybrid) journals and indexing institutional repositories for global discovery, and will present our future plans in the Open Access arena.

Primo & MetaLib Product Update

Wednesday 5/1/2013 | 1:15-2:15pm | Classic Center - Olympia 2 | Ex Libris | B.3.01

*Rikki Trachtenberg (Ex Libris); Tamar Sadeh (Ex Libris); Gilad Gal (Ex Libris)***Primo Product Demo 1**

Wednesday 5/1/2013 | 2:30-3:30pm | Classic Center - Grand 1 | Ex Libris | B.4.01

*Ray Porter (Ex Libris)***Primo Product Demo 2**

Thursday 5/2/2013 | 11:00am-12:00pm | Classic Center - Olympia 1 | Ex Libris | B.7.08

*Andrew French (Ex Libris)***Rosetta Product Demo**

Wednesday 5/1/2013 | 5:15-5:45pm | Classic Center - Olympia 1 | Ex Libris | B.6.01

*Nir Sherwinter (Ex Libris)***Rosetta Product Update**

Thursday 5/2/2013 | 1:30-2:30pm | Classic Center - Olympia 2 | Ex Libris | B.9.02

*Nir Sherwinter (Ex Libris)***SFX Product Update**

Thursday 5/2/2013 | 1:30-2:30pm | Classic Center - Olympia 1 | Ex Libris | B.9.01

*Christine Stohn (Ex Libris)***Testing Primo ScholarRank™ Technology Using A/B Practice**

Thursday 5/2/2013 | 1:30-2:30pm | Classic Center - Parthenon 1 | Ex Libris | B.9.03

Tamar Sadeh (Ex Libris)

A/B testing (or split testing) is an evidence-based practice used by companies such as Google, whereby a specific change in the software is made and released to a controlled group of users. Key performance indicators (KPIs) enable the software developer to compare the difference in behavior between that group and the rest of the user community. Such comparison provides insights into the success of the recently introduced change. Ex Libris has implemented A/B testing in order to measure the impact of enhancements and tuning applied to ScholarRank, the Primo relevance-ranking algorithm. The session will describe the infrastructure for the relevance-ranking A/B testing and present findings derived from KPIs.

The Value of Alma

Thursday 5/2/2013 | 1:30-2:30pm | Classic Center - Grand 1 | Ex Libris | B.9.06

Jack Ammerman (Boston University); Susan Stearns (Ex Libris)

During this session, Jack Ammerman, Associate University Librarian for Digital Initiatives and Open Access at Boston University [BU], will discuss ways in which BU is increasing service offerings while decreasing the staff resources required for resource management workflows. Susan Stearns, Vice President of Strategic Partnerships from Ex Libris, will report on the experiences of other Alma collaborative partners and early adopters who have realized benefits from migrating to Alma by providing a unified approach to library operations through merged functions, more collaborative work, and the development of new service models.



Voyager Product Update

Wednesday 5/1/2013 | 2:30-3:30pm | Classic Center – Parthenon 1 | Ex Libris | B.4.04

Mike Dicus (Ex Libris)

General/Strategic

Dealing with E-Resource Bibs from Multiple Vendors

Wednesday 5/1/2013 | 2:30-3:30pm | Classic Center – Grand 3 | General Track | B.4.06

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.

ELUNA 101

Wednesday 5/1/2013 | 2:30-3:30pm | Classic Center – Athena C | General Track | B.4.12

John Greer (University of Montana); Melissa Wisner (Yale University)

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

Wednesday 5/1/2013 | 2:30-3:30pm | Classic Center – Athena B | General Track | B.4.11

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.

An Introduction to Vufind 2.0

Friday 5/3/2013 | 1:00-1:30pm | Classic Center – Grand 4 | General Track | B.14.05

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.

Linked Data Special Interest Group and ELUNA: why we should be involved, who's interested, how you can help!

Wednesday 5/1/2013 | 4:00-5:00pm | Classic Center – Athena B | General Track | B.5.13

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

Linked Data's potential to transform library metadata and information services is increasingly being recognized and incorporated into service development by North American Libraries – as witnessed by Library of Congress's BibFrame initiative and several others. IGELU formed a Linked Data Special Interest Group two years ago; its activity and programming reflects remarkable commitment, experimentation and achievements from a number of libraries, particularly in Europe. Ex Libris has shown interest and involvement with linked data, and seeks information from customers on use cases and ways we would like to see linked data capabilities incorporated into Ex Libris products. Isn't it time ELUNA got involved on this topic? What are you planning, working on, thinking about, would like to see? Come join the discussion and contribute to getting a group off the ground.

Local Hosting of Ex Libris Services - UCO Library Experience

Friday 5/3/2013 | 9:00-9:30am | Classic Center – Athena B | General Track | B.12.02

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.

Moderator/Speaker Orientation

Wednesday 5/1/2013 | 8:00-8:30am | Classic Center – Grand 1 | B.1.01

Debbie Clark (University of Southern Indiana); Rose Scruggs (University of Southern Indiana)

An opportunity for moderators and speakers to come learn about rooms, technology, and uploading presentations to the dropbox.



Oracle SQL: Tips and Tricks for Aleph and Voyager Systems Librarians

Thursday 5/2/2013 | 3:45-4:45pm | Classic Center - Grand 4 | General Track | B.10.09

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 and techniques 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, Oracle Database Links, and so forth. There will be 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.

Preparing for RDA implementation

Thursday 5/2/2013 | 11:00am-12:00pm | Classic Center - Grand 5 | General Track | B.7.03

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

RDA, a new cataloging code, has been developed to replace AACR2. As the new standard is adopted in the shared cataloging environment, well-planned preparation is essential to manage RDA implementation. Like many other libraries in the U.S., TCNJ Library had decided to implement RDA in March 2013. A series of actions have been taken to gradually and systematically train the cataloging staff to ease their way into the new RDA workflow. This presentation will describe TCNJ Library's journey toward full RDA implementation.

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

Friday 5/3/2013 | 1:00-1:30pm | Classic Center - Grand 3 | General Track | B.14.02

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

Wednesday 5/1/2013 | 1:15-2:15pm | Classic Center - Grand 5 | General Track | B.3.08

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!

Voyager, Bibliotheca and RFID Security

Thursday 5/2/2013 | 3:45-4:15pm | Classic Center - Athena B | General Track | B.10.12

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.

What to Expect When Moving to a Hosted Environment

Wednesday 5/1/2013 | 5:15-5:45pm | Classic Center - Parthenon 1 | General Track | B.6.05

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, hindsight and testing that was conducted by Texas Tech University during the implementation.

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

Wednesday 5/1/2013 | 1:15-2:15pm | Classic Center - Parthenon 2 | General Track | B.3.09

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

Friday 5/3/2013 | 11:00-11:30am | Classic Center – Athena B | MetaLib Track | B.13.02

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.

Posters

Permissions in Alma: Creating, Testing, and Adjusting Staff Roles

- Presented by: Emily Owens (Virginia Commonwealth University)
- Friday 5/3/2013, 8:30-10:30am

Automating Daily Exports of Voyager Records to Ebsco EDS and Summon

- Presented by: Lori Stethers (Wesleyan University)
- Friday 5/3/2013, 8:30-10:30am

Automating the Request and Accession Processes for an Offsite Facility from Voyager and ILL

- Presented by: Merritt Lennox (Syracuse University)
- Friday 5/3/2013, 8:30-10:30am

Be Gone: Saving Time and Trouble While Weeding Your Collection

- Presented by: Krista Clumpner (Northern Michigan University)
- Friday 5/3/2013, 8:30-10:30am

Integration of openAthens SSO and SFX

- Presented by: Qinghua Xu (AbbVie)
- Friday 5/3/2013, 8:30-10:30am

Primo

Displaying Thumbnail Images for Films

Thursday 5/2/2013 | 1:30-2:30pm | Classic Center – Grand 5 | Primo Track | B.9.08

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

Friday 5/3/2013 | 11:00-11:30am | Classic Center – Parthenon 1 | Primo Track | B.13.01

Tom Ruthven (University of New South Wales); Ichsan Tamsir Putra (University of New South Wales)

UNSW Library has an active development program to utilise 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**

Wednesday 5/1/2013 | 5:15-5:45pm | Classic Center - Grand 3 | Primo Track | B.6.06

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

Thursday 5/2/2013 | 11:00am-12:00pm | Classic Center - Athena A | Primo Track | B.7.05

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

Thursday 5/2/2013 | 1:30-2:30pm | Classic Center - Grand 2 | Primo Track | B.9.10

Bennett Ponsford (Texas A&M University); Sherrie Kristin (Purdue University Calumet); Marc Keepper (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 different implementation options and from Ex Libris. The emphasis will be on Primo Direct and TotalCare.

Making Sense of Primo Ranking

Thursday 5/2/2013 | 3:45-4:45pm | Classic Center - Parthenon 2 | Primo Track | B.10.11

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 an dialogue on other ranking settings in Primo - users successes and failures.

MetaLib is dead, long live Primo?

Wednesday 5/1/2013 | 4:00-5:00pm | Classic Center - Grand 2 | Primo Track | B.5.06

Anne Highsmith (Texas A&M University)

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

Wednesday 5/1/2013 | 4:00-5:00pm | Classic Center - Grand 1 | Primo Track | B.5.08

Peter Hornsby, Jon Bodnar, and Alain St. Pierre (Emory 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, data sources, and search functionality.



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

Thursday 5/2/2013 | 11:00am-12:00pm | Classic Center - Grand 2 | Primo Track | B.7.10

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.

Primo at Northwestern - Story of Local Development

Thursday 5/2/2013 | 11:00am-12:00pm | Classic Center - Grand 1 | Primo Track | B.7.11

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

Friday 5/3/2013 | 1:30-2:00pm | Classic Center - Grand 1 | Primo Track | B.14.10

Shelley Neville (LDS Church History Library), Beck Locey (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

Friday 5/3/2013 | 11:00-11:30am | Classic Center - Athena H | Primo Track | B.13.06

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

Wednesday 5/1/2013 | 5:15-5:45pm | Classic Center - Grand 5 | Primo Track | B.6.10

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

Thursday 5/2/2013 | 1:30-2:30pm | Classic Center - Grand 3 | Primo Track | B.9.11

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.



Targeting and making use of item types in disparate metadata

Friday 5/3/2013 | 9:00-10:00am | Classic Center - Grand 2 | Primo Track | B.12.08

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/>

Trouble-shooting tips for Primo

Thursday 5/2/2013 | 3:45-4:45pm | Classic Center - Parthenon 1 | Primo Track | B.10.04

Alison Hitchens (Tri-University Group (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

Friday 5/3/2013 | 9:00-10:30am | Classic Center - Olympia 2 | Primo Track | B.12.10

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

Friday 5/3/2013 | 1:00-2:00pm | Classic Center - Olympia 1 | Primo Track | B.14.09

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

Aleph Product Working Group

Wednesday 5/1/2013 | 2:30-3:30pm | Classic Center - Parthenon 2 | PWGs | B.4.03

Convened by: Bill Slauenwhite (Novanet)

Did you know that there is a group of your ELUNA colleagues working on your behalf year-round with Ex Libris to improve Aleph? Is there something about Aleph that really ticks you off? Is there something that your institution needs Aleph to do or do better? Come to the Aleph Product Working Group meeting and meet the team that is your voice on Aleph with Ex Libris. We'll review what we did this year and listen to you on what we should do next year. Free pizza and beer! (Well not at this meeting but I'm sure there is somewhere at some time ...)

Aleph Product Working Group (leadership session)

Thursday 5/2/2013 | 12:00-1:30pm (during lunch) | Classic Center - Athena J | PWGs | B.8.01

Convened by: Bill Slauenwhite (Novanet)

This working lunch is intended for current and incoming Aleph PWG members and representatives from Ex Libris.

Alma Product Working Group

Wednesday 5/1/2013 | 2:30-3:30pm | Classic Center - Olympia 1 | PWGs | B.4.10

Convened by: Betsy Friesen (University of Minnesota)

Join members of the Alma Product Working Group (PWG) for a short business meeting followed by an open discussion of topics you, as Alma customers, might wish the PWG to consider over the next year.

**MetaLib and MetaLib+ Product Working Group**

Wednesday 5/1/2013 | 5:15-5:45 pm | Classic Center - Olympia 2 | PWGs | B.6.02

Convened by: Mark Needleman (University of Florida)

The annual meeting of the MetaLib/MetaLib+ PWG is open to everyone! Come and hear about the work the group has done over the past year, have a say in our plans for the coming year, meet your MetaLib/MetaLib+ representatives and vote for new PWG members! This is an opportunity for you to participate in the work of the product working group and have a say in the future of MetaLib, and especially MetaLib+ and the features of MetaLib that get incorporated in the MetaLib+ portion of the Primo User Interface. Immediately prior to the MetaLib/MetaLib+ Product Working Group Ex Libris will be doing a Primo/MetaLib Product Update at 1:15PM, take the opportunity to follow up afterwards with the MetaLib PWG.

Primo Product Working Group

Wednesday 5/1/2013 | 2:30-3:30pm | Classic Center - Olympia 2 | PWGs | B.4.02

Convened by: Michael North (Northwestern University)

The annual meeting of the Primo PWG is open to everyone! Come and hear about the work the group has done over the past year, have a say in our plans for the coming year, meet your Primo representatives and vote for new PWG members!

SFX Product Working Group

Thursday 5/2/2013 | 3:45-4:45pm | Classic Center - Olympia 1 | PWGs | B.10.01

Convened by: Marina Oliver, Texas Tech University

The SFX PWG meeting is an opportunity for your voice to be heard as an user. During the meeting we will report on the work done by the PWG over the past year, elect officers and discuss important issues brought forward by SFX users in attendance and via the list. Additionally we will ask for volunteers to work with the ELUNA 2014 Conference Program Committee in developing the SFX program for next year's conference. This is the meeting you should attend if you want to become more involved in the development of SFX and the SFX user community.

Verde Product Working Group

Wednesday 5/1/2013 | 4:00-5:00pm | Classic Center - Athena A | PWFs | B.5.03

Convened by: Allison Erhardt (University of Manitoba)

The Verde PWG meeting is your chance to come discuss issues regarding Electronic Resource Management and best practices. There will be a very short presentation followed by discussion of how best to implement a process for Ustat updates. Please join us, all are welcome.

Voyager Product Working Group

Wednesday 5/1/2013 | 4:00-5:00pm | Classic Center - Parthenon 1 | PWGs | B.5.02

Convened by: Sherrie Kristin (Purdue University Calumet)

Come and meet your Voyager Product Working Group. Speak to the people that you see posting and responding on the list. We will show you what we have done this year; discuss enhancements, and projects we are working on currently.

Regional User Groups

DC Ex Libris User Group (DCEXLibris)

Thursday 5/2/2013 | 5:00-6:00pm | Classic Center - Athena C | RUGs | B.11.01

Eastern Canada User Group (ECUG)

Thursday 5/2/2013 | 5:00-6:00pm | Classic Center - Athena G | RUGs | B.11.02

Ex Libris Bluegrass Users Group

Thursday 5/2/2013 | 5:00-6:00pm | Classic Center - Athena B | RUGs | B.11.03

*No formal meeting scheduled, but the room is available for networking.***Ex Libris Northeast User Group (ENUG)**

Thursday 5/2/2013 | 5:00-6:00pm | Classic Center - Olympia 1 | RUGs | B.11.04

Ex Libris South-Central User Group (ELSUG)

Thursday 5/2/2013 | 5:00-6:00pm | Classic Center - Olympia 2 | RUGs | B.11.05

ELUNA-Southeast Users Group

Thursday 5/2/2013 | 5:00-6:00pm | Classic Center - Grand 2 | RUGs | B.11.06

**Ex Libris Southwest User Group (eSWUG)**

Thursday 5/2/2013 | 5:00-6:00pm | Classic Center - Grand 3 | RUGs | B.11.07

*No formal meeting scheduled, but the room is available for networking.***Great Lakes Users Group (GLUG)**

Thursday 5/2/2013 | 5:00-6:00pm | Classic Center - Grand 4 | RUGs | B.11.09

Northwest User Group (NWUG)

Thursday 5/2/2013 | 5:00-6:00pm | Classic Center - Grand 5 | RUGs | B.11.11

Upper Midwest Users Group (UMWUG)

Thursday 5/2/2013 | 5:00-6:00pm | Classic Center - Grand 1 | RUGs | B.11.12

*No formal meeting scheduled, but the room is available for networking.***Western Canada Voyager User Group (WCVUG)**

Thursday 5/2/2013 | 5:00-6:00pm | Classic Center - Athena A | RUGs | B.11.13

No formal meeting scheduled, but the room is available for networking.

Rosetta

Creating Metadata Best Practices for Implementation with Rosetta

Friday 5/3/2013 | 1:00-1:30pm | Classic Center - Parthenon 1 | Rosetta Track | B.14.04

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

Friday 5/3/2013 | 11:00-11:30am | Classic Center - Grand 5 | Rosetta Track | B.13.04

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

Wednesday 5/1/2013 | 1:15-2:15pm | Classic Center - Grand 4 | Rosetta Track | B.3.07

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

Wednesday 5/1/2013 | 2:30-3:30pm | Classic Center - Athena A | Rosetta Track | B.4.08

Shelley Neville (LDS Church History Library); Beck Locey (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.



SFX/bx

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

Thursday 5/2/2013 | 11:00am-12:00pm | Classic Center – Athena C | SFX/bX Track | B.7.12

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.

Juggling Apples and Oranges: How do you maintain multiple knowledge bases?

Friday 5/3/2013 | 1:00-1:30pm | Classic Center – Olympia 2 | SFX/bX Track | B.14.03

Margery Tibbetts (California Digital Library)

This is an open discussion session to discover if any best practices exist in the community for dealing with multiple vendor knowledge bases (KBs). The California Digital Library has acquired multiple products with e-resource knowledge bases. All of the knowledge bases are slightly different in how they define a licensed package, in the data tracked, in the frequency of updates, in data exporting, etc. Ideally, we would like to update in one knowledge base and push the changes to the other knowledge bases. Are you dealing with KB challenges or want to learn more? Bring your experience to share.

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

Wednesday 5/1/2013 | 2:30-3:30pm | Classic Center – Grand 5 | SFX/bX | B.4.09

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 California Digital Library's efforts after an external review

Wednesday 5/1/2013 | 1:15-2:15pm | Classic Center – Grand 3 | SFX/bX Track | B.3.06

Margery Tibbetts and Lena Zentall (California Digital Library)

In 2012 the University of California libraries had an ADA evaluation of the library websites that surfaced some accessibility issues. Some of the problem areas identified were with the SFX menu and citation linker. We will discuss the ADA evaluation report, tools used to determine ADA compliance and changes CDL made to come into compliance. ExLibris will be making accessibility improvements to SFX in 2013, but if you have customized your SFX windows, you may need to do further work to become compliant with ADA.

Using Primo with SFX: interactions and implications

Friday 5/3/2013 | 9:00-10:00am | Classic Center – Grand 3 | SFX/bX Track | B.12.07

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

Wednesday 5/1/2013 | 5:15-5:45pm | Classic Center – Grand 4 | SFX/bX Track | B.6.07

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

Aleph Systems and Reporting SIG

Thursday 5/2/2013 | 11:00am-12:00pm | Classic Center – Athena G | SIGs | B.7.13

Convened by: Jeannie Dixon (Florida Virtual Campus)

Consortia Systems SIG

Thursday 5/2/2013 | 3:45-4:45pm | Classic Center – Athena C | SIGs | B.10.14

Convened by: Kristine Hammerstrand (CARLI)

Federal Libraries SIG

Wednesday 5/1/2013 | 11:45am-1:15pm | Classic Center – Atrium (lunch table) | SIGs | B.2.01

Convened by: Kathy Varjabedian (Los Alamos National Laboratory)

Hosted Customers SIG

Thursday 5/2/2013 | 1:30-2:30pm | Classic Center – Athena G | SIGs | B.9.13

Convened by: Lesli Moore (Texas Health Science Libraries Consortium)

Voyager Serials and Acquisitions SIGs (combined)

Thursday 5/2/2013 | 1:30-2:30pm | Classic Center – Athena H | SIGs | B.9.14

Convened by: Sherrie Kristin (Purdue University Calumet)

Steering Committee

ELUNA 2013-2014 Handoff Meeting

Thursday 5/2/2013 | 8:00-9:00am | Classic Center – Athena J | Steering Committee

ELUNA Business Meeting & Wrap Up

Friday 5/3/2013 | 2:00-3:00pm | Classic Center – Athena E&F | P.5

ELUNA Steering Committee and Ex Libris Dinner

Thursday 5/2/2013 | 7:30-9:00pm | Ballroom at the Georgian | Steering Committee

ELUNA Steering Committee/Ex Libris Management Meeting

Wednesday 5/1/2013 | 3:45-5:30pm | Classic Center – Athena J | Steering Committee | B.5.01

Leadership Networking Event

Thursday 5/2/2013 | 6:00-7:30pm | Tapped at the Georgian | Steering Committee

NERS Lunch – PWG Outgoing and Incoming chairs, ELUNA SC, NERS Team

Wednesday 5/1/2013 | 11:45am-1:15pm | Classic Center – Athena J

Vendors

Get, Share and Analyze Content with CCC, Pubget, and Ex Libris

Thursday 5/2/2013 | 11:00am-12:00pm | Classic Center – Athena H | Vendor | B.7.14

Tim Bowen (Director, Academic Products & Services, Copyright Clearance Center); Ernie Chin (Director, Business Development, Pubget)

You want to make it easy for patrons and staff to access and share copyrighted content. You also need to manage and develop collections and find creative ways to allocate budget and resources. To meet these challenges CCC, Pubget and Ex Libris offer an integrated licensing, content and analytics solution designed to help you, your colleagues and patrons get the information they need, the rights to share it, and the insight to maximize the value of your content purchases. Learn how this solution and its components – Pubget, Get It Now with SFX, the Annual Copyright License, and PaperStats – can help your library increase operational efficiencies, realize administrative and financial cost savings, increase patron satisfaction.

Are you in the Zone? Integrating Global and Local with YBP Library Technical Services



Wednesday 5/1/2013 | 2:30-3:30pm | Classic Center – Grand 2 | Vendor | B.4.05

Ann-Marie Breau (YBP Library Services); Deborah Silverman (YBP Library Services)

Whether you are working in the Alma Library or Community Zone, batch loading MARC records into Voyager or Aleph, or representing e-resources in the SFX knowledgebase, Libraries are trying to present a global information universe for their local users. Please join us for a discussion of how YBP Library Services is helping to bring the global and the local together for information management and discovery as well as integrated metadata workflows.

Verde

Verde Round Table: Licenses and more

Wednesday 5/1/2013 | 1:15-2:15pm | Classic Center – Grand 2 | Verde Track | B.3.04

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

Friday 5/3/2013 | 1:30-2:00pm | Classic Center – Grand 5 | Voyager Track | B.14.12

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

Friday 5/3/2013 | 1:00-1:30pm | Classic Center – Grand 2 | Voyager Track | B.14.01

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

Friday 5/3/2013 | 11:00am-12:00pm | Classic Center – Athena G | Voyager Track | B.13.11

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.

Global Data Change Demystified

Wednesday 5/1/2013 | 1:15-2:15pm | Classic Center – Grand 1 | Voyager Track | B.3.05

Wendy Crist (Arkansas State University); Tracy Farmer (Arkansas State University)

The release of Voyager 8 brought the long-awaited Global Data Change functionality to Voyager libraries. This session will describe the setup and logic of the Global Data Change workflow as well as detailed examples of completed projects at Arkansas State University. Projects include mass changes to bibliographic records in preparation for RDA and bulk URL changes in the 856 of bibliographic and holdings records due to a change in our EZproxy URL. We now rely on this powerful tool for controlling the quality of our catalog.

Integrating Electronic Resources in the Voyager Catalog with Other Library Systems

Wednesday 5/1/2013 | 5:15-5:45pm | Classic Center – Grand 2 | Voyager Track | B.6.09

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

Thursday 5/2/2013 | 1:30-2:30pm | Classic Center – Athena A | Voyager Track | B.9.09

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

Friday 5/3/2013 | 11:00am-12:00pm | Classic Center – Grand 2 | Voyager Track | B.13.12

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

Friday 5/3/2013 | 1:30-2:00pm | Classic Center – Parthenon 2 | Voyager Track | B.14.11

Alan Waugh (Mount Royal University)

Have fun fast tracking custom Voyager reports by playing with Access Update Queries. Using a gestalt-like templating technique, we build and test a resource table to feed fiscal year-end reports. Inspired by a concept described by Neri Oxman in “Rapid Gestalt”.

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

Friday 5/3/2013 | 9:00-9:30am | Classic Center – Athena A | Voyager Track | B.12.01

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

Thursday 5/2/2013 | 3:45-4:45pm | Classic Center – Athena A | Voyager Track | B.10.03

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

Thursday 5/2/2013 | 11:00am-12:00am | Classic Center – Grand 3 | Voyager Track | B.7.07

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 Make-Table Queries in Access

Friday 5/3/2013 | 11:00-11:30am | Classic Center – Olympia 1 | Voyager Track | B.13.03

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

Wednesday 5/1/2013 | 5:15-5:45pm | Classic Center – Athena A | Voyager Track | B.6.08

Peter Zhang (UT Arlington Library)

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

Voyager Queries with Backbone

Friday 5/3/2013 | 9:00-10:00am | Classic Center – Parthenon 2 | Voyager Track | B.12.06

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???

Wednesday 5/1/2013 | 1:15-2:15pm | Classic Center - Athena A | Voyager Track | B.3.12

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

Friday 5/3/2013 | 10:00-10:30am | Classic Center - Athena C | Voyager Track | B.12.12

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.