



## CHAIR REPORT 2017

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## Introduction

By tradition, the IGeLU chair presents the annual report to the General Assembly at the conference. I like the tradition, since it's a good opportunity to show our members what IGeLU returns for their membership. Members' not only pay their annual membership fee - although IGeLU could not survive without that – but many volunteers also invest much of their precious time on top of demanding jobs to help this community to become successful.

### Can we make a difference?

This organization offers members a level of influence and participation in the development and enhancement of the vendor's products that is unique in the software world. There is the official Product Development Collaboration Agreement, where Ex Libris commits to invest development resources to implement enhancement requests ranked and voted by our members.

Besides that, the ongoing discussions between our Working Groups and Ex Libris product managers guarantee a level of collaboration and interchange of views and vision that results in improved quality of services and the development of functionality our institutions and staff depend on daily. The IGeLU membership not only gives each institution the opportunity to actively take part in this, but provides the framework for all members to benefit from the results of this close and vibrant relationship which we have been nurturing since its inception in 2006, as an inheritance of our predecessors ICAU and SMUG.

### New CEO for Ex Libris

It was a big surprise to receive the news that Matti Shem-Tov succeeds Kurt Sanford as CEO of ProQuest starting July 2017. Matti has lead Ex Libris since 2003 and we owe him a great deal for his constant and principled commitment to working closely with us, the customers.

Without Matti, both Ex Libris and IGeLU would not have been able to develop the meaningful and effective relationship originating from the time that Azriel Morag led the company. We wish Matti good luck in his new position and like to think ProQuest made a very wise choice.

IGeLU is very happy that Bar Veinstein, the former VP Resource Management is taking over the CEO role from Matti and we trust Bar will continue and expand the close collaboration we build our successes upon.

### Mark Dehmlow to step down from the IGeLU Steering Committee

After three consecutive terms in the Steering Committee since 2012 the IGeLU Statute forces Mark Dehmlow to step down. It's simply impossible to list all Mark's contributions to IGeLU for he has been so very active on so many topics. At the pinnacle of all his work is our Enhancement Request System (NERS). IGeLU can't do without NERS and Mark is the founding father, main developer and administrator of the platform.

We are thankful for all of his work and so very happy that Mark has offered to continue his work for IGeLU as our CTO. He will keep on developing and managing NERS, the [www.exlibrisusers.org](http://www.exlibrisusers.org) discussion list platform and the new conference App.

I hope to have inspired you to read all about the benefits that come with the membership of this active and joyful community in the rest of this report, in which I proudly present the results of all our work last year.

**Theo Engelman, IGeLU Chair**

## Main results

Since our last meeting in Trondheim 2016 we have achieved some excellent results from work being carried out by our Working Groups. But no year comes without surprises and new issues. IGeLU is lucky to always find ways and volunteers to cope with them and I am happy to share the results and big issues with you in this report.

### Alma UX

This year Ex Libris has delivered the new Alma User Interface that is really improving the User eXperience (UX) and makes working with Alma more efficient and intuitive. This new design is the result of the close collaboration between the Alma Product Working Group (joint with ELUNA) and Ex Libris product management. Without this close collaboration, the redesign of Alma wouldn't have been the same. Many volunteers from member institutions worked together with UI designers and UX experts to improve and modernize the Alma User Interface. The first development partners have already adopted the new interface and before the end of 2017 all Alma customers will be able to benefit and enjoy the result of this fine job. We greatly thank all community members and Ex Libris staff for this excellent example of collaborative enhancement. It shows how IGeLU really can make a difference for all customers.

### Primo UI

This year Ex Libris has delivered the new Primo User Interface (UI) to all customers. The process to design, develop, build and test the new Primo UI was started back in 2015. Both the IGeLU and the ELUNA Primo Product Working Group have collaborated intensely together with Ex Libris to make the Primo UI much more effective and intuitive. The agreement of the Jerusalem meeting in July 2015 to add a local development framework enables customers now to build new functions and connections to other systems on top of the Primo UI, regardless of the location of their Primo instance (i.e. local or Ex Libris cloud).

The close collaboration between the community developers, Primo experts and Ex Libris developers has made this project into a big success for all customers who can now benefit of a Primo UI that fits customers using Primo out of the box, to customers depending heavily of locally developed Primo modifications. Another very significant proof of success coming from the organized community!

### Summon first enhancement cycle

The Summon/360 PWG has delivered its first success by organizing a voting cycle on a list of enhancements collected from the backlog of customer requests originating from the ProQuest Workflow Solutions era.

The voting cycle resulted in 7 enhancements focusing on the Summon UI and Ex Libris was so generous to give the community more developing points than formally agreed upon in the Product Development Collaboration Agreement. Already in the July version update the first enhancement has been implemented, most others will follow later this year.

Besides the NERS voting cycle, the PWG has successfully advocated for an extra investment by Ex Libris to modernize and improve the 360 back office functionality by starting to identify the big 'pain points' that will result in a priority list of enhancements to be implemented in the coming year.

I am proud to see how efficient and effective this community can operate and deliver, thanks to the collaborative efforts of community volunteers and Ex Libris Product Managers.

## Authentication Focus Group

IGeLU and ELUNA have formed a Focus Group on Authentication (AFG) that originates from the intention by Ex Libris revealed last conference to separate the Authentication for Alma from the product itself. In the cloud world, it is best practice to not mix authentication with the actual product or service. But for customers relying on internal Alma authentication we need to assure that moving to external authentication does not cause major problems or investments. The AFG discussed the customer perspective with Ex Libris based on a customer survey and together both parties are now formulating a strategy and road map to introduce external authentication in a way that customers are able to adapt and can plan to implement in line with their local IT departments, infrastructure and security policies.

The AFG showcases the flexibility and expertise the organized customer community can offer when working closely with Ex Libris to solve issues that emerge and need to be addressed.

## Integration of ProQuest products

IGeLU has closely monitored the ongoing integration of the former ProQuest products (Summon, 360 and Intota) into the Ex Libris services and support organization. After the first success last year when Summon was added to the Product Development Collaboration Agreement with the same amount of annual development points that Primo gets both IGeLU and Ex Libris were convinced the integration should move forward quickly.

Main targets for the customers were the addition of these products to the Salesforce support platform, the Customer Knowledge Center, the System Status Pages, the Developers Network and Idea Exchange. Ex Libris is smart enough to acknowledge the synergy for the company in applying all of these additions within one year and so we can look back on a very successful year where all important customer portals and support are fully integrated now.

The close relation and productive cooperation between organized community and vendor pays off.

## Growing Leganto PWG

IGeLU started the Leganto Product Working Group (PWG) last year, at a stage where just 15 customers were using this new product. We were convinced that founding the PWG for such a non-mature product is useful to help Ex Libris grow the product and to help the customers coordinate and evaluate their vision on the product and to formulate enhancement requests.

The PWG, formed and lead by Sue Harmer, invested a lot to organize and unite the customers. The result is that after this conference the PWG and Ex Libris will use NERS to prioritize a list of enhancements to close the backlog from the initial launch of the product. Although currently Leganto is not part of the Product Development Collaboration Agreement and Ex Libris is not bound to any commitment on developing and implementing any of these enhancements it is good to see the PWG and Ex Libris start to use the NERS system and workflow for the product.

IGeLU is advocating to Ex Libris the addition of Leganto to the Product Development Collaboration Agreement and we will give you positive news on this very soon.

## Free membership for all new customers

This year, both IGeLU and ELUNA have agreed on offering all new customers of Ex Libris a first year's membership free of charge. Offering new membership for free the first year gives new customers the opportunity to engage with the community and experience the benefits that come with membership without having to invest immediately. It also allows IGeLU to engage with these new customers and to demonstrate to them the value and benefits of being part of the International community.

We hope and expect to enlarge our representation among the Ex Libris customer base and will start to offer this free first year membership as soon as possible after this conference, when we have worked out all the details.

## Steering Committee activities

Besides the main achievements a lot more activities and events have been going on since last conference. It is simply too much to list each and every meeting or event, IGeLU is very productive and all volunteers work hard to make sure their efforts pay off for the community.

### Steering Committee

The Steering Committee's (SC) main task is to facilitate the Working Groups for their job. It means taking care of finance and the stability of the organization on the long term. IGeLU uses a broad set of facilities like our WebEx online conference system, our WordPress website, our Google collaboration document infrastructure, Twitter, our new Conference App and the new Exlibrisusers.org heavy used email distribution lists platform.

Besides that the SC coordinates the work done by the Working Groups and takes care of initiating new groups where and when necessary. The IGeLU SC has periodical meetings with the Ex Libris Users Group of North American (ELUNA) Steering Committee and with Ex Libris executive management to streamline work and discuss new developments. Acting as a sparring partner for Ex Libris' senior management is important to represent the customers' voice at an early stage. Last but not least the SC is heavily involved in preparing each annual conference.

### New Discussion list platform

Part of the results this year is the successful migration of our Public Discussion lists. The new [www.exlibrisusers.org](http://www.exlibrisusers.org) platform - installed, configured and managed closely with ELUNA - offers all customers of Ex Libris worldwide a perfect platform to share their information, skills and experience and to communicate about issues that suddenly arise and need attention. It's one of the basics that IGeLU and ELUNA offer to not only our members, but to the entire customer community!

### Other Communication channels

Our website [www.igelu.org](http://www.igelu.org) and our periodical News in Brief combined with Twitter (@IGeLU) are the main IGeLU communication channels. **Shameem Nilofar Maideen** manages all of these and behind the scenes Shameem is playing an indispensable role as note taker. She is constantly modernizing our communication tools and we owe her much gratitude for all the work that is seldom recognized by our members.

### Liaising to Working Groups

**Dave Allen** is doing the major part of liaising to Working Groups which means he attends almost all online WebEx meetings. Because these meetings involve people from the APAC region to the US West Coast the time slots are usually very uncomfortable for Dave, but his motto "sleep is so overrated" gets him going. His investment for IGeLU counts for 200% and if it weren't for Dave we would have to expand the SC!

### Conference planning

Our conference is at the heart of the organization and without a decent planning committee we would never be able to have so successful and highly rated conferences. **Naomi Greidinger** has during the year a consistently growing job that culminates in being almost full time active to arrange all the big and small things that come with organizing our annual conference. **Tracey Clarke** has been her backup and assistant this year and she will succeed Naomi as the new Conference planning Committee chair. Besides that Tracey has worked closely with Sue Harmer to build and expand the Leganto PWG this year.

## Working Groups activities

It cannot be repeated too much:

**Product and Special Interest Working Groups are the backbone of IGeLU.**

Some Working Groups are joint with ELUNA, others IGeLU only.

Their activities comprise:

- **closely monitoring the use and development of the product**
- **managing the enhancement processes**
- **discussing relevant and urgent issues with Ex Libris' product management**
- **organizing Show&Tell sessions for members on topics**
- **conference programme planning, inviting presenters and manage the Q&A sessions**
- **attending to working meetings through the year to discuss and plan their activities**

I want to give a big thank you all to the IGeLU PWG and SIWG coordinators:

- **Augusto Ribeiro**, Aleph PWG
- **Betsy Friesen**, Alma PWG
- **Sue Harmer**, Leganto PWG
- **Christian Hänger**, Primo PWG
- **Rich Wenger**, SFX/bX PWG
- **Daniel Forsman** and **Lesli Moore**, Summon PWG
- **Cindy Greenspun**, Voyager PWG
- **Margaret Briand Wolfe**, Analytics SIWG
- **Marcus Zerbst**, ARC SIWG
- **Sveinbjörg Sveinsdóttir**, Consortia SIWG
- **François Renaville**, Content (formerly known as KBAB) SIWG
- **Mehmet Celik**, Interoperability SIWG
- **Laura Akerman**, LOD SIWG

and to all other members of these Working Groups for the work they have been doing for our community over the past year. I know it's disputable to not mention all of them here, but due to our very large number of volunteers we are so lucky to have, the list would simply get too long for this report. The links below to the Working Groups on our website also show the working bodies of each group.

I also want to give a big thank you to **Mark Dehmlow**, **Dave Allen** and **Mehmet Celik** for their important work in the Authentication Focus Group on behalf of IGeLU in close collaboration with ELUNA.

For more detailed results reported by the Working Groups our website pages <http://igelu.org/products> and <http://igelu.org/special-interests> and our News in Brief <http://igelu.org/about/communication/newsletters> archive are the best sources of information.

## Aleph PWG to merge

After having merged the enhancement cycle two years ago with the ELUNA Aleph PWG, both PWGs have now decided to merge. The SCs will design the framework for the new merged group after this conference and the coming year the groups will slowly execute the merging process.

Merging both PWGs is the result of the product slowly getting old and seeing many existing customers actually migrate or plan to migrate to a next generation ILS.

## Analytics SIWG

The Analytics SIWG has devoted much time to collecting use cases from member institutions and is currently finalizing this process to present the collection to Ex Libris. The next step will be to discuss the use cases with Ex Libris and the goal is to work together with Ex Libris to define solutions to the requirements that can be deduced from the use cases. It's not a quick win exercise, but by investing this much time and effort into analyzing and understanding the real and evolving needs of customers the SIWG will greatly contribute to the roadmap for Analytics that Ex Libris is developing.

In many ways this is similar to the development process eight years ago that led to Alma.

## ARC SIWG

ARC is more or less the predecessor of the Oracle Business Information Analytics services that Ex Libris nowadays automatically adds to their state of the art products Alma, Primo and Summon.

The ARC SIWG has not been very active last year. The product is stable and mature and there are no fixed agreements on enhancements with Ex Libris. This SIWG will become more active when a new version of ARC will be announced by Ex Libris. In the past members of the group have been helpful in beta testing new versions and this has helped the usability for the customers. The ARC coordinator is also involved in the Analytics SIWG to assure that knowledge and experience from the past will be used in the next generation Analytics products and services.

## Consortia SIWG

The Consortia SIWG was dormant last year, only to wake up for each conference to organize a meeting for representatives of consortia. But this spring we have seen a new initiative coming from the Icelandic, Belgium and Luxemburg consortia reaching out to Ex Libris to advocate for additional functionality for consortia in Alma and Primo. We are very happy to announce that starting this conference Sveinbjörg Sveinsdóttir from the Landskerfi consortium from Iceland is taking over the coordinator position from Peter Klien who is taking a sabbatical from IGeLU.

At the conference the traditional Consortia Business meeting will focus on the new mission of the SIWG and attendees will be invited to participate to build an active group that will represent the interests of modern consortia who serve a broad spectrum of patrons.

## Renaming KBAB to Content SIWG

The group formerly known as Knowledge Base Advisory Board has been renamed shortly before this conference into Content Working Group. The group is also charged with taking over the organization and management of the Content voting cycles for Knowledge Bases for SFX, 360, Alma and for indexes for Summon and Primo Central.

The Content Working Group will work very closely together with the new Ex Libris Content Operations unit that unifies all content ingestion processes for these products. The unification of the Content Operations inside Ex Libris promises to give a swing to the quality and transparency of the Ex Libris content repository that underlies SFX, 360, Alma, Summon and Primo Central.

The Content SIWG is very important for the community to better understand this Ex Libris repository and to advocate for flexibility and faster delivery of additional content for SFX, 360, Alma, Summon and Primo Central.



## Interoperability SIWG

The key goals of the Interoperability SIWG are very clear and published on <http://igelu.org/special-interests/interoperability/key-goals>. As a result of these key goals the SIWG has produced last year an important document: the [Open Standards Position Paper 2017](#).

Both IGeLU SC and ELUNA SC have endorsed the document. The document defines “Openness” in all its manifestations and forms ending with this statement that will be the base for further discussions on the Ex Libris API roadmap:

*“For the sake of global interoperability, Ex Libris should support all applicable open standards for their product suite anyway. Consequently it is a matter of efficiency that in time all Ex Libris proprietary protocols and formats are replaced by open standards, also for internal interoperability. By doing so, Ex Libris can provide a true Open Platform.”*

Members of the SIWG are involved in discussions that PWGs like Primo and Alma have with Ex Libris about interoperability and also take part in the Authentication Focus Group. The SIWG is very active in organizing and helping the famous IGeLU [Show & Tell session](#)

## Linked Open Data SIWG

The LOD SIWG has been very active this year in designing and executing a survey among the customer base to inventory the use, needs and plans for Linked Open Data. The result will lead to focus the activities of the group for the near future.

The announcement by Ex Libris in May 2017 that it is carrying out its BIBFRAME roadmap, designed to enable institutions to gradually implement BIBFRAME with minimal disruption to their workflows is a big success for the LOD SIWG and the result of long discussion between the group and Ex Libris. The LOD SIWG is very active in organizing well attended [Show & Tell sessions](#) for all customers together with the other SIWGs.

## SFX PWG

The SFX is organizing and managing the NERS enhancement voting cycle and representing the customers in regular meetings with Ex Libris product management. The result is obvious for all customers. SFX enhancements are delivered fast and generous by Ex Libris. Although SFX is a rather old and mature product, the customer base is still large and many customers heavily depend on SFX for their Discovery to Delivery linking which makes the product indispensable as long as a customer has not purchased a next generation ILS. This makes the SFX PWG an important working body acting a bit in the background but actively representing and advocating the customers interests to Ex Libris.

## Voyager PWG

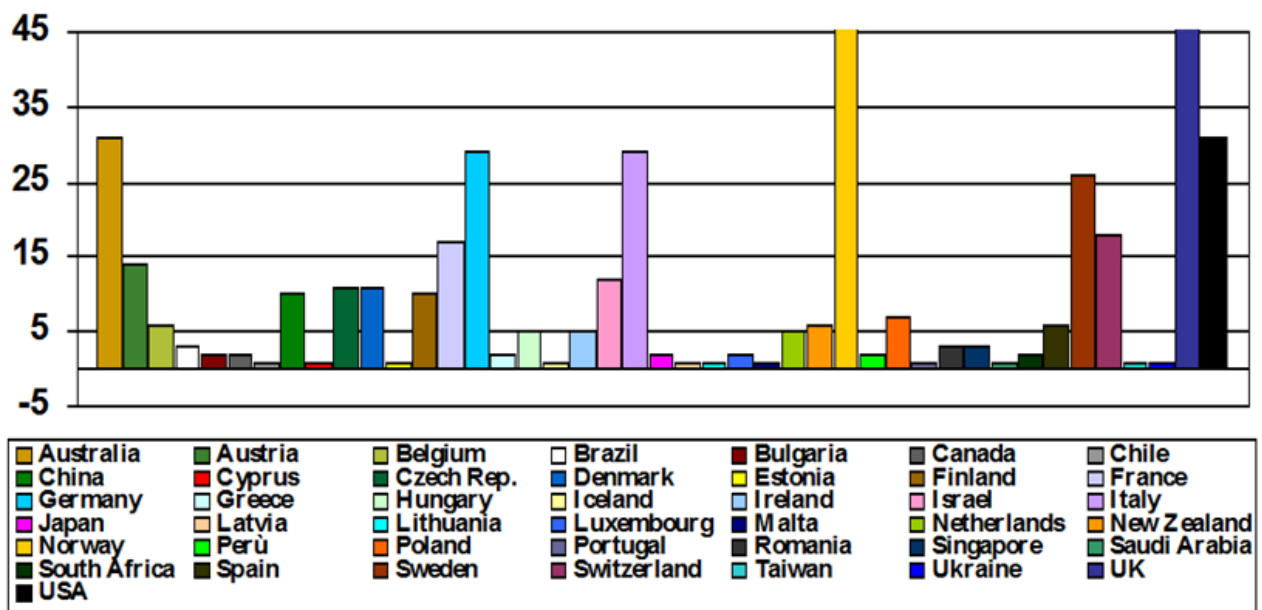
Many Voyager customers have made the transition to Alma, which has had an impact on the number of volunteers that staffed the PWG. Thanks to the coordinator who has recruited new active members the Voyager PWG is able to represent the customers interests to Ex Libris by having regular meetings with the Product Manager.

Besides the work on enhancements for Voyager versions 10.2 and 11 the PWG is committed to updating the Voyager information on the Ex Libris Developers Network platform and attracting more presenters on Voyager to IGeLU conferences.

## Membership

Since the last conference 35 institutions have joined IGeLU while 17 members did not renew their membership in 2017. Apart from these regular members the Norwegian BIBSYS consortial member has added 69 new consortial institutions and converted 8 existing regular members to consortial institutions. This means the total number of registered IGeLU members is now 472, a growth by 87 members.

In comparison to the 1<sup>st</sup> IGeLU meeting in Stockholm 2006 with 210 members from 29 countries we have seen a stable, significant and healthy growth. Our member institutions now represent 43 countries:



The growing market share of Ex Libris, together with the acquisition by ProQuest leads to a much larger customer base. Expanding IGeLU is needed to organize a better representation of this growing customer base so IGeLU will have to invest in reaching out to all of these new customers in all regions of the world (APAC, EMEA and America).

### Consortial membership

To better serve the needs of the community the Steering Committee has reacted to requests by consortia to develop a special consortial membership that will allow large consortia to organize their representation inside IGeLU much easier. At the 2016 Trondheim conference the General Assembly approved to the implementation of a special Consortial membership and in 2017 this has been successfully used by Norwegian Consortium BIBSYS which is registered as consortial member having 77 consortial institutions inside IGeLU. The BIBSYS consortium also uses the option to vote as a collective. More information: <http://igelu.org/about/membership/consortial-membership>

### Administration

The IGeLU administration team in Siena led by Guido Badalamenti has invested time to modernize the back office administration to facilitate the Consortial membership and to enhance the self service options for members now and in the near future. I want to express my sincere thanks to **Guido Badalamenti, Fabrizio Di Fuccia, Duccio Di Blasi, Katia Pizzo** and **Katia Medagliani** for all their indispensable work and devotion to the community.

## IGeLU General Assembly & Budgets

At the IGeLU General Assembly on Day 1 of the conference, Monday, September 11<sup>th</sup>, Session 4: 14.00-15.00, you will be asked to give your formal approval the Steering Committee needs to get for the budgets and the Chair report.

For the open positions of the Steering Committee, the candidates will present themselves at the meeting after which the voting immediately starts. Please register for the voting at the conference reception desk and pick up your voting slips. Don't forget to ask if any not attending member institution has mandated you to vote on their behalf by proxy.

### Budgets

The IGeLU treasurer **Guido Badalamenti** takes care of IGeLU's financial administration. This almost invisible work is very important for the continuity of IGeLU and we owe Guido – Ex Officio SC member since 2006! – a lot. All budget information is transparent for members and non-members published on our website: <http://igelu.org/about/organisation/budget>.

As usual, the largest items of expenditure in the 2016 budget were the contributions to the Annual Conference meeting in Trondheim and to Steering Committee and Working Groups meetings. We need to persist on expanding our membership base to allow for the bigger expenditures due to higher prices for both travel costs and large conference venues that come with the growing customer base. Also the closer collaboration with ELUNA in joint Working groups increases the costs for travelling, just as the expansion to the Asia and Pacific region does.

In 2016 we managed again to level our expenditures to our income and so our expenditures are well in balance with our regular income. According to the Steering Committee proposal, the draft of the final budget for 2017 and the draft budget 2018 reflect the high conference costs and the expected larger expenses for the activities of the growing number of working groups. We expect a Rosetta Product Working Group to become active in the near future.

Thanks to the growing membership and the ongoing support by Ex Libris we are again able to present balanced budgets for 2016, 2017 and 2018, and keep the membership fee stable for the 12<sup>th</sup> year! During the General Assembly at the conference you will be asked to approve to the budget.

### Voting on two open positions of the Steering Committee

This year there will be voting on four positions on the Steering Committee; a call for candidates has been published in the pre-conference News in Brief on our website and was distributed via the mailing lists. The elections will take place during the conference. The four Steering Committee positions are open because the terms of Mark Dehmlow, Tracey Clarke and Shameem Nilofar Maideen have expired. Shameem and Tracey are happy to candidate again for re-election, Mark needs to step down, see page 1 of this report for a tribute to Mark!

The fourth open position is for the expansion of the Steering Committee approved at the 2016 Trondheim conference by the General Assembly.

Please collect your voting slips at the registration desk to vote for the candidates of your choice. More information on all candidates on our website: <http://igelu.org/archives/9946>

### Free membership for all new customers

Page four of this Chair report describes the decision made by the IGeLU Steering Committee to introduce a free first year membership for Ex Libris customers. I hope next year to be able to report you a similar success as the Consortial membership introduction this year produced.

**Theo Engelman, IGeLU Chair**