

Ex Libris Users of North America (ELUNA)

2008-2009

Annual Report

to

International Group of Ex Libris Users (IGeLU)

Helsinki, Finland

September 6, 2009

## **Leadership:**

### *Steering Committee*

In March and April 2009, ELUNA held online elections for new members of the Steering Committee. This was a competitive election, with six candidates standing for four open positions on the SC. The new ELUNA Steering Committee took office following the ELUNA 2009 meeting May 1-4 in Richmond, Virginia, USA. The current composition of the Steering Committee is:

- Pascal Calarco, University of Notre Dame/Michiana Academic Library Consortium (MALC) Chair, DigiTool PG Liaison 2009-2010 (re-elected 2009 for 2009-2011 term)
- Bob Trotter, University System of Georgia Chair-elect, SFX PG Liaison 2009-2010, Liaison to ELUNA 2010 (re-elected 2009 for 2009-2011 term)
- Kristine Hammerstrand, University of Illinois/Consortium of Academic & Research Libraries of Illinois (CARLI) Secretary 2009-2010, Liaison to ELUNA 2011 (elected 2009 for 2009-2011 term)
- Laura Morse, Harvard University Member at Large, Verde PG Liaison 2009-2010, (elected 2009 for 2009-2011 term)

The other continuing members of the Steering Committee are:

- Edward M. Corrado, State University of New York (SUNY) at Binghamton Webmaster, Liaison to MetaLib PG 2009-2010 (term ends 2010)
- Wil Frost, University of Hawaii at Manoa Communications Officer, Liaison to Regional User Groups 2009-2010 (term ends 2010)
- Gary Johnson, College Center for Library Automation (CCLA) Aleph PG Liaison 2009-2010 (term ends 2010)
- Suzanne Julich, University of Iowa Treasurer, Primo PG Liaison 2009-2010 (term ends 2010)
- Janet Lute, Princeton University Past Chair, Voyager PG Liaison 2009-2010 (term ends 2010)

### *Product Group Chairs:*

The following were elected or continued as ELUNA Product Group Chairs at the ELUNA 2009 meeting:

- Aleph: Linda Allbee, Online Dakota Information Network (ODIN)
- DigiTool: vacant
- MetaLib: John Little, Duke University
- Primo: Dale Poulter, Vanderbilt University
- SFX: Maribeth Manoff, University of Tennessee at Knoxville
- Verde: Heather Tunender, California State University, Fullerton
- Voyager: Emily Batista, University of Pennsylvania

## **ELUNA Status: 2009-2010**

### *Membership*

ELUNA lost a few members this year, from 347 to 317 as of September 2009. These 317 represent a total of 1131 total member libraries, as we have several large consortia in ELUNA. The loss is mostly attributable to individual libraries also having ELUNA membership when they were part of a consortium. This year, ELUNA is planning a major membership drive to increase our membership in Voyager-only libraries that are not yet ELUNA members. We are developing a glossy brochure and related marketing materials that we can use for new Ex Libris customers in North America, existing customers who have never joined ELUNA, and vendors to seek sponsorship at future ELUNA meetings.

### *Annual Meetings*

ELUNA 2009 drew approximately 480 attendees, which was only a bit down from the previous meeting in Long Beach, CA. We were helped substantially by the proximity to the greater Washington, DC area and the east coast corridor which made it easy for many attendees to spend some time at the meeting even if they could not stay for all of it.

ELUNA 2010 will be held in Fort Worth, Texas, May 9-14, 2010. The Program Committee will be chaired by Sherrie Kristin, Purdue University-Calumet and the Local Arrangements chaired by Walter Betts of Texas Christian University.

ELUNA 2011 will be held in Milwaukee, Wisconsin in May 2011, and will be hosted by the University of Wisconsin system.

ELUNA 2012 will be held in Quebec City, Quebec in May 2012, and will be hosted by the Universite du Quebec consortium.

### *Regional User Groups*

The Regional User Groups (RUGs) were established within the Voyager user community, and since the merger have slowly been integrated into the rest of the Ex Libris user community. There are 16 RUGs – a Caribbean group (UCAREL) was started this year that includes Puerto Rico, Trinidad and Tobago, Bahamas, Dominican Republic, and Jamaica. Ten RUGs met this year, 5 were scheduled following the ELUNA 2008 conference. ELUNA worked with the Ex Libris Chicago office to enhance marketing and visibility for the RUG meetings .

ELUNA will be providing more support and new financial commitment to the RUGs beginning with the Fall 2009 meetings, and Pascal Calarco and Wil Frost held a focus group breakfast discussion with members of the RUGs who were present at the ELUNA 2009 meeting in Richmond.

### *URM and OCLC Record Use Policy*

At the ELUNA 2009 meeting, the Steering Committee and Ex Libris senior management discussed the impasse with OCLC on equitable access to the WorldCat bibliographic records corpus. Within the

URM construct, the “community zone” layer would be contributed descriptive metadata records from individual libraries, external vendors and other entities. OCLC has been trying to make its records use policy more specific and restrictive, and, in ELUNA's opinion, effectively bar OCLC member libraries to share the bibliographic records in their catalogs with commercial entities and projects such as the URM. Therefore we reached out to several other ILS user communities in North America, the Unicorn Users Group International (UUGI), and the Customers of Dynix Inc. (CODI) to jointly endorse the International Coalition of Library Consortia (ICOLC) Statement on the Proposed OCLC Policy for Use and Transfer of WorldCat Records, dated May 11, 2009. This was forwarded to the OCLC Members Council as input in their review process. The Members Council eventually decided to abandon the proposed policy and begin again. ELUNA would like to continue this advocacy, and have IGeLU as well as other ILS user groups join this effort over the next year.

### *Organizational Issues*

ELUNA will be focusing on several organizational areas this year, which will be carried over into future years in some cases:

- Improving communication with our membership
- Securing a longer-term Treasurer for organizational continuity
- Extending Chair term from one to two years for leadership continuity
- Strengthening relationships with Regional User Groups, supporting them and integrating them into ELUNA
- Strengthening and reorganizing Special Interest Groups to reduce organizational isolation
- Enhancing our web presence in terms of content, usability and access

### **Joint Efforts Between ELUNA and IGeLU**

For the past few years, the Steering Committees of IGeLU and ELUNA have had as a broad goal to increase the interaction, communication, collaboration and joint efforts between the two organizations to bring the global user community of Ex Libris products, combine our efforts and work on areas of common concern as advocates of our member institutions to advance, improve and strengthen the user community's relationship and influence with Ex Libris and its products.

The overall goal was to be able to have the two user groups meet, discuss and plan together twice a year, strengthening relationships between the organizations, and have the opportunity to meet with Ex Libris senior management at two major events each year, thus increasing our face-to-face communication, exposure, and influence with them.

To this end, in January 2009, the IGeLU Steering Committee and Product Working Group leaders joined their ELUNA colleagues at the American Library Association 2009 Midwinter meeting in Denver, Colorado for five days of joint meetings and with Ex Libris senior management. This was extremely valuable for both the Steering Committees and the Product Groups, working on issues such as URM strategy sessions, Rosetta, B/x launch, SupportWeb/DocPortal/Pivitol integration and migration issues, and enhancing collaboration amongst product groups across the two organizations.

The new ELUNA Steering Committee voted to commit to sending its Steering Committee and Product Group leaders to the IGeLU meeting, with ELUNA substantially supporting this travel as IGeLU currently does with its leadership. The next North American meeting will be at ELUNA 2010 in Fort

Worth, Texas May 9-14, 2010.

These efforts have paid off very well so far. A few activities pursued jointly between IGeLU and ELUNA over the past year demonstrate the success of this venture:

#### *NERS*

A replacement for a joint product enhancement system was first discussed in earnest at IGeLU 2008 in Madrid, with Lukas Koster (IGeLU), Mark Dehmlow (IGeLU), Pascal Calarco (ELUNA), Fabrizio di Fuccia (IGeLU), and Duccio di Biasi (IGeLU). These initial discussions were furthered at the IGeLU SFX PWG meeting in Munich in April 2009, where Lukas, Mark and Fabrizio were joined by Bob Trotter (ELUNA), where the technical approach was established in more detail. From then until the IGeLU 2009 Helsinki meeting, Mark and Bob set out to code the solution according to these specifications. A robust functional description combined with a modular design approach along with two very talented programmers in Bob and Mark have contributed to this application, code-named as NERS (“New Enhancement Request System”), to have significant completion within the space of one year, which is a remarkable accomplishment considering the distances involved for those collaborating on the project. Once complete, IGeLU and ELUNA will have a shared single enhancement workflow and system in place that is applicable to all current and future products with robust user authentication and authorization features.

#### *Pivotol/SupportWeb/DocPortal*

This past year saw some real gains in deduplication and merging of system functionality in terms of customer-facing support systems that continue to advance the functionality of Ex Libris' support structure for the user community. The ability to see all open support incidents, migration of SupportWeb documentation to DocPortal, and improving the search capability were all advances the two user groups collaborated on with Ex Libris. There are still other improvements that can be made and that we expect, but these incremental steps have partially addressed customer issues across the global user community who use these systems.

#### *EL Commons*

The adoption of the user community shared wiki platform, which along with the Developer Zone represents “EL Commons” continues to move forward although this past year we were still struggling with issues of permissions, domain addresses for consortia for personal account creation, Product Groups being actively adding content and responsiveness of the system. The Aleph product groups now have a lot of content on the wiki, and there have been a large number of code contributions on both the wiki and Developer Zone areas. Beate Rusch (IGeLU) and Pascal Calarco (ELUNA) have worked with Laura Gilinski and Hani Iluz (Ex Libris Group) throughout the year and we will continue to work on improving this collaborative platform for the user community.

Respectfully submitted,

Pascal V. Calarco,  
Chair, 2009-2010  
Ex Libris Users of North America (ELUNA)