



**IGeLU 2011: USE.PT UPDATE REPORT**  
**[PORTUGUESE NUG MEMBERS' INSTALLATIONS STATUS | INTERNAL]**

Joint IGeLU SC and National/Regional User Group Representatives Meeting  
(including PWG and SIWG coordinators)

**10 SEPTEMBER 2011**

Hatter Student Building, University of Haifa, Haifa, Israel

**SUMMARY**

USE.pt – “Utilizadores de Sistemas Ex-Libris em Portugal” [Portuguese Ex Libris users] aims at promoting cooperation and information sharing between Aleph integrated library system’s users and all of the other products from Ex-Libris in Portugal and foster its development, in response to opportunities created by continues evolution in information technologies. New forms of library services’ organization and operation analysis, sharing and recommendation are also at the core of USE.pt main goals.

UNA.pt (National Aleph User Group), a national association established formally in July 2002 to represent the interests of ALEPH Portuguese users (similarly to ICAU, but at a national level), was the predecessor of USE.pt. UNA.pt, in order to accommodate the growing adoption of Ex Libris products in Portugal, had its social designation renamed to USE.pt and statutes changed accordingly, in June 2006, opening its membership to any institutions with an Ex Libris product’ license.

This report is a differential update of Ex Libris products implementations and evolution status in Portugal, in relation to as they were by the last IGeLU Conference (5th IGeLU annual conference, held in Ghent, Belgium, August 30 – September 1, 2010).

**1. USE.pt members’ implementations**

The numbers of USE.pt members were reduced in this last year from 14 to 12 due to Ex Libris products cancelation or integration in a central installation; the present installations by product are as follows:

Member Institution	Aleph	DigiTool	MetaLib	SFX	Primo
Assembleia da República	(canceled)		(canceled)		
Centro de Informação Europeia Jacques Delors	18.01 SP 2264				
Fundação para a Computação Científica Nacional			4.4.3	4 (2011 2800)	(see product notes)
Instituto Politécnico de Leiria	18.01				
Universidade da Madeira	18.01	(canceled)			
Universidade de Aveiro	18.01, SP 2264 (STP v20.2.3: Mid-September)				
Universidade de Lisboa	18.01	3.2 SP 28*	4.3.0 (548)*		
Universidade do Minho	18.01		(canceled)		
<i>Universidade do Porto</i>					
Reitoria	18.01, SP 2237 (v20.2.3: data migr/, Target Test)		(canceled)	3	
Faculdade de Economia	18.01				
Faculdade de Engenharia	18.01, SP 2259 (STP v20.2.3: Mid-September)	3.3 SP01, Service Pack Level 1580	4.4.2 (701)	4	
Faculdade de Letras	18.01, SP 1613 (v20.2.3: being tested, STP: soon)				
Faculdade de Medicina	(merged into "Reitoria" central installation)				
Universidade Lusíada	18.01	3*			

Table 1: Portuguese Ex Libris Clients and Products

Note: all of the institutions not presenting a planned date for Aleph v20 STP (“Switch To Production”) are expecting starting the upgrade process in mid-September / October (some already started) and do the STP until the end of the civil year.

\* updated information as of October 2010.

## **1.1. General product notes and installation progress at a national level**

### **Aleph**

Besides the cancelation and merge mentioned above, there were no major changes, with all of the installations, at the present time, with Aleph 500.18.01 still in production; in a meeting in Lisbon in 25<sup>th</sup> January 2011 (see entry bellow) between USE.pt Steering Committee and associates and with Ex Libris representatives, it was agreed to have 3 installations, representative of the remaining ones (one large and two small/medium sized) starting the upgrade process into Aleph 20 as soon as possible (March/April), passing relevant obtained knowledge to the remaining ones, that would follow in September / October.

In the meeting mentioned above, USE.pt Steering Committee (SC) presented the intention of organizing a national workshop devoted to Aleph migration 18.01 to 20.01 that took place in March (see entry 3.2).

A special remark to the fact that when Portugal still had a national distributor, this has begun implementing ILL2 (Integrated ILL), proving a special training for ILL operators in March 2009. Meanwhile, with the breach of representation and distribution of Ex Libris products in Portugal by this company, many installations were left at the middle of the process and still don't have it running (going to implement it from scratch in version 20).

Small technical problems occurred (placed as incidents in CRM), but were promptly solved by Ex Libris.

### **DigiTool**

Regarding the period covered by this update report there are no special remarks, with all of the ongoing processes running according to advanced and adopted road map (to have a new minor version release by Ex Libris [3.4] and implement it until of the year), looking forward to ALMA.

### **MetaLib**

During the present year, three installations have canceled their MetaLib contracts (please refer to Table 1), mainly due to the lack of in-house support dedicated technical staff and to also to the low level of user satisfaction registered by their users.

At b-on (national consortium run by FCCN - Fundação para a Computação Científica Nacional), in the second semester of 2011, PrimoCentral was activated in MetaLib as a new quick-set (named SuperSearch).

Also according to FCCN, during the present year both MetaLib and Primo Ex Libris support response times have been bad, with some incidents taking more than 4 weeks to be solved (Primo implementation and Metalib related ones).

## **SFX**

Besides the upgrade from SFX3 to SFX4 on most installations, that was a smooth and went quite well, there is nothing special to report about SFX implementation in Portuguese installations.

## **Primo**

Special remark to the adoption of PrimoCentral by FCCN for b-on national consortium as mentioned above; its implementation is almost finished and it is expected to be announced to the community during this year's last trimester.

## **2. Interaction with Ex Libris USE.pt: Meeting, Lisbon, January 25, 2011**

Initially proposed by Ex Libris, the main goal of this meeting with USE.pt SC became Aleph migration discussion and analysis (first upgrade being done without the intervention and training of a national distributor). Given that, it was open to all of the associates who wanted to participate and some new points were added to its agenda, with Ex Libris being highly represented by Robert Bley (Managing Director of Ex Libris (UK), our contact in organizing it), Jürgen Küssow (Ex Libris Germany, who presented ALMA in Portuguese) and Martin Büscher (from Ex Libris Support Team, who presented Ex Libris' Road Map to Aleph v20 migration and possible upgrade scenarios, advising the better suited ones according to Portuguese installations, timely advanced, prior to the meeting itself). A commitment was also achieved regarding the localization, namely translation into Portuguese of Portugal, carried out by USE.pt members, using an Excel sheet sent by Ex Libris Support, with all of the entries (in English and Brazilian Portuguese), done by University of Lisbon, with a first Revision from University of Oporto ("Reitoria") and then a final one by all of the members. This translation was sent to Ex Libris (Aharon Rivlin / Ori Miller) and incorporated into both Upgrade Expresses (18>19 and 19>20).

## **3. USE.pt's promoted workshops:**

### **3.1. MetaLib / SFX held in Porto on October 13, 2010**

This meeting was attended by representatives of all USE.pt members with MetaLib / SFX licenses. Relevant topics discussed at the meeting were: Primo, PrimoCentral and

the presentation of the portfolio of commercial offers related to these products, complemented with a discussion about the introduction of SFX4 and the U-Stat product.

### **3.2. Migration Aleph 18:01> 20:01, held in Aveiro on March 25, 2011**

As a first activity proposed by the new USE.pt Steering Committee, with data and commitments established with Ex Libris representatives in the Lisbon meeting (entry 2. above), a migration national workshop was held at the University of Aveiro, on the 25<sup>th</sup> of March 2011. The main aim was to analyze all of the possible local scenarios and establish a set of common approaches, group the installations so that USE.pt could provide as maximum of support and guidance in this process as possible, gathering information and routing common problems to Ex Libris and answers back to the group.

Augusto Ribeiro, from the Rectory of the University of Porto, based on presentation by Ex Libris (“Guidelines\_for\_Aleph\_18\_01\_to\_20.x\_Upgrade”, present in the Documentation Centre, also presented in the Lisbon meeting), explained the mechanics of the upgrading process from version 18.01 to 20.2, and remembered the various scenarios presented by Martin Büscher. Augusto also recalled that the Ex Libris would support the installation of Aleph in virtual machines and that it was advised to have a separate test server dedicated to this process (whether a physical or virtual one).

Also the implications of changing from a 32 bits OS into a 64 bits one were analyzed by the entire group (mainly Aleph System Managers) and migration scenarios advanced.

Based on this information, a quick analysis of the documentation present in Ex Libris Documentation Centre and Ex Libris Support Team mails to Aleph’s mailing lists (*Aleph-news-l* and *Aleph-news-eu-l*) it was then outlined a common strategy for the migration process at a Portuguese national level, as referred above in Aleph section of this report.

A typical project plan was also presented, having Ex Libris’ “Aleph 18-20 upgrade project plan” as basis, and the associated road map of activities, interactions with Ex Libris support (along with a timeline when those should occur and what information should be attached to the support incidents in CRM). All of the relevant documentation was gathered and organized by stages in the upgrade process in a “DocKit”, distributed to the present members, properly protected (encrypted).

## **4. Integrated Communication with members, and the Library community in general:**

- Already existing mailing lists:
  - General members list: [use@fe.up.pt](mailto:use@fe.up.pt);
  - Steering Committee / Managing Board: [diruse@fe.up.pt](mailto:diruse@fe.up.pt);
- Institutional website USE.pt
  - <http://metis.fe.up.pt/use/>
  - remodeled, adopting Drupal (Open Source) CMS providing member’s areas;
  - future registration of the USE main domain (USE.org / USE.eu);

- New facebook page:
  - <http://tinyurl.com/facebook-use-pt>
  - regularly updated, even with notices to events not totally Ex Libris products related, but considered of interest to USE.pt members;
- New facebook closed group:
  - <http://www.facebook.com/groups/189384901076814/>
  - Internal sharing of ideas between USE.pt and its members (both ways);
  - Informal communication and sharing amongst USE.pt member institutions' staff;
  - Sharing of notices about Ex Libris products international events and new developments / new Ex Libris products.

## 5. IGeLU: Activities, PWGs and SIGs

### 5.1. Current IGeLU members

- |    |          |   |
|----|----------|---|
| 1. | 351CIEJD | CIEJD – Centro de Informação Europeia Jacques Delors                                |
| 2. | 351FCCN  | FCCN – Fundação Computação Científica Nacional                                      |
| 3. | 351FEUP  | Universidade do Porto – Faculdade de Engenharia                                     |
| 4. | 351UP    | Universidade do Porto   |
| 5. | 351USE   | USE.pt (Utilizadores de Sistemas Ex-Libis), representing the remaining institutions |

### 5.2. Active involvement of USE.pt members in IGeLU activities:

- Coordination of the **DigiTool Product Working Group** by FEUP (Faculdade de Engenharia UP, Luís Miguel Costa);
- Shared Coordination of the **Special Libraries Special Interest Working Group** by CIEJD and CEDEFOP (European Centre for the Development of Vocational Training);
- **Aleph Product Working Group** additional support by Augusto Ribeiro, University of Porto.

## 6. Future activities

- Promote further thematic workshops;
- Study groups set up, besides the currently running one [study of the impact, benefits of switching from UNIMARC to MARC 21, of this last adoption];
- Reactivate the National Product Working Groups;
- Promote a national meeting to introduce the main points covered in IGeLU2011's;

Proposals for activities advanced in the first USE.pt SC meeting, 2011/2012 biennium, November 2010:

6.1 Possible USE.pt application for European projects;

6.2 Iberian Meeting of Ex Libris products users (pre-proposal, intended to be scheduled for 2012), aiming at presenting and discuss:

- Organization of the two associations (NUGs);
- Activities promoted;
- Transversal good practices;
- Local developments in the member installations;
- Possible partnerships and/or establishment of *Special Interest Groups*.

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USE.pt Update Report for IGeLU2011, Sept. 2011

**USE.pt Steering Committee**, 2011/2012 biennium:

**President** Filipe Bento (Universidade de Aveiro)

**Secretary** Dulce Correia (Instituto Politécnico de Leiria)

**Treasurer** Carlos Medeiros (Centro de Informação Europeia Jacques Delors)