

VERSION 1.1
SEPTEMBER 14, 2014



IGELU 2014: USE.PT UPDATE REPORT

NATIONAL/REGIONAL USER GROUP REPRESENTATIVES MEETING

PRESENTED BY: PAULO LOPES

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ORGANIZATION AND ACTIVITIES

The Portuguese association for ExLibris users – USE.pt – was created in 2006, in order to accommodate the growing adoption of ExLibris products in Portugal. It aims to promote cooperation, information sharing between his members and to foster its development in result of the opportunities created by the continuous evolution in information technologies.

It succeeded the former UNA.pt association, held back in 2002 to represent national Aleph users.

It is composed by three government bodies: a General Assembly, the Steering Committee and the Supervisory Board.

It yields an annual meeting and general assembly and organizes, when justified, product upgrade & product update workshops.

USE.PT GOVERNANCE BODIES

General Assembly:

President: Carlos Medeiros, Centro de Informação Europeia Jacques Delors.

Steering Committee:

President: Pedro Graça – Universidade do Porto;

Secretariat: Helena Saramago – Universidade de Lisboa;

Treasurer: Paulo Lopes – Fundação para a Ciência e a Tecnologia.

Supervisory Board:

President: Eloy Rodrigues, Universidade do Minho;

Assistant: Dulce Correia, Instituto Politécnico de Leiria;

Assistant: Paulina Pereira, Faculdade de Economia da Universidade do Porto.

USET.PT PROMOTED ACTIVITIES

USE.pt General Assembly 2014, hosted by FCT-FCCN, on January 31st, where a new USE.pt member was presented, a new Steering Committee board was elected and the preceding year management, financial and activities report was presented and approved.

Participation in the Spanish ExLibris User Group annual meeting, at Valencia, June 5th 2014, with the aim of establishing close a cooperation between the two associations of ExLibris Products Users of the Iberian Peninsula.

FUTURE USE.PT ACTIVITIES

- Continue the Iberian cooperation;
- Promote further thematic workshops;
- Reactivate the National Product Working Groups;
- Promote a national meeting to introduce the main points covered in IGeLU2014's;
- Possible USE.pt application for European projects;

- Iberian technical seminar.

MEMBERS & TYPES OF LIBRARIES

The number of members increased compared to last year, counting with one more member. Now USE.pt counts with a total of 12 members:

- 1 is a private hold company, based in Lisbon servicing users in Portugal , US and Brazil – EDP;
- 1 EU Institution – Jacques Delors Information & Documentation Center –;
- 1 national funding agency for science, technology and innovation, under responsibility of the Ministry for Education and Science (Responsible for a national consortia management, with 60 members);
- 9 University Libraries, were University of Porto counts as 4 members. Three of their biggest faculties have independent installations and are independent members ;

In recent years two Institutions cancelled their participation in use.pt. Drop ExLibris products and adopted other solutions – Universidade Lusíada and the National Parliament –

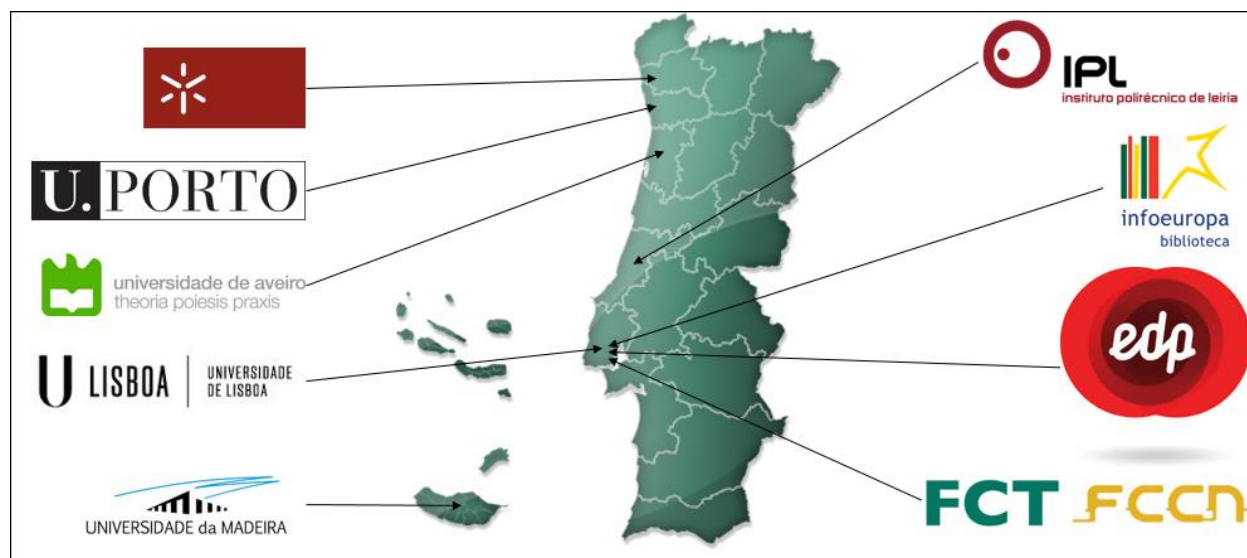


FIGURE 1: USE.PT MEMBERS NATIONAL GEOGRAPHIC DISTRIBUTION

LIST OF USE.PT MEMBERS AND THEIR PRODUCTS

Member	Aleph	Metalib/ Metalib+	SFX	Digitool	Primo
Centro de Informação Europeia Jacques Delors	X				
Eletricidade de Portugal – EDP –	X		X		X
Fundação para a Ciência e a Tecnologia		X	X		
Instituto Politécnico de Leiria	X				
Universidade da Madeira	X				
Universidade de Aveiro	X				

Member	Aleph	Metalib/ Metalib+	SFX	Digitool	Primo
Universidade de Lisboa	X	X	X		
Universidade do Minho	X				
Universidade do Porto – Economy	X				
Universidade do Porto – Engineering	X	X	X	X	
Universidade do Porto – Humanities	X				
Universidade do Porto – Rectory	X		X		

MEMBERS CONTACTS

Member	Institutional contact	Technical contact	Product URL
Centro de Informação Europeia Jacques Delors	Carlos Medeiros carlos.medeiros@ciejd.pt	Manuel Múrias manuel.murias@ciejd.pt	https://infoeuropa.euroid.pt
Eletricidade de Portugal – EDP –	Dídia Cruz didia.cruz@edp.pt	ExLibris	
Fundação para a Ciência e a Tecnologia	Teresa Costa teresa.costa@fccn.pt	Paulo Lopes plopes@fccn.pt	http://pesquisa.b-on.pt http://sfx.b-on.pt
Instituto Politécnico de Leiria	Rosa Marcos rosa.marcos@ipleiria.pt	Pedro Figueiredo pedro.figueiredo@ipleiria.pt	http://www.catalogo.ipleiria.pt
Universidade da Madeira	bibuma@uma.pt	bibuma@uma.pt	http://bibuma.uma.pt
Universidade de Aveiro	Ana Bela Martin abela@ua.pt	SBIDM-Tecnologias@ua.pt	http://opac.ua.pt
Universidade de Lisboa	Helena Saramago hsaramago@reitoria.ulisboa.pt	António Manuel anrmann@reitoria.ul.pt	http://sibul.reitoria.ul.pt/
Universidade do Minho	Eloy Rodrigues eloy@sdum.uminho.pt	dtsi@reitoria.uminho.pt	http://aleph.sdum.uminho.pt
Universidade do Porto – Economy	Adelino Pinto adelino@fep.up.pt	Paulina Pereira ppereira@fep.up.pt	http://biblios.fep.up.pt
Universidade do Porto – Engineering	Ana Azevedo ana@fe.up.pt	Pedro Graça pgraca@sp.up.pt	http://metalib.fe.up.pt http://aleph.fe.up.pt http://digitool.fe.up.pt http://sfx.fe.up.pt/feup/az

Member	Institutional contact	Technical contact	Product URL
Universidade do Porto – Humanities	João Leite jleite@letras.up.pt	Vitor Pereira vpereira@sp.up.pt	http://aleph20.letras.up.pt/
Universidade do Porto – Rectory	Martins Ferreira jmf@reit.up.pt	Tiago Fernandes tfernandes@reit.up.pt	http://catalogo.up.pt

COMMUNICATION WITH MEMBERS AND WITH THE LIBRARY COMMUNITY IN GENERAL

Communication with members is held thru several channels, namely:

- Mailing list
 - General members list: geral@usept.org
 - Steering Committee / Managing Board: diruse@usept.org
 - Technical staff (Installation Managers and System Librarians): admins@usept.org
- Institutional website use.pt
 - <http://www.usept.org>
 - adopting Drupal (Open Source) CMS providing member's areas
- Facebook page:
 - <http://tinyurl.com/facebook-use-pt>
 - updated, even with notices to events not totally ExLibris products related, but considered of interest to use.pt members
- Facebook closed group:
 - <http://www.facebook.com/groups/189384901076814/>
 - Internal sharing of ideas between use.pt and its members;
 - Informal communication and sharing amongst use.pt member institutions' staff;
 - Sharing of notices about ExLibris products international events and new developments / new ExLibris products.
- Plans for a YouTube Channel for sharing use.pt events videos
 - Example: <https://www.youtube.com/watch?v=smkbwK3mVd0> (use.pt 2012 workshop event)

CURRENT IGELU MEMBERS

- 351CIEJD : Centro de Informação Europeia Jacques Delors
- 351FCCN : Fundação Computação Científica Nacional
- 351FEUP : Universidade do Porto – Faculdade de Engenharia
- 351UP : Universidade do Porto – Rectory
- 351USE: : Portuguese National Group, representing the remaining institutions

MEMBERS ACTIVITY AT IGELU

Over the years USE.pt members have secured a regular participation at IGELU conferences (and ExLibris system seminars too):

- Around 2007-2010 one element of USE.pt at the IGELU Steering Committee.

At the moment several USE.pt members play an active role at IGELU's Product Working Group activities:

- One Digitool Product Working Group member
 - Luis Costa, the PWG Coordinator;
- One Aleph Product Working Group member
 - Pedro Graça, member responsible for the ADM module.

INSTALLATIONS STATUS AND DATA BY PRODUCT AT A NATIONAL LEVEL

The current installations status and data by product are as follows from the Institutions that responded to the annual survey.

SFX

Members	Satisfaction level [1-10]				Infrastructure		
	Version	Product	Support	Nº Records	N.º Users	Production server	Test server
UP-FEUP	4	8	9	39.000 journals 68.000 ebooks	10.000	Virtual	No
FCT\FCCN	4	8	6	180.000	350.000	Physical	Yes
UL	4	-	-	-	-	-	-
EDP	4	-	-	-	Registered: 2.112 Potential: 10.000	-	-

DIGITOOL

Members	Satisfaction level [1-10]				Infrastructure			
	Version	BIB Format	Product	Support	Nº Records	N.º Users	Production server	Test server
UP-FEUP	3.4	DC	7	9	55.000	10.000	Physical	No

METALIB/METALIB⁺

Members	Satisfaction level [1-10]				Infrastructure			
	Version	Product	Support	Resources	N.º Users	Production server	Test server	
FCT\FCCN	4.5.2	8	6	18 Publishers / Aggregators 95% of the resources covered by primo central	350.000	Physical (Metalib) SaaS (Metalib+)	Yes	
UL	-	-	-	-	-	-	-	
UP-FEUP	4.5.2.1	6	9	180 active targets	10.000	Virtual	No	

ALEPH

Members	Version	BIB Format	Satisfaction level [1-10]			Nº Records	N.º Users	Infrastructure	
			Product	Support				Production server	Test server
CIEJD	21.1.2	UNIMARC	8	8	52.000	8.500	Virtual	No	
IPL	20.01	UNIMARC	8	6	140.000	14.500	Virtual	No	
UMA	18.01	UNIMARC	8	8	71.000	17.000	Physical	No	
UA	20.2.3	UNIMARC	8	9	235.000	21.000	Virtual	Yes	
UP-Rectory	18.01	UNIMARC	8	8	290.000	25.500	Virtual	Yes	
UP-FEP	18.01	UNIMARC	8	8	65.000	6.000	Virtual	No	
UP-FEUP	20.2.7	UNIMARC	9	8	160.000	10.000	Physical	Yes	
UP-FLUP	20	UNIMARC	-	-	225.000	17.800	Physical	No	
UM	18.01	UNIMARC	-	-	317.000	22.306	Physical	No	
UL		UNIMARC	-	-	-	-	-	-	
EDP	22	MARC21	-	-	100.000	Registered: 2.112 Potential: 10.000	Virtual	No	

PRIMO

Members	Version	Product	Satisfaction level [1-10]			Nº Records	N.º Users	Infrastructure	
			Support					Production server	Test server
EDP	-	-	-	-	-	Registered: 2.112 Potential: 10.000	SaaS		

GENERAL PRODUCT NOTES AND INSTALLATION PROGRESS AT A NATIONAL LEVEL

IMPACT OF ECONOMIC CRISIS IN LIBRARY SOFTWARE EVOLUTION

- Significant cuts in the institutions budgets and consequently in Libraries too – in some cases over 30% ;
- There have also been delays in the availability of budgeted funds;
- For the reasons listed above it is difficult to draw scenarios for the next 2/3 years to Portugal;
- In two of the largest Portuguese University institutions:
 - Lisbon University is in a major fusion process with other university institution (IST);
 - Porto University is undergoing a restructuring process and the election of a new Rector;
- Given the current situation, the adoption of open source solutions tend to be considered
 - Examples: ISCTE-IUL or Universidade Lusíada (Former ALEPH user and use.pt member)
 - European project in which one component is to assess the viability of Koha as a ILS solution – UPorto, UMinho UAveiro –

ALEPH

At the present time the University of Porto is discussing with ExLibris the possibility of substitute the four independent contracts that four entities inside the University have with ExLibris by one unique contract. This probably will originate a fusion process of four aleph installations, probably to a newer Aleph version.

There's no news of possible version upgrades for the times to come.

DIGITOOL

Nothing to report.

METALIB

Nothing to report.

SFX

Nothing to report.

PRIMO

Nothing to report.

INTERACTION WITH EX LIBRIS

GENERAL SATISFACTION WITH SUPPORT AND WITH EXLIBRIS

Satisfaction level of 7.75 points in a 1 to 10 scale. Value determined from the last inquiry held to use.pt members, with the results being included on 2013 annual report, presented on last IGELU congress in Berlin.

This last year, we have been witnessing a degradation of response time for support incidents and some incidents needed to be escalated in order to achieve some kind of response.

Majority of the users still think that relation through a National distributor would be better, mainly because of: Language and cultural issues; National distributors tend to know better the “little things” of costumers; Physical presence at installation sites is much appreciated and valued; Users give value to a closer and ongoing support.