CHAIR'S REPORT 2019

2019 Chair's Report

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Introduction

The IGeLU Chair's report is presented annually at the Conference General Assembly.

To save printing and wasting resources this report will be published onto the IGeLU web site.

The report also provides me with an opportunity to thank the large number of volunteers who form the backbone of IGeLU. These volunteers help drive the development of the Ex Libris products on your behalf and to meet your requirements. Essentially, they are the 'voice' of the community when discussing issues with Ex Libris.

I also like to report that the IGeLU 2019 is a landmark conference as this is the first IGeLU conference held outside of its traditional European base. This represents an opportunity for IGeLU to connect with the Asian customer base and increase the 'voice' of our community.

What makes us unique?

IGeLU has over 400 members which represents over a thousand institutions. Both IGeLU and ELUNA are not-for-profit organizations which operate independently of Ex Libris. In brief our aims are to represent the collective voice of the community when dealing with Ex Libris to ensure that product development benefits both the customer (you) and Ex Libris.

Besides our official Product Development Collaboration Agreement, where Ex Libris commits to invest development resources to implement enhancement requests ranked and voted by our members, 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 gives each institution the opportunity to actively take part in this and provides the framework for all members to benefit from the results of this close and vibrant relationship.

Dave Allen, IGeLU Chair

Steering Committee Activities

Steering Committee

The Steering Committee's (SC) main task is to help the Working Groups (WGs) do their job. It means taking care of financials and the stability of the organization in the long term. IGeLU uses a broad set of facilities such as our WebEx online conference system, our WordPress website, our Google collaboration document infrastructure, Twitter, our new Conference App and the joint IGeLU and Ex Libris Users Group of North American (ELUNA) exlibrisusers.org email distribution lists platform.

The SC coordinates the work done by the Working Groups and takes care of initiating new groups as required. The IGeLU SC has periodical meetings with the ELUNA Steering Committee and with Ex Libris Executive Management to streamline work and discuss new developments. These meetings allow us to represent the customers' voice during the early stages of any new product developments.

Shameem Nilofar Maideen stepping down from the IGeLU Steering Committee

Due to work commitments, Shameem Nilofar Maideen is stepping down from the IGeLU Steering Committee. She has been involved as SC Liaison Officer for several Working Groups and has been heavily involved with the 2019 Conference as the Local Conference Coordinator. She also has been instrumental in bringing the Annual Conference to Singapore. We are thankful for her commitment and wish her much success.

exlibrisusers.org list platform

The www.exlibrisusers.org platform - installed, configured and managed closely with ELUNA – offers discussion lists to customers of Ex Libris worldwide. This offers a platform for customers to share information, skills and experience and to communicate about issues that suddenly arise and need attention. In addition, lists have also been created to support Regional and National customers. In addition, these lists can be configured to support non-English languages. Please approach either IGeLU or ELUNA if you wish to set up a Regional or National list.

Other Communication channels

Our website and our periodical News in Brief combined with Twitter (@IGeLU) and Facebook are the main IGeLU communication channels. **Cindy Greenspun** manages all of these communication channels as her role as IGeLU Communications Officer.

IGeLU Steering Committee Roles

Each member of the SC has defined roles. These are as follows

Dave Allen – Chair and Alma and Rosetta Liaison Officer

Maribel Alvarado – Aleph, Analytics and Leganto Liaison Officer

Cindy Greenspun – Communications Officer and Voyager Liaison Officer

Christian Haenger – Content, Primo and National and Regional User Group Liaison Officer

Ken Herold – Interoperability/Developers and Summon Liaison Officer

Shameem Nilofar Maideen – 2019 Local Conference Coordinator

Jone Thingbø – IGeLU Document Control and Consortia and Linked Open Data Liaison Officer

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. **Tracey Clarke** has been working tirelessly throughout the year organizing this year's conference and her commitment and energy are to be applauded. In addition, she is already starting work on the 2020 IGeLU Conference.

Finance, legal and administration

The IGeLU treasurer **Guido Badalamenti** takes care of IGeLU's finances, the members administration and all legal affairs. This almost invisible work is very important for the continuity of IGeLU and the work that he and his team undertake for IGeLU is much appreciated.

IT-services and infrastructure

Mark Dehmlow takes care of all internal IGeLU ICT services and infrastructure. The IGeLU's website is capable of hosting multiple websites. As a result, **Mark** has successfully set up and migrated the following Regional and National User websites to the IGeLU platform

- ANZREG, the Australian and New Zealand User Group
- GUAL, the Latin American User Group
- ITALE, the Italian Ex Libris product users Group

This web hosting is available for free to all Regional and National User Groups. Please contact IGeLU if you wish to take up this opportunity. Finally, **Mark** is also the developer and administrator of **NERS**. Without **Mark,** IGeLU would not have a unique, dedicated and flexible voting system that allows us to offer one of our major benefits to the community; the privilege to vote in enhancement cycles as part of the official Product Development Collaboration Agreement with Ex Libris.

Working Groups activities

It is important to note that **Working Groups (WG) are the backbone of IGeLU.** The working groups rely on community membership and I encourage members to volunteer to join the working Groups when positions become available.

Some Working Groups are Joint Working Groups 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 thank the IGeLU WG coordinators:

- **Augusto Ribeiro,** Aleph WG
- **Betsy Friesen,** Alma WG
- **Margaret Briand Wolfe,** Analytics WG
- **François Renaville,** Content WG
- **Mehmet Celik,** Interoperability/Developers WG
- **Sue Harmer,** Leganto WG
- **Laura Akerman,** LOD WG
- **Knut Anton Bøckman,** Primo WG
- **Kirsty Smith,** Rosetta WG
- **Jiri Pavlik,** SFX WG
- **Ken Herold,** Summon WG
- **Antonella Ward,** Voyager WG

and to all other members of these Working Groups for the work they have been doing for our community over the past year. Please refer to our website for the full list of WG members who have taken the time to represent the community.

I have requested each of the WG coordinators to provide me information for inclusion into this report. The following reports have been supplied:

Aleph WG

As of the IGeLU 2018 Prague conference the ELUNA and IGeLU Aleph Working Groups has merged into one joint WG. **Augusto Ribeiro** is the current coordinator and **Camelia Anghel** will be the deputy. A**ugusto's** report is as follows:

On the 3rd June 2019, there was an Aleph minor release, Version 23.3.

Enhancements approved at the last voting cycle will be included in these versions until Aleph version 23.4 which is planned for December 2020.

The next voting cycle will take place from the middle of 2020 and enhancements selected must be sent to ExLibris until December 2021. These new enhancements will be included in next versions of Aleph.

Alma WG

Betsy Friesen has been the coordinator since 2012 and I would personally like to thank **Betsy** for her commitment and hard work that she has taken on as the Alma WG Coordinator. **Betsy's** report is as follows:

Enhancement cycles

5790   Provide an option to view URL in CZ portfolios
6348   Split role user manager in 2: the user manager and the patron manager
6201   Link resolver delivers physical holdings for wrong titles for PCI records
6430   Enhancing security and management of API keys

5054 Portfolios in an electronic collection/package should inherit data displays from the collection's service

5631 User profile - Add field for last active date

5340 Option to not show related holdings locations

5632 Automate Borrowing Request Processes

4057 Administration: Expand Repository Advanced Search Options

5299 Add Pop-Up Notice at Scan in Items

The above enhancements totaled 175 points. The Alma WG is allowed under the enhancement agreement 200 points. However, the next ranked enhancement was 100 points. To meet the 200-point agreement the WG added next enhancement that fit which was

5685 Add ability to customize Purchase Request online form

Additionally, Ex Libris vetted the 25 top voted enhancements and discovered three requests that they felt were already supported in Alma. They issued Supported Functionality in NERS top 25 Enhancement Request List on the Alma list. Ex Libris has offered to look at enhancement requests a bit earlier in the process next cycle.

There was a lively discussion at ELUNA about numbers of enhancements and voting. It is likely that the Alma Group will archive old enhancements. If institutions are still interested in forwarding old enhancements to the next voting cycle they will be able to do so. This will be discussed further at the IGeLU business meeting.

Alma Sub-Groups

Alma Working Group (WG) members worked together with staff from their own institutions and other Alma institutions on various sub-groups. For more information on the following groups, please join the Alma WG business meeting at IGeLU or through the Alma list post-IGeLU.

- UX Focus Group
- Alma Authority Working Group
- Ask the expert
- Premium SB Refresh - Keep Config
- Known Issues
- Alma Consortia Working Group
- Alma Performance Focus Group
- DARA Focus Group (Smart Recommendations)
- Community Management Focus Group

Ex Libris is working with additional groups in other Alma areas, primarily analytics. The Alma WG is also considering the establishment of other groups around functional areas in Alma, (e.g., fulfillment, acquisitions, licensing)

Analytics WG

Led by **Margaret Briand Wolfe,** the group spent the bulk of their time since 2017 writing evidence documents for Alma, Primo and Leganto based on evidence culled from the product lists, the ELUNA and IGeLU conference archives, and users who contacted the working group directly.

In February and March, the documents were distributed to Ex Libris as well as to the Alma, Primo, Leganto, Consortia and Analytics Lists. A google form was also released to the Lists as a means to provide feedback to the Analytics Working Group. Reviewers were able to request a priority change or submit additional use case evidence via the forms.

Summon Analytics was not included in this initial release but the group is currently in the process of gathering and vetting Summon evidence.

The Analytics working group met with Asaf Kline and Yoel Kortick from Ex Libris in May at the ELUNA conference to discuss the evidence documents. Ex Libris is committed to working with the group to address the issues raised in the documents and has scheduled monthly meetings with an Analytics Working Group sub-group. These meetings will begin in October. In addition, Ex Libris has created a Basecamp to keep track of written communications regarding the evidence documents.

Although the current evidence documents are closed for additions, issues continue to arise. The group will continue to gather analytics evidence and document issue raised via the various Lists and discussions at ELUNA and IGeLU conferences.

Content WG

Lead by **François Renaville** and **Kathy Varjabedian** the group has been monitoring the Summon, 360, SFX, Alma and Primo lists and reported major Content issues (linking, metadata, delivery) to the Ex Libris Content team. When possible, the WG provided direct feedback to the customers. The group has also been acting as a go-between between Ex Libris and some vendors when existing collections took too long to be updated. **François'** report is as follows:

Ex Libris requested the Content WG's help for two aspects regarding the new Central Discovery Index (resource types and activation) and for the new Alma Provider Zone.

A NERS Content ballot was organized in the second half of 2018.

The Content WG organized a survey "Dealing with Content issues". The initial results of this survey will be presented at IGeLU 2019.

In January 2019, the CWG welcomed 7 new members coming from 4 different counties (Sweden, Switzerland, USA, UK).

In spring 2019, election of a new IGeLU coordinator for the joint IGeLU/ELUNA CWG: Ulrikke Greve Olufsen (University of Norway) was elected.

Some major discussed issues:
- Duplicate Title-Level Records in PCI and Alma CZ/SFX KB. Hopefully fixed after CDI is launched.
- Some (mostly KB collections) that are particularly slow to be added/updated.

Interoperability WG

The interoperability WG lead by **Mehmet Celik** created a position paper with the focus on an open platform and standards. The WG wants to create and enhance awareness within the community but especially within Ex Libris to consume and document their own APIs in the hope to create open API's.

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The Interoperability WG wants to focus more on institutional interoperability and help developers to develop. Not by doing all that work for you but by facilitating discussions, collaborations, etc.

Leganto

The IGeLU Leganto WG is led by **Sue Harmer** who has been a strong advocate for improvements to the to the product. **Sue's** report is as follows:

NERS 2019 ballot
Development points increased from 30 (2018) to 40 (2019 ongoing).

In 2018 and 2019, we've borrowed 2 points from our next year's allocation for enhancements.

Final ballot included 75 enhancements, almost double the number in our 2018 ballot:
- 16 customers submitted enhancements
- 46 customers voted
- Top 3 enhancements accepted for development by Ex Libris and placed on the Leganto roadmap: NERS IDs 6474, 6265 and 6268

Collaborating with Ex Libris on 2 focus groups (UX focus group now planned for H1 2020):
- Librarian Analytics Dashboard
  Delivered in June 2019; 7 members from Canada, US, UK and Australia
  Very positive feedback from the community
- Tighter integration with Alma purchase request flow
  Kicked off in August; 8 members from US, UK and Australia

Webinar series:
- Leganto as a Teaching and Learning Tool: an information literacy pilot project presented by Janet Goosney and Kate Shore, Memorial university of Newfoundland
- Leganto Librarian Analytics Dashboard presented by Jessie Donaghey, Bond University

Linked Open Data WG

This year, the Working Body coordinated by **Laura Akerman** developed and maintained a Dashboard of linked data features in Ex Libris products (right now, Alma and Primo). This helps customers keep up to date with what is planned, what is released, where documentation can be found (which varies between product documents and the Developers site), and any issues being resolved. **Laura's** report is as follows:

The Linked Open Data Working Group continued to provide information to both Ex Libris and customers about linked data developments within Ex Libris products and in the wider Library and cultural heritage communities. It publishes a much-appreciated monthly newsletter to a mailing list of 428 members covering its activities highlighting the status of new product features, and also listing events and documents related to BIBFRAME, LD4 and other activities that have a bearing on the future of linked data in libraries, as well as upcoming conferences. It also maintains a Dashboard of linked data features and roadmaps across products showing location of documentation on various Ex Libris sites and noting any issues with the features.

The Working Group continued to lead and contribute to discussions with Ex Libris staff and community members on Basecamp about technical aspects of linked data features, often testing them as they

become available. It held advisory discussions with Ex Libris managers on the "search engine optimization" feature in Primo, discussed the outlook for enhanced conversion of MARC to RDA vocabularies, welcomed Itai Velzman as the new liaison for linked data and discussed the very exciting roadmap for native linked data editing in Alma, and is contributing to discussions on handling Getty vocabularies' URIs in MARC The group realizes a need to work more closely with the Alma, Primo and other Product Working Groups as Ex Libris moves forward with linked data features.

Members of the Working Group cover a broad mix of linked data experience across IGeLU and ELUNA, both with the technical end and with involvement in library organizations and initiatives. This contributes to our ability to keep Ex Libris and others aware of developments, and to attract outside "Show and Tell" speakers, such as Jodi Williamschen of Library of Congress speaking on their BIBFRAME editor.   Members contributed to SWIB (Semantic Web in Libraries), the European BIBFRAME Workshop, a CARLI webinar talking about linked data features in Primo and Alma, and other events, and co-coordinators Akerman and Li presented at the LD4 (Linked Data for Libraries) conference in May; Akerman's was a Community talk on the experience of the Linked Open Data Working Group. We lost a valued member, Jack Ammerman, and are looking toward recruiting more members after IGeLU.

The latest initiative is an open call for "User Stories and Use Cases," inspired by use cases Harvard shared with Ex Libris while partnering on the BIBFRAME publishing feature in Alma. Our goal is to open up the visioning to the larger Ex Libris user community, with an aim to fill in the picture more with end uses and end users that can better inform development of infrastructure. We held a presentation on this topic at ELUNA, and plan to have more discussions and encourage more of these use cases during and after IGeLU. Xiaoli Li and Working Group member K. T. Lam will also do a linked data presentation at IGELU. '

In the coming year, we look forward to a greater focus on contributing advice to the linked data editing feature in Alma, possibly linked data features in Summon and other products, and continuing to connect with the Ex Libris user and broader library linked data communities to further the realization of Linked Data's promise for libraries.

Primo WG

Knut Anton Bøckman is the WG coordinator and has been very active. The major highlights of the group are as follows:

- Primo VE summit in Jerusalem with ExLibris and ELUNA - report and follow-up activities.
- Feedback, analyses and reports to improve Primo UI accessibility
- Primo Studio customer contributions governance and improvements
- NERS enhancement voting and follow-up procedure on previous NERS rounds.

Rosetta WG

The Rosetta User Group officially joined IGeLU and ELUNA as a joint working group from January 2018. The move into IGeLU and ELUNA has been very smooth and being part of a wider organization has enabled the Working Group to focus on ensuring that Rosetta development continues to meet the needs of its customer base. **Kirsty Smith** is the coordinator of this WG and her report is as follows:

- Two enhancement request cycles competed – 6.1 and 6.2. Of the 13 enhancements submitted 3 were delivered with release 6.1 and 7 are scheduled for release 6.2

- The annual Rosetta Working Group meeting was held in June, hosted by the RMIT in Melbourne, Australia. This was the first time we have held the meeting in the southern hemisphere, the recent growth in Australian customers made it a timely move.
- The Preservation group ran several preservation focused webinars over the year. These have been well attended and a proven great way to share customer workflows and experiences.
- For new Rosetta customers, the Working Group and Product Manager held an introductory webinar. Finding ways to encourage wide participation from the Rosetta community remains a challenge.

SFX/bX WG

Jiri Pavlik is the WG Coordinator for this product and his report is as follows:

- Monitoring COUNTER 5 support development for USTAT
- Preparing SFX enhancement requests
- Undertaking regular monthly calls with Christine Stohn, SFX product Manager

Summon WG

Ken Herold from the Steering Committee is currently organizing the IGeLU Summon working Group. Major highlights with the group have been continued progress with enhancements, content and analytics support. If there are any members who are interested in participating in the Summon WG please contact us.
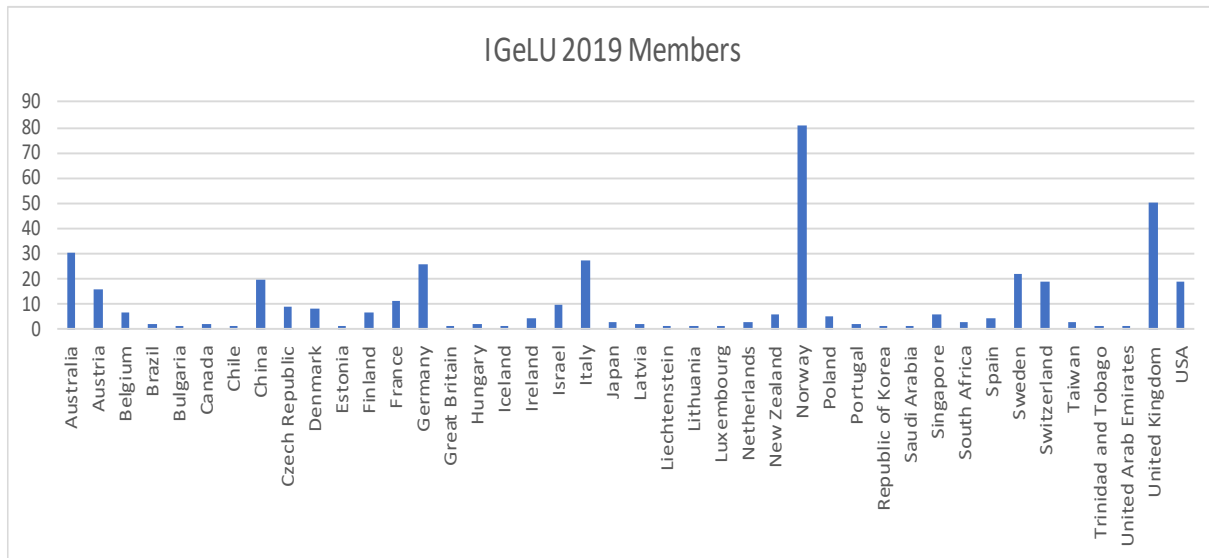
Voyager PWG

Antonella Ward is the Voyager WG coordinator. The major activity of the group has been the migration of viable contents formerly in El Commons into the Ex Libris Developers Network.

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Membership

Since the last conference membership has experienced a small drop. Feedback has indicated that this drop is related to the conference not being held locally in Europe. Based on this feedback IGeLU will need to better explain the benefits of IGeLU membership other than the discount rate t attend the annual conference.

IGeLU 2019 memberships is as follows.

IGeLU 2019 Members

Generally, IGeLU will have to invest more time and effort in reaching out to all new and existing customers in all regions of the world (APAC, EMEA and Americas).

Administration

This year The IGeLU administration team in Siena led by Guido Badalamenti has implemented the new administration to facilitate the Consortial membership and to enhance the self service options for members now and in the near future. https://igelu.org/about/membership/members-details
I want to express my sincere thanks to **Guido Badalamenti**, **Fabrizio Di Fuccia**, **Duccio Di Blasi**, **Katia Pizzo** and **Katia Medaglini** for all their indispensable work and devotion to the community.

IGeLU General Assembly & Budgets

Budgets

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 2019 budget were the contributions to the Annual Conference meeting in Singapore and to Steering Committee and Working Groups meetings.

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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.

In 2019 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 2019 and the draft budget 2020 reflect the high conference costs and the expected larger expenses for the activities of the growing number of working groups.

We are proud and satisfied to be able to present balanced budgets for 2017, 2018 and 2019, and **keep the annual membership fee stable at €250.**

During the General Assembly at the conference you will be asked to approve to the budget.

Voting on open positions of the Steering Committee

This year there will be voting on four positions on the Steering Committee; a call for candidates had been published on our website and was distributed via the mailing lists. This year we are using NERS to carry out electronic voting for the first time. Information on voting can be found on our website at https://igelu.org/archives/11906. Voting will close on Wednesday 28th August at 17:00 Singapore time and the successful candidates will be announced on Thursday at the closing session.

Dave Allen, IGeLU Chair