

DACHELA - Ex Libris Users Group of the German speaking countries

Report for INUG 2024

Membership:

For the year 2024 we have managed to continue working with more than 75 members; the membership fee remains stable at 50,- EUR for IGeLU members and 100.- EUR for others.

General Activities

17. - 18. October 2024

Annual Conference of the DACHELA National User Group

After - starting with the Pandemic - we have only met virtually for our annual conferences since 2020 this year's conference will now take place at the Vienna University of Economics and Business from the 17th to the 18th of October.

While the virtual form has advantages we want to meet face-to-face again; the personal encounters, the conversations during the breaks and the lively discussions work better in this format – and accept the disadvantages, e.g. the limitation to a certain maximum number of participants.

During our meetings we always try to cover the variety of Ex Libris products so that we can serve all German-speaking customers and keep them updated about the yearly undertakings especially regarding Alma and Primo. The presentations from both - users and Ex Libris – are always very informative and succeeded by discussions and also questions which are being answered in the conference-chat. Usually, we have an overview of product-news from Ex Libris and gain insight into Ex Libris-Support and Development.

Since 2016, several libraries and consortias in Austria, Switzerland and Germany have migrated to Alma and following one of the biggest German libraries, the Bavarian State Library (Go-Live: May 2023), this year also the ten regional State Libraries of Bavaria completed their migration to one common Alma Institution in July which pushed the Library Independence feature to its limits.

Problematic aspects for the INUG/Ex Libris-Meeting:

1. General Publishing

The General publishing basically is running now. Last year we faced severe problems with the general publishing from the NZ. However, there are always errors that we either notice ourselves or that are pointed out to us by our customers, because we are unable to recognize these errors. We regularly write Salesforce cases (e.g. Salesforce Ticket No.: 07236003, 07271776, 07491722).

If other users complain about publishing, other consortia could amplify the complaints.

2. "Available For"-Collections

- available for NZ titles cannot be added in the set of an IZ collection (06275245 - CD-16 / 49HBZ_UDE: NZ titles are not added to a collection)
- available for NZ titles that cannot be added to an IZ course in a set
- if available for NZ titles are added individually to an IZ course, the inventory display is missing in the IZ course list
- if available-for is deleted for an IZ in the NZ, this is not taken into account in general IZ publishing (07488384 - 49HBZ_PAD: general publishing for deleted available for resources is incorrect)

- with general publishing from an IZ, not all electronic inventory data can be published (affects both available-for-NZ cases and IZ cases) (07216790 - 49HBZ_ZBM: general publishing - not all information on the electronic inventory can be published)
- with general publishing from an IZ, not all course data can be published (affects both available-for-NZ cases and IZ cases) (06679106 - 49HBZ_HBO: general publishing - course data missing)
- for available-for-NZ titles, there are various problems in the area of analytics (especially when it comes to analysing Counter data in conjunction with the IZ
 - o 07076550 - 49HBZ_FHM: questions on cost usage and NZ (available for Portfolios) - 1
 - o 07172114 - 49HBZ_FHM: questions on cost usage and NZ (available for Portfolios) - 2
 - o 07241481 - 49HBZ_FHM: questions on cost usage and NZ (available for Portfolios) - 3
 - o 07102401 - 49HBZ_FDO: Portfolio Details for Consortia Members - available group not updated
- for available for NZ titles and the associated electronic collection and electronic service data records in the NZ, there are various problems in the area of data management (no local IZ settings/additions possible, e.g. linking between the electronic collection data record and a title data record requested by the IZ or IZ-specific public notes)
- for available for NZ titles and the associated electronic collection datasets, there are various problems in the area of acquisitions, which also have to do with the data management mentioned above (e.g. as the electronic collection record cannot be linked to the title record requested by the IZ, no order records can be created on this title record (more purchase types are available on the title record) or acquisition management on a title record for orders and invoices relating to one electronic collection in the IZ and one in the NZ)

3. Stock Transfers

Use cases

- The overall inventory must be transferred from one library to another. This is the case when one library is taken over by another. The old library is then deleted from all reference systems, including Alma (incl. ISIL). The entire collection, including the acquisition data, becomes the property of another library.
- Part of a collection must be transferred from one library to another. This is the case if, for example, the content of a library changes.

Status quo

Organisational mergers/splits of decentralized institutional libraries are possible at any time, so that changes in the library landscape need to be handled after migration.

While the movement of collection data from one library to another library generally works in Alma, the movement of acquisition data (order item information, inventory information, budgets, invoices, vendors etc.) from one library to another is currently not possible in Alma.

The Dual-Layer Libraries / Roles & Rights working group discussed this issue with Ex Libris during the concept phase (October 2019-March 2020), but as the members of the working group were not yet familiar enough with the Alma system at that time, they turned to the Berlin libraries, which had already discussed this feature on a larger scale with Noam Fass of Ex Libris (SF cases 458777 and 642047).

As of August 2024, there is - unfortunately - no news on this topic.

4. When changes are made in the NZ, local extension fields in the IZ are deleted if the title record is linked to the NZ

For some bibliographic records that are linked to the NZ and have local extensions in the MARC21 segment 980-998, these local extensions are deleted after an update of the bibliographic record in the NZ. The local extensions should not be deleted when the NZ bibliographic record is updated. But somehow these local extensions do not seem to be saved correctly in Alma and are therefore not protected from being overwritten when the NZ bibliographic record is updated. (07273301)

5. Consortia Collections in the Central KnowledgeBase / Community Zone

While it is a long standing tradition for Ex Libris to add consortia collections (e.g. BIBSAM_*, BACON_*, BIBSAM_*, CRKN_*, EZB_*, JISC_*) to the Central KnowledgeBase / Alma Community Zone they still handle them just like any vendor collection which is inappropriate to counterproductive in several aspects. Consortia collections come with use cases that never happen for a vendor collection like single titles (portfolios) moving from one vendor/platform to another but nevertheless staying part of the collection. For consortia collections it's rarely the consortium that

provides COUNTER statistics so it makes no sense at all to define COUNTER parameters on the interface level (i.e. globally for all the collections managed by the particular consortium). Since 2021 the DACHELA Content Working Group has tried to convince Ex Libris that there is a strong need to carefully distinguish consortia collections and vendor collections in terms of how to map them onto the data model of the KB/CZ and in terms of what functionality is tied to which layers of that model – but so far without success, unfortunately. Hence, we would like to ask other NUGs to second our proposal by similar ones.

On behalf of the user group:

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