Dale Burke’s Notes from ELUNA 2013 - Athens, GA.

May 1st - Opening General Session - Over 500 attendees

Opened with welcoming remarks by various people associated with bringing the ELUNA conference to Athens. The University of Georgia is in Athens, and they are part of a state-wide consortium called GALILEO which provides library services for the whole state of Georgia. GALILEO uses the Voyager system.

We also received a welcome from Matti Shem, President and Global CEO of ExLibris. Matti also gave us an overview of the state of the company. ExLibris gained 220 new customers in 2012, making their customer total 5300 overall. There are 530 employees worldwide, with 53 ExLibris staff members in attendance. ExLibris now has three large data centers; Chicago - 1222 cloud customers, Amsterdam - 141 cloud customers, and Singapore with 2 cloud customers. They had 95 million dollars in revenue in 2012. They have 1900 PRIMO customers, 150 ALMA customers and 1370 Voyager customers. ExLibris is now owned by Golden Gate Capital which is a 12 billion dollar venture capital fund. Basically the company is doing well and has a strong financial backbone.

PRIMO, their discovery layer, is the next generation software for our current OPAC. PRIMO will encompass much more than just our bibliographic records. It operates entirely in a cloud environment, making it much easier to deliver regular bi-monthly updates. This is different from the Voyager environment where we must go through periodic updates involving downtime to our system. Facebook and Google mail are examples of other systems that operate entirely in a cloud environment, meaning they are rarely if ever taken off-line for updates to be loaded. The cloud based environment is the way the next generation of library systems is moving.

Our current Voyager system runs off of an Oracle database, and in our consortium we have 16 schools working off of one Oracle instance; however, all of the other Washington Voyager users each have their own instance of the Oracle database. ExLibris is also looking at two new ways to handle massive amounts of shared data. They are looking at both Hadoop and Cassandra which would allow all of the cloud based sites to work off of just one instance of Hadoop or Cassandra, rather than each needing to have their own instance. Hadoop is a free, Java-based programming framework that supports the processing of large data sets in a distributed computing environment. Cassandra is an open source distributed database management system. It is an Apache Software Foundation top-level project designed to handle very large amounts of data spread out across many commodity servers while providing a highly available service with no single point of failure. Utilizing Hadoop and Cassandra will be a dramatic change to the structure of library databases.

12 libraries are already live with ALMA, ExLibris’s next generation of the staff clients. ALMA is a major paradigm shift from the way we think about staff clients. It also operates entirely in a cloud environment, meaning it can go through regular updates without downtime. Instead of the five staff clients we have now (Acq. Cat. Circ. Rep. Sys/Admin.) there is just one staff client which encompasses all five of the clients we are used to. Each staff member’s client would be configured just for their use and would provide a dashboard of all areas that a particular staff member had access to. The dashboard also can contain a number of statistical and other data tables that would aid a particular staff member in their duties. An additional 150 libraries will be moving to ALMA within the next few months.
The next person to speak was Mark Triest, President of ExLibris North America. He encouraged participants to become more informed regarding both ALMA and PRIMO. He also stated that ExLibris is very committed to open access to institutional repositories. A school our size would probably not have too much to contribute, but a school like the University of Washington (a new PRIMO and ALMA customer) could have much to contribute.

The next person to speak was Oren Beit-Arie, the Chief Strategy Officer for ExLibris World-Wide. He stated his key goals:

- Enable librarians to work more efficiently
- Drive innovation
- Demonstrate clear value
- Change ownership of information to access to information
- Change selection to fulfillment
- Change just-in-case selection to just-in-time selection
- Change model from user pays to no one pays or author pays

Because of the dramatic increase in the growth of resources there is more need for a discovery layer that will optimize management of resources and maximize the sharing of sharing. He also spoke about the shift away from the Oracle model of the model of massive data processing using Hadoop and massive data storage using Cassandra. He spoke about the next generation of bundling and linking data giving the example of Europeana, the European model to link repositories of cultural and scholarly data. [http://www.europeana.eu/](http://www.europeana.eu/)

The scale of open-access to resources is growing. We are seeing more and more national mandates and funding mandates to make research available through open-access sources. He believes that most of what we currently make available as proprietary (paid closed access) data will need to evolve as more and more open-access resources become available.

ExLibris is positioning itself to become a leading edge company in blending open-access and proprietary data sources. Their PRIMO product indexes open-access data alongside our proprietary data. He cited the California Digital Library's Mission, Goals and Vision statement as an example of new trends in scholarly research. [http://www.cdlib.org/about/mission.html](http://www.cdlib.org/about/mission.html)

He also referenced MOOCs (Massive open online courses) online initiatives. [http://www.moocs.co/](http://www.moocs.co/)

**WebVoyage Skins: What, Why, When and How?? - presented by Tari Keller from the University of Kentucky**

A WebVoyage skin is a set of Web files that control how an individual OPAC looks and works. There are over 100 files that control how our OPAC looks and functions. Edmonds uses one skin for our OPAC, but we could add others, particularly a mobile skin for better OPAC functionality in a mobile environment, and a training skin to see what the OPAC would look like before the public sees it.

Tari shared OPAC skin coding for adding new RDA fields for records. Tari also developed a couple of key access reports that can assist an institution in looking at what is in their data that they might not be displaying in their OPAC. Tari and I have known each other for years, and she is willing to share more information with me in the future. One of the questions that we should ask ourselves at Edmonds is whether we want the line in our OPAC
that currently says WEB LINK to say ONLINE LINK instead, and whether we wish to place that link in another position on the display page of the OPAC.

**Voyager Product Update - presented by Mike Dicus of ExLibris**

Edmonds and the ORCA Consortium are currently on version 8.1 of Voyager. We will be migrating to version 8.2 before our fall quarter in September. There are still many libraries that are using older versions of Voyager. Mike discussed the changes that are coming in Voyager 8.0, 8.1 and 8.2 and then went on to talk about future releases.

Over 150 customer enhancements have been incorporated into the 8.0, 8.1 and 8.2 releases. In addition, Voyager will be able to accept 10 digit OCLC numbers and add limits for the new RDA fields 336, 337 and 338. (More about RDA later) More specific data regarding features related to Voyager version 8.2 will be shared during the summer as we begin to plan for our upgrade to Voyager 8.2.1.

ExLibris has produced a series of next generation products including PRIMO and ALMA; however, they know it will take several years before all of their customers will be able to move to the next generation, so in the meantime they are committed to continued upgrades to the Voyager Product. Voyager 9.0 is already being worked on the Voyager 10.0 is in planning stages. Voyager 9.0 is expected to be released to customers in April of 2014. Voyager 9 will contain more support for open URL support, enhancements to SIP2 Protocol (which Edmonds uses with our security system), support for Windows 8 along with other improvements and enhancements for both staff and users.

**ALMA Demo - presented by Amanda Schmidt of ExLibris**

ALMA is ExLibris’s staff module designed as a next generation Integrated Library System. It is a major paradigm shift from how we currently operate in the Voyager staff clients. Currently we have several independent staff modules:

- Acquisitions
- Cataloging
- Circulation
- Reporter
- System Administration

In ALMA there is only one over-arching staff client, encompassing all of the functionality from our existing staff clients. Staff members are assigned levels of security and functionality depending on their duties. The initial screen functions as a dashboard, allowing a staff member to move to various functions through widgets. The dashboard also contains numerous links to reports and data analytics designed to improve staff access to data that will make them more productive. Tasks on a staff members dashboard are populated automatically because of the cross linking of having all of the staff modules together. One very crude example of this would be the workflow for a new book the EdCC library is purchasing for reserves. A library selector would indicate that a book was to be ordered for our collection. Once a bib record was uploaded from the OCLC database a task would appear on the dashboard of the person responsible for creating the Purchase Order. Once the Purchase Order was ready for approval a task would appear on the dashboard of the person who had responsibility for approving and sending the order. This would send a task to the person expecting the book so that it can go through the receiving process. Once that task was completed a new task would show up on a dashboard, alerting the processing person that the book was ready for initial processing. If a different person handled the reserve
processing a new task would also show up on their dashboard letting them know when the book was ready for them to complete their reserves task.

The ALMA model expects tasks to be clearly assigned and carried out. The initial overall configuration will have expectations programmed into it. Once a library moves to ALMA there will no longer be a need to extended upgrade downtime. Because ALMA operates in a cloud environment updates will be made more regularly in the background, similar to the way our Gmail client is being routinely upgraded.

You can find more info about ALMA here: http://www.exlibrisgroup.com/category/ALMAOverview

**Integrating Electronic Resources in the Voyager Catalog with Other Library Systems - Presented by Janetta Waterhouse from the University of Illinois at Springfield**

This session covered data clean-up that would facilitate moving e-resources from the Voyager environment to the discovery environment (PRIMO). The most important thing I got out of this session was the idea of running reports to check the URL's of our current electronic resources. As an example, all of our netlibrary records use a netlibrary URL; however, netlibrary is now owned by EBSCO and the newer records contain EBSCO URLs. GALE has also changed the structure of their URLs over time and I need to check to see if I need to standardize the URLs prior to loading these kinds of records in a discovery environment such as PRIMO.

Understanding our data and cleaning up our data will be the most effective tools in migrating our data to the discovery environment.

**ExLibris Updates – Support - presented by Yaniv Avni, Chief Operating Officer for ExLibris Global Operations Group**

ExLibris is evolving into a SaaS (software as a service) Cloud Company. If you wish to read more about cloud computing you can check out this link: http://en.wikipedia.org/wiki/Cloud_computing

Structure of ExLibris Support: (182 employees in support)

- Global Customer Support – US Team and European Team
- Cloud Engineering – Design and Architecture
- Cloud Operations – Performance on a day-to-day basis
- Data Services – Consolidation of all knowledge base services

ExLibris has 3000 instances of cloud services, including the ORCA consortium. They have 56 employees devoted to cloud services and spend about $5,000,000 per year in support of cloud services. ExLibris uses Equinix Cloud Services as a private solution. http://www.equinix.com/ Voyager has a 99.86 uptime rate in the ExLibris Cloud environment.

ExLibris support tracks approximately 40,000 support incidents from over 5,000 customers per year, from three call centers worldwide. Support is available 24x7.

ExLibris will be launching a new CRM (Customer Relationship Management) system in the fall of 2013, which should improve support handling of incidents.
ExLibris Updates – presented by David Beychok, V.P. for Discovery and Delivery

ExLibris continues to craft their comprehensive solution for Discovery. PRIMO 4.1 is the current version of their product. PRIMO has updates every two months. PRIMO is also available in a mobile environment. Next generation linking will soon be available because of Hadoop and Cassandra. ExLibris is working to shorten the installation process for PRIMO, especially for Voyager customers. You can check out PRIMO information here: http://www.exlibrisgroup.com/category/PrimoOverview

ExLibris Updates – presented by Bar Veinstein, V.P. for Resource Management

He stated that all ExLibris customers are on an evolutionary path to ALMA; however, he also stated that Voyager updates will be available for several more years. Several existing ExLibris Customers are migrating to ALMA, along with several new customers who are migrating to ALMA from other library vendors. He listed the success factors for ALMA as:

- Ease of implementation
- Depth of functionality and efficiency
- Interoperability and collaboration
- Flexibility and scalability
- Innovation and cutting edge development
- All customers on one version
- Painless upgrades
- Ironclad security
- Aggregated analytics

The analytics available in ALMA will provide all sorts of new data that will greatly assist decision making in the future. ALMA will provide a decision support mechanism that not only provides useful statistics but can also be used for predicting patterns for future data handling. A further explanation of the use of analytics in academic environments can be found here: http://www.educause.edu/ero/article/academic-analytics-new-tool-new-era

Preparing for RDA Implementation – presented by Yuji Tosaka from the College of New Jersey

Catalogers have used AACR2 as the cataloging standard for many years. RDA is the new standard designed for the digital world and an expanding universe of metadata users. RDA: Resource Description and Access is the new, unified cataloging standard. RDA is being implemented in order to improve the user experience in the discovery of resources. As of April 1, 2013 the U.S. Library of Congress and the British Library are using RDA as their official descriptive cataloging standard. The College of New Jersey has been planning and training staff for the last two years.

The library of Congress has published an online tool called the RDA Toolkit that libraries will find helpful in understanding the changes. Edmonds needs to get a subscription to the RDA toolkit. GMD’s have been removed from records and replaced by various 300 level fields. Latin abbreviations are being removed.

A survey was conducted to see if institutions were preparing for RDA. They found that research institutions were moving toward RDA much faster than 4 year colleges. Community colleges did not respond to their survey.
The college of New Jersey found that hands-on experience was very important to the full understanding of the RDA changes. Adam Schiff of the University of Washington Libraries has a number of RDA resources posted on his website: http://faculty.washington.edu/aschiff/

Mr. Tosaka is willing to share some of his training slides for RDA and FRBR with me. Once I receive the materials I will share them with other Edmonds and ORCA members.

**Voyager Serials and Acquisitions Special Interest Group – facilitated by Sherrie Kristin of Purdue University**

There used to be Special Interest Groups (SIG’s) for all of the Voyager Clients, but this combined SIG is all that is left. There was an initial discussion regarding the future of the SIG. Members present indicated they felt a benefit from meeting together to discuss issues related to Serials and Acquisitions. The meeting was interesting but not particularly useful to me seeing as how I was assisting people with problems more than they were assisting me.

**ExLibris Question and Answer Period**

16 Questions were submitted to ExLibris staff in advance. The questions were read and then one of the staff members responded to the questions. Nothing significant came out of this session.

**Voyager, Bibliotheca and RFID Security – Presented by Dale Burke of Edmonds Community College**

I gave a half-hour presentation on Edmonds experience migrating from a magnetic strip security system to a Bibliotheca RFID security system. I discussed the process we went through and the positive changes to Voyager circulation workflow that resulted.

**Northwest User Group (NWUG)**

The Northwest User Group for ExLibris users has not been active during the last year. With the Orbis Cascade Alliance becoming ExLibris members there is renewed interest in the group once again. Chris Ewing from Eastern Washington University is going to lead the group for the coming year. Shellie Whittaker and Dale Burke have agreed to assist if necessary.

**When are my books due back?? – How the University of Minnesota has utilized ALMA implementation to simplify circulation policies – presented by Christopher Rose.**

The four campuses of the University of Minnesota used the ALMA configuration mapping task as an opportunity to look at their existing circulation policies in order to simplify and realign new circulation policies for ALMA implementation. They decided to focus on collection based circulation policies rather than item type circulation policies. Their goal was to unify circulation policies across the four geographic campuses. They wanted to avoid exceptions if possible. 16 stakeholder meetings were scheduled. Each campus was asked to develop a proposal for a shared policy. The library directors used these proposals to create a set of guiding principles. A smaller group then took the guiding principles and refined policies further. Various graphs and forms were presented to staff, allowing individual comments to be posted. The library directors resolved any differences. The University of
Minnesota Libraries will not go live with ALMA until December 2013, but they feel the process they went through to reduce circulation policies will be beneficial.

Circulation history from Voyager will not migrate to ALMA.

It is also very important to look at the status of all of your data prior to migrating to ALMA. (Patron Data, Bibliographic Records, Vendor Records, Item Records, Holding Records, Suppressed Records, Serials Records)

It will be important for ORCA libraries to become more familiar with their data:

- Use of 853/863 pairs in Serial MFHD’s
- Use of 866 in MFHD’s
- Item Status reports
- Indicator positions in MFHD’s and Bibliographic records
- On-the-fly records
- Enumeration, Chronology, Year
- Item types
- Use of 500 tags, 650 (indicator 4) tags, 856 tags, 900 tags
- OCLC Reclamation Project status and OCLC Control Numbers
- RDA Compliance