

Notes from the INUG – Ex Libris Meeting: Helsinki, 6 September 2009

1. CRM/Pivotal replacement
Ex Libris is planning to replace Pivotal and is currently looking into alternatives.
2. Voyager Upgrade
The Voyager equivalent of Upgrade Express is in development.
3. ARC Problems (upgrade, missing fields, Cognos expertise)
Ex Libris has not been aware of upgrade problems. Matti noted that it was possibly not ideal to have used 3rd party software such as Cognos – Primo and Verde use BIRT embedded at a much lower cost.
Note from Users: Attention does need to be given to ARC as Aleph (+ ARC) will be used for a number of years notwithstanding the URM. Possibly open source could be used for reporting by smaller Aleph sites.
4. Product updates and roadmaps
Ex Libris will be providing a webinar series starting in October which will keep customers who are unable to attend IGeLU or ELUNA current with developments. Information shared will include developments since the presentations made in Helsinki. The series will cater for different time zones.
5. URM Progress (input, feedback & communication)
Serious concerns were raised as to poor communication re URM progress and Focus Group activities. Ex Libris agreed to consider and implement improved processes and communication channels. Ex Libris also noted that they intend providing webinars on URM progress in time.

Subsequent Ex Libris response.

Ex Libris have made changes based on User input with the following objectives:

- Improve overall communication – between Ex Libris and the Focus Groups, between the Development Partners and the Focus Groups and within the Focus Group membership itself;
- Create forums for more active discussion – both among the Focus Group members and between the Focus Group and Ex Libris; and
- Allow more frequent interaction with the Focus Groups, particularly on issues that are reviewed with the Development Partners – as Ex Libris is now moving even more quickly with URM development, it is important to have forums for quite quick feedback on issues and concerns.

To achieve these goals, Ex Libris are in the process of completing the following:

- Modifying the format of all of the Focus Group calls so that each includes a formal update on URM progress, work Ex Libris have been doing with the Development Partners, etc. Thenceforth, Ex Libris will provide an update on activities since the last call. In this way Ex

Libris expects to keep the Focus Groups better informed and make it easier for them to be well integrated into the work they are doing.

- Establishing a listserv for each Focus Group. These listserv's will include all of the members of the Focus Group as well as representatives from Ex Libris. Ex Libris will be posting questions and issues to the lists, asking customers to provide them with scenarios and sample workflows, etc. Ex Libris believes this will allow them to get quicker and more frequent feedback from customers on issues they encounter during their design and development as well as provide a forum for more interaction among and between the Focus Group members.
- Ex Libris are working with the Development Partners to have a Development Partner Representative for each of the Focus Groups. The Representative would assist Ex Libris in ensuring the Focus Groups are kept informed of their progress as well as provide another linchpin in aligning the two collaborative forums.

Note A: A 4th Development Partner has been introduced – Purdue University, and an Australian/New Zealand URM group of 10 major libraries has been established.

Note B: The Ex Libris URM presentation made at IGeLU 2009 in Helsinki will be available on the DocPortal.

6. Small libraries
Suggestion from Ex Libris: IGeLU should consider looking into the needs of small libraries.
Suggestion from Jirka: possibly a SWIG?
7. How can Ex Libris help IGeLU get new members?
Suggestion: Promote IGeLU when talking with new customers.
8. Number of countries represented at this session.
18 of 21 NUG's registered.

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