Approved by:

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ANNUAL REPORT
(02 January – 30 December)
The NALIS Foundation

After the successful establishment of NALISF, the acquisition of the necessary software platform (in 2009) and the very construction of the National Academic Library and Information System (in 2010), in 2011 the net of academic libraries and the NALIS Union Catalogue were further developed by means of including new associate members and a large amount of retroconverted records.

I.
New participants in the NALIS Project

The successful functioning of the NALIS Union Catalogue (NALIS UC) in its first stage – when it comprised records from only the founding libraries – has led to enlarging the NALIS network. 9 new libraries joined within the first half of 2011 (the numbers in brackets below signify the date of contracting the libraries to submit their electronic catalogues' data):

- Plovdiv University (14.02);
- University of Economics – Varna (24.02);
- Central Medical Library (01.03);
- Technical University of Gabrovo (07.03);
- Trakia University – Medical College, Stara Zagora (10.03); *this associate member withdrew its membership in NALIS on 1 Jan 2012 after the required three-months' prior written notice, but without stating any reasons;*
- D. A. Tsenov Academy of Economics – Svishtov (15.03);
- Agricultural University - Plovdiv (15.03);

- Technical University of Sofia (26.04);
- Technical University of Sofia, Branch Plovdiv (09.06).

Since 7 of these libraries use the AB Library Software of PC-TM, NALISF contracted the latter to develop a program for an output in MARCXML from the libraries' catalogues into the NALIS UC (10.05).

The subscribed databases and electronic periodicals from the national subscription and the subscriptions of CL-BAS, SUL and AUBGL were integrated in SFX/Metalib within the first half of the year. The bibliographic records of all the associated libraries were fully integrated in NALIS UC in the second half of 2011 (the NBU records were ingested as early as in Feb).

There were preliminary talks with some other institutions, namely:

- Technical University of Varna;
- Medical University of Varna;
- *Constantine Preslavski* University of Shumen;
- *St. Ivan Rilski* University of Mining and Geology, Sofia;
- Archives State Agency;
- Union of the Bulgarian Actors;
- Free University of Burgas;
- *Ivan Vazov* National Library, Plovdiv;
- Regional Library of Ruse.

One of the goals of the NALIS Project is to attract also public libraries that are technologically prepared to be included in the NALIS UC. Since most regional libraries in Bulgaria use the library and information system e-Lib, developed by SoftLib, we had successful preliminary discussions with SoftLib for future collaboration.

The negotiations with the Sofia National Library continued and the bibliographic records it provided were successfully tested for integration into the NALIS UC. A written statement was requested from the National Library management on their expectations of a possible future cooperation with NALIS. Unfortunately, despite the high evaluation given to the NALIS project, the National Library refused inclusion due to the condition of its electronic catalogue and the prospects for its development, financial and organizational problems.

II.
Software platform necessary for the creation of a
library and information network

After configuring the software in the previous year, 2011 was devoted to its further adaptation to the needs of both patrons and associated libraries.

The integration of all available records (and the retroconverted by the founder libraries and those from the associated members) to **Primo** broadened the content of the NALIS Union Catalogue to 1,105,168 entries at the end of December. The module interface was translated into Bulgarian and a separate home page of the catalogue was created. Other important improvements were:

- o Export-import of data from MetaLib to Primo and configuration of Primo to MetaLib in order to develop the search in external databases;
- o Configuration of quick sets in Primo;
- o Upgrade to Primo 3.1;
- o Integration of the bibliographic records of the associate members using the AB library software;
- o Creation of a user guide for the catalogue and publishing it on its homepage.

The total number of digital objects in the NALLIS UC is 377: a collection of letters from the Salvini Archive (Bulgarian and English version, 366 items), 8 digitised old printed books provided by CL-BAS and 3 items, which set the start of future digital collections (old printed books, periodicals and newspapers from the Bulgarian National Revival) provided by SUL. These achievements have resulted from careful preparatory work, namely:

- o Construction of a workflow;
- o Creating of new administrative units in DigiTool;
- o Establishment of a connection between the metadata of DigiTool and ALEPH and configuring the connection between DigiTool and Primo;
- o Upgrade of the module with the latest service pack;
- o Creation of a sample collection modification of the user interface to include the NALIS banner;
- o Processing and description of the digital objects for the first collection („Salvini").

The first client software Meditor of DigiTool was installed in the AUBG and the NBU; a user manual for publishing digital items in it was prepared; the CL-BAS and SSUL

specialists, who started working actively, were consulted in due course. Primo and DigiTool were configured in such a way as to allow the creation of logical collections. The VUZF University and the UBA have planed their involvement in digitisation on a later stage (as currently the adoption of ALEPH is of paramount importance for them).

A new license for **SFX / MetaLib** was purchased and activated for the needs of the NALIS consortium. It provides integrated search across every subscribed database (regardless of the level of access) and optimisation of this search – through analysis, tests and adjustments to the subscription of institutions involved in the project. In the second half of 2011 working with SFX/MetaLib involved mainly maintenance, update and test (of the data and the access rights) and upgrade of the products themselves.

In the first half of the year the work on **ALEPH** continued in two main directions: configuring modules and preparation of outputs for statistical data. By the end of May the configuration of all modules was completed, and the ALEPH check programs were transformed into a web environment. In addition, ALEPH was configured according to the needs of the libraries that joined in 2010 – the VUZF and the UBA. In the second half of the year the efforts were focused on teaching ALEPH, and also on its adaptation to DigiTool. Along with that, the documentation necessary for retroconversion of the VUZF and UBA holdings in ALEPH (forthcoming) was made, as well as a program for bar code and call number label printing.
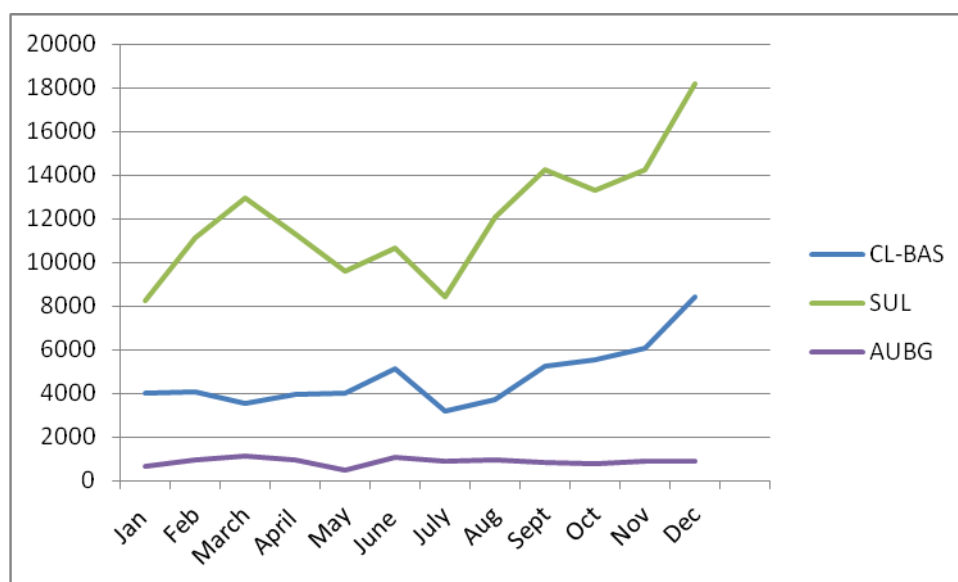
In July the NALIS Foundation became a member of IGeLU (International Association of Ex Libris Clients), and in September the Foundation's associates attended the annual conference of the association. This allowed for active communication with colleagues from around the world, for discussion of issues that come with the use of each respective software, and access to their good library practices.

In September the NALIS team and two associates of the Sofia University Library participated in the annual technical seminar organised by ExLibris in the city of Haifa (Israel). There their newest software Alma was demonstrated, and the trends in the development of the already existing applications and their latest upgrades were presented and visited the National Library of Israel and the University Library in Jerusalem and established useful relations with a similar to the NALIS Foundation Israeli institution - MALMAD – as well as with the management and experts from the National Library of Israel and the Jewish University of Jerusalem.
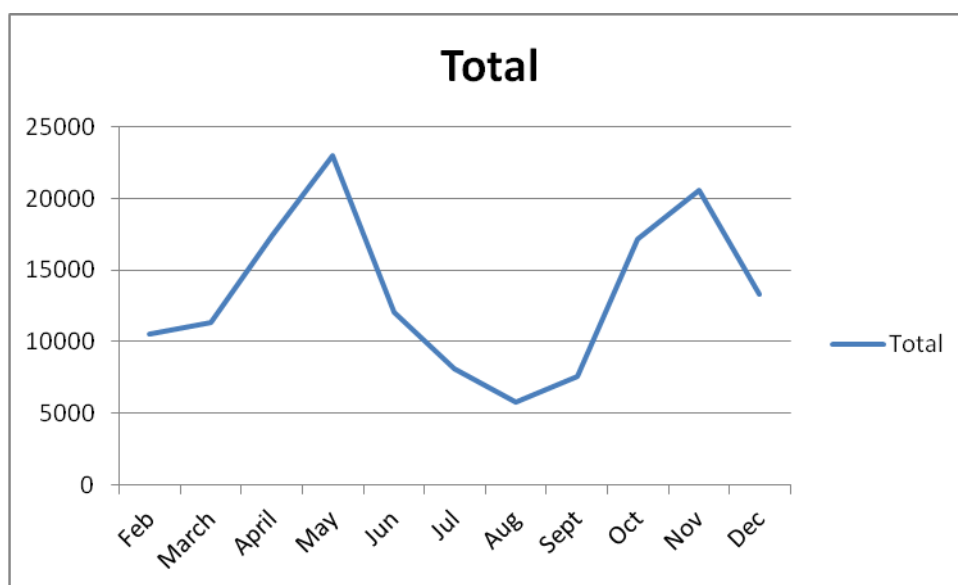
III.
Retroconversion

By the end of 2010 the three institutions had retroconverted 45,468 records. The total number of the bibliographic records retroconverted in 2011 is 211,757, or nearly five times higher. The graph shows the participation of each of the founding libraries by months:

IV.
NALIS Union Catalogue

The total **number in the NALIS Union Catalogue** reached **1,105,168** by the end of December, after the integration of the retroconverted records and the records provided by the associated members,

The chart below shows the statistics of **the searches in the NALIS Union Catalogue:**

Note: The January data were not included due to technical reasons.

Although the statistical range is still relatively small, the data indicate a clear seasonality, which seems to reflect the predominance of student body amongst the catalogue users.

V.
Training

In 2011 the following events were held in the NALIS Foundation offices:

- One-week course in **ALEPH 500, v.20, Acquisitions/Serials** for representatives of founder libraries and associated libraries – attended by 10 representatives from the VUZF, UBA and CL-BAS (11-15.07);
- One-week introductory course in **Bibliographic MARC 21 Format and ALEPH 500, v.20** for representatives of founder libraries and associated libraries - attended by 4 representatives from the VUZF, UBA and CL-BAS (18-22.07);
- Two-day course in **DigiTool for libraries using ALEPH** for representatives of the founding libraries and associated libraries – attended by 10 representatives from the VUZF, UBA, USB and CL-BAS (10-12.10);
- Two-day course in **DigiTool for libraries not using ALEPH** for representatives of the NBU and AUBG – attended by 6 representatives from the NBU and the *Panitsa* Library of the AUBG (17-19.10);

Along with that, the NALIS Foundation team received additional training in:

- o ***Primo Support*** – online course (05.07);
- o ***Technical seminar in Ex Libris*** (14-16.09).

VI.
Library Formats

We continued our work on the translation and editing of the documents related to MARC 21 and on ensuring the free access of the Bulgarian library community to it.

- Translation, editing and proofreading of MARC 21 Format for Bibliographic Data were completed. By the end of the year the format was ready to be published online on the NALISF website.
- Work on the vocabulary items (creating, editing, structuring, etc.) continued throughout the year and was published online in due time in the *Library Standards/Dictionaries* section.

VII.

Publicity and promotion of NALIS activities

In 2011 the NALIS Foundation made important steps to affirm itself in the professional community and public space.

The most significant event in this respect was the ***international forum*** entitled The NALIS PROJECT - ONE YEAR LATER. It was held on 21 November with the invaluable assistance of the America for Bulgaria Foundation. It was attended by leading figures from cultural institutions in the U.S., UK, Italy, Germany and Bulgaria, who shared their experience and knowledge in creating digital libraries, use of library software, engaging the public and other activities for protection of the valuable collections.

The forum was attended by directors of several university libraries in South Eastern Europe. This was considered as the first step towards the future inclusion of some of them in the NALIS Union Catalogue.

The forum and the NALIS activities throughout the year were subjects of presentations and *reviews* here and abroad, television interviews with three experts and 8 articles in prestigious Bulgarian and foreign periodicals.

The Annual Meeting of the associated members of the NALIS Foundation was held on 13 December and was attended by representatives of seven of the eleven associated libraries, of ABF and NALIS. Among the discussed issues were retroconversion, technological innovations in academic libraries, usability and functionality of the NALIS UC, everyday library services and work with students. The meeting contributed to an atmosphere of trust and commitment amongst the participants in the project.

In 2011 the Board of Directors made a serious effort to improve visibility of the Foundation and to widen public awareness of its work. We adopted "Guidelines for promotion of the NALIS activities" and many of the initiatives have already been implemented. They expanded its presence in the Internet environment and facilitated the access to the NALIS Union Catalogue. The Foundation's *website* was continuously updated with news and other relevant information. We made and distributed effective promotional materials such as flashcards (portable memory), a desktop calendar and a poster.

VIII.
Management and Administration

In 2011 the NALIS Foundation was managed in strict accordance with the rules and procedures adopted by the Board of Founders and the Board of Directors.

In 2011 ten ***meetings of the Board of Directors*** were held, as well as two ***meetings of the Council of Founders***.

The Annual Meeting of the Board of Directors and the ***Council of Experts*** was held on 21 November. On it strategies for promotion of the Foundation and the NALIS Union Catalogue were discussed.

All monthly and quarterly *reports* were timely prepared and provided to the Board of Directors and ABF.

In early 2011 ***a second system administrator*** was appointed, which greatly increased the efficiency in the software aspect of the NALIS work.

6 January, 2012

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