



ANNUAL REPORT  
(4 January – 30 December 2010)  
The NALIS Foundation

After the successful establishment of NALISF and the acquisition of the necessary software platform in 2009, 2010 began with the very construction of the National Academic Library and Information System.

I.  
**The NALIS Project**

The first step towards configuring the **software platform** necessary for the creation of library and information network was the analysis of the situation in the three founding libraries. Later their databases were integrated in the software modules SFX/Metalib and Primo. (The respective servers were installed and configured within the first quarter of the year.)

The work on the modules went through the following stages:

- **SFX/ MetaLib**
  - Installation by Ex Libris;
  - Integration of the founding libraries' data into SFX;
  - Preparation to configure MetaLib;
  - Configuration of MetaLib and preparation of quicksets for CL-BAS, SUL and AUBGL;
  - *Finalisation* of the work on the two products (25 March) and addition of certain quicksets for SUL in MetaLib.
  
- **Primo**
  - Installation by Ex Libris;
  - System analysis and configuration consistent with the peculiarities and requirements of the 3 founding libraries;



- Preparation of outputs from the 3 libraries' bib data to Primo and testing;
- Integration of the bib databases of the 3 libraries – more than 500,000 records – in Primo;
- Successful tests of the Primo search (July)
- Study of the product;
- Accumulation of data from the associated libraries and update of the founding libraries' data;
- Tests of the NBU records.
  
- **DigiTool**
  - Installation by Ex Libris;
  - Configuration in consistence with the needs of CL-BAS and SUL;
  - Creation of the first digital objects in the module – an old-printed book and 2 periodicals of the Bulgarian National Revival – and their integration.
  
- **ALEPH**
  - Installation by Ex Libris;
  - Work on the outputs from Aleph to Primo;
  - Study of the product;
  - Preparation and configuration of ALEPH 500, version 20;
  - Gathering information on the type of call numbers at the associate members' holdings.

In 2010 the work on the software platform strictly followed the planned schedule. There was a slight delay just in the work on ALEPH, and yet ALEPH is the module most familiar to the NALIS team (due to the experience of it gained at CL-BAS).

In addition to the software platform, there were some enhancements in the **NALISF office infrastructure**:

- The mail server was installed and configured;
- An internal computer network was constructed;
- The back-up of servers were set;
- The software for the telephone exchange was adjusted;



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- An image file was created and software installed on the computers intended for the training.

The principal purpose of the project is the construction of the **NALIS Union Catalogue** (NALIS-UC) and a good progress was made in this respect. As planned, in its first stage the NALIS-UC included bib records only of the founding libraries. The catalogue has been opened to users since September and has functioned successfully so far.

The last quarter of 2010 was marked by intensive contacts aiming at further development of the catalogue. NALISF has tried to attract not only libraries but also the organisations that manage the library software most used in the state.

- 1) Negotiations began with the two **Bulgarian software companies** which had developed and maintained the library software applied at public and academic institutions. Cooperation with them should result in integrating the bib information they've gathered in the NALIS-UC.
  - Primasoft and Softlib:
    - Preliminary talks for collaboration and integration of their *Regina* catalogue (comprised of bib records of certain public libraries in Bulgaria) into the NALIS-UC;
    - Successful test of some PrimaSoft bib records and import into Primo.
  - PC-TM, the creator of the AB Program Package widely used by the university libraries in Bulgaria:
    - The several meetings with them were focused on the possibilities for future cooperation and for integration of their database in the NALIS-UC;
    - Bib records from the PC-TM database were successfully tested and imported into Primo.

## 2) **OCLC**

What followed after some correspondence in the first quarter of 2010 and a meeting in late May was the intention to contract OCLC for the use of bib data.



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## II. Associate Membership

The first half of 2010 was dedicated to elaborating the strategy to attract associate members to NALISF. This task was a prioritised part of the project. The Board of Directors (BD) formulated the principles for association, a standard agreement as well as some financial and administrative issues related to it at a few meetings. There were preliminary talks with certain academic institutions.

At the end of 2010 there were already 3 NALISF associated members, namely:

- VUZF University;
- New Bulgarian University;
- Union of Architects in Bulgaria.

There were negotiations with some other institutions:

- Plovdiv University
- Central Medical Library
- Institute for Market Economics
- Centre for Advanced Study
- American Research Center in Sofia
- Ministry of Foreign Affairs
- National Library (NL) in Sofia

Because of the special status and significance of NL, we had several meetings with their management to discuss the possibilities for future collaboration. The perspectives and tasks of this collaboration were much clearer at the end of 2010 and in 2011 we are going to start working together.

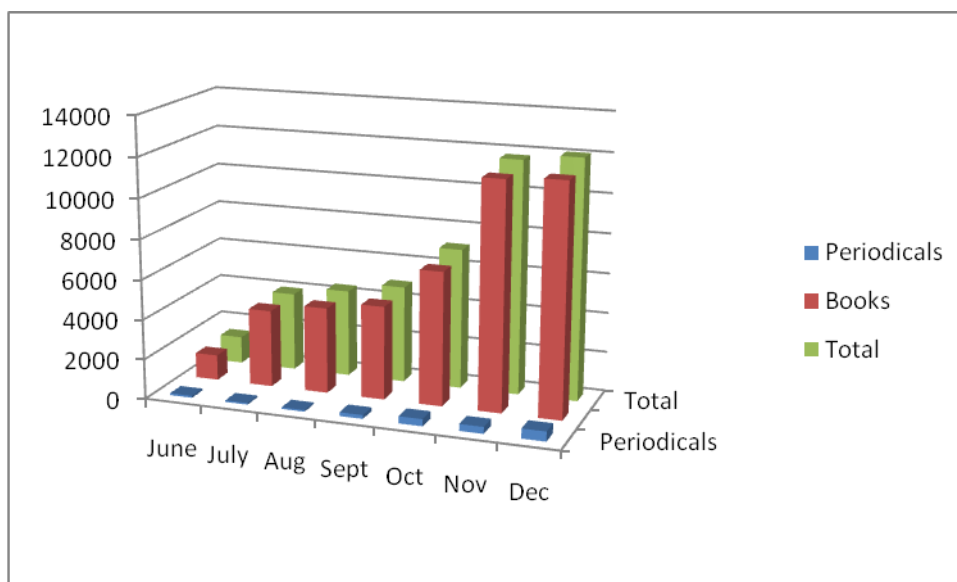
## III Retrospective Conversion

The active interest and support on the part of the America for Bulgaria Foundation (ABF) helped determining retroconversion of bib records as one of



the major tasks for NALISF. The actual work in this respect began in the first quarter in 2010 with the establishment of a working group to coordinate the activity. Within the second quarter the plan for retroconversion was ready and approved by BD. Its implementation started in June.

The number of retroconverted bib records increased month by month as shown below:



The three institutions have retroconverted 45,468 records in total.

In addition, NL made a plan for the retroconversion of their bib records and this was a great step towards its collaboration with NALISF.

#### IV. Training

All the introductory courses in the software products purchased from Ex Libris took place in the NALISF office:

- A two-day course in **MetaLib** intended for representatives of the founding libraries (16-17 February);



- A two-day course in **SFX** intended for representatives of the founding libraries (18-19 February);
- A two-day course in **DigiTool** intended for representatives of the founding libraries (25-26 March);
- A two-day course in **Primo** intended for representatives of the founding libraries (29-30 June);
- Four courses in **ALEPH** intended for the NALIS team – a course per module:
  - Circulation Module (16-18 November)
  - Interlibrary Loan Module (22-23 November)
  - Printing Services (24-25 November)
  - Acquisition/Serials (6-7 December)

In addition, the NALIS team was trained online. There were:

- Four courses in **DigiTool** (13,18, 20 May and 23 July);
- A course in **SFX** (01 October).

There was also a meeting with BLIA (Bulgarian Library and Information Association) dedicated to the coordination of the training activities related to the projects of BLIA and NALISF.

## V. Library Standards

The translation and revision of **MARC 21** continued together with the attempts to provide the Bulgarian library society with free access to it. The results in this respect are as follows:

- By the end of May the two key booklets related to MARC 21 were published on the NALISF website. In June the Library of Congress amended the list of MARC translations with the Bulgarian ones (i.e. ours, see <http://www.loc.gov/marc/translations.html>). In September the updated version of *Understanding MARC Authority* in Bulgarian was published on the NALIS website.
- The translation of *MARC 21 Format for Bibliographic Data* began in April and by the end of May a fourth of it was ready. Yet this activity had to be postponed because of more urgent tasks at the Foundation.



- The concept of a single library dictionary developed. It was accepted that there should be three dictionaries and that they should be published on the NALIS website.
  - Online Multilingual Dictionary of MARC 21 Terms;
  - Online Glossary of Bulgarian Library Terms (in Bulgarian);
  - Some Acronyms (explained in Bulgarian).

The work on the dictionary entries (creation, revising, structuring etc.) continued during the whole year and was regularly reflected in the online publication.

## VI. Publicity

In 2010 NALISF made important progress in its establishment among the Bulgarian professional society and in the public space.

The most important event in this respect was the NALIS *International Forum* entitled *Integrating Bulgarian Library Resources: NALIS – the Gateway to Bulgarian Academic Libraries*. It was organised with the inestimable support of ABF, both financial and in terms of attracting experts on a world scale.

At the Forum NALISF was officially presented to the Bulgarian society and NALIS-UC was demonstrated. It was actually straight after the event that the catalogue became available to the users.

The lecturers – from the US, UK, Germany and Bulgaria – discussed some global tendencies in the integration of library resources and best library practices in the respective states. The forum was attended by more than 200 librarians, computer specialists, scholars and scientists who actively participated with various questions. Invited were also representatives of the Bulgarian government and of certain non-governmental organisations.

The Forum and the NALISF were well disseminated in various presentations both in Bulgaria and abroad, in an interview with the NALISF's Executive Director and in 8 articles about the Foundation in prestigious local and foreign periodicals.



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In 2010 the Foundation's **website** was activated and was regularly updated with news and other relevant information.

## VII. Management

During the whole year NALISF was managed strictly according the regulations accepted by the Board of Founders (BF) and the Board of Directors (BD).

The most important institutional step was the establishment of a **NALISF Council of Experts**. It is going to provide authoritative professional support to the project, expertise to the NALISF management and help it objectively define the priorities in its choice of technologies and standards related to the library and information systems.

Thanks to Mr C. Pforzheimer III the managers of some of the most prestigious libraries in the world accepted to be members of the NALIS Council of Experts. These are: Deanna Marcum (Library of Congress, Associate Librarian for Library Services), Richard Ovenden (Bodleian Library, University of Oxford, Keeper of Special Collections and Associate Director) and Robert Darnton (Harvard University, Professor and Director of the University Library).

The first meeting between the Council of Experts and the Board of Directors took place on 23 September. The Council's usefulness and timeliness was revealed fully on the very next day – at the NALIS Forum.

Several **documents**, related to the construction of the national academic library and information system, were approved in 2010. Some of the most important are listed below:

- Standard Associate Membership Agreement;
- Status of the Council of Experts at the NALIS Foundation;
- Status and Objectives of the Working Group for Retroconversion and Digitisation of the Library Holdings Involved in the NALIS Project.

Approved were also some internal rules related to the Prevention of Money-Laundering and Funding of Terrorism.





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Both re-registration of NALISF and a change in its Articles of Association were undertaken in compliance with the decisions of the Board of Founders from March 2010.

During the year the **Board of Directors** met eight times and **the Board of Founders** – twice (the second time was out of the schedule and was necessitated by the need to choose a new BD member from AUBG).

All the monthly and quarterly **reports** were prepared and delivered to BD and ABF in time.

The **procedures** related to the supply of office equipment were carried out, namely for the purchase of: a router, servers and UPS, 2 screens, 10 PCs, 10 operating systems, security system for the training room and the BD room. Besides, a labour medical company and an insurance company were contracted and NALISF was registered as a personal data administrator.

3 January 2011

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