Shared LSP Project Update

August 23rd, 2019

www.suny.edu

What's Happening with my Health Checklist?

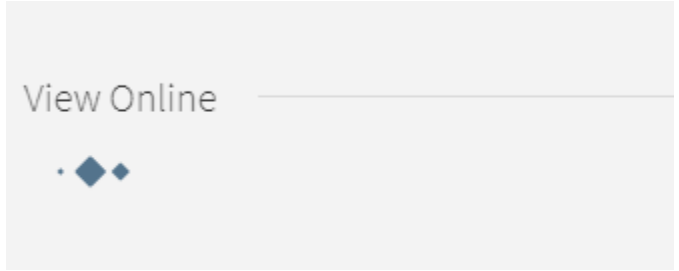
- Thanks to the 2/3 of campuses who completed them.
- Shannon reviewed and responded if there was any direct question or there was any query about specific or general issues.
- ExLibris is using as an internal communication channel now.
- No further feedback or communication about these forms is planned.

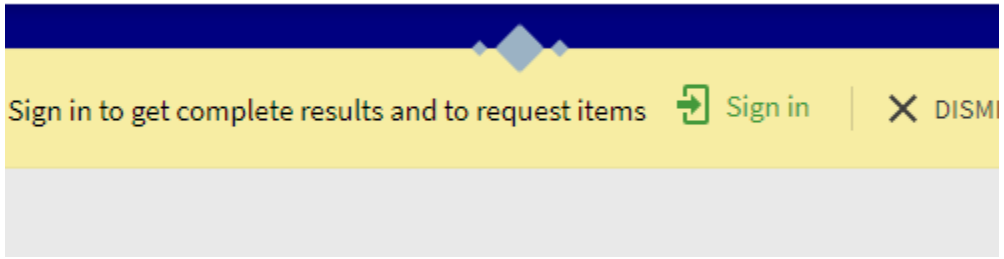
Banner-Alma Integration Update

- SUNY working with many campuses to get SIS loads before beginning of semester.
  - If you haven't already started working with us, it may take some time before we can get to you as we're trying to finish work with several campuses.
- Noticing the following issues with SORYALM data:
  - Email preferred tags set to "false"
  - No preferred addresses being designated
  - Alma symptom will be that e-mails are not sent and in the case of addresses, these aren't generated/printed.
  - Please review your xml files before loading.

Primo VE Meeting Summary

- SUNY met with Ex Libris in Buffalo on August 6th and 7th.
- Reviewed Following Issues:
  - Indexing: Items not showing up in Primo
  - Search Results Speed
  - Open URL Resolver Speed
  - Communication
  - Documentation





Follow Up to August 6th Primo VE Meeting

- Monthly meetings with SUNY and Ex Libris to review performance for searching for all sites.
- Work with Ex Libris and sites outside of performance indicators (2.2s for 50% of searches, and 4.5s for 95% of searches) to review configuration and how to improve performance.
- Begin reviewing OpenURL performance in next 1-2 months.
- Ongoing communication about coming improvements to Primo VE and OpenURL resolution.
- Immediate escalation of indexing issues to Ex Libris Primo VE Product Manager and VP of Discovery Solutions.
- In-depth summary and presentations shared to Institutional Leads Basecamp.

Central Discovery Index (CDI) Task Force

- As a new Primo VE consortium, SUNY was encouraged to be an early adopter of CDI.
- Early adopters get opportunity to see CDI in test systems before having this change sent to live system for all, which would have happened only a few months later anyway.
- Early adopter program will begin later this Fall.
- CDI combines PCI and Summon index, as well as makes activations easier in Alma/PCI.
- Should provide much better way to handle EBSCO content.
- CDI TF Charge and Members: https://slcny.libguides.com/cdi-task-force

Introducing Jennifer Koerber

- Will be working with SUNY for 1 year to help us build and extend Alma/Primo related training program.
- Jennifer was previously the Alma Training Manager for the Harvard migration from Aleph to Alma/Primo VE.
- Has extensive technology training background at Boston Public Library.
- Much of her work in Harvard Program can be found at:
  - https://wiki.harvard.edu/confluence/display/LibraryStaffDoc/Alma
- Will be working with SUNY Shared Library Services Staff to frame training program and begin delivering additional training soon.
- In absence of a Training Working Group, will report plans and directions to LSP Advisory Board to ensure SLC input.

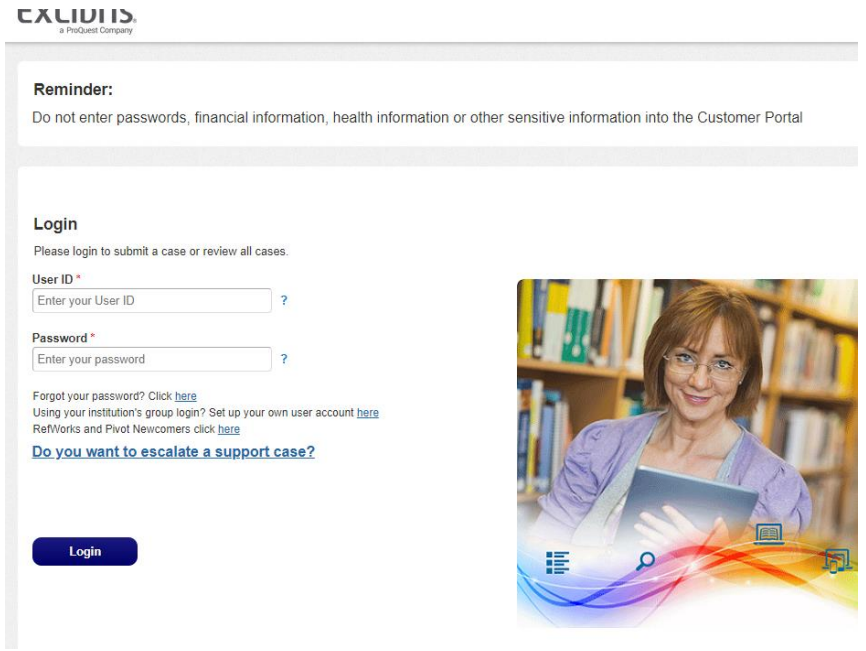
Image from jenniferkoerber.com

Training Survey

- Surveys have been sent to institutional leads as well as distributed to all staff.
- All staff survey is available at:
  - https://www.surveymonkey.com/r/DZ9JQJM
- If you haven't heard about the institutional lead survey, check with your local contact.
- Deadline for submission is August 30th.
- Surveys will inform our planning on training for next 1-2 years.
- If you have more in-depth thoughts on training that you'd like to share, please send us a message at: info@slcny.libanswers.com

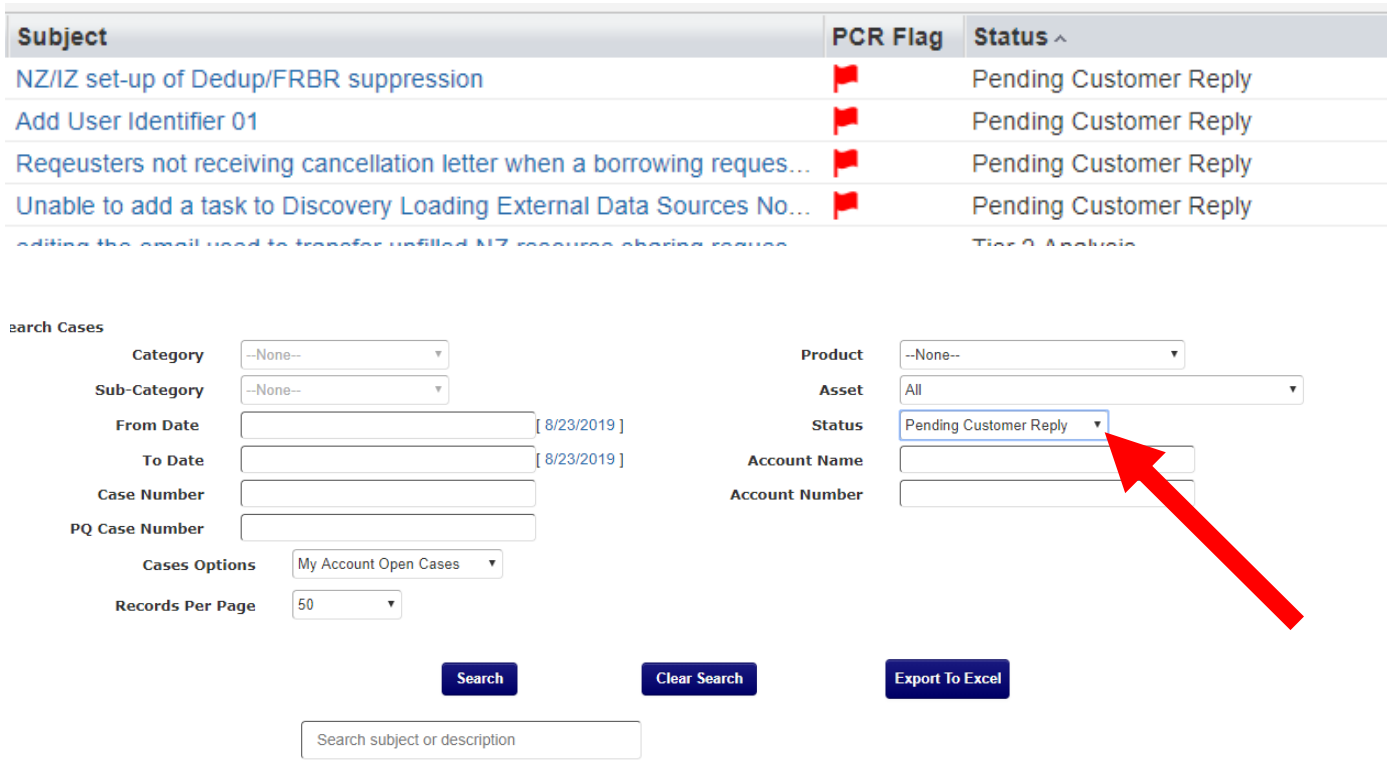
Transition from Implementation to Support

- SUNY has met with Support Managers at Ex Libris and will meet again with them soon.
  - Identified following areas that have been problematic since go-live:
    - E-Resources
    - Printing
    - SIS loading
    - Resource Sharing troubleshooting of obscure config. issues
    - Primo VE indexing and overall performance
- Estimated timeframe for switch to support is mid-to-late September.
- Ex Libris internal meetings between support and professional services/implementation happening soon.
- SUNY has requested at least 2 weeks notice of exact date, and ability to negotiate final date.



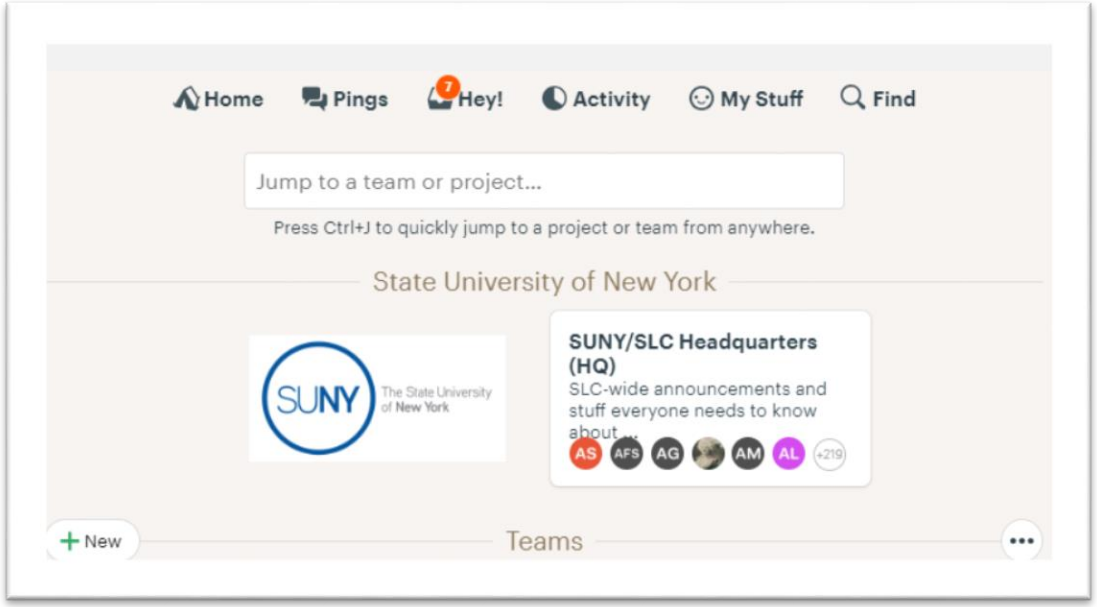
Review of Salesforce Cases

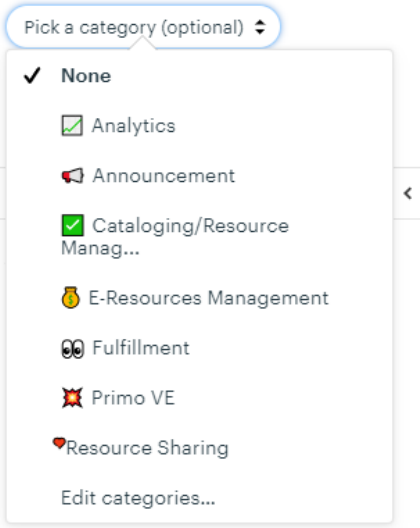
- We're reviewing the hundreds of open Salesforce cases as part of our transition to support.
- SUNY will have monthly meetings with Support Managers to review cases and discuss trends.
- In review, there is an extremely high number of cases that are "Pending Customer Reply."
  - Please check your Salesforce instance and close any that should be closed, or respond that you still have this issue.



Peer to Peer Platform

- SUNY/SLC HQ will be used as Peer to Peer Platform until a longer-term decision is made about what platform would work best.
- If you're not already there, please add yourself:
  - https://3.basecamp.com/3649838/join/3oUqZrsjbeqZ
- Categories have been added for functional areas.





Extended Support

- Contact us at LibAnswers (info@slcny.libanswers.com) if you are interested in extended support.
- Will send Service Level Agreement, Options, and Participating Institution Agreement.
- Staffing for Extended Support:
  - Susan Perry will begin at end of August 2019
  - Additional Staff will begin September 3rd, 2019
  - Additional Staff from SUNY institution begins end of December 2019
  - As more campuses enter into agreements, new staff will be added.

Electronic Theses and Dissertations

- At the request of campuses and working groups, SUNY has been working with Ex Libris over the past 6 months to determine the best way to harvest collections from Institutional Repositories.
- We've initially focused on ETDs to get the process worked out.
- SUNY is configuring ETD Discovery Import Profiles in the Network Zone.
  - Will allow Institutions/IZs to add as a separate local scope, which isn't possible if Discovery Import is in IZ.
  - Beginning initial phase of discussion and feasibility of having an ETD Portal using Primo as the front end to aggregated Discovery Import Profiles.

Resource Sharing Update

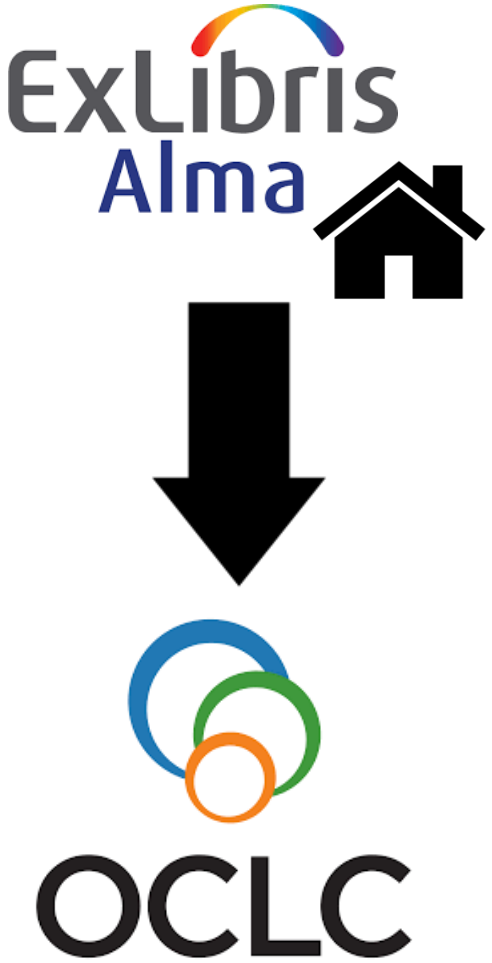
- 53 campuses are now lending in Alma
- August statistics to date:
  - Total requests: 1,203
  - Filled requests: 577
  - Fill rate: 47%
  - Average borrowing turnaround time: 4.0 days
- Problem with how Primo VE passes author information to Alma was causing some requests to fail
- Temporary fix (removing author search from locate profiles) has already resulted in higher fill rate - Ex Libris working on long term fix
- We will continue to monitor unfilled requests for other potential locate issues

Resource Sharing Update

- Printing improvements included in September Alma release will hopefully address printing difficulties and improve resource sharing usability
- IDS Project also working on printing alternative based on Cal State's CleanSlips - should be available very soon
- Lending Expiry Time has been increased from 2 days to 3 days for all libraries
- Resource Sharing Requests Cleanup Job has been turned on for all campuses – will run every Monday at 1:00am

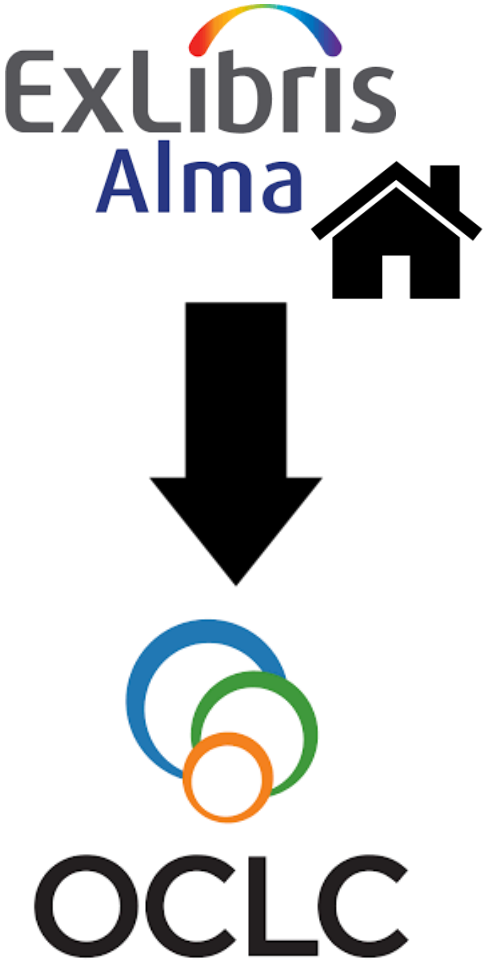
OCLC Bibliographic Publishing Profiles Update

- One of the factors that Ex Libris looks at when deciding to move SUNY from implementation to support is to make sure that the bibliographic publishing profiles jobs are successfully running SUNY-wide
- The bibliographic publishing profiles job help to ensure that the holdings SUNY-wide are as accurate as possible, which will help ensure the accuracy of our shared NZ bibliographic environment



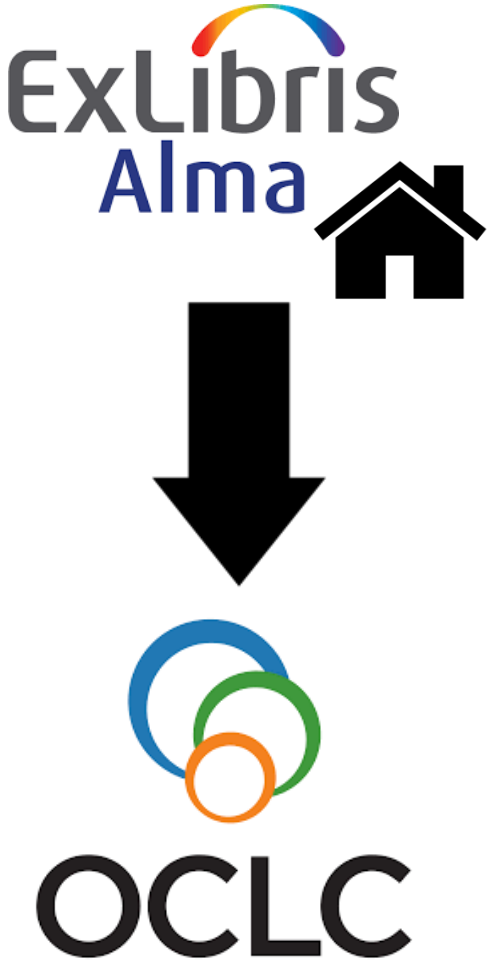
OCLC Bibliographic Publishing Profiles Update

- 30 of 60 SUNY campuses OCLC Worldshare bibliographic datasync collection and Alma publishing profiles configuration were managed by the SSLS
- 47 of 60 campuses bibliographic publishing profiles jobs are running in Alma
  - 29 of 47 campuses were managed by the SSLS
- 6 campuses have not created their OCLC Worldshare bibliographic datasync collection



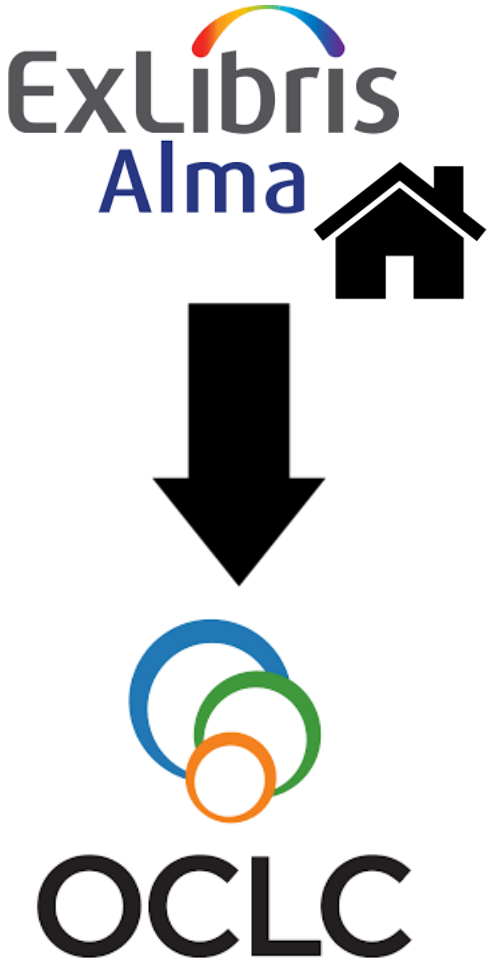
OCLC Bibliographic Publishing Profiles Update

- Emails have gone out to campuses regarding bibliographic publishing profiles for the following reasons:
  - They do not have an OCLC Worldshare bib datasync collection created
  - They have not submitted their OCLC Worldshare bib datasync collection
  - They are not running publishing profiles in Alma
  - Their files were going into the wrong OCLC sub-directory



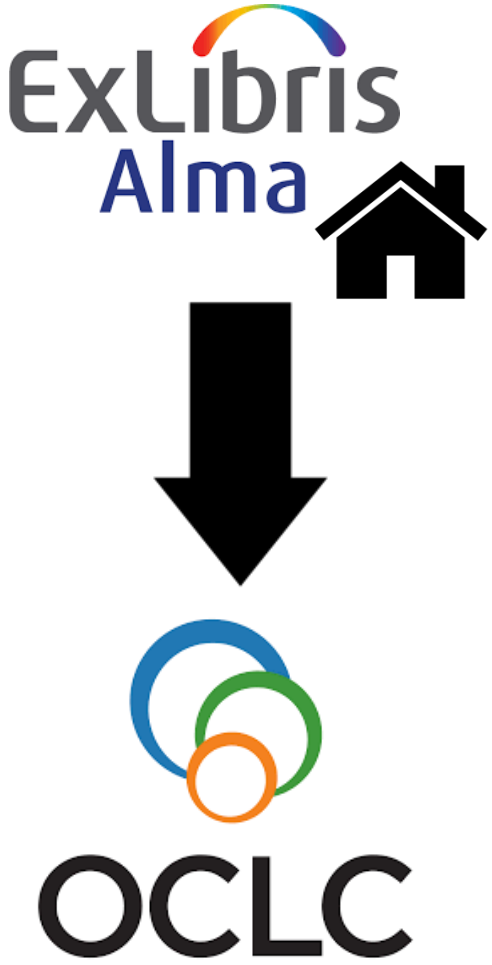
OCLC Bibliographic Publishing Profiles Update

- The changes that the SSLS recommended to be applied to the OCLC Worldshare bibliographic datasync collection were successful for the campuses that the SSLS managed
  - The changes applied to the bibliographic datasync collections prevented bib records without OCLC numbers and e-resources from publishing



OCLC LHR Publishing Profiles Update

- Worked with OCLC to ensure there were no changes necessary in the configuration of the OCLC Worldshare LHR datasync collection
- Currently using SUNY Oneonta's serials to test the LHR publishing profile behavior
- A training session will be held to go over the workflow to publish LHRs once the workflow has been finalized



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Questions or Discussion?

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