

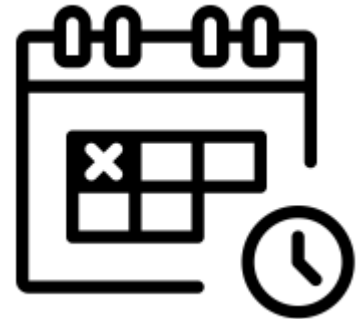
# LSP Update Webinar

April 11, 2018  
Shannon Pritting



# Upcoming Key Dates

- Week of July 9th: Kick-Off Meeting. Will be blend of in-person and virtual
  - Training and generic sandbox access will begin soon after
- October 15th: Test Load
- December 11-14: 4-Day Workshop. Will be blend of in-person and virtual



# Vanguard Phase Update

- Blend of recorded webinars and live webinars
  - Weekly trainings: 1 hour on Alma functions
  - Irregular Mostly Weekly 2-hour sessions on Specific Topics
    - Preparing Migration Forms
    - P2E (Print to Electronic)
    - Beginning of Configuration Forms
    - Data will be migrated very soon
    - June 3-day workshop in Brockport—will understand much more about workflows & configurations



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# Some General Observations About Vanguard Phase

- Migration is complex, and requires an understanding of how Alma is different than Aleph or other tools.
- Completing Alma Essentials is a good way to begin to understand Alma conceptually.
- More Network Zone training is coming, and will start to connect Alma understanding with how we envision using Alma in SLC.
- Project Managers for ExLibris are dedicated to helping, and we're working to help them understand SLC's objectives and goals.
- The clearer we can be with what we want to do with Alma, the more helpful our assigned Project Management team will be.

# December Workshop: Dec. 11-14

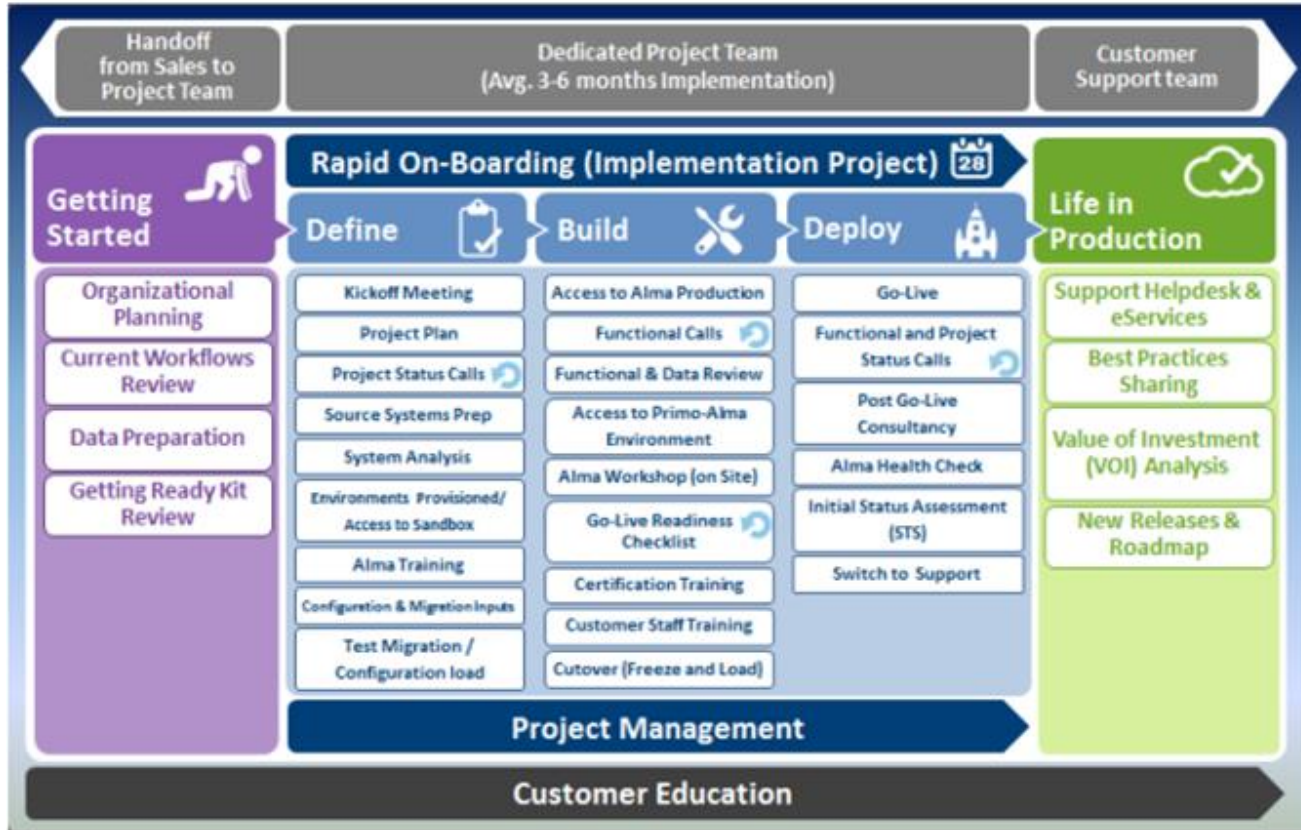
- Due to requests from campuses shifted dates one week later.
- Will have virtual component that has been requested by many campuses.
- Virtual component makes arrangements more complex as we have to do both well.
- Looking at Albany area—in discussions to get best venue.
- Can attend 1 day or all 4 days.
- Days will be generally broken down by functional areas.

# Kickoff



- Tentatively Set for the week of July 9th
  - In-person or virtual
- Will provide general overview of the all-SUNY project, with key dates provided and general approach.
- Good way to get to know Ex Libris Project Team.
- Vanguard Kickoff was virtual, with all-SUNY set to be more expansive event.

# The Ex Libris Implementation Methodology



# What Will a Typical Week be Like Through Implementation?

- Training and Education
  - 30 minutes to an hour of recorded trainings.
  - 30 minutes to an hour of work on a sandbox environment to test concepts in recorded trainings.
  - 1-hour live webinar with ExLibris (or watch recording).
  - SLC related training for Alma/Shared Platform (1 hour).
  - Extensive training such as certification (1 hour)
- With Live Data in System
  - Review data in system and test functionality for adjusting data as needed (1 to 1.5 hours)
  - Review system functionality and work on projects for needed services for go-live (1 hour)
- Special Projects Related to Migration and Implementation
  - Completion of migration forms, configuration, testing (1 to 1.5 hours)



# Weekly Meetings: Begin After Kickoff and Continue Until Go Live

- Wednesdays 11am - 12 pm
- Target Audience: Institutional Lead and local implementation team
- Topics: Mostly related to understanding aspects of Alma/Primo and required migration preparation.
- Every other Week Fridays 2-4 focused sessions on specific topics



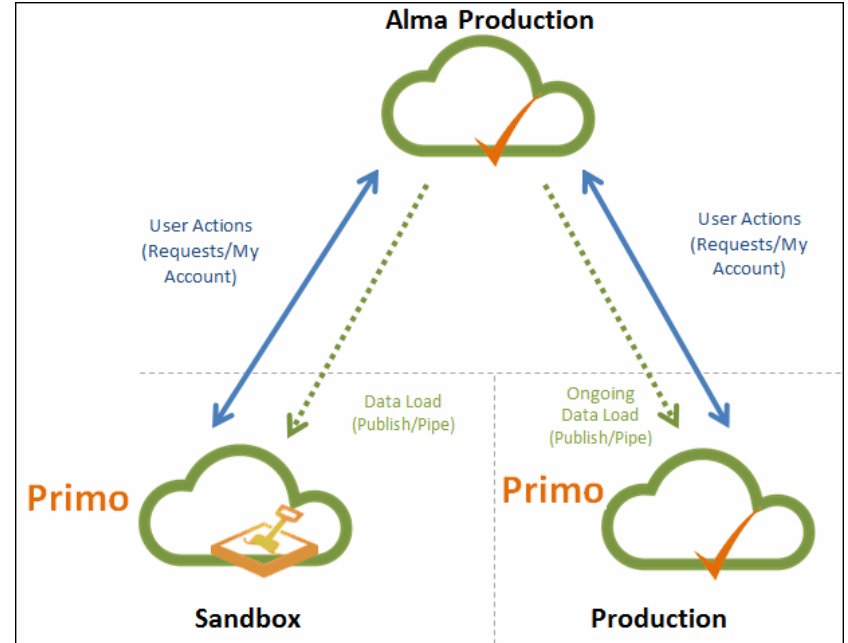


## Additional Use

- Will vote on costs at SLC next week
- Strategy for Aleph additional use and how to handle report requests/needs will be forthcoming soon after.
- Will keep Aleph for 6 weeks after go-live, but in a reduced capacity
- Will release strategy for reports in Aleph to give campuses access to legacy data.
- We will have from October 2018 to July 2019 with our Aleph data in Alma.

# Alma & Primo Sandbox

- Have 5 premium sandboxes
  - Forming Group to analyze and develop process for which campuses will be sandbox campuses
  - Decision will last life of contract
  - Sandbox decision should benefit campuses and SLC
- Will need to provide training on how Alma/Primo sandboxes are different from current environment.



# New Policies and Best Practices

- [Appeals Process for Policies:](#)
  - 20 campuses can initiate appeal, which will be reviewed by SLC Board and LSP Task Force.
- [Bibliographic Utility](#)
  - OCLC identified as primary bibliographic utility

<https://slcny.libguides.com/policies>



# Working Group and Task Force Updates

- Many WG members are focusing on getting more knowledge of Alma, including completing Alma Essentials.
- Getting access to Sandbox
- Participating in some/all of Vanguard phase activities



# LSP Task Force

- Further analysis of 3+1 Model, with specifics to be presented to SLC at 4/18-4/20 meeting.
- Reviewing policies and best practices (some forthcoming).
- Developed Initial Sandbox Strategy/Guiding Principles to serve as initial guide for Sandbox group.



# Discovery Working Group

- Members of the WG have been gathering questions and concerns about Primo from their campuses. The WG has organized a structured document based on the questions and concerns that is organized by functional areas. The WG will begin reviewing and discussing this document and is working through Alma training and researching answers to the questions in order to develop future recommendations.
- Members of the WG will be presenting on the group's work at SUNYLA



# E-Resources Management

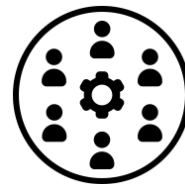
- The ERM WG has been [analyzing the SUNY ERM survey data](#) to compile and highlight responses where migration or implementation issues may need "heads-up" or formal recommendations from the WG.
- We are working to understand how managing e-resources from the network zone actually works, especially how Analytics works, e.g. can campuses with privileges in the IZ can run Analytic reports to capture data from both the IZ and NZ.
- Collaborating on training and developing shared understanding of e-resource management workflows.





# Access Services & Resource Sharing

- Prepared a poster presentation for SUNYLA
- Patron data retention recommendations have been drafted and will be shared soon with the Data Migration Working Group
- Met with individuals from Northwestern to further understanding of how loan policies work within Alma. The WG has had difficulty conceptualizing fulfillment units, location and item policies. The meeting with NW helped to clarify.
- The Fines and Fees proposal has been revised and will move onto the LSP Taskforce soon.
- Questions are being prepared for a Q&A with ExLibris regarding the Fulfillment Zone vs. the Resource Sharing module. This will allow the group to evaluate the best solutions for moving forward with consistent lending policies across the consortium.



# Systems

- Focusing on training, with all members working to complete Alma Essentials.
- Investigating examples of Banner query that other Alma libraries are using for SIS integration.

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# Training

Training is coordinating a series to train the trainers - how to put together training and use the tools (zoom and LibGuides). We plan to finish our survey and launch it this month to identify both training needs and training volunteers.

Many thanks our LibGuides and online training subgroup volunteers!

## LibGuide Trainers

- Logan Rath, Brockport
- Ken Fujiuchi, Buff State
- Leslie Wong Loock, Nassau
- Laura Harris, Oswego
- Lauren Puzier, Albany
- Sarah Levy, Rockland
- Christine Faraday, Nassau
- Jean Linn, Niagara

## Online Trainer Trainers

- Amanda Calabrese, Delhi
- Cheryl Marriott, Downstate
- Logan Rath, Brockport



# Libguide Transition

Many Thanks to our Libguide Consultants:

- Logan Rath (Brockport) and Ken Fujiuchi (Buff State)

The screenshot shows the SUNY Libraries Consortium website. At the top left is the logo and name. Below it is a breadcrumb trail: SUNY Libraries Consortium / SLC Guides / LSP / LSP Implementation Overview / Task Forces and Working Groups. The main heading is "LSP Implementation Overview" with a search box on the right. A left sidebar contains a vertical menu of blue buttons: "Task Forces and Working Groups", "Meeting Minutes and Documents", "Institutional Leads", "Vanguards", "Timeline", "Communication Channels", "FAQs", "Presentations and Webinars", and "Ex Libris Documentation and Training". The main content area has two sections: "LSP Implementation Team" with a list of three members (Shannon Pitting, Heidi Webb, Kristy Lee) and their roles; and "Task Forces and Working Groups" with a list of five groups (LSP Task Force, Data Migration Task Force, Access Services and Resource Sharing Working Group, Acquisitions Working Group, Analytics Working Group) and their respective leads and update dates.

The screenshot shows the SUNY Libraries Consortium website. At the top left is the logo and name. Below it is a breadcrumb trail: SUNY Libraries Consortium / SLC Guides / SLC and LSP Implementation Updates. The main heading is "SLC and LSP Implementation Updates". Below this is a sub-heading "3/29 SLC Board Meeting Minutes" with a byline "by Shannon Pitting on April 10th, 2018 | Comments". The text below says "SLC Board Meeting Minutes from 3/29 are now available:" followed by a URL. Below this is another sub-heading "Ex Libris Announces SUNY's selection of Alma and Primo" with a byline "by Heidi Webb on April 3rd, 2018 in LSP | Comments". The text below says "Ex Libris recently announced SUNY's selection of Alma and Primo." followed by a quote: "Moving to the Alma platform will increase efficiency and maximize the use of resources; libraries will have access to cross-system analytics, which will facilitate data-driven decisions". Below this is a link to a press release: "Check out the full press release: <http://www.exlibrisgroup.com/press-release/suny-selects-ex-libris-alma-and-primo-solutions-for-libraries-on-61-campus/>". On the right side, there is a "Recent Posts" section with three items: "3/29 SLC Board Meeting Minutes", "Ex Libris Announces SUNY's selection of Alma and Primo", and "April LSP Update Webinar". Below this is a "Subscribe" section with the text "Enter your e-mail address to receive notifications of new posts by e-mail." and a form with an input field and a "Subscribe" button.

# LSP Sessions at SUNYLA Conference

## Wednesday Pre-Conference

- Leading the Way Pitfalls and Possibilities- What it Meant to be a Vanguard

## Thursday/Friday Presentations

- Preparing to Open Pandora's Box: Readyng Your Library's E-Resources for Alma Migration
- Supporting Transitions with Comprehensive Professional Development Planning
- SUNY LSP Data Migration Task Force Recommendations & Best Practices
- Opening the Discovery Door: Getting to Know Primo

## Poster Presentations

- The Times they are a Changin': Envisioning New Practices & Policies in Alma



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