Shared Library Services Platform Update

3/1/2018

Shannon Pritting

SUNY **Libraries Consortium**

LSP project will result in SUNY Libraries becoming SUNY Libraries Consortium

- Transition from SCLD to SLC for effective decision making.

- SCLD was a body where all decisions were voted on as a whole.

- SLC is an organization where committees are making policies.

- LSP Task Force has final authority for migration activities.
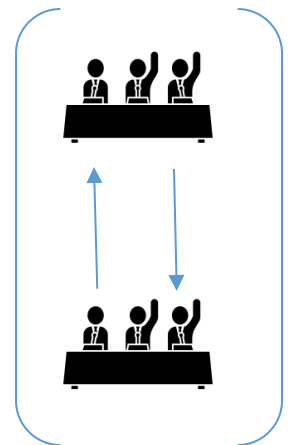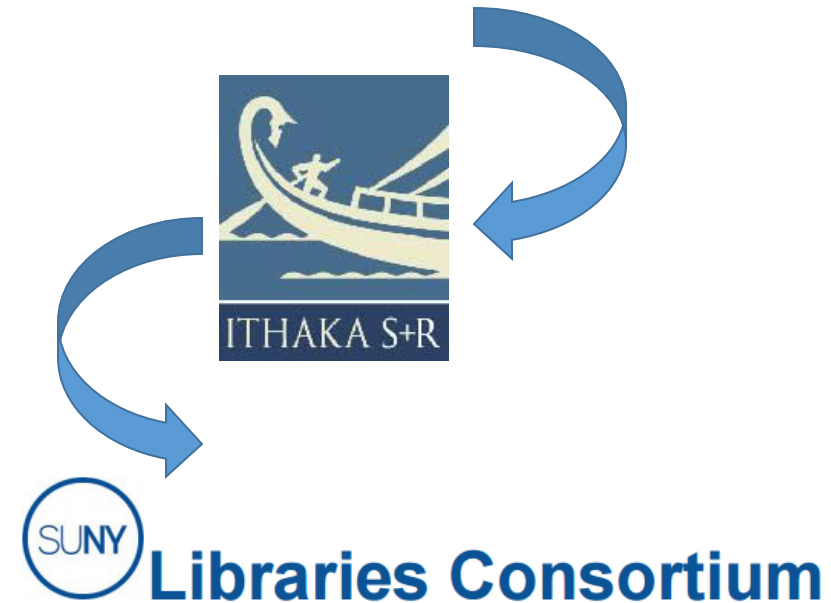
What's Due Now or Due Soon?
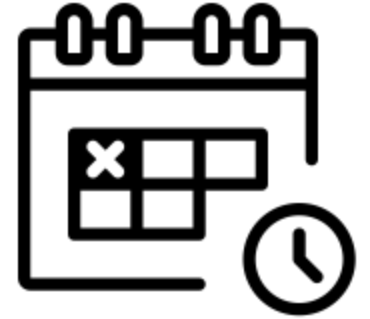
- Alma Implementation Form due today
  - Thanks to the 41 campuses who have already submitted (as of this morning)
- Decision on bXRecommender due March 21st
- Bib delete opt-in/opt out due by March 13th

Ex Libris Project Management Team

- Ashley DeHaye (Project Manager)

- Pam Tejes (Alma Consultant)

- Svetlana Smirnov (Alma Consultant)

- Lynn Higgins (Primo Consultant)

Key Dates: 2018
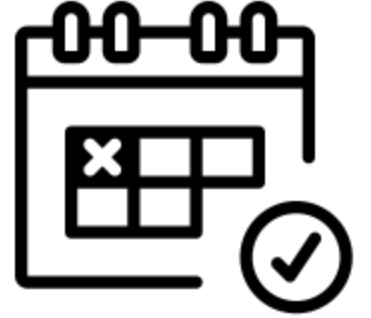
- Next Week: Sandbox Available and Beginning of Training for Vanguards
- March 9th: Vanguard Kickoff
- April 15th: Vanguard data load
- May 1st: Vanguard Sandbox Available
- October 15th: SUNY Initial Data Load
- December: 4-day Alma workshop
  - Focus will be on workflows in Alma, not training

Policies: Network Zone Loans

- ASRS Network Zone Loan Policy
  - Main Collections for Faculty, Staff, and Graduates:
    - 16 Weeks, 3 Renewals
  - Main Collections for Undergraduates:
    - 16 weeks, No Renewals
  - Short Loans for Restricted Collections:
    - 30 days
    - Intended for media, specialized subcollections
  - Resource Sharing preferred over recall
  - No recalls unless item needed for reserves

Data Migration and Preparation Update

- For the most part, whatever is in Aleph, will migrate.
  - No ability to filter by date, status, etc.
- If you don't want it to migrate, it should be deleted.
- Issues will be flagged as "Technical Migration."
- 1 Vanguard Load, and 2 SUNY Data Loads
- Final Cutover: 1 month tech services freeze in June 2019
  - Fulfillment will continue with a data gap load.

Additional use and report strategy for Aleph coming soon

- ITEC shared server Aleph libraries additional use functionality and timeline will be coming soon.
- Will be developing policy on what reports will be available to gather data from Aleph through services.
  - Won't be creating complex "data dumps" from Aleph.
  - Will be using services that campuses can run for themselves.
  - Campuses responsible for running reports/services.
  - Process will be to have Working Groups or other body to review service/report requests and forward for feasibility review.
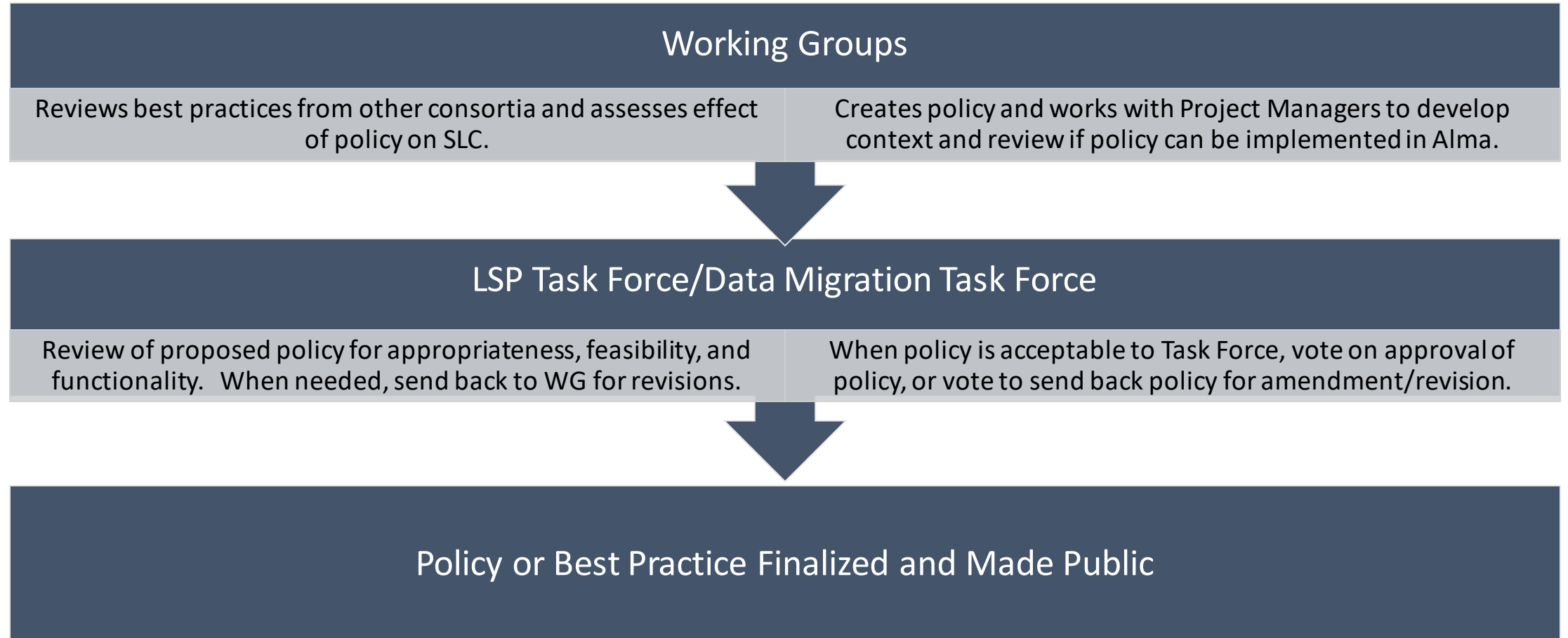
Additional Use and Proquest/ExLibris Products

- For libraries who subscribe to ExLibris/Proquest products that will be replaced by Alma/Primo, there will be a 90-day additional use period.
  - 360 Link
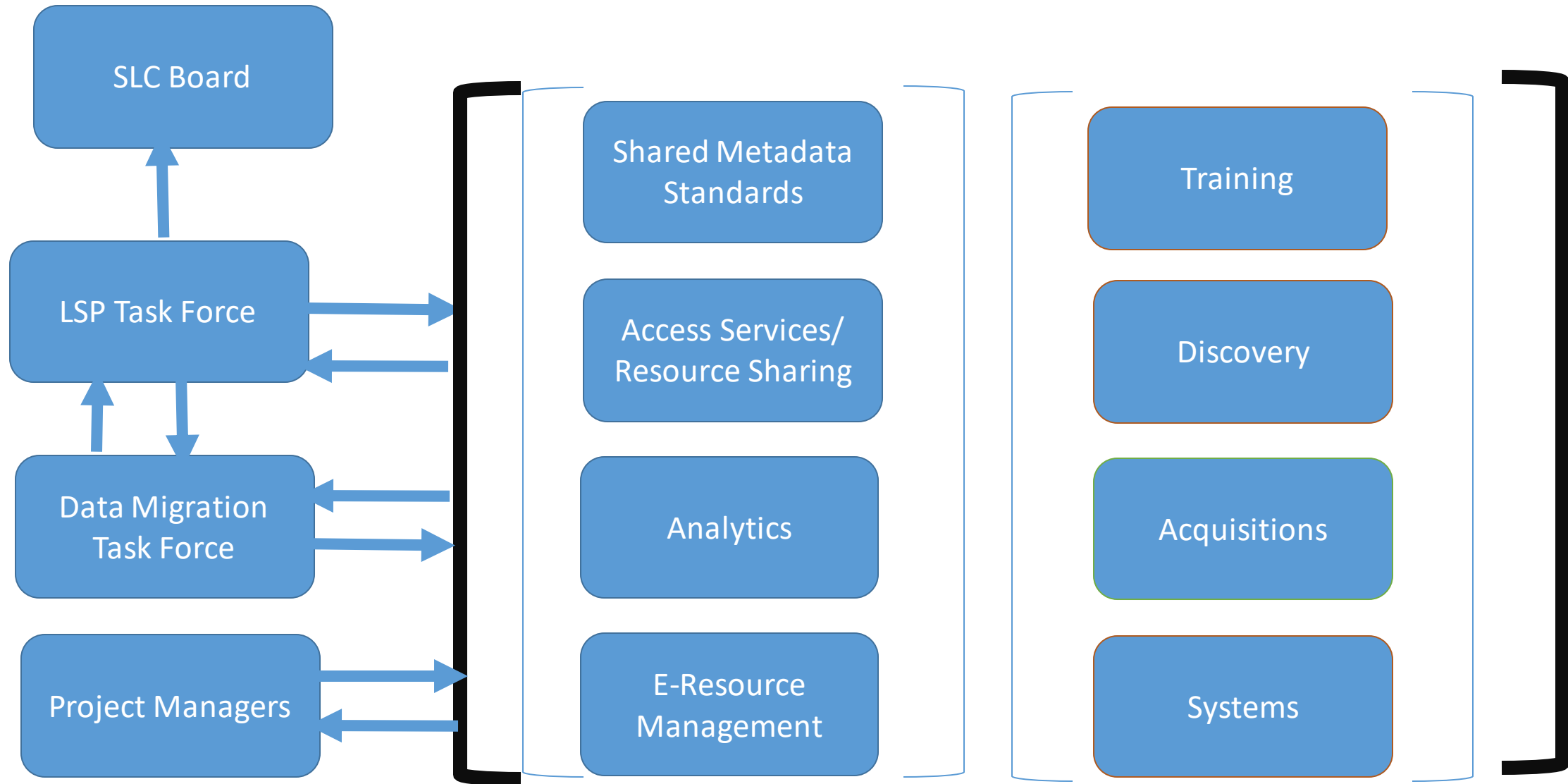 - Intota
  - SFX
  - Summon

Local MARC fields in ITEC managed Aleph environment that will be migrated to Alma.

STA##	59###	962##
501##	650#2	981##
502##	650#4	CNU##
521##	655##	CNA##
540##	69###	CIN##
541##	79###	CPE##
561##	910##	CDP##

How Policies and Best Practices are Created

Working Groups

| Reviews best practices from other consortia and assesses effect of policy on SLC. | Creates policy and works with Project Managers to develop context and review if policy can be implemented in Alma. |

LSP Task Force/Data Migration Task Force

| Review of proposed policy for appropriateness, feasibility, and functionality. When needed, send back to WG for revisions. | When policy is acceptable to Task Force, vote on approval of policy, or vote to send back policy for amendment/revision. |

Policy or Best Practice Finalized and Made Public

LSP Task Force and Working Groups

Many Policies will be needed for SUNY's Network Zone.

- Network Zone can centralize management of many components:
  - Configuration
  - E-resources
  - Vendors
  - Licenses
  - Bibliographic records
  - Discovery logic rules
- Data sharing can also be highly developed
  - Financial Information
  - Usage information
  - Collection development
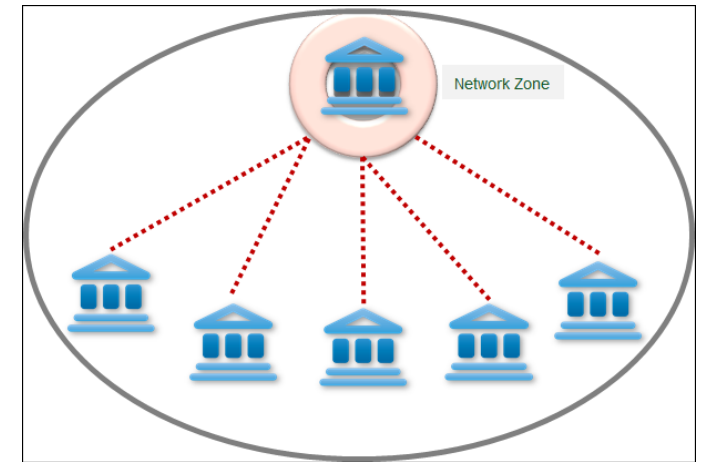
So, What's a Best Practice?

- Recommendation, often for data cleanup.
- Based on Working Group and Task Force expertise, or the recommendation from Ex Libris.
- Formed as it will make the migration or functioning in Alma smoother.
- If work is needed to bring data in line with best practice, Project Management Team will operationalize as much as possible.
- If campuses wish to opt out of best practices, the campus assumes responsibility for data clean up or other work needed to resolve issues in Alma.

Introducing the SLC Web Presence

- Migration from Commons Site to Libguides now mostly finished.
- Working groups will be posting content on their libguides.
- Main Website URL is:

https://slcny.libguides.com

What's new in our web presence?

- Improved ability to keep up on what's going on with LSP Project:
  - Blog: slcny.libguides.com
  - Overview: slcny.libguides.com/overview
  - Policy/Best Practice Aggregate Site:
    https://slcny.libguides.com/policies

How We're Communicating

- Institutional Contacts via Basecamp:
  - Get notices of events, minutes, request for input, and tasks. Expect that they are sharing out to local campus staff and librarians.
  - Get more day-to-day and weekly details.

- SUNYLSP listserv and Basecamp HQ:
  - Major events, webinars, and high level updates.
  - Information that needs to be broadly shared.

- Libguides:
  - Posting as much content as possible that is product of work of Working Group, Task Forces, announcements, and webinar recordings.

Communication is key, but it's hard.

- We're working to try to manage the signal vs. noise.

- Many details will be coming, far more than any person can track.

- Institutional Leads will be highest level of communication.

- Develop institutional communication and support structure.

High Level Overview of Working Group Activities

- Developing expertise in Alma.

- Researching consortial best practices.

- Researching consortial best practices with a shared LSP.

- Gathering input from SLC community about current practices.

- Gathering data about functional areas.

- Focus is on best practices and evidence based decision making that is needed in a shared environment.
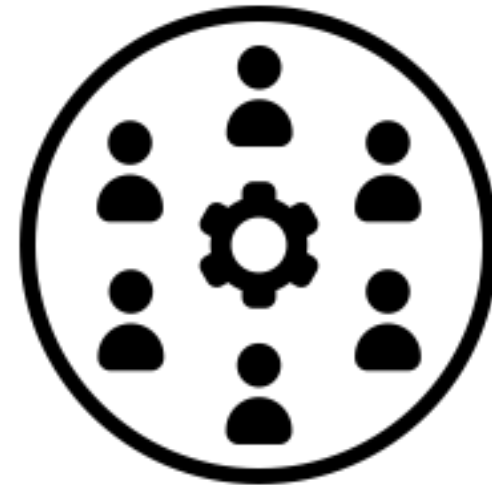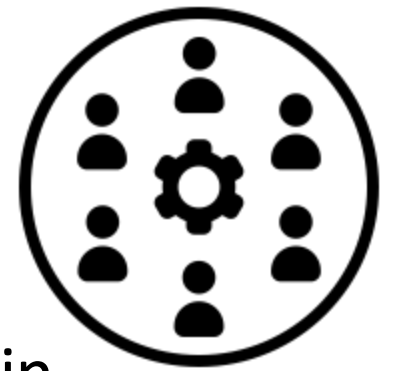
Working Group Updates: Discovery

- Discovery:
  - Reviewing research on Primo and best practices of other consortia using Primo.
  - Preparing framework for review and upcoming recommendations for Discovery policies and best practices.
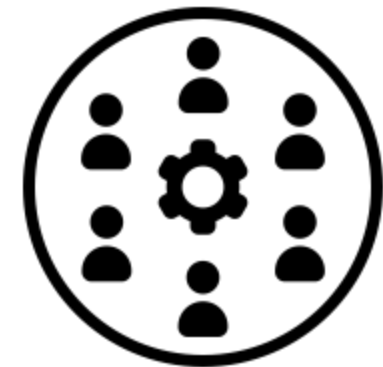
Working Group Updates: ERM

- Survey responses have been received from all campuses. Questions are being divided and assigned to WG members for analysis and formatting for SUNYLA presentation.

- Reviewing best practices for managing e-resources in the network zone.

- Compiling list of e-resources titles (e.g. different types of e-resources such as ebooks, A&I, streaming media, etc.) to test in the Vanguard phase.

Working Group Updates: ASRS

- Had webinars with BibSys and CalState which has been helpful in answering questions regarding policies and workflows and gave us much food for thought going forward.

- A fines and fees policy as well as proposal for purging patron data will be finalized and sent to the Taskforce soon.

- Have begun coordinating with institutional finance offices to determine feasibility, if any, for financial transactions between institutions.

- Basic recommendations for campuses to change fines/fees as necessary

Working Group Update: SMSP

- Sent 17 policy recommendations to LSP Task Force for review and consideration.

- Significant work on local field mapping in preparation for testing local extensions for Vanguard phase.

Volunteers Needed: Online Training Coaches

Soon, the Training WG will be sending out a call for functional area trainers.

In addition to documentation and videos to be available in LibGuides, some trainers will be providing online training to members in the SLC.

To best support these essential volunteers, the Training Working Group would like to provide training on online training. We need individuals with experience with the design, development, and assessment of online training methods and tools.

If you or anyone you know of is interested or you have any questions, send an email to the following which will go to everyone in the training working group: **save-twD52YKLtgh3@3.basecamp.com**

Potential LSP Related Presentations at SUNYLA Conference

- Currently under review by program committee.

- Most Working Groups have submitted a presentation proposal.

- Vanguard pre-conference presentation submitted.

- Data Migration presentation submitted.

SUNYLA 2018 | Throw Open Our Doors
Academic Librarians Open to New Experiences, Opinions, and Viewpoints
Finger Lakes Community College, June 13-15, 2018

Questions?