2/15/2019 Library Services Project Update

Shannon Pritting

LSP Implementation Project Director

Update on Library Shared Services and Support for LSP

- Shannon and Gail will continue on FT with LSP Support post-go live.
- NZ Coordinator will begin in early May, 2019
- Resource Sharing Program Manager will begin in late April, 2019
- Discovery and E-Resources Program Manager will begin in July, 2019.
- Working on hiring 3 additional support staff as soon as possible, with target date late 2019.
- SUNY System Administration developed partnership with campus to host new positions.
- Library Shared Services independent of SLC, and will be managed by SUNY.
- Cost structure being developed, and will be discussed with campuses.
  - No additional costs for this Fiscal Year.

NZ Maintenance Task Force

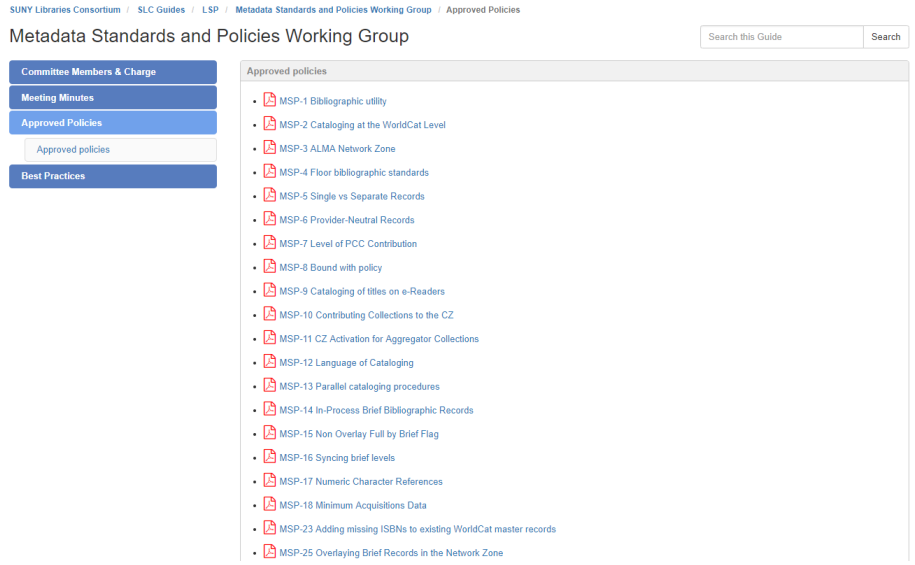
- Finishing up the last few pieces of work, but was highly successful, and recently delivered summary presentation.
- Highlights:
  - Analyzed and tested process for maintaining Network Zone bibliographic environment.
  - Reviewed methods for keeping IZ-OCLC in sync.
  - Reviewed how other consortia are maintaining NZ.
  - Analyzed NZ policies needed, but found that SMSP had it covered.
  - Developed NZ Coordinator job description.
  - Analyzed NZ test load methodology and analyzed if cutover approach needs to be different.
  - Will be releasing OCLC update triggers soon.

SMSP Policies

- SMSP Best Practices
  https://slcny.libguides.com/c.php?g=777081&p=5814452

  Bibliographic Record Network Zone And Local Fields Policies
  https://slcny.libguides.com/ld.php?content_id=45688752

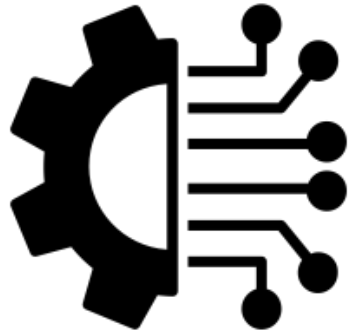
  SMSP
  Approved Policies
  https://slcny.libguides.com/mspwg/policies



Authentication

- We will be following up with campuses who have not configured Alma/Primo authentication.
- Reminder that SUNY federated authentication is only a possibility if your campus has no identity management solution that will work with Alma/Primo.
  - If your IT dept. wants to use SUNY federated authentication, the SUNY administrators of federated authentication will have to engage with your campus IT to make sure that there are no local options.

Banner-Alma Integration Update



- SICAS released application to Oneonta for testing, and Oneonta is currently working out some initial alpha testing issues.
  - Oneonta has been testing this on Banner 9, which has created a need for some tweaks.
- Will release SICAS application to 5 beta testing campuses in next couple of weeks.
- Estimated timeframe is to begin working with campuses on Banner-Alma integration in early-late March.
- If you have not yet implemented authentication in Alma/Primo, then we will wait for you to set up authentication before we schedule your campus for Banner-Alma integration.

E-Resources Migration for Guided Path Campuses

- Project Management team working on completing link resolver forms based on:
  - Fresh pull of your Ebsco data as of ~2/1/2019
  - Your input on the e-resources consultation.
- Will deliver link resolver form and portfolio loader files.
- Estimated delivery in early-mid March—depending on how long it takes us. For some, there's a lot of data manipulation we need to do, and it's time consuming.
- When we deliver your link resolver form and portfolio loader files, that's the end of our involvement. We've already expanded guided path more than we intended/should have.

P2E

- Reminder that all Aleph content that is not deleted will be migrated.
- Project Mgrs. will be reaching out in March to campuses who OLIS has reviewed their P2E and Aleph data and found a need to review P2E strategies.
  - Campuses will need to determine if they're going to delete or create a P2E of electronic content.
- Many campuses had appropriate P2E strategies, and we may not reach out soon, as we'll just prompt to make sure that all you want is a "refresh" of the same collections, etc.

Reiteration

- After we deliver your LRAA and Portfolio loader files, if there are issues, or you have questions, it’s your responsibility to resolve independently.
- We will do no more consultations, or review/analysis of your Ebsco holdings—No Exceptions.
- We’ll schedule a single web session on reading and interpreting your LRAA, and then it’s up to you to make sure these files are what you want to migrate.
- We’ll provide a deadline for revised LRAA forms, and if we receive nothing from you, the form we send is what will be used at cutover.

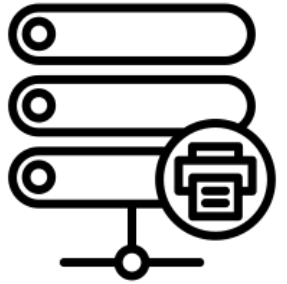
Reminder on Guided Path

- What SUNY Project Mgrs. Said they would do:
  - Complete Aleph to Alma Migration form, config. form, and link resolver form
  - Limited data cleanup such as STA deletes—which has already been completed.
  - Review your current ERM environment and suggest path forward.
- **Guided path work will be completed** upon delivery of LRAA form and P2E file.
- We will make no changes to the Aleph to Alma migration form unless you request a change. And, you must be specific—tell us exactly what needs to change in the form.

In-Person Training

- Will be guided exercises, with short demos.
- Assistants will be available to help walk through workflows.
- Limit of no more than 4 attendees per institution.
- Full details including agenda at:
  - https://slcny.libguides.com/overview/spring2019training

Printing



- Have provided two sessions on options for setting up printing from Alma (if you don't have an email-enabled printer):
  - Thunderbird
  - Namtuk Automatic Email Manager
- Now is a good time to begin this discussion with your IT dept. if you haven't already.
- SUNY will get a group license for Automatic Email Manager if your campus desires. Deadline to express interest is 2/19:
  - https://goo.gl/forms/RPbFVasm3bihGXqH3
  - Cost will be distributed to campus via recharge.

Resource Sharing Released

- All campuses now have lending and borrowing activated.
- Rota and Partners controlled and distributed in NZ.
- Campuses should begin to test sending borrowing requests and processing lending requests. And, one feeds the other regarding testing…
- Please post any issues or questions via Basecamp.

Walk-In Borrowing and Lending Expectations

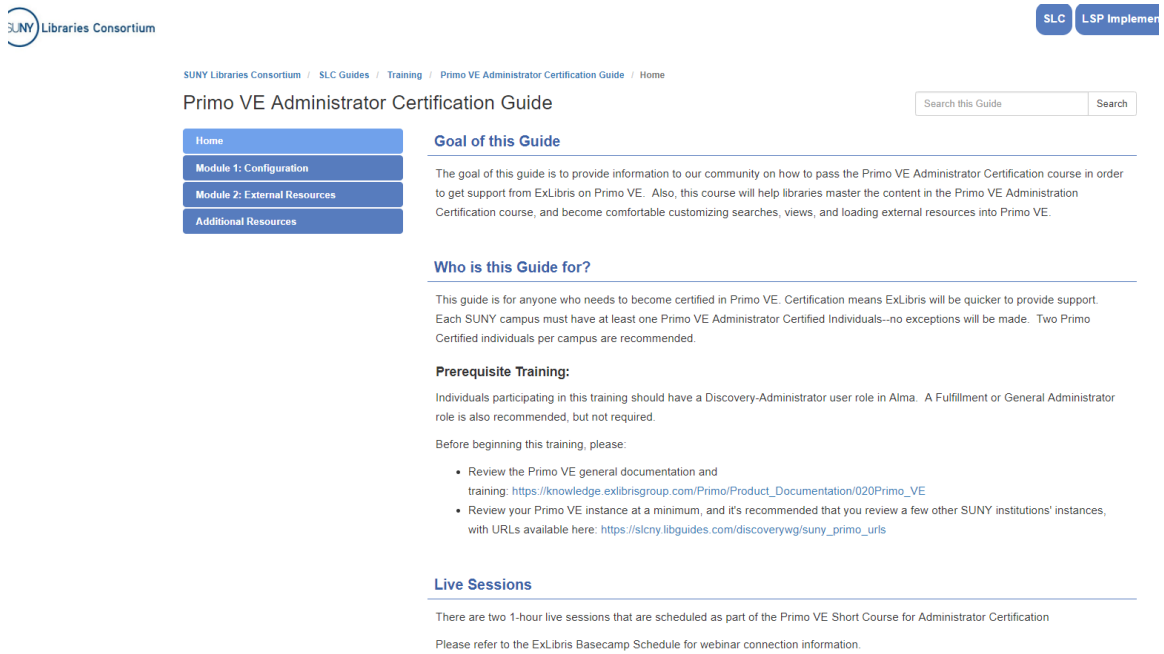
- Implementation of this functionality SUNY-wide is being considered via SLC review channels (Working Group to Task Force).
- Lending Expectations for SLC campuses also being reviewed.
- Reminder that this is our first foray into a collectively governed resource sharing arrangement, and campuses can expect to have a higher volume of resource sharing.

Primo, External Resources, and ETDs

- SUNY working on project to harvest all the ETD collections within SUNY, and harvest into NZ Primo VE instance.
- Will be creating NZ scopes for each, and then pull into a search profile-slot-view that will be SUNY ETDs.
- Focus on electronic theses and dissertations.
- Will be a test on how we can manage external harvesting from the NZ and take advantage of the consortial nature of Primo VE.

Primo VE Certification

- We've provided a structured course/support materials for Primo VE certification.
- At least one person per institution must be certified—no exceptions.
- Please try to get at least one person certified by 2/22.
- Email certification to Ashley:
  - Ashley.DeHaye@exlibrisgroup.com
- Details at:
  - https://slcny.libguides.com/primovecert



Some Trends from Health Checklist—And What We're Doing about It.

- Thanks to the 50ish campuses who submitted a Checklist.
- Generally, campuses have expressed that they want/need to do more work directly in Alma to get comfortable with workflows.
- Areas with most questions/issues were in acquisitions, and we've responded with Acq. Training Session.
- Developing more step-by-step training for processes as well as that was requested.
- Defined need for ERM type activities, and we're planning on addressing that soon—but it makes more sense to tackle acq. first.
- Will complete another health checklist in a few months.

General					
Library Activity	**Yes**	**No**	**NA**	**Provide Information to demonstrate you have successfully completed task or list the issue(s) you encountered while trying to complete the task. Use specific identifiers such as job name. For training of staff question, pleas provide as much detail as possible, and feel free to attach any additional files if needed.**	**SF Case # or Basecamp Post (If Applicable**
Did you test your activated jobs and notified which jobs should be deactivated (if at all)?	☐	☐	☐		
Did you complete internal training of your staff?	☐	☐	☐		N/A

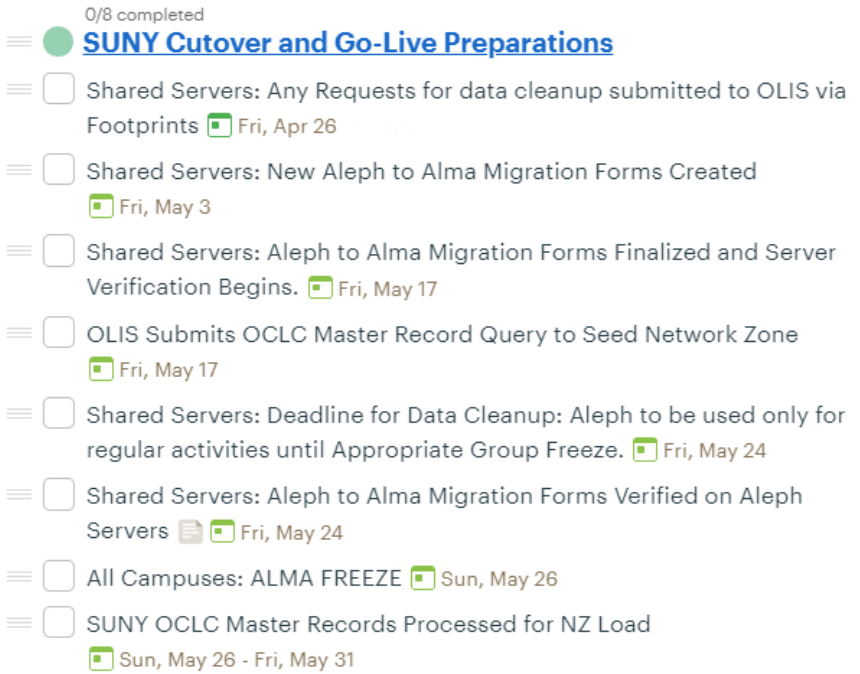
Analytics					
Library Activity	**Yes**	**No**	**NA**	**Provide Information to demonstrate you have successfully completed task or list the issue(s) you encountered while trying to complete the task. Please list the name of the reports you ran or scheduled.**	**SF Case # or Basecamp Post (If Applicable**
Are you able to access **Alma Analytics**?	☐	☐	☐		
Are you able to run **out-of-the-box** reports?	☐	☐	☐		
Are you able to create a **new** report?	☐	☐	☐		

Internal Training

- Question on Health Checklist:
  - Did you complete internal training of your staff?
  - 65% responded that they haven't yet started or are waiting until later in Spring.
- High recommendation is that your campus begins internal training ASAP.
- If you haven't begun this yet, you'll need to review the rest of what you've anticipated doing and make some things less of a priority to focus on training.
- If you need help prioritizing, please reach out to us at:
  - info@slcny.libanswers.com

Cutover/Go-Live Groupings and Dates Finalized

- The groupings and dates discussed/released in December-January are finalized, and ExLibris has accepted groups.
- Other related cutover dates now on schedule.
- No gap loads.
- Groupings and dates shared on 12-21-208 Project Update:
  - https://public.3.basecamp.com/p/QHUifLZDN8rspvA1ZLrB8sEe



Training Sessions

- Scheduled
  - 2/15: Primo VE and External Resources
  - 2/19: ILLiad-Alma integration
    - Follow Up working sessions on March 4th and March 14th.
  - 2/20: PDA/DDA Approaches and Best Practices
  - 2/27: Licenses
  - 3/8: Booking
  - 3/13: Deleting Records of Various Kinds
  - 3/15: FY Rollover Process
  - 3/22: Overdue and Lost Loan Profiles
- Planned, but not scheduled
  - Usage data (COUNTER/SUSHI)
  - Authority Control

- We're reviewing and adding more topics as needed, and as comes up in sessions.
- Send session requests to: info@slcny.libanswers.com
- Note that some of these are "Alma-Primo VE Weekly Meetings" on the Project Schedule.

Questions