April-May 2022 SLS Update

May 27, 2022

GENERAL UPDATES

Shannon Pritting

Staffing Updates

- **New Associate Director of SUNY Library Services:**
  - **Maureen Clements**
- **Search Underway for Associate Director of Assessment and Data Analysis:**
  - https://esc.interviewexchange.com/jobofferdetails.jsp?JOBID=147193

Upcoming CPD Leadership and Management Certificate

- OLIS has been working with CPD and librarian experts within and beyond SUNY to create courses connected together through a certificate.
- Feedback from many individuals in SUNY libraries who went through other leadership programs was used in developing certificate.
- Certificate will launch in Fall 2022, and first iteration will be roughly a year.
- Focus will be on learning and applying methodologies and tools to issues that librarians and staff face regularly.
- Will be forming an advisory board soon

Upcoming CPD Leadership and Management Certificate

- Courses will be in two groups.
- **Courses in Leadership and Management**
  - Change Mgmt
  - High Performance Teams
  - Assessing your leadership style
  - Inclusive Leadership
  - Project Management
- **Courses using methods in different functional areas**
  - Universal Design for Libraries
  - Access and Collection Strategies
  - Developing Library Partnerships
  - Library Strategic Planning
  - Library Assessment

Artstor

- Working on a 10-year agreement to replace current agreement.
- Exemption request approved by OSC, now working with vendor to establish agreement.
- Limited escalation and central agreement with invoices paid by campuses.
- Hope to begin developing contract soon, but still currently on schedule as current agreement doesn't expire until December 2022.

Elsevier ScienceDirect Renewal

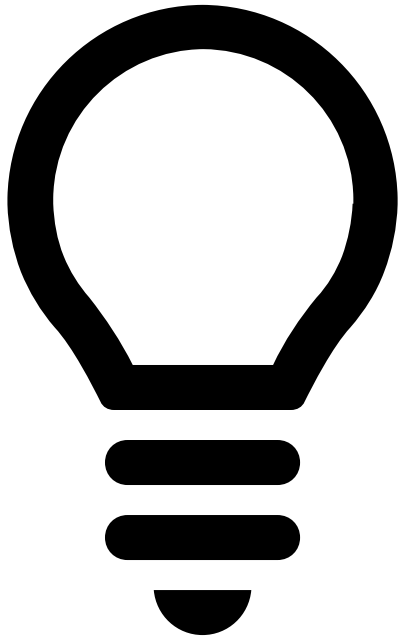
- 3-year renewal of Elsevier Agreement finalized.
- 1 less campus participating (doesn't affect pricing)
- Representative Task Force formed to guide this renewal
- Task Force and SSCC decided to keep the group of journals as static as possible
  - Not planning on swapping, but report and analysis leading to understanding, not analysis.
- Retained YOY price increase caps and APC discounts

SUNY Research Analysis Program

- The SUNY Office of Research, Innovation, and Economic Development (ORIED) is working on creating a program to analyze research output, strengths, and trends across the system.
- OLIS has been consulting with ORIED, and assisting with analysis of products and solutions.
- IR staff and admins from doctoral institutions also involved.
- Working to finalize agreement for solution and tool.
- OLIS will be sharing information as the program expands and when agreement for tool is finalized.

Spotlight on SUNY Libraries

- Series developed by Cori Wilhelm to focus on the great things that SUNY libraries are doing!
  - **June 14th—Jaclyn Savolainen from Dutchess will present on Active Learning Strategies: Transforming One-Shot Sessions**
  - To Register: https://slcny.libcal.com/event/9200206

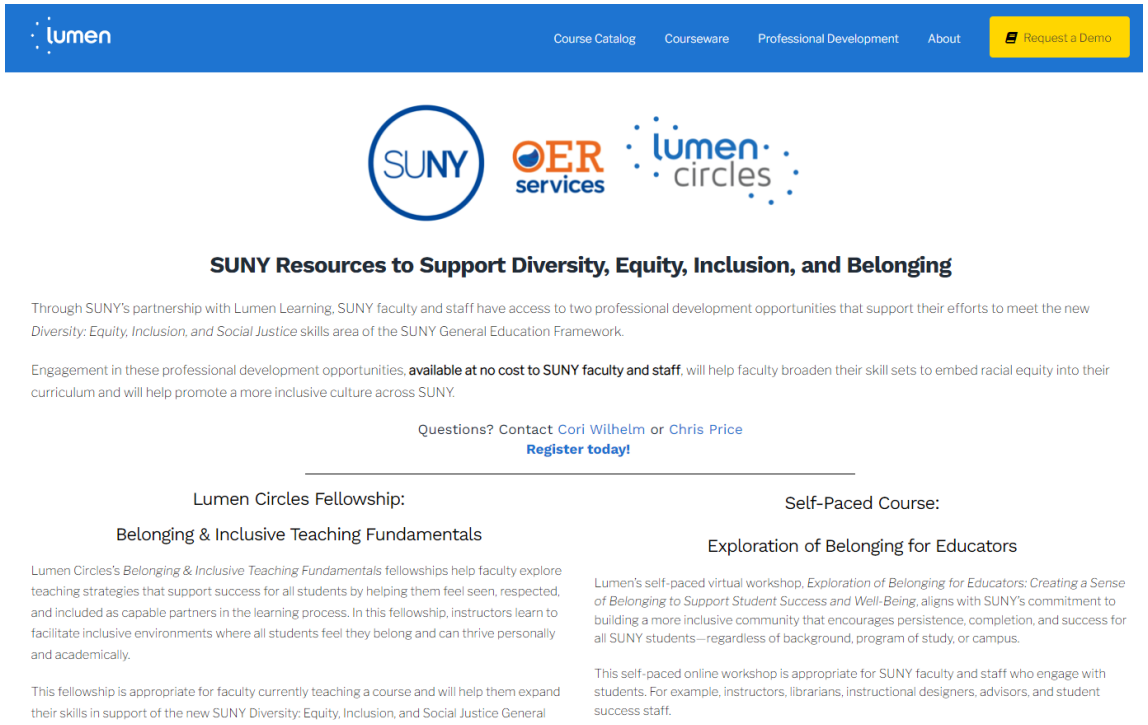


- Interested in presenting a Spotlight?
  Contact Cori at cori.wilhelm@suny.edu

Free Online Course: Exploration of Belonging for Educators

- Using Lumen Circles
- Self-paced course intended for librarians and other student support faculty and staff.

- https://info.lumenlearning.com/belonging-suny



Update on Alma-Primo VE Contract

- 5-Year Amendment provided to Clarivate for review.
- Waiting for Clarivate signatory to be back in office.
- Not expecting any issues, and minimal allowed escalation is what was proposed.
- Agreed on audit of usage (bibs, users, etc.) with EXL, and understanding is that we are within allowed subscription metrics.

OCLC-Alma Synchronization Issues

- Working with both vendors to review issue.
- Should see some improvements by Fall.
- SLS will be presenting about and assisting with catch up synchronization work.
- Longer term acknowledgement that Alma synchronization will require some manual intervention.
- Root cause is FTP failures leading to files not being delivered and Alma job not failing.

Libkey/Thirdiron Renewal

- All campuses renewed Thirdiron/Libkey subscription.
- Processing renewals.
- If any non-subscribing campus is interested, please reach out and we can set up a trial.

Library Acquisitions and Retirement Survey (LARS)

- SLS will continue to facilitate LARS for the state-operated campuses.
- Reporting period is 7/1/2021 - 6/30/22.
- Due date is 8/5/22.
- Campuses may submit their own data, or SLS will submit on your behalf.
- Emails will be sent in June, verifying your preference, as stated last year.
- Survey request will be sent 7/5/22.

Discovery & Resource Management

Michelle Eichelberger

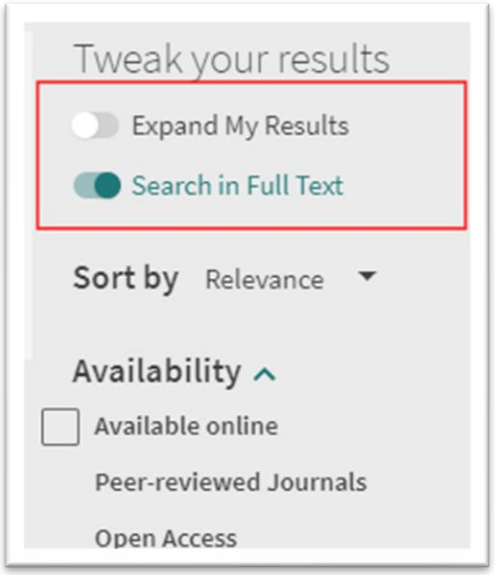
May/June Discovery Updates

Give Us Feedback Tool:

- Opt-in, can configure up to four issue types
- Configuring the Feedback Tool for Primo VE.
- Lots of discussion on Primo-L about functionality, placement, wording, etc. Not a perfect tool but a decent place to start if you don't have anything.

Include/Exclude Full Text Matches in CDI

- Default is to always search "full text," which isn't the full text of the article. Full text = "there are fields in the CDI records that are not visible in Primo, but which do respond to search queries - all of our searches do rely on what is in the CDI records. It relatively rare that the full text is indexed, but we have many record providers who include Abstracts, Tables of Content, Snippets, or other complex fields" [Thanks to Nancy Babb!]
- If your searches are too slow, could allow patrons to choose full text vs. Basic metadata search but will be hard to explain. Changes are made in Search Profiles and Labels config



Request Pickup Locations now sorted alphabetically by location under each campus

June Release will be maintenance only – no new features

Angular 1.8 Version Upgrade: November 2022

Details:

- Upgrade from Angular 1.6.10 to Angular 1.8 coming in the Primo/Primo VE November 2022 release
- Could impact any Javascript customizations like chat pop-ups, Libkey integration, etc.
- Ex Libris has created a tool to let you check your current settings to see if and how they will be impacted, and you can create a copy of your live view for testing

Important Links:

- Knowledge Center article about the change
- What changes in Angular 1.8 could affect my Angular customizations?
- How do I check my Angular customizations to see if they need adjustment?
- How do I adjust the code for my Angular customizations?
- Introductory video (YouTube; WebEx)
- Ex Libris FAQ.

May/June Resource Management Updates

Semi-Annual Re-indexing

- Should be complete for all SUNY campuses
- Submit ticket to info@slcny.libanswers.com if you run into any indexing issues (content missing from Primo, or lingering after deletion, etc.)

Set Unavailable Physical Items Process Types

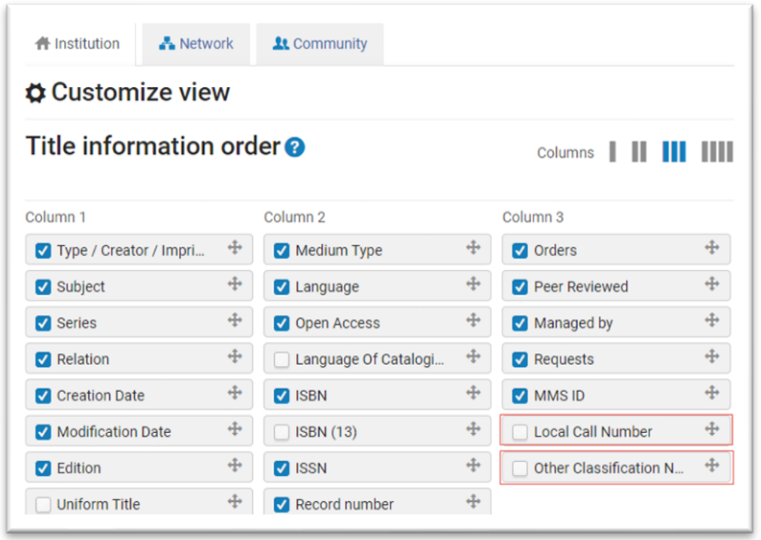
- Improvements made to process for bulk changing work orders and process types
- NERS enhancement request to make it easier to mark a large set of items unavailable, due to renovations, COVID restrictions, etc.

Portfolio Action Save and Test Access was added when creating a new portfolio: can now add and test at the same time

May/June Resource Management Updates, cont.

Additional Updates:

- **MD Editor:** now works in Safari on Mac OS
- **COUNTER Platform derived from Interface**: new read only field that will be used for cases where there is more than one COUNTER report for the same resource, to help differentiate reports
- **Digital Import Profile:** can now choose to overwrite existing bibs in Alma or keep original record



Searching:

- **Local Call Number and Other Classification Number Now Displayed in All Titles Search Results** – has to be configured with search result configuration icon
- **Physical Items Search by In Process Types:** can now search by custom-defined "In Process Types"

Shared Collections

Esta Tovstiadi

Renewal Updates

ProQuest Resources
- Waiting on contract finalization and vendor to send invoices

STAT!Ref Nursing eBooks
- Please respond by 5/31

SpringerNature Agreement
- SUNY contract, 4% escalator cap, billing via recharge, 10% discount new subs

SUNYConnect Reminder

Academic Video Online

- Access start date estimated for Aug. 1
- Current subscribers who have renewal cycles outside of August – July, we will work with ProQuest and the campus to prorate.
- Campus contact information has been shared with vendor

EBSCO

- Access for new DEI ebook collection begins July 1
- 8 databases will be removed from SUNYConnect starting July 1, for more information: https://slcny.libguides.com/c.php?g=1030210&p=7466759

eBook Project

1. Discussions with SSCC, University Centers, Vendors
2. Leverage existing spend to increase access across SUNY
3. Reviewing data related to current collections

Resource Sharing

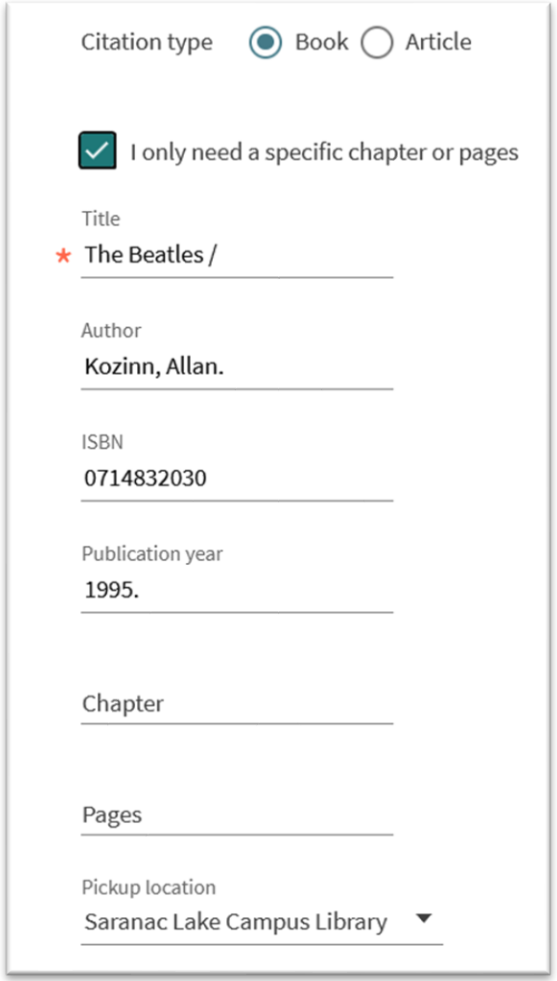
Timothy Jackson

Temporary RS Loan Period Policy

- At the start of the pandemic, ASRS recommended and the LSP Advisory Board approved a temporary expansion of SUNY's Alma resource sharing loan period
  - All requests would be given a 16 week loan period with three renewals
- This temporary policy will expire on May 31, 2022
  - Resource sharing loan period will return to 16 weeks with three renewals for faculty/staff and grad students or 30 days with one renewal for all users for items from "protected collections" (new, rare, media, etc.)
- SLS will handle all configuration work needed to switch back to our regular loan periods
- Reverting to our regular loan period will not change the due date of any resource sharing item currently on loan
  - Loans to undergrads will become non-renewable

Alma RS Book Chapter Requesting

- Ex Libris included a new RS book chapter requesting feature in a recent Alma Release
- SUNY has not implemented this feature because of problems with how unfilled book chapter requests are exported to ILLiad
  - Chapter title and page numbers are not exported to ILLiad
  - Would have created too many problems given our Alma borrowing fill rate (65%-70%)
- This problem should be fixed in the June Alma update
- Granted the fix adequately addresses the ILLiad export issue, we will look to implement this book chapter requesting feature for interested libraries this summer
- Cannot separate book chapter and article lending, so libraries that wish to borrow book chapters via Alma will need to start fully participating in digital RS lending in Alma



Expanding Alma RS Beyond SUNY

- Canisius College is interested in Alma resource sharing with SUNY
  - Private college in Buffalo
  - They are on the ELD courier
- Testing with Canisius has gone well, so we hope to go live in June or July
- Assuming libraries that are already borrowing and lending with Ithaca College via Alma will want to participate
  - Please email info@slcny.libanswers.com by June 3 if you wish to opt out of Alma RS with Canisius
- Nazareth College plans to start borrowing from SUNY via Alma this summer
  - Most SUNY libraries already borrow from Nazareth via Alma
  - Will give campuses opportunity to opt out before we go live with lending to Nazareth
- Working with WRLC libraries on going live with Alma RS pilot project
  - Albany, Buffalo, and Stony Brook participating
  - WRLC participants are American University, George Washington University, and Marymount University
  - Hope to go live by end of June
  - Long term goal is to include all interested libraries

SUNY Courier Task Force

- Current Empire Library Delivery (ELD) contract expires in July 2023
  - ELD Advisory Board already working on next contract (SUNY represented on this board)
  - SUNY needs to make decisions about courier participation
- SUNY Courier Task Force charged with helping up determine the future of SUNY's participation in a shared courier for moving materials between libraries
  - Identifying metrics needed for evaluating courier needs
  - Coordinating outreach to SUNY sectors and evaluating their input
  - Developing courier related policies (will require wider approval)
- Task Force members:
  - Glen Bogardus (Potsdam), Katherine Brent (Cobleskill), Heather Gad (Oneonta), Matthew Hartman (Stony Brook), Kristen Heinrich (Purchase), Jill Kehoe (Maritime), Laurie Oltramari (Genesee), Angela Persico (Albany), Rick Powell (Cortland), Elise Thornley (Binghamton), Erin Wilburn (Broome)
- First meeting was on May 12, and next meeting is scheduled for June 2

ProQuest Ebook ILL Pilot Project

- Pilot Project Update:
  - Project update for participating libraries held on Tuesday, May 24 at 9:00am
  - Discussed how the pilot project has gone to date and what we need to be thinking about long term
    - How will we handle request processing long term?
    - Shared ebook collection strategies?
  - Recording sent to everyone who completed Doodle poll for meeting
  - Email info@slcny.libanswers.com if you need the link to the recording
  - Will be following up with participating campuses in the coming weeks
- Request volumes:
  - 315 requests filled to date
  - 31 campuses have borrowed ebooks from other SUNYs
  - 15 campuses have loaned their ebooks to other SUNYs
- Top 5 Borrowers:
  - Albany (46), ESC (33), FIT (32), New Paltz (25), Binghamton and Purchase (19)
- Top 5 Lenders:
  - Buffalo (187), Binghamton (50), Hudson Valley (17), ESC (16), New Paltz (13)

Idea Exchange

- Idea Exchange allows us to make suggestions for improving Ex Libris products, including Alma and Primo
- Ex Libris is not contractually obligated to implement any of these ideas, but they do implement some popular ideas
- Currently SUNY's best option for advocating for improvements in Alma and Primo
- Improvements and Enhancements Committee (IEC) is trying to coordinate Idea Exchange voting across SUNY
  - Collectively, we have enough votes to push ideas to top of the most popular ideas list
- Idea Exchange webinar held on May 4
  - Recording: https://public.3.basecamp.com/p/rPEvKmJnyVXT9bsky8ZWKhWJ
- IEC Libguide contains list of ideas you may want to vote for
  - Libguide URL: https://slcny.libguides.com/c.php?g=1092166&p=8305911
  - Form for submitting ideas to IEC: https://slcny.libwizard.com/f/IEC

Repositories

Yvonne Kester

New Modules for SOAR and SDR

- Content & Usage Analysis (CUA) Module
- AudioVisual Streaming Module

Content & Usage Analysis Module

Visualizes:

- Content growth
- Usage
- Occupied storage

Content & Usage Analysis Module

Content statistics (available to administrators)

- Number of items can be filtered, sorted, visualized
  - This can be done for the whole repository, communities, collections, or by metadata
  - All metadata fields are supported and can be configured
- Default filter criteria are:
  - Date – past month, past 3 months, past year, or custom range
  - Scope – Whole repository, community, collection
  - Text metadata
- Generated report visualized as a graph and data table
- Contents of table can be exported to Excel/Google Sheets; graph can be saved as an image

Content & Usage Analysis Module

Usage Statistics (available to administrators)

- Downloads
- Item page views
- Collection page views
- Community page views
- Repository page views
- Other metadata fields can be logged as well. By default, dc.contributor.author and dc.creator are logged to create the "Most Popular Author" page
- Usage reports can be filteres by time once the report has been generated

Content & Usage Analysis Module

Scheduled Email Reports

- Allow admins to subscribe to reports that are sent at scheduled intervals
- Email will contain an Excel file and PNG image of the graph

Storage Reports

- Enable admins to see how much storage is taken up by collections and communities, as well as by users or groups of users
- Export to CSV file

Content & Usage Analysis Module

Publicly Available Statistics
  - Show metrics to all repository visitors
  - Includes all items, regardless of restrictions
- Statistics by country
- Most popular items
  - List of items displays clickable titles that link to item pages
- Most popular authors
  - List of authors displays clickable author names that link to browse pages for those authors
- Responsive usage statlets
  - Small reports displayed on public pages as graphs or tables
  - Based on the scope of the page (e.g., item page, collection page)
  - Responsive to screen size

Content & Usage Analysis Module

Robot and spider filtering

- Uses default DSpace user agent lists and COUNTER bot list

Browser Support and Accessibility

- Tested in Chrome, Firefox, Safari, and Internet Explorer
- Internet Explorer versions 10 and under are officially unsupported

Data Caching

- Publicly available statistics, statlets, and "most popular" pages are cached for 24 hours

AudioVisual Streaming Module

- Provides in-browser playback using the HTTP Live Streaming (HLS) protocol
- Compatible with modern browsers and devices
- Does not require plugins or client-side dependencies such as Flash or Silverlight
- Has fallbacks to support older browsers/platforms if needed
- File transcoding to format suitable for streaming
- Player automatically selects the highest possible bitrate based on current network connection
- Supports a wide range of audio and video file formats
- Captions are supported
  - File formats: srt, ttml, stl, scc, WebVTT
  - Multiple closed caption files may be used for the same audio/video file, to support multiple languages

SUNY