

SLC Shared LSP Update Webinar

May 30, 2018

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Upcoming Key Dates

- June 5-7: 3-Day Vanguard Workshop
- July 10-11: Kick-Off Meeting. Will be blend of in-person and virtual
 - Training and generic sandbox access will begin soon after
- October 26th: Test Load
- December 11-14: 4-Day Workshop. Will be blend of in-person and virtual



December Workshop: Dec. 11-14



- Due to requests from campuses shifted dates one week later.
- Will have virtual component requested by campuses.
- Can attend 1 day, all 4 days, or specific days.
- Days will be generally broken down by functional areas.
- Will be at Upstate Medical Center in Syracuse NY.
- Costs, hotel information, and other details coming soon.
- Likely that SLC will have meeting day before 4-day workshop.

Who Should Attend December Meeting?

- Institutional Lead should attend all four days, if possible.
- Key members of campus implementation team.
- If a large campus, department head for functional area should attend at least the day(s) that align with their responsibilities.
 - Alma is a different system, so functional areas are a little different than current systems or organizational structures.
- This won't be specific training, so no need to send large group, but do send key individuals who will be leading your implementation.

Kickoff

- July 10-11
 - In-person or virtual
- Will provide general overview of the all-SUNY project.
- Good way to get to know Ex Libris Project Team.
- If possible, implementation lead and other major contributors on your local implementation team should attend both days.

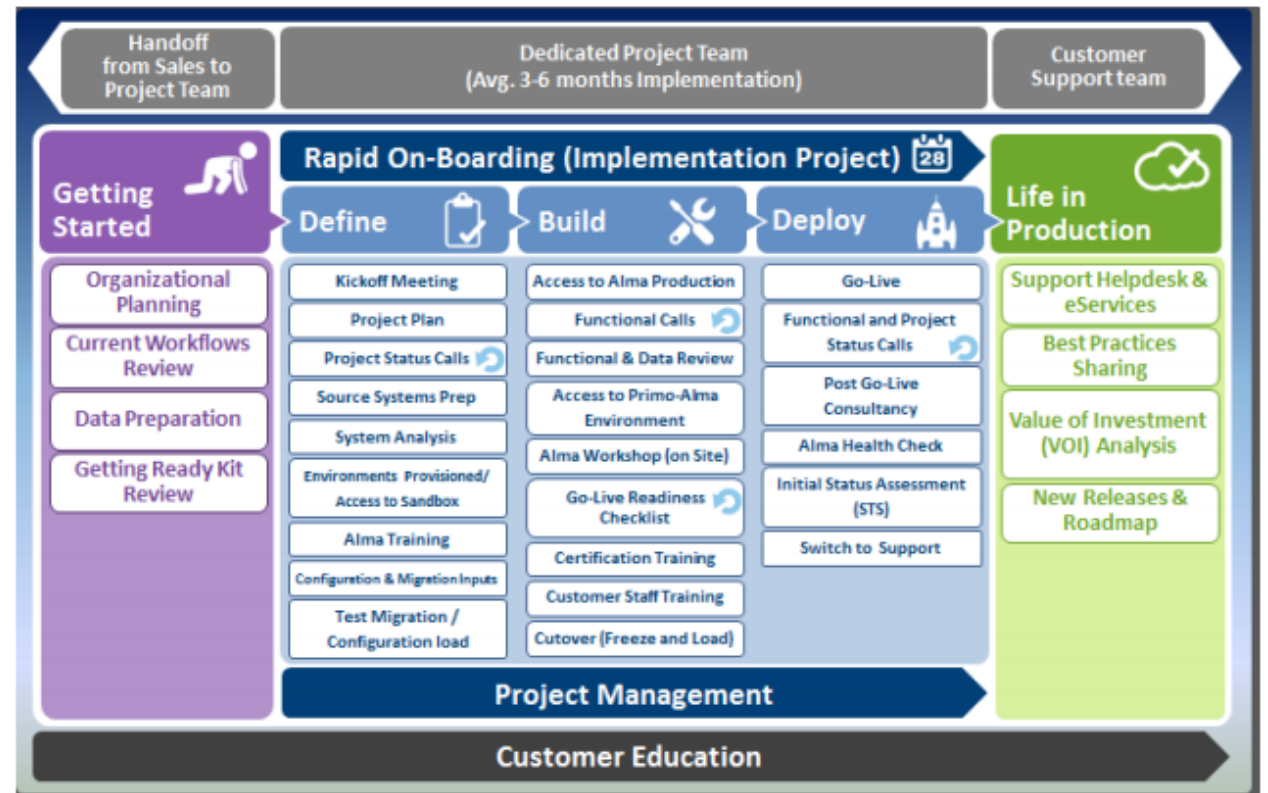


Be bold. Be a Viking.



What Will the Kickoff Cover?

- Major project milestones, timelines, and overview of project.
- Review of Implementation Methodology
- Approach to forms and other migration related activities.
- Overview of Alma and Primo
- Introduction to Network Zone

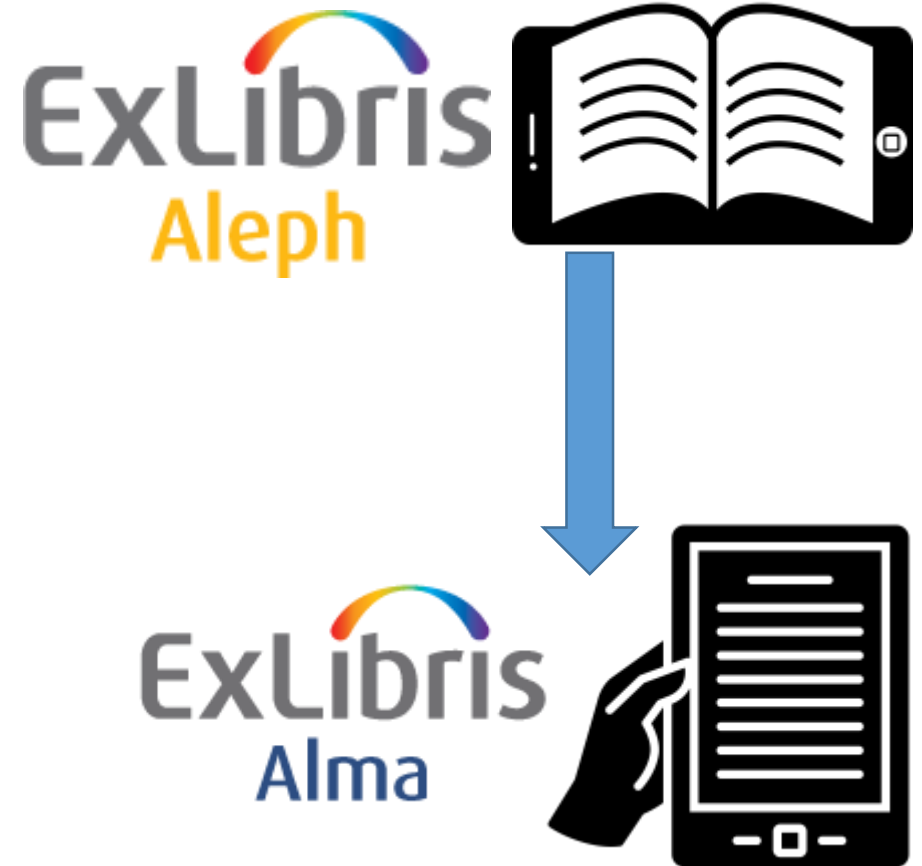


Look at Alma as an opportunity to rethink processes and policies, not as a direct migration of systems. It's not Aleph, and it's not your current link resolver.

Ask not what the SLC can do for you, but what the SLC can do together to advance all SUNY libraries.

Print To (2) Electronic

- Process for moving e-resources in the ILS (Aleph) into Alma as electronic material.
- Campuses have this content duplicated in disparate systems.
- Alma is a unified resource management system.
- If we don't look at P2E strategically, we'll be cleaning up data for years and will not be using Alma's capabilities.
- If SLC wants to coordinate e-resource procurement, we need to have similar practices in new system.



Weekly Activities: Begin After Kickoff and Continue Until Go Live

- Live Web Meetings: Wednesdays 11am - 12 pm
- Every other Week Fridays 2-4 focused sessions on specific topics.
- 1-2 Hours weekly of training videos and exercises.
- Local discussions about policies and planning.
- Review of migration forms and engaging with ExLibris, SLC, and OLIS on migration needs.



New Policies and Best Practices

- Metadata Standards Guiding Principles and Data Cleanup Before Migration:
 - <https://slcny.libguides.com/c.php?g=777081&p=5814452>



Update from April SLC Meeting: Aleph Additional Use

- Awaiting SLC vote.
- On August 1, 2019:
 - OPAC servers shut down
 - Read only GUI access to Aleph
 - Dev servers shut down
- Total cost for additional use will be \$421 per ITEC hosted campus, if vote is approved by SLC.
- As soon as issue is voted upon by SLC, process for requesting and facilitating Aleph reports will be released.



What Can I do In June to Prepare?

- Watch Alma Essentials for Your Area:
 - https://knowledge.exlibrisgroup.com/Alma/Training/Alma_Essentials/Alma_Essentials_-_English
- Have meetings to discuss campus project management.
- Identify process for reviewing internal policies and procedures that could be reviewed during implementation and migration.
- Review any upcoming projects for your library, and ensure you're planning enough time for migration and implementation.
- Learn more about Basecamp, and join the SLC Shared LSP HQ:
 - <https://3.basecamp.com/3649838/join/3oUqZrsjbeqZ>

SUNYLA Conference Shared LSP Activities

- Working Groups presenting or providing posters.
- Vanguard and Change Management Pre-Conference Sessions.
- Project Managers will be attending conference.
 - Contact us if there's a SIG or other meeting you'd like one of us to attend.



SUNYLA 2018 | Throw Open Our Doors

*Academic Librarians Open to New Experiences, Opinions, and Viewpoints
Finger Lakes Community College, June 13-15, 2018*

Gathering Questions and Creating FAQs

- SLC Libanswers Created to gather questions from campuses and to serve as FAQ Center/Knowledgebase.
- Single point of contact:
 - info@slcnyc.libanswers.com

A screenshot of the SUNY Libraries Consortium website's "SLC FAQs" page. The page has a light gray header with the site name and navigation links. Below the header is a search bar with the text "SLC FAQs" and a "Search" button. The main content area is divided into two columns. The left column lists several FAQ items, each with a title, "Last Updated" date, "Topics" (Alma, Primo), and "Views" count. The right column contains a "Contact Us" section with an email link and a "Submit a Question" button.

SUNY Libraries Consortium / SLC FAQs Browse: 10 Answers Topics ▾

SLC FAQs

Popular Recent

What kind of data cleanup should we be doing in Aleph to prepare for the migration?
Last Updated: May 22, 2018 | Topics: Alma | Views: 17

What is an LSP?
Last Updated: May 22, 2018 | Topics: Alma | Views: 14

What is Primo?
Last Updated: May 22, 2018 | Topics: Alma Primo | Views: 13

What systems will go away and be replaced with the LSP?
Last Updated: May 22, 2018 | Topics: Alma Primo | Views: 13

Can you tell me more about the different aspects of Alma and how it is structured?
Last Updated: May 22, 2018 | Topics: Alma | Views: 13

Why are we doing this project?
Last Updated: May 22, 2018 | Topics: Alma | Views: 12

What are the Institution, Community, and Network Zones?
Last Updated: May 22, 2018 | Topics: Alma | Views: 12

What is Alma?
Last Updated: May 22, 2018 | Topics: Alma | Views: 8

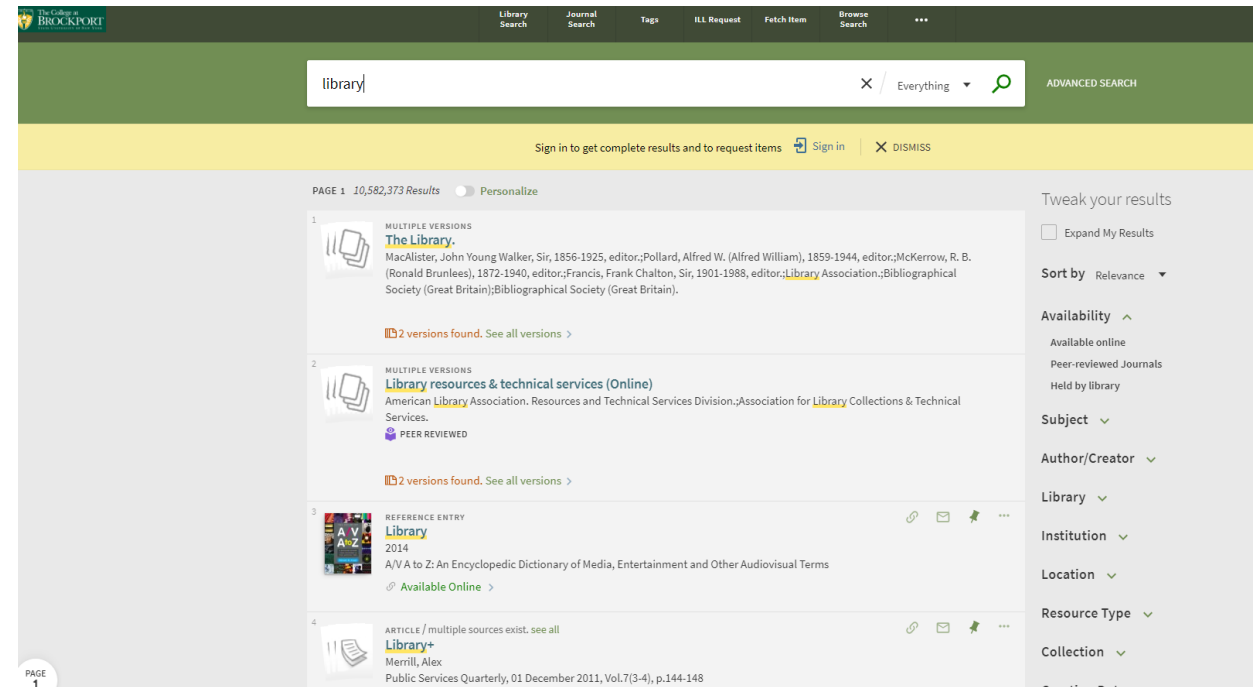
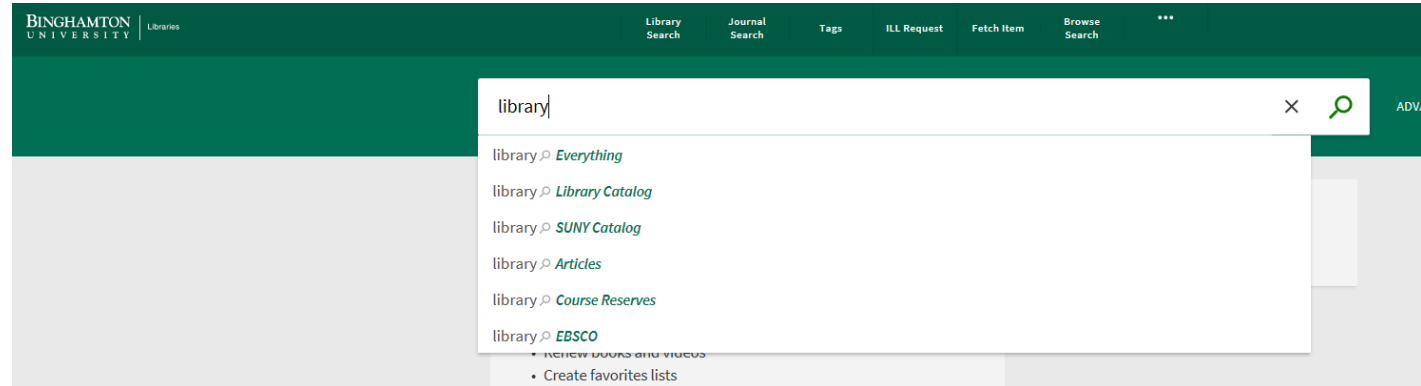
Contact Us

[✉ Email: info@slcnyc.libanswers.com](mailto:info@slcnyc.libanswers.com)

[📄 Submit a Question](#)

SLC Primo instances released.

- Multiple scopes:
 - SLC
 - Ebsco (using Ebsco APIs)
 - Everything
 - Primo Central Index Content activated and library collection.
 - Course reserves
 - SUNY Catalog



Primo instances available for viewing, with some disclaimers.

- These are test instances that we're still configuring.
- These instances aren't necessarily exactly what your Primo will look like.
- Fulfillment and other patron services not yet integrated.
- Any feedback or questions, send to info@slcnyc.libanswers.com

Binghamton:

- https://suny-bin.primo.exlibrisgroup.com/discovery/search?vid=01SUNY_BIN:01SUNY_BIN&lang=en&sortby=rank

Brockport:

- https://suny-bro.primo.exlibrisgroup.com/discovery/search?vid=01SUNY_BRO:01SUNY_BRO&lang=en&sortby=rank

Buffalo:

- https://suny-buf.primo.exlibrisgroup.com/discovery/search?vid=01SUNY_BUF:01SUNY_BUF&lang=en&sortby=rank

Oneonta:

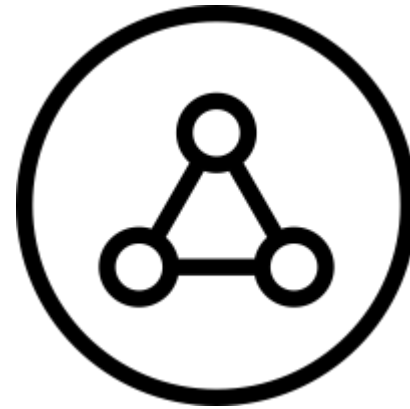
- https://suny-one.primo.exlibrisgroup.com/discovery/search?vid=01SUNY_ONE:01SUNY_ONE&lang=en&sortby=rank

Potsdam:

- https://suny-pot.primo.exlibrisgroup.com/discovery/search?vid=01SUNY_POT:01SUNY_POT&lang=en&sortby=rank

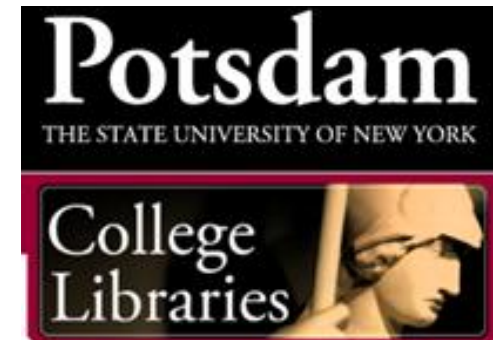
Introducing the Network Zone

- Overall, successful initial NZ load.
- Used OCLC #s to match around 4 million records.
- OCLC collection query created to pull holdings for all libraries as foundation of NZ.
- Aleph records then overlaid, with 035 OCLC # as match point.
- 64% match rate.
 - Institution match rates range from 55% to 96%



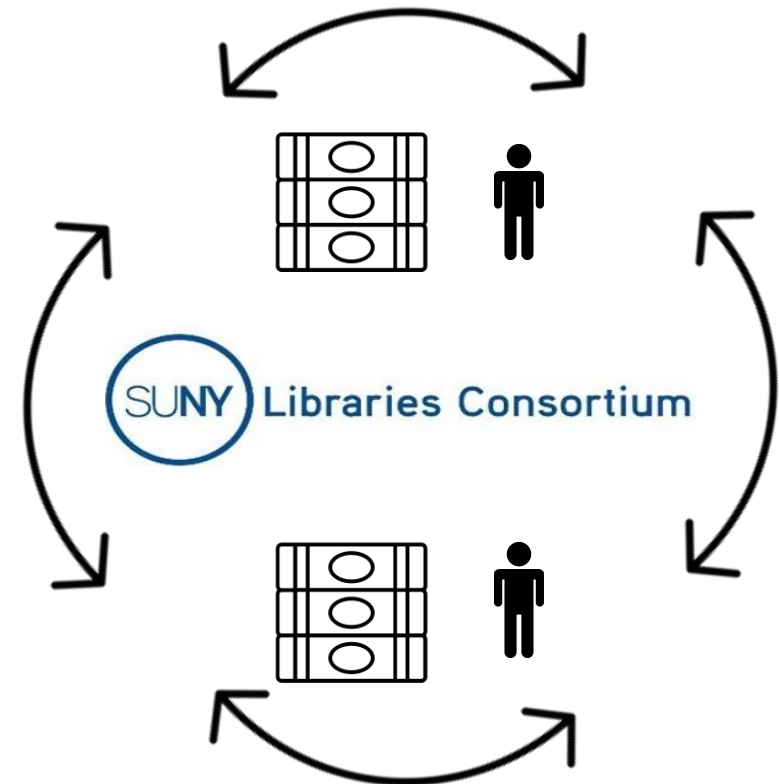
Vanguard Update

- Vanguards reviewing data migration to identify issues we can address before test load.
- Learning features of system, which is easier with system with institution data.
- Will address authentication and other integrations soon.
- 3-day workshop next week.
- Involving working group members in testing and other activities.



Resource Sharing Testing

- Two Vanguards will test one method:
 - Fulfillment Network with Automated Rota
- Another two vanguards will test a different method:
 - Resource Sharing
- Will consider staff and user experience for both methods.
- Unlikely that article resource sharing will be major component at go-live.



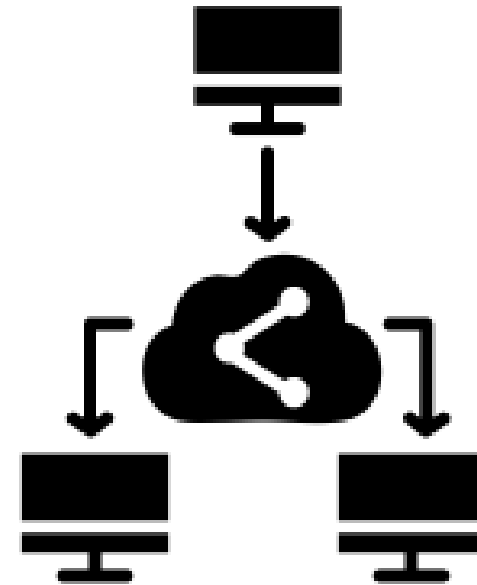
OCLC Data Sync

- Way to keep OCLC holdings up to date in Network Zone.
- Project Mgrs./OLIS discussing process with OCLC.
- Issue up for discussion is whether full cataloging membership needed.
- Holdings Registration level being discussed.
- Larger community update forthcoming after firmer discussions with OCLC.



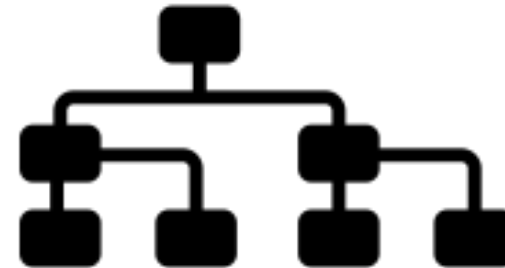
Data Sharing Framework

- Provide clear framework for data sharing expectations in Shared LSP.
- Focus is on:
 - Use Cases
 - Process for Accessing Data
 - Goals and Benefits of Sharing
 - Best Practices
 - Pre-Defined Roles and Who Should Have Access



Working Group and Task Force Policies and Processes

- Working Groups will be needed to manage cooperation in shared SLC.
- Establishing sustainable and fair policies and processes is key for smooth operations after go-live.
- Group focusing on laying out policies to guide these groups going forward.





Working Group Updates: Training and Acquisitions

- Acquisitions:

- Finalizing first policy: determining minimal acquisitions usage in Alma.
- Reviewing cross-working group policies.
- Creating acquisitions survey.

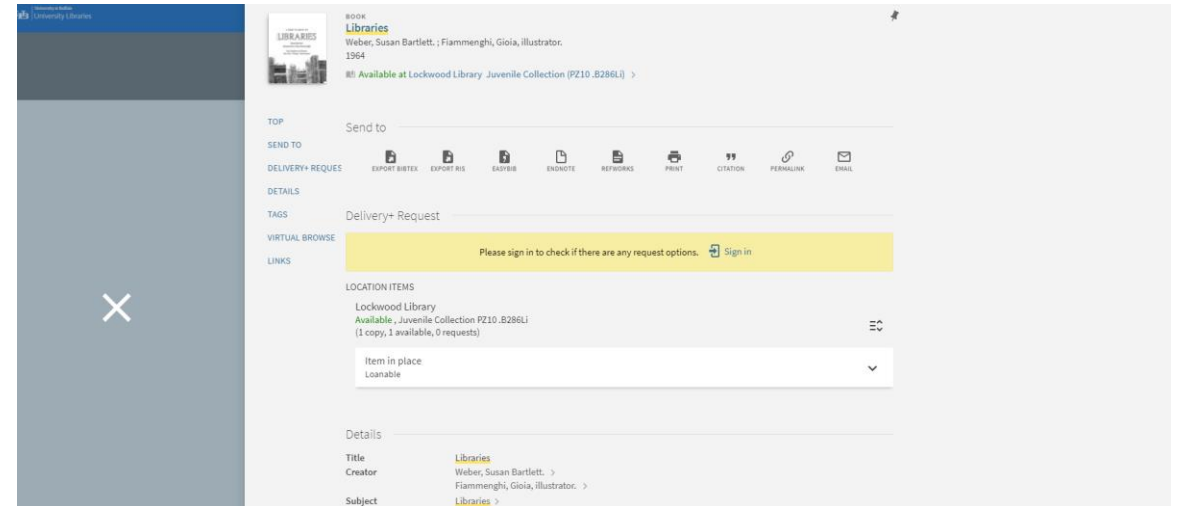
- Training:

- Finishing survey on training topics and methods.
- Creating train the trainer topics and Libguides templates.



Working Group Updates: Discovery

- Testing of Ebsco API scope and functionality.
- Beginning review of recommendations and best practices for Primo UI for consistency across SLC.
- ExLibris training is focusing heavily on Primo VE, so WG members participating in this testing.





Working Group Updates: ERM

- Reviewing e-resource data migration, specifically how P2E data migrated.
- Reviewing current practices for managing e-resources in Aleph and other systems, and implications for Alma migration.
- Creating guiding principles for e-resource management in shared SLC LSP.
- Created resource guides for Alma ERM, including glossary.

SUNY Libraries Consortium / SLC Guides / LSP / E-Resources Management Working Group / ALMA ERM Glossary

E-Resources Management Working Group

Search this Guide Search

- Committee Members & Charge
- Meeting Minutes
- Documentation
- ALMA ERM Glossary**
- Bibliography

ALMA ERM Glossary

Full glossary:
[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/120Alma_Glossary](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/120Alma_Glossary)

Activate/Deactivate - Activation makes an e-resource available for publishing for discovery (via Primo). This is the mechanism that reveals or suppresses (deactivates) the MARC bibliographic record linked to the database e-resource. See [Activating Electronic Resources](#).

Aggregator package - A type of electronic collection that **includes all titles** (as opposed to a selective package, which includes only some of the collection's titles). See [Adding a Local Electronic Collection](#).

Examples: JSTOR Arts & Sciences I, Project MUSE

Alma Link Resolver - The Alma component that responds to external requests with a menu of physical, electronic, and digital services. For a physical resource, a request is offered; for an electronic resource, a context-sensitive link is provided; for a digital resource, a direct link to the digital object is provided. The Alma Link Resolver responds to OpenURL requests as well as requests from systems such as Primo. For more information, see the training video [Alma Link Resolver](#).

Central Knowledge Base (CKB) - The part of the Community Zone that contains linking information to electronic resources around the world. See [Introduction to Alma Inventory](#).

Community Catalog - Metadata records stored in the Community Zone, which are updated as required by Ex Libris or by contributions from the community. Inventory records can link to these records; alternatively, the current versions of these records

<https://slcn.libguides.com/c.php?g=777084&p=5573743>

Questions

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