Systemwide Digital Library Services Report

Unified Library Management System

Here are the major project milestones since COLD's last meeting in June:

- The CSU libraries went live with Alma and Primo as scheduled on June 27.
- CSU+ resource sharing was brought online on July 10.
- The implementation phase of the project ended on August 9, and all library instances are now supported by Ex Libris' production support teams.
- The new governance structure started on September 1.

Support

Since going live, Chancellor's Office ULMS staff have turned their focus to solving any remaining issues from the migration, as well as addressing new issues as they arise. We are working closely with the CSU libraries and Ex Libris support staff to best address any problems.

We have started meeting with Ex Libris support managers monthly to escalate and prioritize issues, as well as identify larger trends that should be addressed. We have also begun meeting quarterly with Ex Libris executives to begin work on larger development concerns. Ex Libris has been very responsive in both areas. We see this as a fundamental duty and an ongoing priority for our team, which we are carrying out in consultation with the ULMS Coordinating Committee.

Assessment & Training

In order to help assess where the Chancellor's Office can best direct its resources to assist the campuses, we conducted a survey of library staff, librarians, and administrators in early September. We received 127 responses from all 23 campuses and Moss Landing. Although a preliminary analysis shows that perceptions and experiences differed by campus, we were able to identify certain system-wide trends.

In response to "What went better than expected?" collaboration among campuses and that the system having gone live on schedule were prominent. "Areas of the system that need the most work?" included Primo Central Index, u-resolver display logic, and dedupe/FRBR within Primo. Issues for the future include continued integration with PeopleSoft, continued streamlining of workflows and processes, and collaborative collection development.

The survey also clearly identified ongoing training as a need. The Chancellor's Office is already planning an ongoing training program for this academic year. CO staff will work with the ULMS functional area committees to better identify specific needs, and plan to deliver targeted training in tandem with CSU library experts beginning in late 2017.

Areas of focus

In addition to the broad support and training the Chancellor's Office is providing to the campuses for Alma and Primo, we are also focusing our efforts on specific areas of the system.

E-Resource Management. ERM is a particularly important area of focus for the CO, especially in terms of consortial acquisitions and management of ECC and Opt-in purchases in the Network Zone. We are working with the Acquisitions & ERM Committee to provide better documentation in this area, have begun testing a workflow to replace coded memos, and are working directly with Ex Libris to identify and fix some minor shortcomings in e-resource management functionality in the Network Zone.

Discovery. The Chancellor's Office is also working closely with the Discovery Committee to proactively identify configurations and customization that will improve search and usability within Primo, and is leading a joint Discovery and Resource Management task force to undertake a more systematic evaluation and correction of Primo data normalization, deduplication, FRBR, and indexing rules. The CO is also continuing to enhance our custom application for browsing course reserves, which most campuses use.

CSU+ Resource Sharing. By all accounts, go-live with this major new service for the CSU libraries went well. Over 20 one-hour web training sessions were conducted prior to go-live and Zoom was used as an on-call help service the first week of go-live to ensure a smooth transition. Over the summer months, COLD also approved the purchase of 1,150 courier bags for the sole purpose of CSU+. These bags are currently in use across the CSU as are new flip cards designed by one of the campuses.

Ongoing work with CSU+ is focused on continued improvement of documentation of workflows and configurations. We'll be working closely with the Resource Sharing Committee to achieving a one-to-one ratio of borrowing and lending, as well as reporting consistent statistics. Clarification of some resource sharing policies is also a priority.

Systems integration, etc. Other areas of focus include solidifying integrations between Alma and PeopleSoft, including continued work on accounts payable (CFS) and bursar integrations.   We are also interested in formalizing ULMS communications methods, developing a coordinated approach to enhancement voting with ELUNA, and working with the ULMS Coordinating Committee to align ULMS functionality with COLD strategic directions.

ScholarWorks

We are currently in the midst of migrating the campuses from our older DSpace institutional repository platform to the new Samvera (previously named Hydra) platform.

Here are the major milestones since the last major ScholarWorks report in February:

- Completed initial data modeling work in April
- Finalized initial configuration of Amazon Web Services deployment in June
- First campus instance of Samvera began beta testing in June

The move to a more robust platform for managing both institutional repository collections and archival collections has generated a great deal of interest among the CSU libraries, particularly those who are eager to move off of CONTENTdm. As in previous years, the Chancellor's Office will be working closely with STIM this year to identify priorities within the project.

In August, Aaron Collier, our lead developer and project manager for the CSU ScholarWorks project, took a position at Stanford University. Our top priority right now is to rehire Aaron's old position. We'll be interviewing prospective candidates the first two week of October.

In the meantime, we've recently finalized paperwork to bring Aaron back on as a consultant to help onboard the new hire and provide direction and assistance with the migration. David and Sarina will be assisting with the project as well. We continue to use our existing contractors, Atmire, to address any problems in DSpace.

Barring any unforeseen circumstances, our expectation is that we will be able to resume migrating the libraries from DSpace to Samvera later this calendar year, with the goal of moving all DSpace collections to the new platform by the end of the academic year, as well as begin work on migrating campuses from CONTENTdm and other local digital asset management systems.