

ULMS Steering Committee Report

COLD Virtual Meeting

September 30, 2020

The Steering Committee did not meet in September, but the Functional Committees and the Chancellor's Office Team has been very busy. A few highlights:

General (CO)

- Brandon is preparing a satisfaction survey of library employees for ongoing discussion with Ex Libris about product improvements
- We are keeping track of bib record and "named users" for the next round of contract renewal discussions
- Malory DeBartolo, who is on contract with the CSU until the end of October, is writing a White Paper on Rapido for COLD before she leaves.

Acquisitions

- The CO (Jessica) is updating Network Zone (NZ) licenses as renewals come in
- The Functional Committee worked with Ex Libris on POL Line Type editing issues.
- The working group continues to share knowledge on topics such as fiscal close, GOBI, PeopleSoft Integration and CDI.

Analytics

- New Analytics platform is in place (OBI). The Committee is keeping an eye on existing reports and reporting any errors found to ExL as they run across them.
- Primo analytics will be upgraded in November. There will be a freeze period prior to the update - email notice will go out prior to the beginning of the upgrade to save any reports any individual may have in Primo analytics.

Discovery

- The primary project for the Discovery Functional Committee this year is to evaluate Primo VE for possible adoption during the summer.
- The CO is implementing an OAI-PHM pipe to bring ScholarWorks records into Primo for discovery.

ERM

The primary project for the ERM Functional Committee is to continue to share knowledge and work on troubleshooting issues due to the recent transition from the Primo Central Index (PCI) to the Central Discovery Index (CDI). This is the underlying index used by Primo and Alma for digital content. The change has had implications for acquisitions, discovery, and access.

Fulfillment

- Created [Recommendations for Reopening & Quarantining Items](#)
- Created a [Fulfillment Services Spreadsheet](#) to keep track of services offered across the CSU during Fall 2020.
- Formed a Locker Task Force to consolidate and organize information for the configuration and use of lockers for book pick-up. Information will be posted to the wiki.
- Continuing work to summarize Course Reserve Survey conducted in Fall 2019.

Resource Management

- Discussions over two policies continue:
 - Putting parameters around import profiles in the NZ to define what match points are used when bringing records into the Network Zone
 - Guidance for when and how to use the 988 NO DEDUP field in the NZ
- The Authority Control taskforce will have a report for the Steering Committee in October.

Resource Sharing (CSU+)

- Chris Lee accepted the Resource Sharing Manager position, and will be start at the Chancellor's Office on October 12.
- The Functional Committee created resource sharing quarantine guidelines and published to Confluence: [Quarantine Guidelines](#)
- The Committee presented a [data snapshot](#) of CSU+ since restart on I-SPIE TV.
- As of 9/21/20, the following campuses are back on CSU+:
 - Bakersfield
 - Channel Islands
 - Chico
 - East Bay
 - Fresno
 - Fullerton
 - Humboldt
 - Maritime

- Monterey Bay
- Northridge
- Sacramento
- San Bernardino
- San Diego
- San Francisco
- San Luis Obispo
- San Marcos
- Sonoma
- Stanislaus