

## Unified Library Management System (ULMS) report

Report to COLD, December 7, 2023

Christina Hennessey, Director (ULMS)

The ULMS Functional Committees continue their goals and initiatives for the 2023-2024 academic year, which were [linked in the ULMS report on the Sept 2023 COLD agenda](#). The Steering Committee is being chaired by the new director of the ULMS, Christina Hennessey, with CSU East Bay's Library Dean John Wenzler serving as liaison to COLD. David Walker continues on the Steering Committee and we have added Christopher Lee and Jessica Hartwigsen from the CO to the committee for this year for their expertise and overall ULMS knowledge.

Chancellor's Office (CO):

The Systemwide Digital Library Services (SDLS) is now fully staffed. Accomplishments since Sept 2023 include:

- The return of the monthly [Technical Services Open Forum](#), a monthly presentation, training, and sharing meeting for CSU Technical Services staff. Attendance and participation has been high with 100+ for each meeting;
- CO staff have returned to monthly meetings with Ex Libris support management;
- CO staff now have access to all Salesforce cases across the CSU so we can see trends, help clarify and escalate cases to solve problems more quickly, and we can open cases at the campus level so everyone at that particular campus can see them. We encourage staff to open their own cases to solve problems and answer questions more quickly but the CO is always here to help with advisement;
- Christina Hennessey met with her counterparts at the UC and California Community Colleges to share ideas and plan projects we can work on together. We continue to expect an in-person eCAUG conference in 2024 to continue to share ideas with our California library colleagues, but may return to a CSU-only conference for 2024 if eCAUG does not have a conference in 2024;
- SDLS held strategic planning meetings in November and December 2023 to help inform the future of the ULMS.

Cross-functional section:

- The annual Ex Libris support satisfaction survey will be coming soon for all CSU library staff that work with Ex Libris products. The survey will be combined this year across the functional groups, so only one survey instead of six surveys. Please encourage your staff to fill out this survey so we can inform Ex Libris of needed improvements.
- As the ULMS becomes more complicated with important issues crossing multiple functional areas, we are forming a new cross-functional group with the working name "Data Issues Task Force" (final name TBD). Two open forums are scheduled for November and December 2023 to discuss many of the metadata issues that were raised with Ex Libris in the Spring 2023 support meetings. Other cross-functional groups may come out of these discussions in relation to FRBR, deduplication, and user interface improvements.

- The Analytics and Resource Sharing groups have worked together to improve the Rapido dashboard to help the CSU understand our statistics for informing the Rapido evaluation.

#### Assessment & Analytics:

- Has started CSU monthly open forums with a combination of planned presentations and time for open questions about Analytics;
- Support for new Analytics user interface;
- Continue to clean and reorganize Analytics folders in the Network Zone and 'CalState' areas to make it easier for library staff to find the reports they need

#### Discovery:

- Gathering and reporting problems for the Data Issues Task Force;
- Looking at the mobile experience for Alma and Primo through Analytics [Primo and GA4], previous CSU Salesforce cases, and getting input from Ex Libris on mobile cases;
- Revisiting the CSU-wide settings for FRBR and de-duplication since we moved to Primo VE in 2021 along with Resource Management

#### Electronic Resource Management (ERM):

- Started monthly office hours in October 2023, these have been very successful with good questions, presentations, and attendance;
- License management was presented at the TS Open Forum on Nov 16 by Anthony Davis, Jr (Fullerton), this led to good conversation at ERM Nov 20 office hours about license management and [to a shared document](#) of who approves licenses at various CSU campuses;
- The committee is discussing the formation of an Acquisition Task Force, like the ERM Wiki Task Force, where the group will have specific tasks to investigate. The tasks discussed are creating best practices for license creation in Alma, test and report on the new POL Task List, and update the acquisitions wiki pages with current information;
- RapidILL lending note work continues;
- Met with the Ex Libris Content Team November 1;
- The ERM wiki task force has been very active in cleaning up the ERM wiki pages

#### Fulfillment:

- Continue to develop the general fulfillment survey with input from other committees and library Deans;
- Discussions of changes in student behavior and enforcement of library policies;
- Working on plans for best practices on purging patron records;
- Looking into developing other best practice documents in relation to access services and fulfillment

#### Resource Management –

- Resource Management will start their own monthly office hours in December 2023;
- Working on FRBR/de-duplication issues with Discovery;
- Wiki documentation cleanup continues;

- The group is looking into what we can learn and try in relation to CSU-wide cataloging statistics, especially in relation to time measurement;
- Linked Data Task Force (LDTF)
  - Presented on Wikidata Building Project at November 16, 2023 TS Open Forum
  - Group is recruiting for more members
  - Asking for help with access to FacilitiesLink at more campuses to support Wikidata Building Project
  - Wikidata Building Project study group will start in January 2024
  - Along with the Digital Archives Working Group (DAWG), The LDTF created a [very brief survey](#) (1-2 minutes!) to learn about CSU-wide interest in linked data applications for digital discovery, several responses so far, responses until December 20
- Inclusive Description Task Force (IDTF)
  - [Presented October 16, 2023](#) to hundreds of library faculty & staff internationally on “Words Matter for the CSU: Inclusive Description Task Force” ;
  - This group continues to be a leader in this space in libraries;
  - Working on an LCSH proposal for “forced removal and incarceration”;
  - Upcoming activities include more mapping for the Homosaurus, GSSO mapping;
  - Group is recruiting for more members

#### Resource sharing:

- Very focused on the Rapido evaluation and delivering report to COLD for December 2023 in-person meeting presentation and discussion;
- Rapido Refreshers continue to remind staff of best practices and workflows with Rapido and to help new ILL staff;
- The group managed the first cycle of Rapido enhancements and getting input from all CSU libraries for the NERS process;
- I-SPIE website is being redesigned and moved to a CSU server to move off of the free site with ads;
- Wiki documentation reorganization and improvements continue;
- The possibility of a new courier and West Coast Pod plans and development continue