Unified Library Management System (ULMS) report
Report to COLD, February 22, 2024
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 chaired by the 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.

Accomplishments since December 2024 include:

Chancellor's Office (CO):
- We continue to host the Technical Services Open Forum, a monthly presentation, training, and sharing meeting for CSU Technical Services staff. Attendance and participation has been high with 75-100 for each meeting;
- The SDLS/CO department is reviewing the ULMS listserv memberships to make sure we are reaching all the appropriate staff and faculty and that our communications can be more targeted to areas of the system, without too many duplicate messages;
- CO staff has been working with campuses to grant more SalesForce account and case access in order to have Ex Libris cases solved more efficiently. We are working on training for campuses on workflows and writing better cases;
- Monthly meetings with Ex Libris continue for our support cases across the CSU;
- We also had a meeting with Ex Libris on February 12 in relation to our use of "Collaborative Networks" features in the CSU. Ex Libris has formed a new department to focus on consortial needs and they looked closely at our use of consortial features and where it could be improved, and we will be working with this new knowledge over the next few months. A new consortial-focused dashboard is being developed for use by all consortia, of which we will see a demo on February 20.

ULMS-related conferences:
- Many CSU staff and faculty have had presentations accepted for the ELUNA Conference in Minneapolis, Minnesota in May 2024. Registration for the hotel and conference will be available in early March, and the conference program will be available in late February. You can see a preview of the costs for registration and hotel on the conference site. Please reach out to CO staff if you have any questions about which staff and faculty should be in attendance this year or appropriate sessions or workshops;
- Planning is underway for the in-person regional ELUNA California User Group, or eCAUG. Possible attendees have been asked to fill out the survey from the eCAUG planning committee by March 1, 2024. Instead of having our own ULMS/CSU-specific conference, we plan to have a shared conference with our ELUNA California colleagues again this year, likely in late summer or early fall 2024. Information about hotel and costs to come;
- SCELCapalooza is coming up at the end of February 2024 on the Los Angeles campus of Loyola Marymount University. Folks from the CO that will attend some of the days: SDLC (Kirstie Genzel, Ann Roll) and SDLS (Christina Hennessey, Christopher Lee). If there is a

session you would like us to attend on your behalf or a vendor or colleague you would like us to speak to at the conference, please let us know.

Cross-functional section:

- The annual [Ex Libris support satisfaction survey](#) was shared on February 7, 2024 on *ulms-announce*. The survey is for all library administrators, faculty, and staff: technical services, public services, and anyone who uses Alma, Primo, and Rapido. There is only one survey this year and multiple answers per campus are encouraged. Once the survey is closed, the ULMS functional committees will work with your feedback to inform the report we share with Ex Libris each year so they can improve our services. The deadline for the survey is Monday, February 26, 2024. Please encourage all your staff, faculty, and administrators that have any interaction with Ex Libris products to fill out the survey;
- Two new task forces have been named in the ULMS: a data issues task force and an acquisitions task force. We will also soon be recruiting for new members for the normalization rules task force. Thank you for supporting the work of your faculty and staff in these important task forces. Task force membership has a shorter time commitment than functional committees and is for a few focused, time-sensitive projects;
- Out of the data issue task force open forums and other discussions has come a working document to compare discovery configurations for the CSU Primos;
- Chris Lee has been demoing a new CSU-wide Canvas course to train our CSU staff on resource sharing, expanding on training offered by Ex Libris on Rapido to make it CSU-specific, and to connect certification and badging to this course in order to give resource sharing staff more permissions in the ULMS;
- The Steering Committee has been discussing better ways to handle working documents throughout the academic year in functional committees and how to move them from committees from year to year without losing knowledge;
- The Resource Management and Discovery groups have been working on the implementation of a pilot of genre and audience facets in CSU Primos in Spring 2024;
- The MARCIVE DWS→ CRDP transition was completed in January 2024.

Assessment & Analytics:

- Has continued CSU monthly open forums with a combination of planned presentations and time for open questions about Analytics;
    - [December 7, 2023](#): introduction to beginning Analytics resources; accessing Network Zone Reports from your Institution Zone; A look inside the Rapido Dashboard;
    - [February 8, 2024](#): Introduction to filling out each field for the ACRL survey for 2022-2023, discussions on particular fields and how the CSU should measure them in similar ways for valid comparisons;
- 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, including formalizing an Analytics management policy across the CSU;
- Restored the Network Analytics folder that was accidentally removed in January 2024, recreated the lost work, and working on procedures to protect us from this in the future;
- Stacie Jensen, the Vice-Chair of this group, moved into a new role at Sacramento State and had to step down from this committee. Jung Ah Lee of SJSU was named as the new Vice-Chair for the group.

Discovery:
- [VETT report released Jan 16, 2024](#) by the Primo VE Testing Team (VETT); was presented at Discovery Open Forum Jan 18 2pm-3pm [[recording](#)]
- Discussed the proposal of genre, audience, and accessibility changes from the Resource Management and Data Issues Task Force groups;
- Gathering and reporting problems for the Data Issues Task Force;
- Review of current CSU-wide configuration of Discovery;
- Discussion of recent Primo webinars on upcoming roadmap and development.

Electronic Resource Management (ERM):
- The group has drafted and is reviewing a new ERM problem reporting workflow document, outlining the best ways to tackle problem reports, particularly for E-Resources that are licensed through SDLC/CO. This new process will likely be presented at the March 21 Technical Services Open Forum;
- Kirstie Genzel (Chair/CO) presented on Consortia Manager Tips & Tricks on February 13, this training was well-attended;
- Wiki cleanup - The task force finished reorganizing most of the documentation into 3 main topics (CDI, ERM, Acq), now working on updating old documentation and/or archiving pages that are no longer relevant;
- The ERM group was very helpful in input for the new acquisitions task force. They are ready to support this group and be able to pass along wiki page cleanup, documentation, and acquisitions-related questions to that group;
- The group continues monthly office hours.

Fulfillment:
- Gabriel Castaneda (Chair, CSUN) presented at the January 2024 ULMS Steering Committee on a "Big Idea" on implementing CSU-wide customer service best practices; great conversation and cross-campus ideas ensued;
- Oscar Rodriguez (CSULB) is the new Vice-Chair of the group;
- Continue to develop the general fulfillment survey.

Resource Management:
- Resource Management started their own monthly office hours in January 2024;
- Presented the proposal of genre, audience, and accessibility changes to Discovery;
- Reviewing the Data Issues Task Force working spreadsheet and what should be added/updated;
- Wiki documentation cleanup continues;
- The group has discussed what we can try in relation to CSU-wide cataloging statistics, especially in relation to time measurement;
- After a CSU-wide survey, the [cataloging contacts page](#) has been updated to make it easier to find others in the CSU to assist with cataloging work;
- Linked Data Task Force (LDTF)
  - Discussion of URIs in bibliographic records and implementation by the NZ Mgt Group;
  - Discussion of Sinopia and Alma plans;
  - The Wikidata Building Project continues. The group tried to work centrally through the CO for this project but it needs to be a campus-by-campus project due to

differing use and access of FacilitiesLink at each campus. A study group for this project started in January 2024;
- o Group is still recruiting for more members;
- o Along with the Digital Archives Working Group (DAWG), The LDTF created a very brief survey to learn about CSU-wide interest in linked data applications for digital discovery. Responses were accepted until December 20;
- Inclusive Description Task Force (IDTF)
  - o Creating documentation on how to use the Homosaurus so that other catalogers in the CSU can apply terms and adapt their workflows;
  - o Working on a job description for a LAEP student;
  - o Finalizing the "sexual minorities" mapping for all the NZ records;
  - o Group is recruiting for more members;
  - o Waiting for new normalization rules task force to be populated in order to continue requested changes;

Resource sharing:
- The new I-SPIE website has been moved into production, thanks to all the work by the web committee and CO ATS support. This moves the important work and communication of this group to an official-looking website without ads;
- As mentioned in the cross-functional area above, Chris Lee has been developing a CSU-wide Canvas course on resource sharing to help with training and Rapido access, the RSFC has been reviewing the content;
- Rapido Refreshers continue to remind staff of best practices and workflows with Rapido and to help new ILL staff;
- Chris Lee continues to host regular office hours on resource sharing support on Tuesdays from 11am-noon;
- Wiki documentation reorganization and improvements continue;
- The possibility of a new courier and West Coast Pod plans and development continue