

Unified Library Management System (ULMS) report

Report to COLD, May 9, 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. The Steering Committee also includes the chair of each ULMS Functional Committee, elected at-large members, and David Walker, Christopher Lee and Jessica Hartwigsen from the CO.

Accomplishments since February 2024 include:

Chancellor's Office

- Chris Lee has released a new CSU-wide Canvas course to train our CSU staff on resource sharing named "Rapido 101", 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. Use this link and sign in with your campus SSO to make an account and enroll in the course: <https://csuco.instructure.com/enroll/FATDEE>. This course also uses Badgr badges to show you have completed the course and/or various modules in the course;
- Jessica Hartwigsen is one of the selected consortial representatives on the new Ex Libris Support Advisory Group, working with Ex Libris management to improve the support/customer relationship and outcomes;
- Many members of the Chancellor's Office attended and hosted the [ICOLC](#) (International Coalition of Library Consortia) conference in Anaheim, California on April 14-17, 2024, welcoming 110+ attendees from library consortia all over the world. We learned many new ideas from other consortia that we will be implementing over the coming months, and they learned from the CSU as well. Christopher Lee presented on CSU Resource Sharing;
- Jessica Hartwigsen presented at the ER&L conference in March 2024 on [Working Together: Collaboration between ERM, Acquisitions, and Resource Sharing on Alma Licenses and RapidILL](#), incorporating the work of many folks in CSU libraries over the last few years;
- 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. Plans are to continue the meetings throughout the summer;
- The SDLS/CO department finished reviewing all 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;
- The CSU was selected to be an Ex Libris tester/early adopter for a Network Zone 'central configuration dashboard', useful in determining the setting for particular fields/tables at each

CSU campus configuration and in distributing new settings. The testing period will be from May 12 – mid-June, 2024.

- The CSU has had a few recent meetings with University of California libraries in order to share our resource sharing knowledge and ability to share resources more easily with each other.

ELUNA/eCAUG/IGeLU/I-SPIE

- The [ELUNA Annual Conference](#) is being held in Minneapolis, Minnesota from May 13-17, 2024. The CSU has excellent representation at this conference, with 15 presenters at 18 sessions from 5 CSU campuses and the CO, and 26 attendees in all (from 9 campuses at the CO). For those not attending the conference in person, we will have a [Technical Services Open Forum](#) on May 30 from 11am-noon to cover the main points from the conference. The ELUNA conference is not recorded and is not available online, but we will gather copies of all the available presentations.
- eCAUG, the regional California Ex Libris User Group, has announced a 'save the date' for the 2024 conference of October 24 – 25, 2024 and will be held at the CSU Chancellor's Office in Long Beach, California. In addition to all our CSU library colleagues, our UC, California community college, and other California Ex Libris library friends will be in attendance so we can share ideas with each other. There will not be a separate ULMS conference this year; surveys have shown a greater interest in this shared conference.
- [I-SPIE, the CSU resource sharing conference](#), will be free and virtual this year and held from July 24 & 25, 2024. A call for proposals was sent out April 22, proposals are due May 31, 2024 and can be submitted through [this form](#).
- The [call for proposals](#) for the [IGeLU conference](#) at DGI Byen in Copenhagen, Denmark (September 9-12, 2024) has been extended and will now close May 26, 2024. The theme of the conference is: "Beyond Limits and Differences: Data, Hidden Treasures and Mermaids". Unlike the ELUNA conference, IGeLU will be a hybrid conference so you can attend and present from California. IGeLU is the international version of ELUNA and also has an annual in-person conference.
- The [ELUNA Primo Working Group](#) is currently seeking applicants for open working group positions – apply by May 10 from [this form](#). They have 5 positions to fill. Terms will start June 1, 2024 and will run for 2 years. Normal time commitment is around 2-4 hours a month, with additional time during NERS Enhancement cycle and ELUNA Conference planning time. Time commitment includes a monthly hour-long virtual meeting and additional time to complete projects. It would be great to have CSU representation on this group again!

Cross-functional section

- The call for ULMS functional committee members for 2024-2026 was sent to the *ulms-announce* listserv and COLD listserv on April 30, 2024:

The nomination period for ULMS Functional Committee membership for the term 2024-2026 is now open. These committees are responsible for developing and maintaining policies, procedures, and best practices for use of the ULMS and for identifying opportunities for improving processes as well as

new ideas for how to grow use of the system. It's important to ensure that your voice is heard in how you use the system now and in the future.

There are the following openings on the committees ([each functional committee wiki page is linked from here](#))

- 1) Assessment & Analytics (2 vacancies)*
- 2) Discovery (2 vacancies)*
- 3) Electronic Resource Management (1 vacancy)*
- 4) Fulfillment (3 vacancies)*
- 5) Resource Management (4 vacancies)*
- 6) Resource Sharing (4 vacancies)*
- 7) At-large members (2 vacancies)*

Nominations will be open until Friday, May 31. *The best way to indicate interest in serving is to let your library dean know, but you are welcome to copy Christina Hennessey on the request or write her a separate email as well. Christina will review the nominations with members of the ULMS Steering Committee and will let you know in mid-June 2024 if you will be on the committee starting in the 2024-2025 academic year.*

- In the same April 30, 2024 email calling for ULMS functional committee nominations, there was a call for new members for the Monthly Testing Group:
I am also making a call to add some new members to the [ULMS Monthly Testing Group](#) so this work can continue. This group has no attached time commitment or time to serve, we would just like more testers for our monthly and quarterly Ex Libris releases. We have an excellent Primo/Discovery testing team in [VETT \(VE Testers Team\)](#), but we need more testers for Alma-related releases, especially acquisitions, linked data, Rialto, and fulfillment-related testing. There is no deadline for letting me know your interest.
- The acquisitions task force has been reformed, held a kickoff meeting April 2, 2024, and will be meeting bi-weekly through the coming months. Projects underway include: gathering all the acquisitions-related issues for the CSU (including in historical Salesforce cases), looking at Rialto use across the CSU, moving acquisitions back to its own area on the ULMS wiki (out of ERM), training and implementation help for Alma & PeopleSoft/CFS integration, looking at acquisitions-related items on the Ex Libris roadmap.
- The annual Ex Libris support satisfaction survey was shared on February 7, 2024 on the *ulms-announce* listserv and closed February 26, 2024. The survey was for all library administrators, faculty, and staff: technical services, public services, and anyone who uses Alma, Primo, and Rapido. There was only one survey this year and multiple answers per campus were encouraged.
Some results from the survey have been presented already at open forums on [Analytics](#) and [Resource Sharing](#) in April 2024. More results in other areas and overall will be shared at later forums in the summer.

The deliverable out of this survey is a report for Ex Libris on how they can improve our services. The ULMS Steering Committee will be reviewing the draft report in May 2024 and a final report will be shared with Ex Libris and the CSU in June 2024.

- Although the CO is no longer formally gathering ELUNA/NERS enhancement input for the CSU, we thank you for the input on the CDI & Rialto enhancements in April 2024. The CO has recently voted for ELUNA enhancements in the Rapido, Content, Leganto, Alma, Primo, CDI, and Rialto areas. The first rounds of voting cycles are complete for now with possible Alma & Primo voting in the coming months. The ELUNA enhancement process is still planning to move to the [Aha!](#) platform in 2025.

Assessment & Analytics

- Has continued CSU monthly open forums with a combination of planned presentations and time for open questions about Analytics:
 - [ULMS Assessment & Analytics Open Forum from March 7, 2024](#) (56 min.). Topics included: ELUNA 2024 Conference Analytics sessions | Managing Usage Statistics in Alma: COUNTER & SUSHI | Cross-Analytics Dashboard in development with Ex Libris
 - [ULMS Assessment & Analytics Open Forum from April 25, 2024](#) (50 min.). Topics included: Alma and Primo Consortial Folder Policy | ULMS satisfaction survey in relation to Analytics
- 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.

Discovery

- [VETT report for Spring 2024](#) sent in email April 11;
- Plan to start collecting tools and templates on the wiki, starting with excel templates for the Resource Recommender;
- Testing of the new [book carousel](#) feature in Primo, which has some issues of accessibility and sorting currently;
- Testing on the new normalized subjects feature in Primo;
- Continuing looking at use of mobile Primo interface in the CSU;
- **Data Issues Task Force (DITF)**
 - The DITF has been meeting bi-weekly since March 2024, led by Jill Strykowski /SJSU, discussing data issues and problems in the ULMS and how to work with Ex Libris to get these solved. The group has been looking at different configurations of rankings, scopes, and search results across the CSUs; what can be learned from previous Salesforce cases on these topics in the CSU; title matching and OA faceting, and DEDUPE/FRBR settings. Jill will be presenting on the work of this group at the [ELUNA conference on May 15, 2024](#).
- **Normalization Rules Task Force (aka "Norm rules")**
 - Due to recent requests for CSU norm rule changes (display and facets), this group has been reformed as of March 2024. The kickoff meeting for the group was April 22, 2024 and the group will be looking at projects in the coming months, including:

helping the work of the DITF, new opt-in OneSearch facets (genre, audience, and publisher), reviewing the implementation of recommended/required norm rules across the CSUs, especially those from the IDTF; creating a new process for submitting/requesting norm rules, and updating the documentation on the ULMS wiki.

ERM (Electronic Resource Management)

- The group presented a new ERM problem reporting workflow document at the [March 21 Technical Services Open Forum](#), outlining the best ways to tackle problem reports, particularly for E-Resources that are licensed through SDLC/CO;
 - Wiki cleanup continues, especially campus contacts. The group will be working with the acquisitions task force soon on moving acquisition wiki pages to the acquisitions area and out of the ERM wiki area;
 - The group continues monthly office hours & open forums:
 - [ULMS ERM Office Hours and Open Forum from March 22, 2024](#) (59 min.).
 - [ULMS ERM Office Hours and Open Forum from April 19, 2024](#) (61min.)
- Jessica presented on how SDLC resources are managed in the Alma NZ for a [NASIG webinar](#), March 26, 2024:
 - Covered NZ licenses, POLs, e-collections, and support for those resources;
 - Recording available for those who may want to know how the Alma NZ and IZ function with centrally managed resources

Resource Management

- Resource Management held their own monthly office hours in March & April 2024:
 - April 18, 2024: [discussion of implementation of secondary resource types in the CSU Network Zone and then individual campuses](#). After this session, further testing showed that our assumptions on this implementation were incorrect so we will hold more sessions/discussions on implementation after further testing. Thanks for your patience as we figure out how to make this work best for all campuses.
- Wiki documentation cleanup continues, including an updated list of cataloging contacts;
- **Linked Data Task Force (LDTF)**
 - The LDTF continues to meet monthly and has been very active in creating a report for STIM & COLD of the need for two new study groups in relation to linked data in the CSU. It will be essential for each library to be ready for linked data changes in the coming years in not only the ULMS, but other library systems. The LDTF presented at the ULMS Steering Committee on March 15, 2024 on this topic to get ULMS input;
 - Discussion of URIs in bibliographic records and implementation by the NZ Mgt Group;
 - Discussion of Sinopia and Alma plans;
- **Inclusive Description Task Force (IDTF)**

- Allison reached out to the Library of Congress directly about the incarceration of Japanese Americans during WWII to gauge their willingness to change the heading and they seem open to proposals and apparently have been discussing the issue internally. Allison prepared new proposals and documentation to send to them (with help from Julie and Yoko who have strong ties to the community) and is waiting for a response.
- Will work with norm rules task force on confirming all requested transformations from this task force are in place

Resource Sharing

- Priscilla Ortiz (CSUSB) had to step down from being the chair of this committee, thank you Priscilla for all your work with RSFC during a very busy time for CSU Resource Sharing!
- Rosemary Farr (CSU Fullerton) has volunteered to be the new chair for the rest of the 2023-2024 year and for 2024-2025 as well. She has already run some of the meetings and led a Rapido Refresher. Thank you, Rosemary!
- As mentioned in the cross-functional area above, Chris Lee developed a CSU-wide Canvas course on resource sharing to help with training and Rapido access (“Rapido 101”). The RSFC actively tested and gave constructive feedback on the design of the course;
- Chris also presented ‘[Rapido for Instructing Patrons](#)’ on March 14, 2024 for CSU library faculty and staff that do not regularly work with resource sharing;
- Rapido Refreshers continue to remind staff of best practices and workflows with Rapido and to help new ILL staff:
 - [Rapido Refresher: Navigation and Organization from March 20, 2024](#)
 - [Rapido Refreshers: WorldShare Configuration and Borrowing from April 11, 2024](#)
- Chris Lee continues to host regular office hours on resource sharing support on Tuesdays from 11am-noon;
- I-SPIE TV continues to meet monthly:
 - [I-SPIE TV from March 21, 2024](#) (17 min.). Topics included: Announcements | Courier updates | Behind the Books
 - [I-SPIE TV from April 25, 2024](#) (59 min.). Topics included: Announcements | Rapido 101 Launch | ILLiad NCIP Borrowing Renewal Addon | ULMS satisfaction survey in relation to Resource Sharing/Rapido

Fulfillment

- Campus interviews for the General Fulfillment survey continuing
- Discussions of implementing CSU-wide customer service best practices continue