

Unified Library Management System (ULMS) report

Report to COLD, December 5, 2024

Christina Hennessey, Director (ULMS)

The six ULMS Functional Committees, ULMS Steering Committee, and ULMS task forces have continued their work for the 2024-2025 academic year. The [ULMS Steering Committee](#) is chaired by the director of the ULMS, Christina Hennessey (CSUCO), with Sacramento State's Amy Kautzman serving as liaison to COLD. The Steering Committee also includes the chair of each ULMS Functional Committee, two elected at-large members, and David Walker, Christopher Lee and Jessica Hartwigsen from the CSUCO.

Chancellor's Office

- The big news out of the Chancellor's Office in Fall 2024 in relation to ULMS is that we are ending our Confluence subscription in December 2024. Many CSU library resources and documentation are hosted on Confluence, including the ULMS wiki. All CO staff, ULMS functional committees, and task forces are working to prepare for this move by cleaning up wiki pages to make for an easier export, as the Confluence-hosted wiki will no longer be available as of December 22, 2024. The CO has given several presentations on the migration plan in November and December 2024, including at the December 2024 COLD meeting and an open forum on December 6, 2024. *[Please note that most links in this report will only work through December 21, 2024; this report will be updated online with new links in its new location in January 2025]*
- 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 and many watch on the recording as well. Recent topics have included: Reports from recent Ex Libris conferences (eCAUG, IGeLU), government document management in Alma & Primo (including plans to move from MARCIVE/CRDP to Collection Manager for federal government documents), configuration of CDI, ULMS wiki migration from Confluence, and discussion of implementation of CSUBuy in relation to library resources.
- The CSU continues to be an early adopter/tester for many new features and products in the Ex Libris family. This gives us the opportunity to test and give input into features and bug fixes early in the product development process, and be ready for the rollout of new features in production with fewer surprises. The CSU has been involved in testing in Summer/Fall 2024 for: Consortial Configuration dashboard, BIBFRAME and linked data, New All Titles Search in Alma, and the AI Metadata Assistant (a cataloging tool). The CSU cannot be part of the early testing for the 'New Discovery Experience' (2025 rollout) as we have consortial needs that will not be supported in the early versions, but we hope to be involved in testing in Summer

2025. We continue to look for these opportunities for not only improving products we use every day, but for professional development for our faculty and staff. Please reach out to Christina if you have an interest in early adoption of a feature as we may be able to manage it centrally.

- The Chancellor's Office is still hiring for Ying Liu's replacement in the SDLC department ([SDLC Analytics and Collection Manager](#)). We hope to have a replacement in Spring 2025 but in the meantime, ACRL/IPEDS reports will be due February 28, 2025 so we want to support your questions. The ULMS Assessment & Analytics Functional Committee did an open forum presentation on December 4, 2024 on how to fill out certain fields in the report but please reach out to Christina if you have ACRL/IPEDS reporting questions until a replacement is hired.
- The CO team continues to have monthly meetings with Ex Libris support to discuss dormant support cases or cases that are not getting proper attention or priority. Thank you to the campuses that bring these issues to our attention with proper context to make these meetings productive. Ex Libris has a 'Defect Backlog Resolution Project' planned overall for Spring 2025 so we hope to see some older cases solved or cleared as part of this project.

ELUNA/eCAUG/IGeLU/I-SPIE

- The [eCAUG Conference](#) (the regional California Ex Libris User Group), was held in person October 24 – 25, 2024 at the CSU Chancellor's Office in Long Beach, California. We welcomed 116 attendees: 48 CSU, 27 University of California, 21 from the California Community Colleges, and many others from California Ex Libris libraries. We also had 7 attendees from the vendor Ex Libris/Clarivate. Lots of great ideas came out of the conference, including working together on shared government documents collections and Discovery configuration testing. Thank you for sending so many of your employees during these lean budget times; we appreciate that for many library employees, this was their first in-person library conference. We had a conference wrap-up on November 7, 2024 at a special [Technical Services Open Forum](#) so CSU folks could share what they learned with those that could not attend. The eCAUG conference is not recorded and is not available online, but all conference slides are publicly available on the [conference website](#). We believe that the conference will be at a California community college next year, then perhaps USC or one of the other California private schools, then back to the UCs before returning to a CSU host.
- The [ELUNA annual conference](#) is scheduled for June 16-20, 2025 in Atlanta, Georgia. We hope to have good representation at this conference from the CSU; registration will open in early Spring 2024. Conference session proposals are open now and close January 25, 2025; an accepted conference proposals leads to a registration discount so please encourage your faculty and staff to submit a proposal.

ULMS committees

Thank you for continuing to support your faculty and staff time working for the ULMS. We currently have 74 unique members in functional committees and other groups working to make the ULMS better and in sharing resources of time and money.

An overall goal for the ULMS this year is to look at the current structure, which has six functional committees based on the original categories of the RFP from the mid-2010s. There are also several task forces. The Ex Libris products have changed quite a bit since then and it may make sense to combine some of the groups and/or make some task forces into committees. We welcome the input of all COLD into ideas to make the ULMS committee structure more efficient. We are also considering possible changes to the structure as we migrate documentation out of the Confluence wiki as we have a chance to start fresh in new document repositories.

As mentioned above, all the committees and task forces are working quickly to support the Confluence migration to other document repositories. This has delayed some of the plans and goals for the committees this year but we will return to those plans later in Spring 2025. Many of the groups are working on designing training materials through CSU systemwide Canvas courses.

Some of the ULMS committees have recently hosted Open Forums for their areas, including two from ERM, two from Assessment & Analytics, and two from Resource Sharing. These forums are a mix of presentations, open discussions, and troubleshooting office hours. These continue to be a great way to share knowledge with other CSU libraries and to give committee members an opportunity to organize and present.