

Systemwide Digital Library Services Report

Unified Library Management System

This is the third quarterly report this year from our group to COLD on the ULMS project. In response to feedback from campus staff, we're planning to return to our previous monthly project updates. Those will be sent to the project listserv and posted on the project Confluence site.

Current highlights

- **Marcus Jun** from Northridge is onboard, taking over duties formerly provided by Sarina.
- The **MARCIVE contract has been finalized** and Marcus is working with the vendor to obtain and load the Documents Without Shelves records into the Network Zone. We will be testing loading using procedures created by Wisconsin. Expect movement on this in the next few weeks.
- **CSU+ resource sharing stats** are being reassessed with a hope of sharing updated reports in late February/early March. Mallory and Nikki (chair of the Analytics functional committee) have been working with Ex Libris to closely scrutinizing the data to ensure accuracy.
- The Chancellor's Office is working with Samuel Barber from Fullerton and the Library of Congress on setting up a **NACO funnel for the CSU libraries**. This will allow us to formally contribute name authority records to the LoC authority file. Doing so comes with no cost and no commitment in terms of submissions. CSU staff/faculty interested in participating will be identified and go through a month-long online training in September. The Authority Control task force will likely lead that charge in consultation with deans.
- David has recently completed several **improvements to the Alma / Accounts Payable integration process** to provide greater flexibility in the different ways in which campuses handle invoice data. More work is planned in this area over the next few weeks.
- We're currently leading a new round of **Primo interface improvements** with the Discovery User Interface task force, including the addition of configurable Google analytics, text-a-call number, and report-a-problem functionality.
- Over the winter break we completed our third major **update to the Primo normalization rules**, including improvements to dedupe and merge and a host of minor changes to subject, note, link, and title mappings. We're working now on major improvements to the subject heading facet and browse mappings, as well as FRBR and citation formatting.

- Jessica's ongoing work has been focused on **adding new e-collections, and setting up orders and negotiated licenses**. Recently she has been working on major updates for Gale (including 50 different e-collections), Safari, and Oxford Archives.

Support and enhancements

An ongoing focus of our work is responding to support incidents for all areas of Alma and Primo through email and Slack, escalating cases with Ex Libris, and meeting monthly with Ex Libris Support Managers to assess and prioritize support issues.

In addition, we've been focusing on the following tasks:

- Working with the other consortia using Alma to expand and prioritize our earlier list of **consortial electronic resource management enhancements for Ex Libris**. This list includes greater integration between the local campus instances (Institution Zone) and the Network Zone for display logic rules and usage statistics, as well as some new ideas for streamlining the opt-in process. Having the backing of several large consortial customers should carry more weight.
- **ELUNA enhancement request gathering** is taking place over the first half of February. The Functional Area Committees have collected requests and Brandon will submit those to ELUNA. Those campuses with ELUNA memberships may also submit their enhancement ideas directly to ELUNA if they wish.
- The Coordinating Committee will advise on **ELUNA enhancement voting** – we expect to gather input from all campuses on the CSU vote and share the results in order to allow ELUNA member campuses to decide whether to use some of their votes to support systemwide enhancements. We will take stock of the process after this year and tweak as needed for next year's cycle.

Training, meetings, assessment

Most of the ULMS functional committees are focused on training, with monthly, or even weekly, webinars for staff. Chancellor's Office staff are participating in those where we can. In conjunction with the ULMS Coordinating Committee, we've collected training topics from the functional committees and begun planning around the **summer ULMS conference / training**, to be held at the Chancellor's Office.

We've recently completed an extensive set of **campus check-in conversations** with the 23 campuses and Moss Landing. The designated campus representatives were asked for an overall characterization of life in their library with Alma and Primo. The conversations give an overall sense of where everyone is at and offered an opportunity to bring up issues that possibly hadn't yet been expressed.

All campuses reported that their staff were able to do their jobs, knowing that there were further ways to do things more efficiently. How people are feeling about things going forward and their thoughts on what we can work on together for further innovation are a part of the information gathering. The CO team is commencing analysis of the data and will communicate findings to COLD at the April meeting.

ScholarWorks

Now that Kevin is on board and acclimated, we've resumed the work of **migrating campuses off of DSpace to Samvera Hyrax**. We've adopted an agile development methodology for the project, so will be tackling this work in various "sprints."

- The first sprint focused on **upgrading our Hyrax instances to version 2.0**, which brings a number of new features, including more flexible management of embargos, nested data structures, and streamlined site administration.
- Future sprints will target work on **authentication, branding, third-party system integrations** and developing **migrations for CONTENTdm and Islandora**. Our work cycle remains focused on completing migrations by summer 2018. We will continue working with libraries on migration planning.
- We've also engaged in several **one-on-one consultations** with those libraries and academic technology groups using ScholarWorks, including reviewing previous project work, conveying timelines, and discussing next steps for migrations. We've established a communication strategy using our existing resources, including the ScholarWorks listserv, Slack channel, Confluence and GitHub site to relay project updates and communicate effectively with stakeholders and user groups.
- We've also recently signed contracts for organizational accounts on **GitHub** and **Amazon Web Services** to better support production deployments.