

ULMS at SJSU

What it means and next steps

Steering Committee Members

Rae Ann Stahl - Project Manager

Julie Kowalewski-Ward - Circulation/ILL

Carole Correa-Morris - Technical Services

Christina Mune - Discovery

Micah Jeffries - Systems

Teresa Slobuski - Discovery

What is the ULMS?

Unified Library Management System

“It’s a next generation digital platform for providing library services across the California State University”

The logo for ExLibris features the word "ExLibris" in a grey, sans-serif font. Above the letter "i" in "Libris" is a small, multi-colored rainbow arch.

Alma/Primo

Implementation Timeline: Now - May 2017

Initial Key Timeline Dates

Fall 2015 - CSU Project Governance Defined

Dec 2015 - Test Migration for 3 Vanguard Campuses

Jan - Mar 2016 - Test Environment Available

Apr - Jun 2016 - Test Data Load for all Campuses

CSU Working Group Leads

Implementation Team

Brandon Dudley	Chancellor's Office
David Walker	Chancellor's Office
Alice Kawakami	Chancellor's Office
Rae Ann Stahl	San Jose
Patrick Newell	Fresno

Technical Services

Stacy Magedanz	San Bernardino
Carole Correa-Morris	San Jose
Kayla Whitehead	Chico
Chris Ashley	San Marcos
Annie Hor	Stanislaus
Luiz Mendes	Northridge
Steve Savage	San Diego

Access Services & Resource Sharing

Christine Evans	Fresno
Julie Kowalewski-Ward	San Jose
Steve Espinoza	San Marcos
Aleta Asbury	San Francisco
Stacy Caron	Fullerton
Troy Compton	San Diego
Matthew Prutsman	Los Angeles

Discovery

Christina Mune	San Jose
Brett Bodemer	SLO
Adam Mann	San Francisco
Mike DeMars	Fullerton
Margot Hansen	Maritime
Elizabeth Altman	Northridge

Systems

Renaldo Gjoshe	Fresno
Micah Jeffries	San Jose
Ian Chan	San Marcos
Latha Ramnath	Fullerton
Brian Moore	San Diego
Suzanna Conrad	Pomona
Lauren Magnuson	Northridge

Analytics

Lisa Bartle	San Bernardino
Jeannie Graham	Chico
Carol Perruso	Long Beach
Stephanie Alexander	East Bay
John Brandt	Stanislaus
Nikki DeMerville	SLO

Campus Project Managers

Chancellor's Office Support

Funding for Implementation Costs

Governance and Implementation Team

- ❑ Brandon Dudley, *ULMS Project Manager*

New Positions

- ❑ Library Workflow Processes Manager
- ❑ Library Data Migration Manager

Benefits of the ULMS

- ❑ More efficiencies and collaboration among CSUs
- ❑ Consortium-wide functionality
- ❑ Improved analytics and data access
- ❑ One search tool across all resources
- ❑ Less fragmented systems and approaches
- ❑ Cost savings

Migration Methodology

Single Cohort

San Jose State University along with the other 22 CSU campuses will migrate to ExLibris at the same time.

- ❑ All CSU's benefit from time and experience with the system
- ❑ Almost a year to experiment with the system before go-live date
- ❑ This is ExLibris' preferred method for migrating large consortia

Data Management

Decide what data to migrate

Assess older or expired records to determine the value of migrating such data.

Data Clean Up

Clean up and/or remove data records and codes (patron, invoice, bibliographic, etc) that are incomplete, obsolete or do not conform to industry standards.

Workflows

Define current workflows

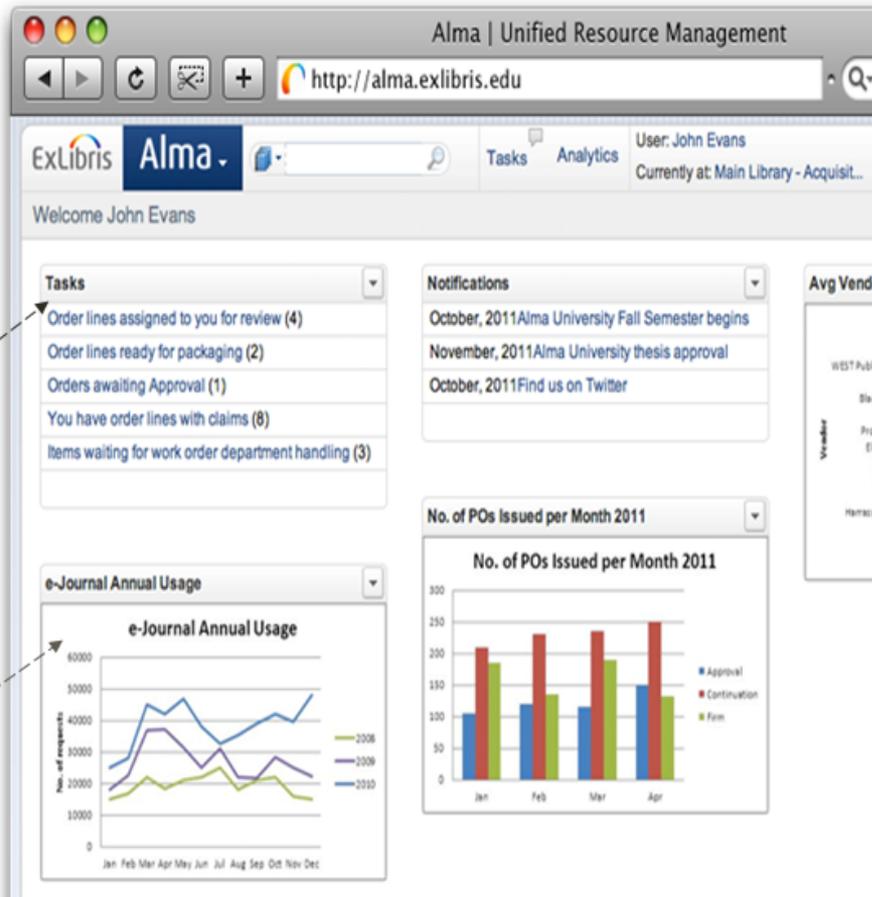
Revamp, retire or adopt new workflows to better manage data.

What is Going Away?

Going Away	Replaced By
Sierra (Cataloging, Acquisitions, Serials, ERM, Circulation, Course Reserves)	Alma
Online Catalog/Encore	Primo
Decision Center/Statistics	Alma
SFX (GetText Link Resolver)	Alma Link Resolver
Link+ (TBD)	Alma Resource Sharing or ILLiad

What Isn't Going Away?

- ❑ ILLiad (Inter-Library Loan Software)
- ❑ EZProxy (Off-campus authentication system)
- ❑ ContentDM (Digital Library/Archives)
- ❑ Digital Commons (ScholarWorks)



Browser-Based
(works on
iPads/tablets)

Task / Workflow
Assignment

Auto-Populating
Statistics

What Does Alma Look Like?

How is Alma's Software updated?

- ❑ Monthly
- ❑ No downtime
- ❑ Release notes sent over listservs and posted on Ex Libris document center
- ❑ ELUNA (ExLibris Users of North America) enhancement process



Discovery

Articles+

Books & More

Course Reserves

Circuit

e-Shelf

My Account

Sign in

to kill a mockingbird

Search

Advanced Search

Browse Search

Ask a Librarian

Databases

Reserves

Looking for a specific article?

e-Journals by Title

Personalize your results

Edit

Add page to e-Shelf

Expand My Results

Expand My Results

Expand My Results

Search WorldCat

Show only

Peer-reviewed

Journals (1,763)

Full Text Online (7,907)

Available in the

Library (15)

Show bX Hot Articles

Results 1 - 20 of 7,920 for All collections

1 2 3 4 5

Sorted by: Relevance

Show only Peer-reviewed Journals (1,763) | Full Text Online (7,907) | Available in the Library (15)



Book

To kill a mockingbird threatening boundaries

Claudia Durst Johnson 1938- / 1994

Online access

Get It

Details



Book

To kill a mockingbird

c1999

Available at Library Stacks - 5th Floor (PS3562.E353 T6335 1999)

Physical Holdings

Details

Virtual Browse



Video

To kill a mockingbird

c1991

Available at Media Library Media (PN1997 .T6274 1991)

Feedback

CSU San Marcos

What Does Primo Look Like?

autism therapy



Search

Advanced Search

Browse Search

Ask a Librarian

Databases

Reserves

Looking for a specific article?

e-Journals by Title

Show bX Hot Articles ▾

Results 1 - 20 of **8,582** for **Articles+** Sorted by: Relevance ▾

1 2 3 4 5 →

Show only [Peer-reviewed Journals](#) (5,058)

Newspaper
Article

☆ **Some question therapy for autism.(NEWS)**

USA Today, Sept 11, 2014, p.09A

Get It

Physical Holdings

Details

Actions ▾



Feedback

Full text available at: [EBSCOhost MAS Ultra School Edition](#)

Full text available at: [ProQuest Newsstand New Platform](#)
Available from 1997

Full text available at: [EBSCOhost Middle Search Plus](#)

Full text available at: [LexisNexis Academic](#)
Available from 1989

Full text available at: [Factiva](#)
Available from 1987

CSU San Marcos

What Does Primo Look Like?

Primo Interface

- Highly customizable at the local level
- Allows greater 3rd party integration (LibGuides, etc.)
- Will be responsive by 2016, sneak-peek late 2015.
- No OPAC or “Classic Catalog”

How will I be trained?

Online and in-person training by Ex Libris

- ❑ Online training via ExLibris-created Moodle courses (starting in October 2015 and available on-demand)
- ❑ In-person regional training summer 2016, likely for those doing system configuration, such as coordinators and supervisors
- ❑ Additional training in 2017 TBD

Monthly Q&A sessions with CSU Implementation Team

How will things change?

- ❑ More opportunity for collaboration with other CSU staff
- ❑ More time devoted to training and implementation of the new system
- ❑ Opportunity to fix workarounds and solve old problems

- ❑ *Go into the process with eyes wide open*
- ❑ *Data clean-up pre-migration is important*
- ❑ ***Alma is not Sierra.*** *Willingness to adapt current workflows leads to a happier Alma experience*
- ❑ *ExLibris provides responsive support during the entire process*
- ❑ *Alma is still evolving and maturing*

ULMS Project Website

ULMS Project Website



- ❑ <http://ulms.calstate.edu/>
- ❑ Will include video of monthly Q&A if you can't attend
- ❑ All documentation related to the project, past and present

Resources

Ex Libris Documentation

- ❑ <http://www.customercenter.exlibrisgroup.com/>
- ❑ Username: 01CALS
- ❑ Password: 2253

ALMA Classes online

- ❑ <http://discoveralma.com/classes.html>

ELUNA

- ❑ <http://el-una.org/>

Listservs

- ❑ Alma: <https://listserv.nd.edu/cgi-bin/wa?SUBED1=alma-l&A=1>
- ❑ Primo: <http://listserv.nd.edu/cgi-bin/wa?A0=PRIMO-DISCUSS-L>

Next Steps

- ❑ Leads meeting Sept 10th, kicking off the working groups
- ❑ Steering Committee will contact stakeholders and experts for the various implementation areas as needed
- ❑ Join listservs if interested in updates:
 - ❑ Access Services & Resource Sharing - join-ulms-access@lists.calstate.edu
 - ❑ Analytics and Reporting - join-ulms-analytics@lists.calstate.edu
 - ❑ Discovery - join-ulms-discovery@lists.calstate.edu
 - ❑ Systems and Development - join-ulms-systems@lists.calstate.edu
 - ❑ Technical Services - join-ulms-techservices@lists.calstate.edu

SJPL

To Be Determined