SUNYLA Preconference: Library Services Platform Preparation

SUNYLA 2017
Stony Brook University
June 14 - 16

Diversity through Collections, Spaces, & Services
Current Status of Procurement

- Finished RFP process in May, selecting Alma/Primo.
- Currently working on negotiating contract with ExLibris.
  - Timeline for agreement on terms: end of July
  - Timeline for finalized agreement: November-December
- Contract will include details about implementation timeline and how we will implement, such as whether SUNY will implement all at once or in 2-3 groups.
- End of process that began over 2 years ago with RFI, and then progressed with exemption request.
- Through two years of process, Alma and Primo have remained the best fit and we’ve continued to survey the library technology landscape.
Timeline of Activities-To Date

- 2016—Request For Information
- Summer 2016—Alternative Procurement Review
- Fall 2016/Winter 2017—Creation and Review of RFP
- Winter/Spring 2017—RFP Evaluation
- Summer 2017—Select Vendor and Reach Agreement
- Summer-Fall 2017 Begin Developing Structure for LSP Migration
- Summer-Winter 2017 Negotiate and Finalize Contract
What will be included in contract

● Alma
  ○ Link Resolver/Knowledgebase
  ○ Electronic Resource Management System (ERMS)
  ○ Analytics Module
  ○ Acquisitions Module
  ○ Circulation/Course Reserves
  ○ Metadata Management Module
  ○ Consortial cooperation components (Network Zone) includes sharing in all areas.

● Primo
  ○ Fully integrated discovery layer: no extra work to push content to discovery
  ○ Will also serve as catalog with patron features integrated into discovery.
Why Alma and Primo?

- Full featured, with all essential components in production.
- Platform in use by many consortia that SLC should see as aspirational.
- Analytics Module highly developed.
- Works well with consortia and other groups.
- Active development with established history of new features.
- Full SaaS environment.
- Open Platform with ability to integrate with external systems.
Key Features of Alma and Primo

- Shared Bib/Union Catalog
- Easier ILL integration borrowing
- Shared patron base?
- Easier Electronic resource integration
- Integrated Discovery tool
- Automated and exception based workflows
LSP Task Force and Working Groups

Forming Summer 2017:
- Shared Metadata Standards
- Circulation/Resource Sharing
- Analytics
- E-Resource Management

Forming Later in Implementation:
- Training
- Discovery
- Acquisitions
- Systems
Current Work of LSP Task Force

- Creating guidelines, processes, and procedures for formation of committees.
- Reviewing committee nominations.
- Creating and reviewing initial charges of committees.
- Interviewing other consortia that have implemented Alma/Primo recently.
We’re going to need to get much better at communication.

- Instead of centralized email blasts and reminders, will focus on a communication strategy.
- What channels or methods would you like to see us use?
- Project Manager will be working on this soon.
Implementation Timeline (Highly Tentative)

- ~18 months from agreement to go live.
- 18 months includes all activities
  - Training
  - Data Migration
  - Testing
  - Creation of Policies/Configuration
- If contract is finalized Jan. 2018, then it’s likely Go Live is ~June 2019.

https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Implementation_Guides
Implementation Process

- Ex Libris has refined its process through many recent consortial implementations.
- Reliance on Building small group of vanguard members representative of group.
- Build Network Zone and Institutions, and test data migration.
- Go Live as One Group all at the same time.
Vanguards

- Key part of implementation process.
- Will go through shortened go-live (about 4 months), and then go live with the rest of SUNY.
- After shortened go-live, will help to train other SUNYs and be key to larger implementation.
- Requires large campus commitment.
- Amount of time needed depends on who you are.
- External participation to contribute back to larger implementation 1-1.5 FTE total.
Benefits of Being a Vanguard

• Can work out issues in trial go-live.
• Will gain in-depth knowledge of system.
• Staff will have access to ExLibris implementation team and more in-person training.
• Support of SLC LSP Project Team.
• Ability to be key player in configuration conversation.
Want to be a Vanguard?

- Consult with your Director or Dean.
- It’s probably a good idea to discuss as a library staff.
- Contact Shannon Pritting (prittis@sunyit.edu)
- LSP Project Team will be happy to answer questions.
- Role of Vanguards will become much clearer as we formally begin the implementation process.
- Initial discussion have been 4 Institutions, but could have a few more.
- Will try to get the best representation of not only sectors, but representative institutions that will bring up issues or choices we’ll need to confront in implementation.
Support for Implementation

Ex Libris

- Dedicated Project Manager
- Data Migration Consultant
- Training Consultant
- Implementation Consultant
  - Helps with configuration choices and mapping SUNY’s responses to profiles to system.

SUNY Library Consortium

- P/T Project Director
- 2 Project Managers
- OLIS providing data migration support from Aleph.
- LSP Task Force
- LSP Working Groups
Overview of SUNY Roles

- **Project Director**
  - Coordinates project and works closely with ExLibris Project Manager.

- **Project Managers**
  - Will coordinate needed implementation work and provide direct support for Working Groups.
  - Provide direct support to Working Groups as needed.

- **Working Groups**
  - Create policies and processes related to functional areas that are needed for configuration and implementation.

- **Task Force**
  - Creates higher level policies, and works with SLC Board to ensure implementation progresses and is focused on a system-wide view.
Institutional Leads

- Will likely be required by Ex Libris for implementation.
- Serve as institution’s primary point of contact and representation throughout implementation.
- Maintains awareness of implementation, and will ensure institution is ready for migration and implementation.
- Excellent way to be involved both locally and in the SUNY Project as a whole.
Long Term Support Models

• First and Most Important Question:

What Do We Mean by Support?

SUNY Libraries Consortium
Some Overarching Ongoing Support Issues.

• Documentation will be key.
  • Who will own this?

• We have a culture of helping that is admirable, but not sustainable.
  • IDS
  • OLIS

• What support should be centralized?
  • Authentication
  • Enterprise Integration (e.g. Banner)
Where does OLIS fit into these support models?

• Some OLIS staff may participate in working groups.
• OLIS can facilitate (but not provide) funds transfers for release time.
• Partnering on negotiations with vendors.
• Strategic vendor relationship management.
Second “Reclamation” Pilot

Purpose:
- OLIS will be managing data migration for ALMA
- Need/want to be sure that all campuses have the most current OCLC number on a given record (i.e., we all use the OCLC 035 rather than various 019 fields). This will result in more records matching, and matching on the current OCLC number - resulting in a cleaner database.
- Need to make sure campus OCLC holdings match Aleph holdings, as OCLC records will be base records for ALMA
- There’s been some slippage in OCLC/Aleph holdings coordination at some campuses

Participants:
- Alfred U, Brockport, Cayuga Com Col, Genesee Com Col, New Paltz, Oswego, and Potsdam
- Chose small number of campuses to make sure this proposed initiative will work smoothly across SUNY libraries
Second “Reclamation” Pilot

Process:
- Gather information from the campus about workflow, STA values used, how electronic resources are identified.
- Compare the OCLC query collection with the campus Aleph records by way of the OCLC numbers to determine:
  - Which Aleph records need their 035/OCLC number updated to the most current number
  - Holdings in Aleph that are not in OCLC
  - Holdings in OCLC that are not in Aleph
- Using the campus OCLC credentials, use the batch uploading functionality through Connexion to delete or add campus holding symbols to appropriate records in WorldCat.

Update from OLIS:
- By the time SUNYLA starts,
  - 1 pilot campus will be complete (OSW)
  - 2 pilot campuses will be underway (BRO & NEW)
  - 2 pilot campuses will start right after SUNYLA (AUA & GCC)
  - 2 pilot campuses will be scheduled after that (CAY, POT)
Discovery

New User interface

May release has all features implemented from “classic Primo”

Each institution can brand it, modify colors

Option for Union search across all of SUNY


http://library.csus.edu/