



# Unified Library Management System

COLD Meeting, February 2016

# Overview

1. Project update
2. Test Phase Timeline
3. March kickoff meeting
4. Questions?

# 1. Project update

# Staying up-to-date on the project

- Project website: [ulms.calstate.edu](http://ulms.calstate.edu)
- Bi-weekly emails
- Contact Alice with any questions

# Since we last met...

- Vanguard Alma training (Oct-Jan)
- Vanguard ILS data load and Alma Configuration (Dec-Jan)
- Authentication & PeopleSoft integration work started
- Monthly calls with Project Managers and Working Group Chairs (Dec)
- Sarina and Mallory hired, begun campus visits

# Working Group Update

- Discovery
  - Created user personas for Primo testing
  - Survey of existing faceting
  - Scoping and indexing needs
  - Will work on consortial settings for Primo in February
- Access Services
  - Survey of existing lending and borrowing policies
  - Roster of roles and responsibilities
  - Scheduling virtual meeting in February

# Working Group Update (cnt'd)

- Tech Services
  - Data clean-up recommendations
  - Creation of best practices
  - Inventory of local fields currently in use
  - Document and workflow creation
- Systems
  - Survey collecting 3<sup>rd</sup> party integration needs
  - Information gathering for PeopleSoft, Shibboleth, ASRS, ILLiad integrations

# Wrapping up Vanguard phase...

- Vanguard Alma instances
  - Released to Vanguard on Jan 26 for testing
  - Available to all CSU campuses Feb 15
- Vanguard Primo instances released on Feb 3
  - Available to all CSU campuses soon
- Final Primo configuration changes due Mar 2
- Primo Back Office available to Vanguard Mar 9



## **2. Test Phase (now it's YOUR turn!)**

# Test Phase (Phase 2) Timeline: March

- Week of Feb 29: Vanguard-led review of Alma migration forms
- Week of March 7: Vanguard-led Q&A
- Mar 18: Voyager migration form review
- Mar 21-22: Project kickoff at Fresno
- Mar 23: Ill migration form review
- Mar 30: Draft migration forms due to Ex Libris

# Test Phase (Phase 2) Timeline: Apr-Jun

- Apr 13: Final migration forms due
- Apr 15: ILS data exports due to Ex Libris
- May 11: Draft Alma configuration forms due
- May 25: Final Alma configuration forms due
- June 3: Test Alma instances released to all CSU campuses
  
- Weekly functional training and project management calls Apr-Jun

# 3. March Kickoff

# @Fresno State University

- Why Fresno?
  - Vanguard campus, affordable lodging available
- What is the purpose of the meeting?
  - Where we are now, and what's ahead
  - Ex Libris overview
  - Lessons learned from vanguard campuses
  - Working group leads report
- Who should attend?
  - PMs, Leads, campus team representatives
  - Deans decide who from their library will attend

# Registration and travel

- Registration process
  - Limited room capacity
  - Up to 5 or 6 people per campus?
  - Doodle poll registration
- Travel support
  - Travel grant requests

# 4. Questions?



[ulms.calstate.edu](http://ulms.calstate.edu)