# Overview

The implementation of a Unified Library Management System across the 23 campuses provides the opportunity to create a much more efficient transfer of SIS user information into library systems. By centralizing and standardizing this process, the CSU will greatly reduce the time and resource requirements across libraries and campus-level PeopleSoft teams. This will lead to much improved management of the data transfer processes.

# Campus Survey

Currently all campuses are using a combination of manual and campus custom processes to integrate student and faculty data from PeopleSoft to their various library systems. The implementation of a Unified Library Management System has allowed campuses to identify standard requirements for a system wide interface from PeopleSoft.

# Considerations

## Funtional Requirements

The following fields have been requested in the XML output file. System wide agreement on where the data is extracted will be needed to ensure the data is accurate for all campuses.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Required Field** | **Extracted From:** | **Req Field** | **Format / Type** | **Comments/Decision Needed** |
| First and Last Name | PS\_NAMES | Y | CHAR | Preferred or Primary Name |
| Email Address |  | Y | CHAR | Preferred Email Address |
| Student/Employee Type | Student  ACAD\_CAREER.PS\_ACAD\_PROG Employee PS\_JOB | Y | CHAR | Are the expected output values: Undergrad, Graduate, Faculty or Staff? |
| User ID | OPRID.PSOPRDEFN | Y | CHAR |  |
| Barcode |  | N | CHAR | The Barcode is the EMPLID for many campuses. If not some campuses store in PS or enter manually. |
| Expiration Date |  | Y | DATE | How will the expiration date be determined? |
| Mobile Phone |  | N | NUM |  |
| Other Phone Number |  | N | NUM | Option for campus to identify address type on run control page. |
| Department (Faculty/Staff) |  | Y | CHAR |  |
| Major (Students) | ACAD\_PLAN.PS\_ACAD\_PLAN | Y | CHAR | The most recent effective date and lowest sequence numbered academic plan. Display plan description or the actual academic plan code from PeopleSoft? |
| Address 1 | PS\_ADDRESSES | Y | CHAR | Option for campus to identify address type on run control page. |
| Address 2 | PS\_ADDRESSES | N | CHAR | Option for campus to identify address type on run control page. |

Note: Above chart is not complete with all requirements.

### Population Selection Decisions Needed

* What is an active student?
  + Active Program/Plan stack
  + Current/future enrollment
* What is an active faculty or staff member?
  + Active job record
* What is a considered a change?
  + A change in Status, Address or Phone #?

Technical Requirements

* The file must be in XML format, contained within a .zip file. It is recommended to have one zip file, containing a consolidated XML file. There is a maximum limit of 50 XML files in one zip file and a maximum of 20 zip files for each import/synchronization. The maximum size zip file is 4 GB. The zip file should be placed on a secure FTP server, as defined in the integration profile.

# Proposed Solution

Due to the complexity of campus data and various business practices a more robust App Engine process will be developed rather than a simple SQL Statement. As a result it will be more efficient for campuses to run the process as required.

CMS will deliver two system wide processes one that will extract the required data for students and one for staff and faculty. The processes will have the option to be run based on an effective date or for the entire eligible population. The file naming convention will include which system (HR or CS), the campus name and the creation date (YYYYMMDD). Ex: CS\_LONGBEACH\_20160301

Tech Services will monitor campus processing using Nagious. Emails will be sent and Service Now cases opened when campuses are not running the interface as expected. A central folder will be created with sub folders for each campus. The process will outbound the file(s) to the new central folder where Tech Services will zip the campus file(s). The Library System will pick up and load the files for each campus.

# Proposed Delivery

May 1, 2016 – Requirements finalized  
July 15, 2016 – CMS first round of development completed and preview project posted for Library testing team  
July 2016 to September 2016 – Testing and feedback  
October 2016 to November 2016 - CMS Development updates  
December 2016 to January 2017 – Campus round 2 testing  
February 2017 – CMS final development  
March 2017– Project delivered in MP 24