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Library Department Head Meeting Essence Notes

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Library Department Heads

November 9, 2015

Essence Notes

Attending: Bede Mitchell David Lowder Debra Skinner Ruth Baker
 Jocelyn Poole Fred Smith Alva Wilbanks, Recorder

ACRL Survey: Department heads were given survey packets, asked to complete sections pertaining to their departments, and return to Alva prior to January 15.

Alma Implementation Update: David updated the group on the first stages of implementation, including a February deadline for forms describing our current profile. ExLibris recommends the project team should consist of individuals who will serve as Functional Experts and Data Experts. He and Debra will serve as project managers, with David serving as Lead. A webinar will be held on November 19th which all involved in the implementation plans should attend. The Project managers will be updating the department heads periodically and including them in decisions when necessary. Copies of the implementation plan and meeting notes are attached.

Fire Marshall Building Inspection: Bede will contact the fire marshal to reschedule the October 26 inspection that was cancelled.

Disaster Preparedness Plan Review: The Collections Work Team is currently reviewing the plan. Any suggestions or feedback should be sent to Fred. He and Bede and Fred will make final revisions to the plan. Bede will meet with the fire marshal for clarification on evacuation procedure responsibilities and then plan a walk through for some time during Spring Break.

Monday Meeting Rotation Schedule: The new rotation schedule was established and will be shared with faculty and staff. Teams wishing to meet during open dates should contact Alva.

Revise Upwards Evaluation Forms for Department Heads: Following review of the current form, Bede will send the form out to staff and ask that they bring comments or suggestions to the next staff meeting for discussion.

Announcements:

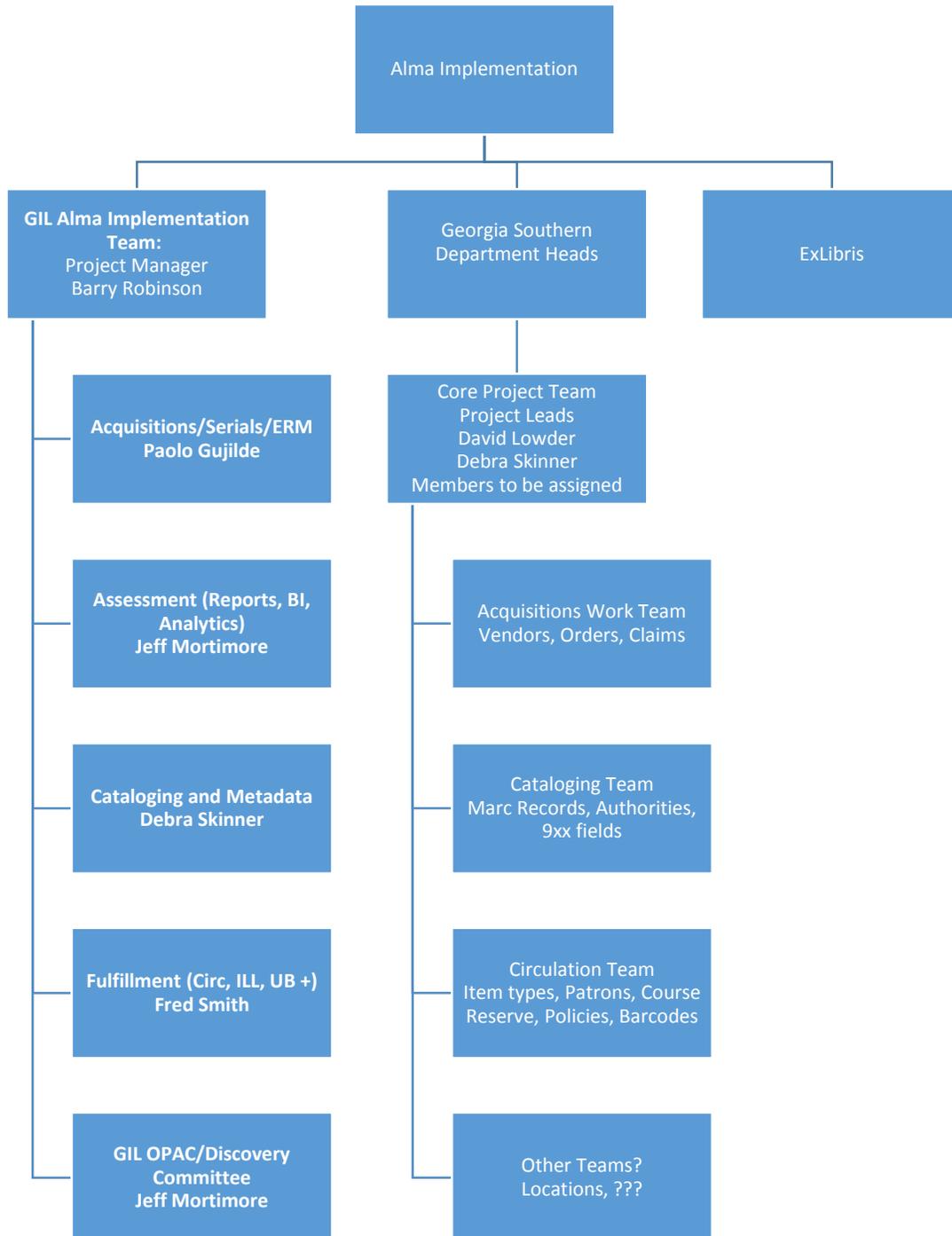
Ruth announced that the job description and ad have been finalized on the position vacated by Kendria Lee. Debra reported that she anticipates having the C&RS secretarial position filled by December 7.

Next meeting date: December 14, 2015

Attachments

Alma Implementation

Everyone in the Library will be involved in some way or another in the implementation to Alma. Some will spend more time than others due to their job responsibilities, talents or both. Below is one draft of how our teams may be aligned. Since we will continue to use Discover as our primary public interface, most of the early work involves technical staff from CRS and Access Services.



ExLibris Recommended Project Team

Functional Experts

Acquisitions – has overall familiarity with workflows in the current system including ledgers/funds, POs and invoices, and acquisition of print monographs and serials

Digital –has overall familiarity with workflows in current system including selection, acquisition, organization, and accessibility and preservation of digital resources

E-Resources – has overall familiarity with workflows in current system including procurement, licensing, and management of all electronic resources acquired by the institution

Fulfillment –has overall familiarity with workflows in the current system including patron registration and management, circulation policies, and calendars

Interlibrary Loan –has overall familiarity with workflows in the current system including lending and borrowing and external resource sharing management applications

Resource management – has overall familiarity with workflows in the current system including bibliographic and authority records, inventory, and local practices

Data Experts

Acquisitions – has full understanding of the institution’s acquisitions data including ledgers/funds, POs, and invoices

Digital – has full understanding of the institution’s digital repository and data

E-Resources – has full understanding of the institution’s electronic resources data including procurement, licensing, and management

Fulfillment –has full understanding of the institution’s patron and circulation data including patron import, circulation policies, and calendars

Interlibrary Loan – has full understanding of the institution’s policies for lending and borrowing, profiles for external resource sharing applications, and integration with NCIP

Resource management – has full understanding of the institution’s bibliographic, authority and inventory data, and access to external resources

Discovery – has full understanding of the institution’s metadata and definitions of what should be discovered and displayed to the end users in Primo

Project Managers

David Lowder - Lead

Debra Skinner

SCOPE

The Project Managers lead the ALMA implementation process and communicate with the Library Dean, Department Heads, and Library faculty and staff on a regular basis regarding status and next steps of the project. Project Managers coordinate all aspects of the ALMA project from initial data cleanup and implementation to testing, and training. The Project Managers oversee the project to keep it moving and on target and coordinate the implementation team of functional experts. Project Managers review project plans, set priorities, and make routine decisions regarding migration and configuration settings. Planning, arranging and scheduling training are also the responsibility of the project managers. Project Managers are the primary points of contact with system level project manager.

Project Team - Functional Experts

Jennifer Gerrald
Paolo Gujilde
Jessica Minihan
Jeff Mortimore
Gregg Vaughan
(Others from Access and ISD)

SCOPE

The Project Team consists of functional experts with familiarity in the following categories: acquisitions, digital resources, e-resources, fulfillment, interlibrary loan, resource management, and discovery as well as data experts for these same areas. Project Team members must understand the workflows for their specific area as well as how the data works within the system. The functional experts attend planning meetings and initial implementation training and are charged with preparing data for migration through various clean-up projects in each area. After implementation, the Project Team will remain involved with testing and training.

Work Teams examples

Cataloging Team

Debra Skinner
Jeff Mortimore
Jennifer Gerrald
Greg Vaughan

SCOPE

The Cataloging Work Team will work in conjunction with the Core Project Team to facilitate the implementation of ALMA. The Cataloging Team will closely analyze the documentation for database cleanup as prescribed by Ex-Libris and the USG Implementation Team and prepare a comprehensive plan for accomplishing the tasks outlined. The plan must be reviewed and approved by the Core Team. While others will be called upon to help with the tasks outlined, the Cataloging Team is responsible for oversight of the plan.

The Cataloging Team will be apprised of new responsibilities by the Core Team as the project progresses, and will participate in full implementation as well as testing and post-cleanup required by the project.

Acquisitions Team

Debra Skinner
Greg Vaughan
Paulo Gujilde
Jessica Minihan
Jeff Mortimore

SCOPE

The Acquisitions Work Team will work in conjunction with the Core Project Team to facilitate the implementation of ALMA. The Acquisitions Team will closely analyze the documentation for database cleanup as prescribed by Ex-Libris and the USG Implementation Team and prepare a comprehensive plan for accomplishing the tasks outlined. The plan must be reviewed and approved by the Core Team. While others will be called upon to help with the tasks outlined, the Acquisitions Team is responsible for oversight of the plan.

The Acquisitions Team will be apprised of new responsibilities by the Core Team as the project progresses, and will participate in full implementation as well as testing and post-cleanup required by the project.

Notes from ALMA Implementation Meeting

October 29, 2015

Debra Skinner

Barry Robinson, Project Director for ALMA, and Bill Clayton, USG Information Technology Services, visited the Henderson Library on Thursday, October 29, 2015, to discuss the implementation of ALMA at Georgia Southern, one of the Vanguard Libraries. David Lowder, Dean Mitchell, and I met with them. We discussed the timeline for the implementation and a few details of what is to come. The major points are listed below.

Remember that this information is preliminary and subject to change.

Timeline for Implementation

- A pre-implementation with dummy data will be available to Henderson Library soon. The kickoff for this is planned for mid-November.
- In late February or early March the dummy data will be pulled offline, and our data will be available in a pre-production environment.
- In August/September the system will be re-loaded with the data from all USG institutions.
- In May/June 2017 the data will be reloaded again for full implementation.

Setup and Configuration

- Before the load of real data in February, Henderson Library faculty and staff will complete “workbooks” which include specifics about settings and how our implementation will work.
- Ex-Libris (vendor for ALMA) will give Georgia Southern access to their **Online Learning Center**. All Ex-Libris training will be done through this portal.
- Ex-Libris will communicate with USG libraries through software called Base Camp. This will contain documents and to-do lists as well as a place for questions & answers.

Data Cleanup

- Data cleanup is one of initial priorities.
- Ex-Libris will provide a document that indicates priorities for data cleanup.

Bibliographic Records

- There are two “zones” in Ex-Libris for bibliographic and holdings data, a Network Zone and an Institutional Zone.
- All records in the Network Zone will be shared by all USG libraries, meaning that there will be only one bibliographic record per title shared by all libraries.
- In order to go in the Network Zone, a record must have an OCLC number.
- Local data from defined fields can go in the Institutional Zone.
- Holdings records (mfhds) and items data go in the Institutional Zone and link to the appropriate bibliographic record.

Teams

- At the state level, we have Functional Teams covering such areas as Fulfillment, Acquisitions, ERM, and Resource Management (Cataloging).
- The teams will be working with Vanguard libraries.

- There is a “Best Practices” team determining how libraries can best work together. Some GIL Committees are serving in this role as well.
- Locally, we may establish “Project Teams” to work in different areas.

Vanguard Libraries

- Role is to test implementation.
- Vanguards will get everyone acquainted with implementation issues.
- Vanguards make possible 2 cohorts for implementation: (1) Vanguards (2) All other libraries.
- Regular WebEx meetings will be held with Vanguard libraries and USG staff.