Public Services Council Meeting of February 23, 2021

Present: Mark Marrow, Beth Dupuis, Ann Glusker, David Wong, Susan McElrath, Kristen Greenland, Neda Salem, Lynne Grigsby, Patrick Shannon, Jami Smith, Yuko Okubo, Ellen Dario, Nicole Brown, Michael Campos-Quinn, Scott Peterson, Salwa Ismail. Guest: Sheehan Grant

Agenda and Notes:

1. **SILS patron services: loan rules and patron types** (Mark Marrow and Beth Dupuis)

July 27, 2021 is the go-live date for our transition to Alma and UC Library Search (Primo VE). We have said that change is coming, but we have not been specific about what those changes will be. A great deal of work has gone into configuring the system for our test phase so we can see how certain approaches work starting in March. After testing we will have an opportunity to make some changes; we will do so by getting input from key Library groups such as Public Services Council, Access Advisory Group, Roundtable, and the UCB SILS Governance Group.

Millennium and Alma are conceptually very different, use different terminology, and will require us to rethink a lot about our policies and practices. Today we are focusing on the differences between Millennium's loan rules and Alma's terms of use as an example of the types of transitions we will be making. Whereas Millennium allowed us to accommodate a great deal of customization for each library location, Alma does not. While it will take some careful thought and consultation to figure out the changes for Alma, it will push us toward simplifying and creating more consistency across our libraries. Overall this consistency will make it more manageable to configure and update our system, make it easier to create shared documentation and training, and be more understandable to our users.

Mark discussed the comparison between Millennium and Alma loan rules (**Slides**). In brief, Millennium sets loan rules by item type (such as monograph) and patron type (such as faculty); Alma sets terms of use based on fulfillment units (which describe how all materials of a type will be shared). For our test, we have created five fulfillment units: general, limited, closed, reserve, and media. In Alma, each fulfillment unit has a standard term of use associated with it. For example, all materials in the general fulfillment unit would circulate to users for a period of time. Alma allows the addition of a limited number of exceptions to the standard term of use but nothing as extensive as we have had in Millennium. In many ways, this is a blessing. We currently have 900+ lines in the loan rule determiner table (sublocations by Division in Millennium) which is a very large number of special rules to maintain.

Alma also allows us to have a limited number of patron types; Berkeley currently has 68 patron types in Millennium. Each of the patron types (such as undergraduate, graduate student, faculty, visiting scholars, community borrowers, and departmental accounts) currently has certain privileges such as how many items they can check out at a time, how long they can keep those items, how many times they can renew items, at what point their account is blocked due to fines, and so on. Mark is currently working on a proposal to map all our current patron types to a maximum of 10 in Alma.

With the new SILS, UCB borrowers will be able to directly request items from other UC Libraries and they will be checked out to them according to that library's terms of use policies. Each of the campuses can set their own terms of use for each patron type, though there is also a benefit to users if we can harmonize among our libraries when possible. We will be testing and confirming our fulfillment units in Alma, and identifying any gaps or issues that need to be resolved or that did not work as we envisioned. We'll then be reviewing the current loan rules and confirming for all libraries and sublocations how those will map to the terms of use we wish to set. Mark and Beth will be leading this process through discussions with the key stakeholders of each library, and Library groups such as Access Advisory Group (which includes representation from all library units that will use Alma). In the past, loan rules have also

been discussed with the Academic Senate Committee on the Library which has faculty and student representation.

Loan rules and patron types are just two examples of the major changes ahead. As we transition to Alma we will also need to learn how that system handles renewals and overdues, to update our patron notification messages, to think about updating links such as in LibGuides and websites, and to prepare for all the other changes to make to be ready for fall semester 2021. This is a great time to give fresh thought to how we should configure things -- not just map our old practices and policies -- and find ways to use the system more effectively for ourselves and for our users. We will be bringing many related issues to PSC and want your ideas as we go to help set up our new system well and communicate the changes to Library staff and the campus.

2. **SILS (Alma)/UC Library Search (Primo) in General** (Lynne Grigsby and Salwa Ismail)

UCB SILS Fact Sheet and UCB SILS Phase 4 groups . Questions? Email: ucbsils@lists.berkeley.edu. Details about ExLibris product, Alma and Primo VE were discussed. Alma is a cloud based staff interface and UC Library Search will be the discovery interface using Primo VE. We have received our test environment in Alma (not Primo VE yet) from ExLibris. The functional group chairs as part of the UCB implementation group are now checking on roles and getting the test plan ready. The plan is to have members of the core and input groups of the functional groups perform testing and help with the design of the workflows. And the members of the input and core groups are expected to consult with their units/staff for input and feedback that can then be provided to the functional groups as the workflows are designed. All groups have representation, as appropriate, from EAL, Bancroft, NRLF, and affiliated libraries. It was discussed that Alma/SILS will bring about a fundamental and philosophical change in how we work with our ILS and how we collaborate across divisions and libraries on policies and workflows and basically in how we do things. There will need to be more centralization of and similarities in policies, roles, loans, etc. that will need to be library-wide in support of our users to provide them with services that are similar as much as possible across the board instead of individual library/division/unit related policy. This will also translate into workflows changing, and while we might not have details around how those workflows will change, because the UCB functional groups are still working on them, everyone needs to be prepared for that change, which will also affect non-SILS related platforms such a LibGuides (such as: is it time to clean up and consolidate our research, subject and library guides?). The go-live date for library staff and UCB users/patrons and all UCs is July 27th and there is local training planned for members of the functional group and other appropriate staff from March 8-12.