INITIAL PROJECT PROPOSAL

Library Services Platform Migration/Banner Integration

# **Executive Summary – SEction 1**

Throughout 2019, 110 of the 115 community college libraries in the state will migrate from their current library management systems to one, cloud-based library services platform from ExLibris. The two ExLibris products are called Alma and Primo and will replace the current Horizon and HIP products from SirsiDynix. Bakersfield, Porterville, and Cerro Coso will all migrate as independent libraries. The Alma product can integrate with Banner to allow continually updated student information to load to the library system for both checkout and for off-campus authentication to library subscription databases. This integration requires an S/FTP server, which can hopefully be provided by the District and could potentially serve the needs of all three colleges. Though Banner integration is available for both student and finance, all three district libraries anticipate using student integration only.

# **Business Problem**

Using the current integrated library system (ILS), staff in the District Office I.T. Department have to manually create flat files from Banner that contain the data needed to create borrower records for students and staff in the ILS. These files are emailed to the BC Library, where they are then manually uploaded to the ILS. Since there’s no integration currently between the two systems, students who register late or roll from waitlists aren’t in the ILS database and a second batch of files has to be created and uploaded two weeks into the semester. This integration would automate the process of capturing current student and staff data and importing it to the ILS. All three college campuses would benefit from this integration.

## Analysis

With nearly all state community colleges migrating to ExLibris, creating this integration is an expected step in the migration process dictated by the state technology office. According to the migration timeline, this step comes later in the year – probably in the fall. Again, this integration would benefit all three district libraries.

# **Solution**

I don’t know all of the technical requirements, but I do know that ExLibris has already established Banner integrations for many of their other customers and so they are familiar with the technical issues and the steps. They would need to work with a member of the District I.T. staff to arrange the correct configuration and permissions.

## objectives

This integration would save time for both district I.T. and library technical services staff by automating the patron data load process. It would also allow for a constantly-updated library borrower database.

Provide the scope of the proposed solution

ExLibris staff would work with District I.T. staff to establish integration with Banner to regularly extract student and staff data (name, ID#, address, phone, email) to Alma. We anticipate using this integration only and not implementing the integration of finance. Integration also requires an S/FTP server to serve as an intermediate step for moving data between the two systems.

## Deliverables

Integration between ExLibris’s Alma library services platform and Banner to regularly extract student and staff data from Banner for import to Alma.

Requirements

## Estimated Cost

Provide high-level cost information or funding(s) for implementing the proposed solution. Items include Software, hardware, training, ongoing license\maint, purchase price.

|  |  |
| --- | --- |
| Description | Estimated Cost |
| Unknown. All ExLibris migration services are being paid by the state. Costs would be limited to staff time used in District Office I.T. Dept.  | ?? |
| S/FTP server.  | ?? |
|  |  |
|  |  |
| Ongoing cost of solution (sponsor will commit to funding) | ?? |
| **TOTAL ESTIMATED COST OF PROPOSED SOLUTION** | **??** |

# **Authorization – Section 1**

Date: Feb. 11, 2019 \_\_\_\_Kirk Russell\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Project sponsor approval

# **College review and approval – Section 2**

*Note: This section to be completed by the campus IT Director, or in the case of the district office, a district office IT Director.*

Provide high-level, summary information about the project and why it is needed. This section is submitted to the college’s technology committee and approved locally before submission to the district wide committee.

If it is determined it can be done locally no further submission into the district wide process is required and the college will proceed as needed.

The following are areas that need to be reviewed and verified prior to further submission into the process. Several of these sections will help indicate if District Office resources are needed.

[ ]  SSO (Single Sign-on) – Will staff need to have access to the system (internal\external to the district).

[ ] Data integration- What other systems will this solutions’ data need to access - both internal\external to the district.

[ ] New application – Is this a new application in the district

[ ] Security – Data\access security analysis

[ ] Legal – Contracting language, FERPA, HIPPA, etc.

[ ] Accessibility – ADA, 508 compliance

## Estimated Total Cost of ownership

This section will share how this product will be supported for the duration of the life cycle until it is discontinued. Key parts will include:

[ ] Ongoing funding source – This is GUI, RP, grant, etc.

[ ] Staff support – how will this be supported for ongoing maintenance of the solution

If this is a grant funded project the college will provide the resources to support this system once the grant funding has ended.

# **Authorization – Section 2**

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ IT Committee Faculty Co-chair

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ College IT Director approval

# **Committee Review – Section 3**

## Estimated Schedule

Provide high-level schedule key milestones.

|  |  |
| --- | --- |
| Project Milestones and/or Phases | Estimated Completion Date |
| Start of Project |  |
|  |  |
|  |  |
|  |  |
|  |  |
| End of Project  |  |

Modifications to any requirements, timeline, scope, etc. of this project can only be authorized with a formal change control request and with approval of the below signatories

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ College IT Director approval

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Chief Information Officer

*This section still in development.*