Outline - 45 minutes + 15 minutes for questions

Link to the presentation:
https://mysacstate-my.sharepoint.com/personal/suzanna_conrad_csus_edu/_layouts/15/WopiFrame.aspx?docid=11aff81e7eae14696b94f3aed49bb2448&authkey=ASdXCCL7nf1HycSuBf3Sk-A&action=view

In the spring of 2016, the California State University (CSU) System began the process of creating formalized self-check testing procedures for campuses utilizing self-check in anticipation of our switch to Alma in June of 2017. Ten of 23 CSU campuses have self-check machines in service. Each campus presented its own unique challenges for migrating to a new system including various self-check vendors, options on self-check machines, authentication procedures, and usage of automated materials handling systems. Our group of five was tasked with creating standardized goals and procedures for linking our self-check systems to Alma despite myriad configurations.
Our goal for this presentation will be to share experiences and provide ideas on how to create formalized testing procedures in a consortial environment. We will discuss how we communicated during the project, documented progress, as well as provide insight into troubleshooting problems that arose during the testing process.

1. Background of the task force (Suzanna)
    a. The California State University system consists of 23 campuses; each campus operates independently with own administration and libraries. The ULMS (Unified Library Management Systems) project started in 2015 after consortial vetting of RFPs from major vendors. The planning phase began in October 2015. Vanguard campuses were selected and used as test institutions (San Jose, Northridge and Fresno).
    b. We have five working groups: access services & resource sharing; analytics & reporting; discovery; systems & development; technical services
    c. Define goals/scope/objective: May 2016
    d. Define deliverables: defined this as our “project links” with resources from Ex Libris, data from surveys, notes from various campuses and listservs with recommendations/troubleshooting/Test configuration / procedures / follow-ups to be discussed in next slides.
    e. Objectives:
        i. Clarify how campuses are using self-check.
        ii. Provide documentation on integrating self-check at affected campuses.
        iii. Test if approaches will be functional with various vendors including 3M, TechLogic, Libramation, Biblioteca, Lyngsoe.
        iv. Provide testing protocols for campuses.
        v. Provide consultation as needed with individual campuses setting up self-check services.
2. How we developed the procedures (Natasha)

    a. First, we developed a survey to find out who was using self checks, what percentage of their circ was on the self check, what functions they were using, and what system they were using.
    b. Next, we asked each campus to set up the system with the developer's network documentation and provide us with any issues they encountered and notes for setting up the system.
3. Communication / Challenges for consortium launch (Suzanna)
    a. Differing priorities
    b. IT level support differs
    c. Staff Turnover/retirement
4. Problems we encountered (Natasha)
    a. Network problems
        i. Our techs had not set up the static IP address like I originally thought they did. I fixed this by having each selfcheck set up with a static IP, NOT a dynamic IP. The reason for this is because for stunnel to connect to Alma securely, it needs a static IP address to attach to in its configuration
    b. Hardware/Software Problems
        i. During installation of Stunnel as a windows service, I received some errors. It said "not a valid win32 application" when i tried to install. That day, I had been having some issues with the wired connection in our building. So i figured the file was probably corrupted in the initial download. I had to uninstall the service which just meant I had to go into the program file and click the uninstall.exe. I redownloaded Stunnel and reopened command line then repeated the last series of commands to install the.exe file.
        ii. I then received an error message saying 'stunnel.exe' not recognized as an internal or external command, operable program or batch file. I navigated to the program file to see why it wasn't recognizing that the file was there. It had disappeared, which was strange because I knew I had successfully downloaded and installed it. I had a hunch that it was located somewhere else and found the stunnel.exe file in the bin folder.
    c. PIN Issues
        i. Currently the system is set up to accept a pin number like the selfcheck did. Right now it can't be set automatically, it will have to be set manually from either Primo by the patron or by a staff member in Alma.
        ii. FYI:You cannot connect via shibboleth,so you will need to decide if you want to require a PIN or not.
        iii. We decided not to require a PIN at our self check machine anymore so there are 2 places you need to make this change to, one in the selfcheck and one in Alma.
        iv. First, you need to make the change in the selfcheck so it doesn't require a PIN. Just uncheck the box in the configuration settings of the self check machine. Workflow > customer id processing > uncheck customer PIN

required for check out and, if you allow manual entry of an ID, Customer PIN required for Manual Entry.

v. Next, go into Alma > Administration > General Configuration > Configuration Menu > External Systems > Integration Profiles > selfcheck profile >actions > click NO on authentication required and then click save.

vi. Restart the selfcheck machine and you should be good!

d. Problem with Ithaca280 printer. In this instance, I highly suggest calling Bibliotheca support. The issue had to do with the printer not being recognized by the selfcheck so I reinstalled the driver and was able to get it working, but it involved some scary driver reinstalls that left me sweating and thinking I had broken the system. Don't be dumb like me, just call support. 1-800-328-0067

e. You may be wondering why most of this wasn't solved by calling support in the first place.
   i. Techs took forever to call me back and I am impatient and would rather do it myself
   ii. 3M was in the middle of restructuring due to being bought out by Bibliotheca so it might have been an issue with getting lost in the shuffle
   iii. Techs are not knowledgeable with connecting self check to outside systems and due to not being able to contact Ex Libris support directly without going through a bunch of people,I chose to go at it alone. Now you get to reap the benefits of all my hard work.

f. Check in/check out - (Suzanna)

g. SIP2 Surprises - Cybrarian (Suzanna)
   i. NCIP add-on used in Illiad to create borrowing requests in Alma that are associated with a patron
   ii. NCIP add-on creates a "stub"; staff clears out stub request manually
   iii. Out of bounds error results if stub (inactive or active) appears on user account

5. Questions or comments?