

Sandbox Testing Plan: Organization Unit Name Change

Current Ex Libris Ticket: 06620571

Related Organizational Unit Name ticket: 06870436

Background

Back in December 2022, UC Santa Barbara noticed they were occasionally unable to create orders off Network Zone (NZ) electronic collections for recharge purposes. A ticket was created with Ex Libris¹. Initially, we believed that a fix was scheduled for October of 2023.

In August 2023, Ex Libris told us that the ordering problem was due to a comma in the Organization Unit Name in three campus institutional zones (IZ): UC Merced, UC Santa Barbara, and UC Santa Cruz. This seemed unlikely so we pushed back. However, Ex Libris development is insisting that no further testing on the ordering bug can continue until the commas are removed. After the commas have been removed, they will update the campus names in the NZ to match what is currently in the IZs.

Screenshot provided by Ex Libris:

Look at the difference between the source code to the name (third column).

*Note that San Diego didn't change.

1	01CDL_IRV_INST	UC Irvine	University of California Irvine
2	01CDL_RIV_INST	UC Riverside	University of California Riverside
3	01CDL_SCR_INST	UC Santa Cruz	University of California, Santa Cruz
4	01UCD_INST	UC Davis	University of California Davis
5	01UCSB_INST	UC Santa Barbara	University of California, Santa Barbara
6	01UCS_BER	UC Berkeley	University of California Berkeley
7	01UCS_LAL	UC Los Angeles	University of California Los Angeles
8	01UCS_SAF	UC San Francisco	University of California San Francisco
9	01UCS_SDI	UC San Diego	UC San Diego
10	01UCS_UCM	UC Merced	University of California, Merced

What Is the Requested Change?

- Remove the comma from Organization Unit Name for UC Merced, UC Santa Barbara, and UC Santa Cruz
- Ex Libris will then update the corresponding Network Zone configuration table

¹ More details can be found on the [Issues with IZ Ordering off NZ Inventory](#) Confluence page.

Why Do We Need to Do This?

Currently, campuses are unable to order off Network Zone (NZ) collections if there is no attached license and group settings are not empty (i.e. campuses have been specifically designated as having access). Ex Libris will not troubleshoot this bug until the comma has been removed from the three indicated campuses and Ex Libris changes the Network Zone configuration table for campus name to match what each campus has for its Organization Unit Name. This change is the first step Ex Libris is requiring and may not fix the IZ/NZ ordering bug.

There are other ways campuses could create orders, such as linking them to Network Zone bibs. However, not addressing this bug limits the options campuses have to link their orders to the Network Zone.

Organization Unit Name Impacts

Expected Changes

Ex Libris support says that changing the Organization Unit Name in the IZ is primarily a cosmetic change. Steven Burke, North America Alma Support Team Lead, says they've helped customers make this change a few times with other consortia and it's always been easy and painless. Ex Libris development says they have made changes to the NZ Configuration table before, it was "successful", and no other changes were needed afterward.

Visible changes in the IZ:

- Alma Configuration
- Primo VE Facets for Institution
- Analytics folder for your Institution (this might require a manual change on Ex Libris' end if we want it updated)
- How holdings for other campuses display in Primo VE (that is, "University of California, Santa Barbara" will likely change to "University of California Santa Barbara")

Updating the Network Zone Configuration table:

- available for
- for E resources
- search facets
- Held by

Unexpected Changes

If there are unexpected issues, they are most likely to be related to NZ group settings for electronic collections.

Testing Proposal

While we are seeing this problem in the production IZ/NZs, SILS Operations Center recommends that all initial testing be done in the sandbox. We will not propose implementing any changes in production unless the sandbox displays the same issues that production does and Ex Libris' proposed change fixes the problem.

Stakeholders

- SILS Operations Center: General NZ health, and verifying the changes are ok, and liaising with Ex Libris
- Operation Team: General IZ health
- UCSC, UCSB, and UCM OT reps: removing the comma from Organization Unit Name
- CDL Shared Collections: Finding appropriate test collections and documenting before and after NZ behavior
- Select campus Acq and/or eRes reps: Before and after order link behavior

Proposed Timing

(I'm trying to be realistic but let me know if we can go faster – or need to go slower)

10/29/2023: CDL Shared Collections and relevant SILS groups finish review and sign off on this test plan.

10/31/2023 - 11/03/2023: Baseline testing

11/06/2023: The three campuses remove the comma from organization unit name in their sandboxes and then Ex Libris updates the corresponding sandbox NZ table.

11/07/2023-11/10/2023: Test in the sandbox to see if removing the comma and syncing the NZ campus names allows ordering and identify any side effects

11/13/2023: Discussion with Ex Libris around next steps. If needed, bring back next steps recommendations to SILS/CDL groups.

Development a Baseline and Documenting Current Behavior

Verify Initial Ordering Problem Exists in the Sandbox

Before we make any changes to the sandbox, we need to verify that it also demonstrates the ordering bug.

1. **SILS Operation Team** identifies three campus testers who have the correct roles and knowledge to create orders off NZ Inventory. Ideally, at least one tester would be from

UC Merced, UC Santa Barbara, or UC Santa Cruz and one would not be from any of those campuses.

- a. Jeremy Whitt (UCLA), Sarah Sheets (UCM), and Tamara Pilko (UCSC) will be our testers.
2. **CDL Shared Collections** will identify two collections for each scenario:
 - a. Collection doesn't have a license attached and has NO group settings (meaning the collection is available for everyone)
 - b. Collection doesn't have a license attached AND HAS group settings including the campus trying to make the order
 - c. Collection doesn't have a license attached AND HAS group settings *excluding* the campus trying to make the order
 - d. Collection Has License attached to the collection and Has Group Settings that include the campus trying to make the order (verify campus is also listed in license)
3. The **selected campuses representatives** [will be given a spreadsheet](#) with specific information and test each of the scenarios and report back on whether or not they were able to order off NZ inventory.
4. If the sandbox exhibits the same ordering behaviors as production, we will proceed to the next step. If not, we will request that Ex Libris examine the differences between our production and sandbox environments.

Document Existing Sandbox Network Zone Alma Behavior

I recommend doing this part as a screencast (Zoom recording) so we can later prove the original behavior. According to Ex Libris, making their proposed changes may impact "available for, for E resources, search facets, Held by"

1. **Gem**: Electronic Collection/Portfolio Group Settings (check the Inventory Management Group Details config table to see if the full name was updated)
2. **Gem**: All Titles Held By (Alma Title search - even though the names aren't fully spelled out with commas in the NZ currently, IZs may be fully spelled out). We may want screenshots from NZ & IZs
3. **Gem**: Pick a campus with access to a particular collection and open it in their Primo VE (to confirm that group settings/linkages weren't broken in Primo after change - Inventory Management Group Details)
4. **CDL Shared Collections**: Negotiated License - member details

Document Existing Sandbox Institutional Zone Alma Behavior

What pre-testing should we do? Just a sample number of campuses?

1. **Campus Reps**: Primo VE behavior documentation
 - a. Check how campus and UC-wide holdings display
 - b. Any changes to search facets?

- c. How do Network Zone electronic portfolios/collections appear?
- d. Do the links for electronic Portfolios still work?
- 2. **Campus Reps:** Alma IZ Searching
 - a. Search for Network Zone titles
 - b. Search for Network Zone electronic collections and portfolios (this should be covered by the ordering testing)
 - c. How do the search facets display?
 - d. Confirm combined search work as expected?

Making the Requested Change

For **UC Merced, UC Santa Barbara, and UC Santa Cruz OT**

1. In your sandbox, go to Configuration Menu > General > Libraries > Add a Library or Edit Library Information
2. Remove the comma from the Organization unit name and Save

Gem will then notify Ex Libris that the change has been made, Ex Libris will update the NZ Configuration Table. At this point, we'll be ready to test the change.

After Change Testing

Testing Non-Order Functionality in the Sandbox

1. **Campus Reps:** Does this change impact the campus Primo VE?
 - a. Check how campus and UC-wide holdings display
 - b. Any changes to search facets?
 - c. How do Network Zone electronic portfolios/collections appear?
 - d. Do the links for electronic Portfolios still work?
2. **Campus Reps:** Alma IZ Searching
 - a. Search for Network Zone titles
 - b. Search for Network Zone electronic collections and portfolios
 - c. How do the search facets display?
 - d. Does combined search work as expected?
3. NZ testing
 - a. **Gem:** Electronic Collection/Portfolio Group Settings (check the Inventory Management Group Details config table to see if the full name was updated)
 - b. **Gem:** All Titles Held By (Alma Title search - even though the names aren't fully spelled out with commas in the NZ currently, IZs may be fully spelled out). We may want screenshots from NZ & IZs
 - c. **Gem:** Pick a campus with access to a particular collection and open it in their Primo VE (to confirm that group settings/linkages weren't broken in Primo after change - Inventory Management Group Details)
 - d. **Gem:** Post to Discovery Slack so members can look over Primo VE pages. Pay particular attention to the campus facets.

- e. **CDL Shared Collections:** Negotiated License - member details

Testing Order Functionality in the Sandbox

1. **Campus Reps:** Using the collections identified for pre-testing which include:
 - a. Collection doesn't have a license attached and has NO group settings (meaning the collection is available for everyone)
 - b. Collection doesn't have a license attached AND HAS group settings including the campus trying to make the order
 - c. Collection doesn't have a license attached AND HAS group settings *excluding* the campus trying to make the order
 - d. Collection Has License attached to the collection and Has Group Settings that include the campus trying to make the order
2. The selected campuses will test each of the scenarios and report back on whether or not they were able to order off NZ inventory.

Limitations of Sandbox Testing

- We cannot verify any impacts this change would have on Analytics
- It does not seem like custom Primo VE domains would be impacted but I don't believe we can test those in the sandbox

Next Steps

- After testing has been completed, SILS Operation Center will discuss next steps for troubleshooting the remaining production IZ/NZ ordering issue with Ex Libris and report back to CDL Shared Collections and relevant SILS groups.
- In addition, assuming there are no negative impacts of making these changes in the sandbox, SILS Operation Team may wish to discuss making this change in production, regardless of IZ/NZ ordering functionality, given Ex Libris development feels the NZ Configuration table and IZ Organization Unit Name being out of sync is a problem.