



VERDE VERSION 2.0

Verde Pre-Production Checklist

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Introduction

Being “in production” with Verde can mean something different at each site. Some sites have a minimal definition of production, while others complete many additional areas of Verde setup before going into production. Regardless of your definition, this document describes the recommended actions to be taken in order to start working effectively with Verde.

1. Staff authorizations

Think about: Which staff members are going to work with Verde? What are their responsibilities? What authorizations will be granted to those people in Verde?

Action: Define Verde User accounts with appropriate authorizations for your library staff. Consortia sites may allow read-only access to the consortia members through guest profiles. Practice creating staff user records in the test instance before you start working in the production instance.

[Related document: see section 3.1 – Users and section 3.2 – Profiles – in the Verde User Guide]

2. Library Organizational Structure

Think about: What is the best way to reflect your library structure in Verde? What roles should be assigned to library contacts?

Action: Define your library organizational structure and contacts in the Verde libraries file. Remember that e-products and their attributes are shared by all administrative units participating in the instance, and that the library structure must include at least one institute-level record. Keep in mind that Verde libraries must be defined in parallel with SFX and Aleph. SFX institutes and relevant Aleph sub-libraries/order units must be defined as institutes in Verde (library code in Verde must match Aleph sub-library code). Remember that contact roles are functional within Verde to filter contacts look-up lists appropriately. Practice creating library records in the test instance before you start working in the production instance.

[Related document: see section 2.17 – Libraries – in the Verde User Guide]

3. External Organizations and Contacts

Think about: Study the Verde organization record structure, and think about the most efficient way to store organizations (vendors, interface providers, licensors, licensing agents, etc.) and contacts data in the system.

Action: Practice creating organization and contacts records in the test instance before working in the production instance.

Think about: Does your library have organizations or contacts information in electronic format? If so, explore the possibilities of loading this information into

Verde. If no electronic data is available, collect all information necessary for manual data entry.

Action: If you are going to load organizations information, consult the document *Loading ORG, ACQ and PRINT data from ILS* (for non-ALEPH customers) or *ALEPH-Verde Interoperability* (for ALEPH customers), and prepare the import file in the required format. It is recommended to verify with your Ex Libris project manager that the file structure is correct. Test loading the file into the test instance before loading to the production instance.

[Related documents: see Loading ORG, ACQ and PRINT data from ILS, ALEPH-Verde Interoperability, and section 2.16 – Organizations – in the Verde User Guide]

4. Library Workflow Reflected in Verde Setup

Think about: Analyze your library's workflow. Think about the following:

- a. What are the stages of e-product selection and implementation?
- b. Take several e-products, and drive them through all selection and implementation stages, such as trial, licensing and price negotiation, activation, review, etc.
- c. Make sure that your library's workflow stages are fully and clearly reflected by the Verde e-product selection and implementation statuses. If there is a need to change the names of the statuses, think about self-explanatory definitions. Note: All pull-down menus can be customized in this manner.
- d. Decide if you have a need to catalog local information in the Work records. If so, it may be useful to rename the 'Local 1/2/3 – 9' fields in the work records.
- e. Compare Verde's workflows with your own workflows and determine if any changes are required. Many aspects of Verde workflows can be customized.

Action: If changes to pull-down menus or local fields are required, perform them with the help of the **Admin > Code Tables** module. If workflow customization is needed, consult with your Verde Implementation Librarian.

[Related documents: see Verde 2.0 Workflows Guide and section 3.4.1 – Updating a Code Table – in the Verde User Guide]

5. Loading Library's Holdings into Verde

Think about: Loading of SFX active holdings provides a fast track to Verde implementation.

Action: SFX holdings from the SFX production region should be loaded (or re-loaded) into your Verde production region just before going into production. Contact your Verde Implementation Librarian to schedule this load, and check the results of the load after it takes place.

Think about: E-resources that are not represented in the SFX and Verde KnowledgeBase will need to be added locally to Verde.

Action: Collect information about non-SFX e-resources which must be reflected in Verde. Study the Verde e-product data structure, and make sure you know how to populate this data. Practice creating and activating work and e-product records in the test instance before working in the production instance.

[Related documents: see section 2.2.3 – Quick Add, section 2.3.1 – Adding New Work Records, section 2.6.1 – Adding New e-Product Records, and section 3.3.5 – Localization – in the Verde User Guide]

6. Populating Acquisitions Data

Think about: Verde is not a full fledged acquisitions system. It keeps acquisition data, in order to provide a full overview of electronic resources management. The customers will continue managing acquisitions in their library or financial systems, and will update Verde acquisition records either with the help of the periodical loads, or manually. ALEPH users will enjoy close (online and batch) interaction between Verde and ALEPH. Study the Verde acquisition record data structure, and think about the most efficient way to store acquisitions data in the system.

Action: Practice creating and working with acquisition records in the test instance. ALEPH users can practice online interaction between Verde and ALEPH in the test environment.

Think about: Do you have acquisitions data in electronic format? If so, you can establish a procedure of periodic loads, which will update acquisition data stored in Verde. Note, acquisition data must be submitted in a standard format (XML, XLS or CSV) in order to enable loads.

Action: ALEPH provides batch utilities allowing the extraction of acquisitions data in the Verde compliant format. Non-ALEPH customers are requested to reformat data in order to enable batch updates functionality. Test loading the file into the test instance before loading to the production instance.

Think about: Verde can contain information about both electronic and print subscriptions. Load or manual creation of print subscriptions will result in creation of the e-products of type e-print in the Verde local KnowledgeBase.

Action: Go through the scenarios of managing print bundled with electronic subscriptions and decide if it would be helpful to represent print journals in Verde. If your decision is positive, think of the possible ways to enter print subscriptions information to Verde. ALEPH customers can extract the data with the help of the standard utilities, and load it into Verde. Non-ALEPH users will need to prepare an XML input file. The Verde KB Manager module provides utilities for manual creation of e-print and associated records.

[Related documents: Loading ORG, ACQ and PRINT data from ILS (for non-ALEPH users), ALEPH-Verde Interoperability (for ALEPH users) and section 5.6.2 – Acquisitions Loader – in the Verde User Guide]

7. Populating License Data

Think about: Study the Verde license data structure, and think about the most efficient way to store license data in the system.

Action: Practice creating and working with license records in the test instance. If your library creates many similar licenses it would be helpful to define license defaults (with the help of the **Admin > Default Values** module).

Think about: Does your library have license data in electronic format? Would it be beneficial to load this data? If the answer is positive, consider using Verde's license loader.

Action: Convert license data to the standard Verde format. Discuss loading this data with your Verde Implementation Librarian. Test loading the file into the test instance before loading to the production instance.

[Related documents: section 2.0 – License, section 3.5 – Default Values, and section 5.6.3 – License Loader – in the Verde User Guide]

8. Verde < -- > SFX

Think about: The test instance of your Verde installation is linked to your SFX test instance. Verde and SFX must be configured to interact – the Verde setup is performed by Ex Libris, the SFX setup must be performed by the customer. The following must be fully functional:

- a. Link to SFX resource from Verde (Open URL)
- b. Deeplink to SFX Admin Center from Verde
- c. Activate and/or deactivate resources in Verde, synchronization programs in Verde and SFX update SFX accordingly
- d. Update local holdings in Verde, synchronization programs in Verde and SFX update SFX accordingly (results in modification of SFX local thresholds)
- e. Update active libraries for an e-product in Verde, synchronization programs in Verde and SFX update SFX accordingly
- f. Flag Verde resource as temporarily unavailable, Verde sends the data to SFX
- g. Display SFX access information in Verde
- h. Display license information and administrative information stored in Verde in the SFX menu

Action: Configure the SFX test instance to interact with the Verde test instance. Test Verde – SFX interoperability features in the test environment.

Think about: *Link to SFX resource* and *Deeplink to SFX Admin Center* are enabled in the Verde production instance. *Update SFX* from the Verde production instance will be disabled until you are comfortable with the system, and approach the production stage.

Action: Notify your Verde Implementation Librarian when you are ready to activate the *Update SFX* function in the Verde production instance. Configure the SFX production instance to interact with the Verde production instance. Access the Verde production instance, use the links and updates to the SFX production instance and make sure you are satisfied with the way the functions are working.

Think about: SFX displays information from Verde to end users, using the ‘i’ button on the SFX services menu. It is possible to display license data, hardware and software requirements, and local notes, after SFX is configured to interact with Verde.

Action: Configure the SFX test instance to display the ‘i’ button, and test the results to make sure that Verde data is properly displayed on the SFX menu. When you are ready to use the Verde production instance, perform the same configuration on the SFX production instance.

[Related documents: see [Configuring SFX to Show Information from Verde](#), [Verde-SFX Synchronization](#), and [section 2.18.1 – Verde and SFX – in the Verde User Guide](#)]

9. Verde < -- > ALEPH

Think about: If your site uses ALEPH, the test instance of your Verde installation is linked to your ALEPH test environment. Verde and ALEPH must be configured to interact – the Verde setup is performed by Ex Libris, the ALEPH setup must be performed by the customer. The following must be fully functional:

- a. Ask ALEPH – display information from ALEPH in Verde
- b. Update ALEPH – create and cancel acquisition records in ALEPH from Verde
- c. Ask Verde – display information from Verde in ALEPH
- d. Jump to Verde – deeplink to the corresponding area of Verde from ALEPH

Action: Configure the ALEPH test environment to interact with the Verde test instance. Test Verde – ALEPH interoperability features.

Think about: Links from the Verde production region to the ALEPH production region will be disabled until you are comfortable with the system, and approach the production stage.

Action: Notify your Verde Implementation Librarian when you are ready to activate Verde-ALEPH interaction in the Verde production region. Configure the ALEPH production environment to interact with the Verde production instance. Access the production environments of both systems and make sure you are satisfied with the way linking and update functions are working.

[Related document: [ALEPH-Verde Interoperability](#)]

10. Print and Mail

Make sure that you gain expected results when e-mails are sent from the system, and that print jobs are initiated.

11. Batch reports and tasks

Think about: Decide with which frequency batch reports and tasks such as Trial Participants Alerts, Subscription Renewal, etc. must be run in Verde.

Action: Use the KB Tools task and report schedulers to configure periodic running of batch processes. Practice running and scheduling tasks and reports in the test instance before working in the production instance.

[Related document: section 5 – KB Tools – in the Verde User Guide]

12. Backup and recovery

Think about: Ex Libris recommends that customers use third party backup tools to accomplish software and Oracle data backups. Basic backup tools can be provided with the Verde system to be used in case the customer does not prefer to use their institutional backup tools.

Action: Test backup and recovery mechanism. If no internal backup tools exist, contact your Verde Implementation Librarian for more information about the Ex Libris backup utility.

[Related document: Verde System Administrator Guide]