

Customer Implementation Form

Customer:

Customer Code:

Project Manager:

Email To:



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# Introduction

Dear Esploro Customer,

This questionnaire is designed to help the Implementation Consultants at Ex Libris evaluate your current environment and provide you with the most suitable implementation for your current and future needs. Please complete this questionnaire as fully and accurately as possible.

If you have any questions about completing this questionnaire, contact your Ex Libris Account Manager. Once you have completed the questionnaire, send it back to your Ex Libris Account Manager.

Thank You.

# General Questions

|  |  |  |
| --- | --- | --- |
| 1 | Describe your current workflow(s) for adding research assets to the repository/ies (e.g. batch load, staff mediated deposit, end user deposit, review/approval, etc.) |  |
| **2** | 1. Describe your current workflow(s) for adding ETD (electronic theses and dissertations) to your research repository. If you do not plan to manage your ETD in Esploro, please indicate this.
 |  |
| 1. Do you currently use ProQuest ETD Administrator in your ETD submission and approval process?
 |  |
| **3** | After going live with Esploro, will you continue depositing research assets in non-Esploro systems and want to import them to Esploro? If so, please list the non-Esploro system(s). |  |
| **4** | Do you mint DOIs for your research assets?* If yes, what DOI registration agency/ies do you work with?
 |  |
| **5** | Upon go live, your Esploro research assets will be published to your Esploro Research Portal.* Do you plan to publish your research assets to additional external sites or systems (e.g. Google Scholar)?
* Do you plan to publish your research assets to your library’s Primo?
 |  |
| **6** | Indicate whether your organization is planning any projects that can either impact the Esploro implementation timeline or introduce dependencies into Esploro implementation planning. |  |

# Research Repositories and Assets

|  |
| --- |
| Research Repositories |
| Please answer each question with the requested information. You may find it helpful to refer to the document [Getting Ready for Esploro Implementation](https://knowledge.exlibrisgroup.com/Esploro/Implementation_and_Migration), available in the Ex Libris Knowledge Center. |
| **Repository System to be Migrated to Esploro** | **Will you require ongoing import to Esploro after initial migration? (Y/N)** | **If your system is accessible via OAI, please provide the base URL (For actual migration, you will be asked to provide an extract of all your data – metadata, file streams, access rights, etc.)** | **Approximate Number of Assets** | **Asset may contain files in addition to metadata? (Y/N)** | **File sizes (approximate total of all files per asset type)** |
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# Additional Data Migration Questions

| **Organization Units** |
| --- |
| Ex Libris will provide you with format requirements for organization units extraction (see [Getting Ready for Esploro Implementation](https://knowledge.exlibrisgroup.com/Esploro/Implementation_and_Migration)). Please answer the following questions: |
| **1** | How do you plan to create Organization Units in Esploro?[ ]  Provide Ex Libris with input: XML or via spreadsheet. (This is the preferred method) [ ]  Manually via the Esploro user interface (UI)[ ]  Other (please explain) |       |
| **2** | Are there any specific issues that you would like Ex Libris to be aware of concerning organization units? |       |

| **Researchers** |
| --- |
| **1** | Do your researchers have individual profiles in Pivot? |  |
| **2** | Which systems are used today to store information about researchers? |  |
| **3** | 1. Can you provide a list of the Alma primary identifiers for your institution’s researchers in advance of the implementation project?
 |  |
| 1. If not, can your researchers be identified as such by Alma user group?
 |  |
| 1. If so, what user group(s) may contain researchers?
 |  |
| 4 | Are there any specific issues that you would like Ex Libris to be aware of concerning researchers? |  |

# Esploro Project Team Information

Please refer to the [Getting Ready for Esploro Implementation](https://knowledge.exlibrisgroup.com/Esploro/Implementation_and_Migration) document, available in the Ex Libris Knowledge Center, for a description of the roles and responsibilities of your Esploro implementation team members.

## Team Member Contact Information

Provide the contact information for each member of your Esploro project team.

| Name | Title and Role | Email | Phone Number | Requires Support Portal Access? |
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