New ILS Directions: Open Source Options and Consortial Implementaion

The Orbis Cascade Alliance Implementation of Ex Libris' Alma and Primo

Susan Hinken, Head, Technical and Collection Services
University of Portland

Xan Arch, Director of Collection Services
Reed College

OLA/WLA 2013

ORBIS CASCADE ALLIANCE

Orbis Cascade Alliance

- 37 member libraries
- Idaho, Oregon, Washington
- Serves approximately 258,000 students
- Extends support services to more than 280 institutions in seven western states
- Long history of collaboration and building relationships among members and vendor partners

ORBIS CASCADE ALLIANCE

Alliance Programs

- Shared Alliance collection
- Direct patron borrowing
- Electronic Resources purchasing
- Courier service
- Northwest Digital Archives
- Digital Services
- Collaborative Collection development efforts
  - *Collection threshold*
  - *Last copy*
  - *DDA eBook program*
- Collaborative technical services efforts
  - *Distributed cataloging pilot*
  - *Cataloging mandates*

ORBIS CASCADE ALLIANCE

Shared ILS background

- 2009: Shared Bibliographic Database Task Force declared the shared ILS is "…the vision for the future but might be a bridge too far."
- 2010: Shared Integrated Library System Team
- 2011: Shared ILS Team issues RFI
- 2012: Shared ILS Team issues RFP
- 2012: July 13 Alliance Council votes to implement shared ILS
- 2012: October 9 an agreement between Ex Libris and the Alliance is announced

ORBIS CASCADE ALLIANCE

Move to a fully integrated platform

- Alma (backend):
  - *Acquisitions*
  - *Cataloging*
  - *Serials management*
  - *Fulfillment*
- Primo (front end):
  - *Discovery*
  - *Link resolver*
  - *Primo Central knowledgebase*

ORBIS CASCADE ALLIANCE

Implementation

- Implementing in 4 cohorts from July 2013 to January 2015
- Member of Alliance staff serves as Implementation Manager
- Shared Implementation Team staffed by member libraries
- 8 working groups, each facilitating migration in a functional area
- Each member library has a local implementation coordinator
- Each member library has a liaison to each working group

ORBIS CASCADE ALLIANCE

Functional areas

- Cataloging
- Acquisitions
- Fulfillment
- Serials/ERM
- Discovery
- Systems
- Collaborative collection development
- Training

ORBIS CASCADE ALLIANCE

Cohort one

- University of Washington
- Willamette University
- Western Washington University
- Linfield College
- Marylhurst College
- Pacific University

ORBIS CASCADE ALLIANCE

Collaborative efforts as the project begins

- Implementation as the single biggest effort
- The creation of the Network Zone
- Providing access using restricted MARC vendor records
- Surveys to determine current acquisitions and cataloging practices
- Training plans, FAQs, and documents
- Shared load profiles and record coding—in the planning stages

ORBIS CASCADE ALLIANCE

Opportunities for collaboration in the new system

- Rethinking workflows
- Viewing consortia holdings at the point of order
- Cross-institutional analytics
- Sharing a discovery service

ORBIS CASCADE ALLIANCE

New possibilities

- Shared approval plans
- Sharing difficult cataloging
- Point of need reporting

ORBIS CASCADE ALLIANCE

More information

http://www.orbiscascade.org/index/shared-ils-implementation

ORBIS CASCADE ALLIANCE