I-SHARE NEXT UPDATE

Kristine Hammerstrand

CARLI Annual Meeting 2018

CARLI has operated Voyager (I-Share) since 2002

We currently have 91 I-Share libraries

Voyager is still being developed and supported by Ex Libris; but Voyager is focused on managing print collections

Library collections have become increasingly focused on electronic resources

CARLI Board decided to launch a search for "I-Share Next" in December 2013

CARLI I-Share Next Task Force was convened in 2014

Cindy Fuller, Millikin University

Tom Goetz, Harper College

Kristine Hammerstrand, CARLI, chair

Tammy Kuhn-Schnell, Lincoln Land Community College

Tami Luedtke, DePaul University

Michael Norman, University of Illinois at Urbana-Champaign

Ted Schwitzner, CARLI

Matthew Short, Northern Illinois University

Connie Walsh, CARLI

Suzanne Wilson, Illinois Wesleyan University

Pat Boze, Illinois State Library (retired, May 2017)

Anita Foster, Illinois State University (left ISU, December 2015)

CARLI, as a unit of the University of Illinois, works with the UI Purchasing staff and Illinois State Procurement Officers (SPO) on major purchases to assure fair and open processes and compliance with University and State rules

Purchases for products over $100,000 require a bid process, i.e., vendors respond to a Request for Proposals (RFP)

While we can draft our own requirements and preferences that go into an RFP, the RFP must be reviewed and approved by UI Purchasing and the SPO before it can be "posted" to the official IL Higher Ed Procurement website

All contact with prospective vendors about the RFP is handled by UI Purchasing during a procurement

While we knew we wanted a product that would more effectively manage e-resources, we had some big picture questions to address when writing specifications:

– Should we stick with running the system on servers we manage or move to a vendor/cloud hosted solution?

– Could we welcome a bid for an open source product that would include CARLI development work?

– Could we leverage the work CARLI had been doing on the XC and VuFind open source products with the selected product?

ISNTF originally planned to allow vendors to bid both local and vendor hosted models that we could compare for cost and functionality

The State Procurement Officer informed us we could not accept more than one bid from any one vendor

This, along with the increasing trend of vendors to offer only cloud-hosted solutions led us to eliminate the option for vendors to bid CARLI-hosted model

This required a significant re-write of the RFP draft, and took more time

We wanted to compare the pros and cons of open source and vendor proprietary software solutions

UI Purchasing and the SPO would allow RFP responses from organizations that wanted to submit a bid for providing services for an open source software solution

ISN RFP posted 11/2017; responses received 1/2018

The ISNTF reviewed and scored the following:

- Functionality descriptions

- Functionality follow up question responses

- Product demonstration

- Product demonstration follow up question responses

- Pricing bids

- Pricing follow up question responses

- Best and final offer pricing responses

Bid Evaluation conclusion: Ex Libris' Alma bid was the clear best choice for CARLI's I-Share Next

Alma is a product from Ex Libris, which is now a ProQuest company

It is not an upgrade of Voyager; it is a whole new product

Alma is in use at several other large consortia including

> GALILEO (Georgia)
>
> Orbis Cascade (Washington/Oregon/Idaho)
>
> University of Wisconsin system
>
> California State University System
> Washington (DC) Research Library Consortium
>
> SUNY system (New York—in implementation now)
>
> Many other major research libraries and consortia

It's web-based; no more loading Voyager clients on PCs!

It's vendor-hosted in a model called multi-tenant which means that all customers are always on the same software version

Ex Libris updates it monthly with new features and fixes

It supports consortial resource sharing; both onsite borrowing and remote requesting

It provides a union catalog through a component called the "Alma Network Zone"

The Alma Network Zone allows consortial sharing of bib records, e-resource packages, and some policy settings

Coordinate the Voyager data migration and Alma system implementation with Ex Libris and library staff

Provide ongoing user support and training, coordinate consortial policies through the Alma Network Zone

Test monthly software releases, report issues, and advocate for enhancements

Continue to assist with batch data loads/updates/deletes

Continue to assist libraries integrating third party products with Alma, e.g., RFID systems, cover image services, shelving mapping tools, self-check systems, etc.

Voyager for all 91 I-Share libraries

SFX for the CARLI libraries that use it with Voyager

– All I-Share libraries will move to Alma and then CARLI will decommission Voyager and SFX

Whatever you use for e-resource management, e.g., 360, Coral, Verde, or maybe even just some Excel spreadsheets

Also…a surprise…

Ex Libris has included their new version of their discovery service Primo, "Primo VE" and its central index along with Alma!

CARLI's RFP was for staff functionality only, we did not require vendors to include a public interface, or central index

We intended to continue to provide VuFind with I-Share Next and had made interoperability with VuFind a requirement

We will continue to run VuFind with Voyager but will move to Primo VE when we implement Alma, and will discontinue VuFind at that time

We have predictable Alma pricing for 10 years!

All one-time costs (data migration and implementation) will be paid by CARLI, using reserve funds set aside for this purpose

Libraries' annual I-Share assessments will cover the annual fees and allow for reserve replenishment with modest increases over the previous year:

FY 2019 assessments	+5%
FY 2020 assessments	+7%
FY 2021 assessments	+4.5%

Assessments for FY 2022 and beyond will be set by a new CARLI Funding Task Force in spring 2019

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This is all still a work in process; a formal project timeline will be negotiated with Ex Libris as part of contract negotiations

Most Alma and Primo training is online on the Ex Libris site and you will be able to train at your own pace; CARLI will also provide training resources, guidance, and events; there will be some test "sand boxes" for experimentation

Data migration will involve testing and review followed by cutover

All 91 libraries will move to Alma in a relatively short interval, so as not to disrupt resource sharing any longer than needed

We expect all 91 libraries to be live on Alma in 2020

Each I-Share library will need a designated "primary contact" person; this will be your I-Share liaison unless your library wishes to designate otherwise

Alma makes use of Single Sign-on; if you have not yet deployed single sign-on with New VuFind, you will want to begin to explore what options your campus has for it

Start doing an inventory of all the services and products you interface with Voyager (e.g., data "feeds" to Bursar systems, self-check stations, ….)

Watch for CARLI emails and website updates as the project gets started

Plan for change!

Let's take a peek at Alma!

Note: This is a generic Ex Libris video that will give you a first look at the Alma product; much of the look and feel, access settings and display options can and will be customized by CARLI and I-Share libraries

This video runs 4min 6sec

https://www.youtube.com/watch?v=IWVXjfVtV_8

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