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
WHAT TASKS WILL THE CARLI OFFICE STAFF PERFORM WITH ALMA?

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/uploads/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.
WHICH SYSTEMS DOES ALMA REPLACE?

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…
ALMA COMES WITH PRIMO VE THAT CAN REPLACE VUFIND

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.
TIMELINE AND IMPLEMENTATION

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=lWVXjfVtV_8