

# New ILS / LMS Selection

Target migration date: Summer 2018

Timeline

## Selection Committee

1st Committee member (11-12 people) for needs assessment

- dean of lib
- tech services
  - Jonathan
  - Nina
  - Curtis
- circ / access services
  - Sharon
  - Elise
- assessment - Jackie
- ref
  - Christian
  - Jeremiah
- tech dept
  - Wit
  - Robert
- NOTE: after the "baby RFP" document has been created (July 31), committee members can opt-out and become "less involved" if they so choose. The final committee must have at least one person from each area.

2nd Committee member for selection (7 people)

## Requirements

overarching: combine e-resource & print. reduce data load. streamline workflow.

### Acq

- "talk" to Banner
- use Electronic Invoices (EDI) as much as possible
- ebooks subscribe vs purchase
- able to handle those weird acq stuffs like "one bib/order record but receive item catalog separately" e.g. those Brooking institute books
- standing order / approval plan
- Serials

### Cat

- OCLC copy cataloging
- ??

### Circ

- better patron load?
- loan rules
  - end of semester date
- request: hold & recall
- inventory / mobile circ

### Ref

- understandable relevancy algorithm
- email / sms record to user

## E-Resources

- quality of KB
- basically compare our current 360 suites to the new system
- Wit
  - how does ebooks records work?
    - Proquest own like EbookCentral
    - Non Proquest e.g. Ebsco - those add, insert, delete

## Reserves

- request item to be put on reserve right from the web
- better stats
- ILL: NCIP, ILLiad integration?

## Web interface

- responsive
- ada
- customizable
- MUST have API
- MUST support LDAP login, IDEALLY support CAS, SAML 2.0

## Quick overview

Alma (ExLibris): <http://discoveralma.com>

- View the Alma courses by visiting <http://www.exlibrisgroup.com/category/AlmaForEveryLibrarian> Once there, to view the individual videos, enter the password: alma4you
- UCONN went live around June 2015

WMS (OCLC): <https://www.oclc.org/worldshare-management-services.en.html>

BlueCloud (SirsiDynix) <http://www.sirsidynix.com/lsp> (a lot of module still "coming soon")

## Sample RFP

- CSU (picked ExLibris: Alma / Primo) see CSU's RFP
- <https://www.loudoun.gov/DocumentCenter/View/110110>
- RFQ
  - [http://www.champaign.org/resources/pdfs/CPL\\_UFL\\_ILS\\_RFQ.pdf](http://www.champaign.org/resources/pdfs/CPL_UFL_ILS_RFQ.pdf)

## TODO

- form a committee
- need assessment
  - talk about the whole current workflow, so everybody understands the big picture
  - good & bad of current systems / workflow
  - what we want to achieve with the new system(s)
  - create
  - a baby RFP (RFQ?)
    - we're not doing a full RFP process, this document is mainly for us; so we know what we want
  - a scoring criteria / rubrics
    - 1-10 scale
    - each can have a different weight
- first round of demo (5-6 vendors)
- 2nd round demo (down to 2 vendors?)
- decision by end of Nov 15!!!!

Stuffs

- systems we're looking to replace (the new system must be able to do...)
  - Millennium ILS
  - 360 Links
  - 360 ERM / Counter
  - Summon (if needed)
- Budget
  - No more than 5% of what we pay for current systems we're replacing
  - yearly increase? no more than 5% ? (current iii = 5%)

#### Scoring Criteria

- do it for current system / workflow first
- then compare

#### Random Bookmarks

- <https://calstate.atlassian.net/wiki/display/ULMS/Unified+Library+Management+System>

#### CSCU

- Alma <https://cscu-ccsu.alma.exlibrisgroup.com/mng/login>
- Primo [https://cscu-ccsu-primo.hosted.exlibrisgroup.com/primo-explore/search?vid=CCSU\\_V1&lang=en\\_US](https://cscu-ccsu-primo.hosted.exlibrisgroup.com/primo-explore/search?vid=CCSU_V1&lang=en_US)