Unified Library Management System

COLD Meeting, October 2015

Overview

1. Project update
2. Face-to-face meetings
3. Stipend campus survey
4. Resource sharing discussion

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1. Project update

Staying up-to-date on the project

- Project website: ulms.calstate.edu
- Bi-weekly emails
- Contact Alice with any questions

Since we last met

- Leads meeting (Sept. 10)
- Kick-off meeting (Oct. 5-6)
- Vanguard phase has begun
- Authentication & PeopleSoft integration
- Wrapping up hiring two new positions

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2. Face-to-face meetings

Working Groups

Advice to Leads about how to obtain support from deans to make a f2f meeting a success

1. Agenda: topics and time allocated
2. Keep costs down: consider type, location length of meeting
3. Attendees: who can and should attend
4. Live-streaming or recording vs. f2f

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Coordination and Consultation

- ULMS Implementation Team
  - Gauge interest from Working Groups
  - Facilitate and integrate into the overall meeting schedule
- COLD will be apprised of the meeting.
- Each dean decides who will attend from their library.

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3. Stipend campus survey

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Nineteen responses

- Stipend
  - Yes: 5
  - No: 11
  - Undecided: 3
- Project Manager rank
  - MPP: 5
  - Librarian: 9
  - ITC: 3
  - LSS: 2

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4. Resource Sharing

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For COLD's consideration

- ECC purchasing – centrally managed or locally managed?
- E-resource licensing – centrally or locally managed?
- E-Resource portfolio management of non-ECC material – centrally, collaboratively, or locally managed?
- Resource sharing – what options to select and to configure?
- Enable walk-in or direct requesting?
  - Enable "pick-up anywhere"?
  - Enable "return anywhere"?
- How much to administer centrally
  - Resource sharing
  - Cataloging rules
  - Vendors & licenses
  - Fulfillment policies

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Resource Sharing

- Definition: "Resources shared amongst network members through requesting and receiving or physical, digitized or printed copies owned by any network member"
- Interaction between patron and owning institution
- Broker model: OCLC Navigator or double-entry in ILL system and Alma
- Peer to Peer: Uses NCIP or ISO 10160/10161 messaging. Uses Rota system to manage suppliers for requesting

Resource Sharing (cont)

- What systems to integrate with Alma?
  - OCLC Network
  - INN-reach (Link+, CIRCUIT)
  - ILLiad
  - Articlereach
  - RapidILL
  - Get It Now
  - LOGIC

Alma Resource Sharing Decisions

- Decisions for COLD by March 2016
  - Readiness to share materials
  - Agreement on fulfillment (circ) policies for shared materials
  - Agreement on rota management
  - Agreement to share patron information (depends on fulfillment network model we choose)

Fulfillment Network

- Definition: "'Special flavor' of resource sharing, where patrons of network members can request and borrow from other network members directly"
- Walk-in: Patron from institution A walks into institution B and requests an item from institution B
  - Patron record is copied from institution A, fulfillment processes from institution B are used for loan terms
- Direct requesting: Patron from institution A may request materials from institution B
  - Requires central authentication system & unified discovery view
- Either choice can allow items to be returned or picked up from any member institution, configurable by the owning institution

INN-Reach (Link+, Circuit)

- Current interface with Alma through DCB (Direct Consortial Borrowing) box
  - San Marcos currently uses a DCB box
- III plans to replace with an API-based solution
  - Should be lower cost but may require custom programming to use with Alma

INN-Reach DCB quote

	Base Fee	Install	Annual Member Fee	Total Annual Fees
Current Link+ Libraries	46,800	251,600	102,000	148,800
Entire CSU	46,800	520,350	235,900	282,700

Suggestion

- That CRSP work with the ULMS Access Services Working Group and Implementation Team members to recommend Alma-based resource sharing options to COLD by Summer 2016

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