



BUSHY SWEET
 Mocha
 Espresso
 Cappuccino
 DRINK HOT
 MEET

COFFEE ROAST
 Mocha ROAST PERKUP HOT GREAT
 ROAST BEAN HOUSE CAFE
 Mocha Espresso
 WAKE UP ROAST ZEST
 CAPUCCINO SHOTS
 CAPPUCINO

SHOTS AMERICANO CAPUCCINO LATTE CHILL





Depth of Collaboration: Orbis Cascade Alliance

Anya N. Arnold





37 Members

Private & Public
Colleges, Universities,
Community Colleges in
Oregon, Washington,
and Idaho

Serving 280 colleges,
universities, archives,
museums in Oregon,
Washington, Idaho,
Montana, Alaska,
Hawaii, and Utah

Non-profit corporation,
8 staff, no central
funding, 20+ years.





Central Oregon Comm. College
Central Washington University
Chemeketa Community College
Clark College
Concordia University
Eastern Oregon University
Eastern Washington University
George Fox University
Lane Community College
Lewis & Clark College
Linfield College
Mt. Hood Community College
Oregon State University
Oregon Health & Science Univ.
Oregon Institute of Technology
Oregon State University
Pacific University
Portland Community College
Portland State University

Reed College
Saint Martin's University
Seattle Pacific University
Seattle University
Southern Oregon University
The Evergreen State College
University of Idaho
University of Oregon
University of Portland
University of Puget Sound
University of Washington
Walla Walla College
Warner Pacific College
Washington State University
Western Oregon University
Western Washington University
Whitman College
Willamette University

Review

- Vision not a tool
- If we envision it, they will build it
- Consensus, decisions, drafting plans
- Laying the foundation
- Building the house



Migrate 37 members to:

Ex Libris Alma and Primo Direct.



Six **BIG** projects at **ONCE!**

Legacy → Next generation

37 → 1

Acting as 1

Unified Discovery Platform

Re-Implementing Resource Sharing

Creating A New Resource Sharing



What does that mean???

We are replacing

- Integrated Library System
- Discovery Systems
- Link resolvers/knowledgebases
- Standalone proxy servers
- Electronic Resource Management systems
- Local servers



ability able acquisitions **alliance** alma already appears automatic available based batch
cataloging circulation clear **collections** con concerned CONSORTIAL control **create current**
data demo demonstrated development different **discovery** display electronic
etc **ex** example features flexible **functionality** going holdings **iii** ils important indexes
information innovative institution integration **interface** item lack level **library**
libris liked list loading **local** looks lot management millennium module multiple needs
nice number **oclc** option order **patron presentation** print process
product question really **records** reports requests reserve resource
results scenarios **search** seems **serials** services shared sierra
solutions staff support **system** think understand useful
user vendor work workflows worldcat years

Created by: Wade Guidy, University of Puget Sound



Building the House

Sept 2012

Project manager begins
Appointments to Working Groups made
Contract with Ex Libris signed

Oct-Dec 2012

Shared ILS Team begins work
Cohorts finalized
Pre-Implementation planning with Ex Libris begins

Jan-June 2013

Kick Off Meeting
Data migration
System configuration
Training



Building the House



June 2013

Cohort 1 went live!

Dec 2014

Cohort 2 went live!

June 2014

Cohort 3 went live!

Jan 2015

Cohort 4 WILL GO live!

Jan 2015

Resource Sharing Migration WILL GO live!



Overall



Laying the Foundation

- ✓ Extracted sample data for Ex Libris analysis
- ✓ Turned in Cohort 1-4 Alma Customer Information Forms
- ✓ Developed a basic understanding of system architecture and functionality
- ✓ Decided on how to build the Network Zone
- ✓ Decided to migrate acquisitions and ERM data
- ✓ Turned in all Alma migration forms



Laying the Foundation

- ✓ Cohort 1-4 data extraction
- ✓ Alma Sandbox environments for Cohort 1-3
- ✓ Basic WebEx based training
- ✓ Summit (NRE) Integration testing and collaboration
- ✓ Functional workshop training
- ✓ Decided on specific go live dates for Cohort 4



Laying the Foundation

- ✓ Testing, Testing, Testing
- ✓ Turning in Cohort 1-4 Primo configuration forms
- ✓ NCIP between OCLC and Ex Libris
- ✓ Created Cutover documentation
- ✓ Created marketing plans



Drafting Plans

Working together

Project management in a many-to-many environment

Developing new talent and avoiding burn out

Shock of the New

Concepts

Data structures

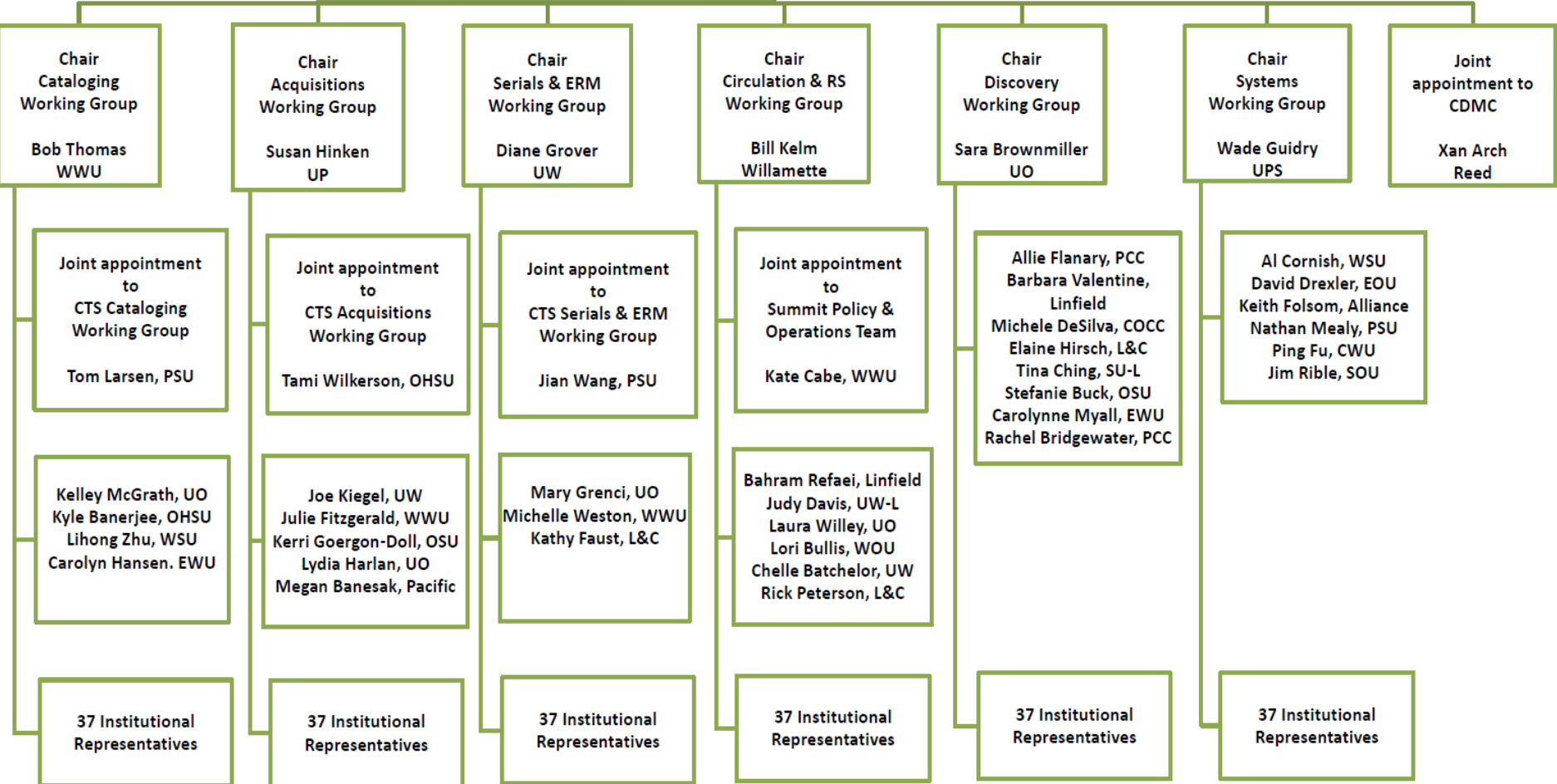
Vocabulary

Capabilities

Working relationships (libraries, vendors)



Shared ILS Implementation Team



Communicating the WHY?

Not an end in itself

... because of the past

... because of the future



The past ...

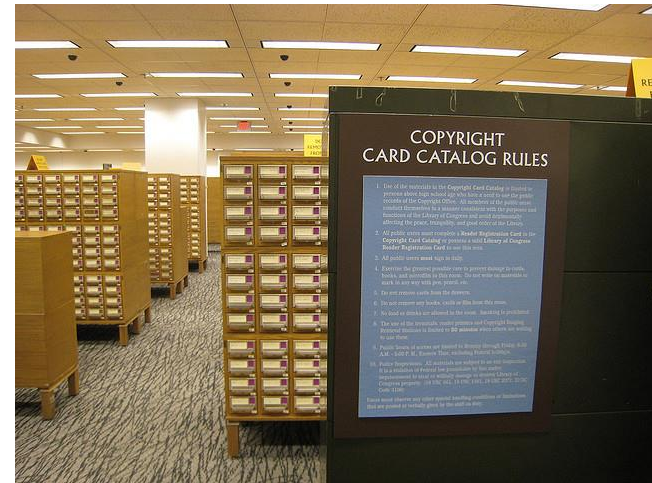
Legacy systems

Based on limited bandwidth, storage, lack of standards

Lagging functionality

Hard to :

- Innovate
- Integrate
- Extract data



The future ...

Better services for students, faculty, staff

Improved resource sharing ... a better Summit

Improved staff tools

New opportunities, enabling

- Collaborative Technical Services
- Vision of “one collection”

New options

Alma, Intota, Sierra, WMS, etc.



Communication

Email Lists internal to Alliance Members

Google Docs

Shared ILS Docs

GoToMeeting—

biweekly and weekly for each area

In person meetings



Communication-Ex Libris

Joint email list

WebEx meetings –

scheduled weekly, sometimes more...



Communication – Face to Face



“The price of
inaction is far
GREATER
than the cost
of making a
MISTAKE.”

Meister Eckhart



Consensus

- What do we want?
- When do we want it?
- Who is going to get us there?



Envision

- What do we want to accomplish.... Why
 - 20 years ago
 - 3 years ago
 - Today
- Is there a shared and unified understanding of that vision?
 - Game of telephone
 - Plato's Forms





Learning is
a gift.
Even when pain
is your teacher.





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