Description and Charge for the ILS Coordination Team

**Description:** Over the next 18-24 months, the Library will be migrating from the current Integrated Library System (ILS) Voyager to Alma, Ex Libris’ cloud-hosted library management system. The Library will create a new working group, the ILS Coordination Team, to coordinate the implementation of the Alma/Primo systems. Working with individuals at the Consortium of Academic Research Libraries (CARLI), Ex Libris project managers, and other members of the Library, the ILS Coordination Team will define and help configure the functional workflows, tasks, best practices, and services of the Alma/Primo systems. The Team will also work to implement and configure the Primo Discovery system as the public interface of the Library's online catalog and local digital collections.

**Charge:** The ILS Coordination Team will oversee the implementation of Alma/Primo to have it ready to utilize by all Library employees by the defined Go-Live date of summer 2020. The Team will be responsible for configuring the ILS system for successful use by Library personnel to acquire, catalog, manage, inventory, and share/utilize the Library’s Collections. The Coordination Team will define and configure the workflows, processes, and best practices for the individual sections of the new system. This will require successful completion of the Alma Certification Training courses to be able to access the configuration menus of the sandbox and production environments. The individuals appointed to the Team will be the expert and decision-maker for these individual functional areas of the system. The Team will also produce and review documentation and training materials for the new system to prepare Library personnel to work with the new system. The team will help test all aspects of the new system to help configure to most optimal settings for the Library. The ILS Coordination Team will continuously communicate out to the Library the status of the implementation to the new system, and inform how it will impact their work. Finally, as the coordination team concludes its work on the implementation, the Team will be tasked with providing a preliminary assessment of the new ILS, the anticipated impact of the new ILS on staffing levels in key units, and opportunities for the institution to utilize the new ILS that will provide increased flexibility and opportunity among staffing in the following two to three years.

The ILS Coordination Team will include representatives from the various functional areas of the system including:

Chair – Responsible for the coordination of the team’s work, establishing project vision, managing timelines, direction setting, and problem solving.

* Michael Norman, Discovery Services Librarian and ILS Coordinator

Acquisitions - Works with the acquisitions processes in the current system including ledgers/funds, POs and invoices, and acquisition of print materials (including monographs and serials).

* George Gottschalk, Acquisitions Operations Specialist
* Stephanie Baker, Library Information Systems Specialist
* Chad Lewis, Assistant Chief Accountant

E-Resources - Works with the e-resources management workflows in current system including procurement, licensing, and management of electronic resources.

* Wendy Shelburne, Electronic Resources Librarian

Fulfillment - Works with the fulfillment and circulation processes in the current system include patron registration and management, circulation policies, and calendar matrices.

* Janelle Sander, Patron Services Manager

Lending and Interlibrary Loan - Works with borrowing and lending processes in the current system including lending and borrowing and external resource sharing management applications.

* Cherie’ Weible, Associate Dean For User Services and Central Access Services Librarian

Cataloging and Resource Management - Works with the cataloging and resource management processes in the current system including bibliographic and authority records, inventory, and local cataloging practices.

* MJ Han, Metadata Librarian and Interim Head of Content Access Management

Systems Administration and Dashboard Permissions capabilities set up within the new system - Works with the systems administration and configuration of the primary roles and functionality capabilities and then helps on an ongoing basis when new people are added to work in the system. Work to show all how to use the enhanced reporting capabilities of the system.

* Megean Osuchowski, Help Desk Coordinator

Public Services – Works with the public services aspects of the system including the public display interface, user interaction with various bibliographic utilities of the system, users account and personalizing services, documentation and instruction on utilizing the catalog, and educating users about the new catalog.

* Sarah Holder, Head of Research and Information Services

Discovery and Delivery - Works with the Discovery and Delivery aspects of the system (including utilizing APIs) and integration of the online catalog into the various discovery environments of the Library and I-Share consortia.

* William Mischo, Head, Grainger Engineering Library Information Center

Training and Documentation - Works to provide training for all in the Library to use the new ILS system, and creates documentation to utilize the different components of the system.

* Jake MacGregor, Organizational Development & Training Coordinator

User Experience – Works with the implementation team to identify, define and improve the overall user experience of the ILS and its public interface. Such work may include direct work on the system (when possible), or liaison work with consortial partners at CARLI.

* John Laskowski, User Experience & Web Strategy Coordinator

Communication – Works to keep the Library informed on the implementation of the new system, sets up information sessions about changes and enhancements, advertises the significant changes or various stages in the development of the implementation and go live dates, and informs the Library’s User Community to all forthcoming changes and impacts on their saved information.

* Heather Murphy, Chief Communications Officer