Collaboration and resource sharing are central to the mission of the Orbis Cascade Alliance. In the technological world of the modern academic library, it was proposed that a shared working environment would better enable member collaboration in the areas of collection development and exploration of collective technical services. As a first step, in January 2012, the Alliance sent out a Request for Proposals (RFP) for a shared integrated library system (ILS). Implementation rolled out at a fast pace with product demos in April 2012, followed by contract negotiation and months of rapid-fire planning culminating with the UW and other Cohort 1 libraries migrating to a new shared system in June 2013. Cohorts 2-4 followed at roughly six-month intervals until completion in January 2015. This poster presents some of the challenges and learning opportunities that UW Libraries’ Acquisitions & Rapid Cataloging Services (ARCS) staff encountered over the course of the transition from Innovative’s Millennium ILS to ExLibris’ Alma. While some of the information provided is historical, much outlines the ongoing story of the development of a cloud-based library management system.

Takeaways

**Communication:**
- Communicate, communicate, communicate—have a communication plan and use it.
- Consortial migration takes a great deal of coordination and cooperation, including the need to agree to shared policies and procedures once things are up and running.
- Keep the end user in mind and informed. How disruptive will implementation be? What will patrons need to know to use the new system?

**Preparation and problem-solving:**
- Checklists help organize tasks to prepare for migration, but are also handy for figuring out how ready one is to migrate.
- Have a useable test site before implementation to allow adequate training time for both public and tech services staff.
- Cross train staff if at all possible—it increases understanding of the system and helps with problem-solving.
- Cloud-based systems present cloud-based issues:
  - problems with internet access
  - browser compatibility
  - lack of certain features, such as macros and keyboard shortcuts
- Have a list of projects and tasks for system down-time; cleaning up one’s email gets old quickly.

**Last thoughts:**
- Be informed—ask lots of questions, including has the vendor handled a consortium or institution of a similar size/complexity?
- In a migration of multiple institutions, size of collection, staff, and technology capabilities matter in terms of migration order as well as drafting policies and procedures that work for everyone.
- Be prepared to laugh a lot and find ways to ease stress (party, Yoga, a walk).
- It took 2 years to migrate the entire Orbis Cascade Alliance, but in many ways the collaboration is just beginning.

References: