Borrow Direct Migration Project

The project will support the development of Harvard Access Services workflows and technical integrations with Alma and ILLiad in order to meet the IPLC migration of the BorrowDirect service from Relais D2D to ReShare Returnables. The migration will require an ongoing feed of bibliographic and item data for materials available for loan through the BorrowDirect services to the POD data lake (tracked in the Borrow Direct HOLLIS Integration Project), development of new staff workflows for processing Borrow Direct requests, NCIP and z39.50 integrations with Alma, and an adjustment of data feeds into ILLiad for our fulfillment of loan requests from our partners. The 90 million records available to our users via BorrowDirect will be made discoverable via a consolidated VuFind catalog provided by IndexData, the project’s vendor partner.

Project Goals

- Develop internal Harvard staff workflows to support efficient processing of Borrow Direct lending and borrowing activities.
- Integrate ReShare Returnables with Alma and ILLiad.

Background

In January 2022, The IPLC executive committee approved a proposal to move the BorrowDirect service from the current Relais D2D platform to ReShare Returnables, with data being pulled from the POD data lake.

Vision

<table>
<thead>
<tr>
<th>ReShare Returnables Migration Vision</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable users at Harvard and partner institutions to seamlessly discover, request, and access eligible items held by the IPLC partnership.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Guiding Principles</th>
<th>Key Performance Indicators</th>
</tr>
</thead>
</table>
| - Integrate the Reshare Returnables system with Alma  
- Integrate the Reshare Returnables system with ILLiad  
- Review and update HL Resource Sharing Workflows  
- Update BorrowDirect catalog links in HOLLIS to point to the new shared system. | - Improve local and partner patron experience for access to shared collections  
- Optimize resource sharing workflows with partners  
- All workflows are included in the review and implementation of Reshare Returnables  
- Follow best practices of technology development | - Patrons can request partner holdings via VuFind  
- Patrons are guided to VuFind via HOLLIS for failed searches and for additional copies.  
- Resource sharing staff are able to meet previous processing turn-around times.  
- Software is reliable, performant and requires minimal ongoing maintenance and support by Harvard staff. |

Time Line

Reshare Project Timeline

- Borrow Direct Gantt chart: [https://docs.google.com/spreadsheets/d/1GOcOpzemWTteceQXaA0AQ1jwv40RiEZTmvMN7sKml0/edit#gid=0](https://docs.google.com/spreadsheets/d/1GOcOpzemWTteceQXaA0AQ1jwv40RiEZTmvMN7sKml0/edit#gid=0)
- Index Data/POD development work:
  - Harvard Preparation and Integration:

Major Harvard Milestones

- Harvard ILLiad integration: June/July 2022
- Harvard ILS/Alma integration: July 2022
- Harvard Discovery Link Updates: July 2022
- IPLC decommission of Relais D2D: September 2022

Dependencies

- IndexData development completes on schedule

Project Teams (see individual pages for membership)

<table>
<thead>
<tr>
<th>Team</th>
<th>Charter Period</th>
<th>Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Oversight Committee</td>
<td>March 2022 - October 2022</td>
<td></td>
</tr>
<tr>
<td>Borrow Direct Access Services Working Group</td>
<td>March 2022 - July 2022</td>
<td></td>
</tr>
<tr>
<td>Borrow Direct Resource Sharing &amp; Technology Integration Working Group</td>
<td>March 2022 - October 2022</td>
<td></td>
</tr>
<tr>
<td>Alma Technical Services Working Group</td>
<td>March 2022 - July 2022</td>
<td></td>
</tr>
</tbody>
</table>