



**ALOHA – BRINGING
A NEW LIBRARY INTO
A CONSORTIUM**

**OREGON LIBRARY ASSOCIATION ANNUAL CONFERENCE
APRIL 21, 2017**

PRESENTERS

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WCCLS & ALOHA COMMUNITY LIBRARY

ALOHA & WCCLS

Aloha Community Library

- Small, independent non-profit opened in September 2012
- Run almost entirely by volunteers with two part time staff until 2016
- Joined Washington County Cooperative Library Services (WCCLS) July 1, 2016
- Opened officially as a WCCLS member library in January, 2017

WCCLS

- Public library cooperative founded in 1976 to provide library service to all residents of Washington County
- Partnership between the county, nine cities, and three non-profits
- Catalog shared by 15 libraries and supported by WCCLS Automation department
- 655,639 bibliographic records and 1,683,001 item records*
 - * as of 3/23/2017

LIBRARYWORLD & POLARIS

LibraryWorld

- Web-based library automation system used since inception of ACL
- Simple to use but with limited services
 - No boolean searching
 - No reports by item status
 - **Lots** of server down time
 - New features added periodically, inconsistently, and without rollout
 - Item limits on reports – Collection too big? You'll never see circ stats again!

Polaris

- Installed client ILS with a “staff client” side and a patron facing web-pac
- WCCLS running on 4.1R2 during data migration, upgraded to version 5.1 in January 2017
- Full-featured catalog searching with Boolean and SQL options*
 - *SQL only available to system administrator level staff
- Reports available via BI Launch Pad web product

2015: THE JOURNEY BEGINS...

Aloha

- March, 2015 – ACL begins catalog clean-up & relabeling project
- May, 2015 – Terri Palmer (Library Director) & Jesse meet with WCCLS Automation to discuss technology preparations necessary for ACL to join WCCLS
- August, 2015 – template created to help cataloging volunteers match minimum requirements for adding new records to LibraryWorld
- November 3, 2015 – countywide Library Levy (Measure 34-235) passes

WCCLS

- June, 2015 – Amy gets LibraryWorld staff access
- July, 2015 – Amy confers with Debra Ellwood, Aloha's cataloging volunteer, about cleanup priorities
 - Make sure item matches bibliographic record
 - Fill in 245 \$h [GMD (SMD)]
 - Replace ebook records
 - Make sure records have an ISBN or UPC (02X field) that matches item
 - Delete bib records with no items attached
- September, 2015 – Amy shares WCCLS cataloging procedures with ACL

LATE WINTER & SPRING, 2016

Aloha

- January, 2016 – Begin ramping up collection and addressing items marked as lost or missing
- March, 2016 – Contractor selected for library remodel
 - Capital Campaign begins to fund remodel and relocation
- March - May – Ongoing cataloging clean up with help of volunteers

WCCLS

- March, 2016 – Begin quote process with Polaris/ Innovative
- March - May – Review Polaris data conversion requirements and compare to LibraryWorld export capabilities
 - LibraryWorld embeds item data in 852 fields of bibliographic records, each item field becomes a subfield

**AS OF MAY, 2016 ALOHA'S PROJECTED OPENING DATE
WAS EARLY OCTOBER, 2016.**

EXTRA! EXTRA!

READ ALL ABOUT IT

VIII

Wednesday, June 22, 2016

50¢

ALOHA LIBRARY EASING INTO WCCLS MEMBERSHIP

WRITTEN BY ERIC APALATEGUI, BEAVERTON VALLEY TIMES

Summer reading entertainment starts soon but circulation services coming after new library space is finished

Next month, the Grammy Award-winning Lucky Diaz and the Family Jam Band will help rock home the message that the Aloha Community Library has finally arrived.

But just because the library officially becomes a member of the Washington County Cooperative Library

Services on July 1, director Terri Palmer cautioned patrons not to expect that arrival to come in one big rush this summer.

“Everything else will happen once we move around the corner,” said Palmer, anticipating the completion of renovations in the library’s future home in a larger storefront at the shopping center that includes Bales Marketplace at 17455 S.W. Farmington Road.

Palmer expects library users to be able to drop off books checked out

from any WCCLS-member library with the new opening of the larger space, which she hopes will happen in mid-October, following several weeks of full closure during the transition.

Community Library Association is in the midst of a fundraising campaign to help for renovating its larger location. They hope to eventually raise \$350,000, but officials also are looking to trim expenses in the shorter term.

However, it likely will be another month or more



ACL JOINS WCCLS

Article taken from:
<http://pamplinmedia.com/bvt/15-news/312478-190600-aloha-library-easing-into-wccls-membership>

JULY, 2016

Aloha

- July 1 – ACL begins receiving funding from WCCLS
 - Collection budget triples, increasing cataloging
 - Jesse & Terri begin working full time
 - Two additional staff members hired
- Basic clean-up of adult fiction, mysteries, large print, western and early reader collections completed by end of July

WCCLS

- July 14 – Quote finalized with Polaris
- July 25 – First conference call with Polaris project lead, Ann Lorish
 - Sample set of bibliographic and item data sent to Polaris
 - Aloha already using WCCLS item barcodes
 - October 3 chosen for data migration
 - Regular conference calls continue through early October

AS OF THE END OF JULY, ALOHA'S PROJECTED OPENING DATE WAS LATE OCTOBER, EARLY NOVEMBER.



THE NEW ALOHA LIBRARY

Future home of the Aloha
Community Library prior to the
beginning of construction in late
August, 2016

AUGUST, 2016

Aloha

- Ongoing catalog clean-up:
 - Review and relabeling of juvenile non-fiction completed (~2000 items)
 - Decision made to recombine all Blu-ray/DVD combo packs previously circulated as separate items; holds placed on OUT items
 - Volunteers directed to delete MPAA ratings from call numbers
- Debra begins shadowing Cedar Mill Community Library cataloging staff

WCCLS

- August 1 – Aloha created as a branch in WCCLS database by Polaris staff
 - Branch data based on existing Cedar Mill Community Library Bethany branch
 - Visible to staff, but not patrons
- August 3 – meet with Aloha staff
 - Patron data will not be migrated (a large percentage already had WCCLS accounts)
 - Aloha staff will have a cataloging moratorium between when the data is migrated and when they open

AUGUST, 2016

Aloha

- Jesse & Debra use record field mapping provided by Amy to begin reevaluation of collection
 - New naming conventions for several collections
 - Begin reconciling disparities between location and collection codes in item records
- August 23 – Construction on new library begins
- Reopening tentatively set for November, 2016 with plans to close the library in October

WCCLS

- Amy prepares draft of item record field mapping and shares with Aloha
 - LibraryWorld has fewer item record fields than Polaris
 - Extrapolate from existing LibraryWorld field contents to fill in additional Polaris fields
 - Example:
 - If LibraryWorld collection = Adult DVD
 - Then Polaris Material Type = DVD
 - Polaris differentiates between Paperback and Book but LibraryWorld does not – default of Book chosen.



**MIGRATION
SEPTEMBER –
OCTOBER**

SEPTEMBER, 2016

Aloha

- ACL collection mapping
 - Spreadsheet to track number of items in location vs. collection
 - Renaming of collections not matching WCCLS
- Final push for cataloging before Polaris conversion
- Bulk deletion of items by status (LibraryWorld added this feature earlier in 2016)
 - Lost status – all items missing since July 2016 or earlier
 - Withdrawn status
 - Missing status

WCCLS

- September 6 – Amy does a trial run of exporting all Aloha's bibliographic and item data from LibraryWorld
 - Exporting all records at once did not work
 - Exported by collection and then combined files by age/ media
 - Created checklists to use for final file exports
- Amy determines LibraryWorld reports to use during migration to ensure all records exported
- Runs LibraryWorld exported file through MarcEdit and note common validation errors
- Sends files to Polaris for testing and eventual trial load on WCCLS test/ training database

SEPTEMBER, 2016

Aloha

- Pulled and deleted records for all items in videogame collection
- Completed recombining of all available Blu-ray/DVD combo packs
 - Updated records to reflect changes
 - Deleted records for combo packs with missing pieces
- Ongoing catalog clean-up:
 - Young Adult fiction
 - Graphic novels (reabeled)
 - Oversize (reabeled)

WCCLS

- Prepare other WCCLS member libraries to work offline on October 3
- Project plans, communication plans, checklists generated
- Continuing to refine item record mapping
- Create MarcEdit saved tasks for fixing most common validation errors in LibraryWorld records

Aloha Data Conversion Communication Checklist

Week of 9/12-9/16

- TUESDAY 9/13 8:30AM CALL WITH ANN LORISH
- SUMMARY NOTES FROM CALL WITH ANN LORISH
- WAIT FOR FEEDBACK FROM JERRY RE: WHETHER DATA LOAD WILL REQUIRE DOWNTIME
- START PLANNING FOR ALL-DAY DOWNTIME (JUST IN CASE)
 - AUTOMATION EMAIL
 - NOTIFY CAROLYN RE: REPORTS
 - NOTIFY MARIE RE: DOWNTIME
 - AMY E AND MARIE WORKING ON SERVICE OUTAGE CHECKLIST
 - NOTIFY LISA

9/20 - all staff
Email w/ outage
list + offline
instructions

- IF REQUIRES DOWNTIME OF ALL POLARIS FUNCTIONS
 - ACL STAFF EMAIL
 - AUTOMATION STAFF EMAIL
 - ALL STAFF EMAIL DRAFT
 - ALL STAFF EMAIL PROOF
 - ALL STAFF EMAIL SEND

- IF REQUIRES DOWNTIME OF CATALOGING
 - ACL STAFF EMAIL
 - AUTOMATION STAFF EMAIL
 - CATS & WACQO EMAIL

of Circus Announcement
of Policy Group Email

- IF DOES NOT REQUIRE DOWNTIME
 - ACL STAFF EMAIL
 - AUTOMATION STAFF EMAIL
 - CATS & WACQO EMAIL (CAUTION WHILE IMPORTING)

Week of 9/19-9/24

- ABOVE WEEKS' ACTIVITIES IF NOT COMPLETED

Week of 9/26-9/29

- REPORT AT CATS ON 9/27
- PUT DISCUSSION IN CATS MINUTES
- POST TO EXTRANET CATS GROUP
- IF REQUIRES DOWNTIME OF ALL POLARIS FUNCTIONS
 - ACL STAFF EMAIL
 - AUTOMATION STAFF EMAIL
 - ALL STAFF EMAIL DRAFT
 - ALL STAFF EMAIL PROOF
 - ALL STAFF EMAIL SEND

9/30 -
Reminder
email

- IF REQUIRES DOWNTIME OF CATALOGING
 - ACL STAFF EMAIL
 - AUTOMATION STAFF EMAIL
 - CATS & WACQO EMAIL

COMMUNICATION
CHECKLIST
DRAFT 1

... WHEN A PLAN COMES TOGETHER

Project plans and communication checklists for the data migration

World Catalog Merge with WCCLS Polaris
Conversion and Cataloging Training for

- meeting (recurring)
- led notes on collections
- opping
- collections
- material types
- fine codes
- stat codes
- check out periods
- ldable?
- on-circulating?
- needed (call #s)?
- ff (Terri, Jessie?, Debra)
- g with Aloha staff
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- om Polaris
- up with Debra
- plan
- e on Aloha collections in LibraryWo
- apping bibs
- apping items
- apping bibs
- apping items

- n LibraryWorld
- LibraryWorld
- item matching with bib records
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- leanup needed before sending file
- nd item info to training server
- nd on training server
- World after data load on training
- n training server
- S
- entation for go live data load
- lists
- ebra?
- ining for Aloha
- s for Aloha staff

ML
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staff
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gistered at branch

Polaris cannot dedupe

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n item has been checke

deleted

non Caster, dates TBD
Aloha SA

ork, Reports, etc.

: to Amy M.

ACL catalog (ACL closed Tuesda
rver (including Aloha)

arcEdit for transmit to Polaris,

≥ full day of downtime on 10/3
to our test server, times proje
day downtime on 10/3

TS re: downtime on 10/3

estimate after test load done
f and looks for corrections tha

ersion

gging training with ACL staff

SEPTEMBER, 2016

Aloha

- September 19 – Terri & Jesse meet with Jean Peick (Technical Services and Reports Librarian, WCCLS) to begin planning RFID tagging project
- September 23 – ACL ceases all cataloging in LibraryWorld
- September 27 – Jean visits Aloha to train ACL staff on RFID tagging procedures; sessions planned for every Tuesday and Friday during closed hours until project completion

SEPTEMBER, 2016

WCCLS

- September 24 – Amy exports all catalog records from LibraryWorld
 - Use checklists to make sure records are not exported multiple times
 - Export by collection – all attempts at exporting entire catalog timed out
- Perform record clean-up using MarcEdit
 - Standard edits performed on all imported bibs (delete 938, remove BISAC headings, etc.)
 - Validation error clean-up
 - Focus on errors that would impact searching or PAC display

Juvenile DVD Videos, Non-Fiction	8007-8015	9	9	9	
Juvenile Fiction	8016-9095	1080 1600	1600	1650	
Juvenile Graphic Novels	9196-99820	125	125	125	
Juvenile Non-Fiction	9821-11423	1603	1603	1579	
Juvenile Non-Fiction					
Juvenile Reference	11424-11446	23	23	2	2
Juvenile Spanish Videos	11447-11457	5	5	5	5
Juvenile Spanish on DVD	11452-11542	91	91	88	88
JUENILE SPANISH NON-FICTION	11543-11619	77	77	74	74
Juvenile World Languages	11620	1	1	1	1
Print Books, Fiction Series	11621-11702	82	82	82	82
Juvenile Non-Fiction	11703-11704	3	2	2	2
Size/Folio	11705-12510	806	806	801	801
Books	12511	1	1	1	1
Reference	12512-12531	20	20	20	19
Reference	12532-12641	110	110	110	
Reference	12642-12645	4	4	4	
Reference	12646-12687	242	242	242	24
Spanish Language	12688-12966	79	79	79	
Spanish Language Fiction	12967-13061	95	95	94	94
Spanish Language	13062-13186	125	125	124	124
Spanish Languages	13187-13202	16	16	16	16
Spanish DVD	13203-14033				
Spanish DVD - Adult	13203-14033	831	831	825	82
Adult Books Compact Disc	14034-14039	6	6	6	6
Adult Graphic	14040-14153	114	114	113	112
Adult Non-Fiction	14154-14367	214	214	214	214
Non-Fiction					
		3	3	3	3

ALOHA COMMUNITY LIBRARY - Holding Report - Sort by collec

Collection	Location	Holdings Report	Status Report	Export	Notes
ABCD ✓✓✓✓	Adult Books on Compact Disc	106	101	101	100 ✓ BIB
ABCDNF ✓✓✓✓	Adult Books on Compact Disc, Non-Fiction	13	14	14	14 ✓
ABR ✓✓✓✓	Adult Blu-ray	122-194	73	73	73 ✓
ADVD ✓✓✓✓	Adult DVD Videos	195-954	760	757	757 ✓
ADVDNF ✓✓✓✓	Adult DVD Videos, Non-Fiction	955-978	24	24	23 ok
ADVDNF	Adult DVD Videos Non-Fiction				
ADVDTV ✓✓✓✓	Adult DVD Television Series	979-1063	85	85	84 ✓
ADVDTV1 ✓✓✓✓	Adult DVD Television Series	1064-1070	7	7	7 ok
AF ✓✓✓✓	Adult Fiction	1071-2926	1856	1856	1849 ✓ 1849 ✓
AGRAPH ✓✓✓✓	Adult Graphic Novels	2927-2987	61	61	61 ok
ANF ✓✓✓✓	Adult Non-Fiction	2988-4357	1370	1370	1368 ✓ 1368 ✓
BB ✓✓✓✓	Board Books	4358-4546	189	189	183 ✓ 182 ok
BBSPAN ✓✓✓✓	Board Books Spanish Language	4547-4569	23	23	22 ✓ 22 ✓
E ✓✓✓✓	Easy	4570-6130	1561	1561	1542 ✓ 1542 ✓
ENF ✓✓✓✓	Easy Non-Fiction	6131-6430	300	300	297 ✓ 296 ok
ER ✓✓✓✓	Early Readers	6431-7014	584	584	545 ✓ 544 ok
ERSPAN ✓✓✓✓	Early Readers Spanish Language	7015-7029	15	15	12 ✓ 11 ok
ESNF ✓✓✓✓	Easy Spanish Non-Fiction	7030-7191	162	162	160 ✓ 162 ✓
ESPA ✓✓✓✓	Easy Spanish Language	7192-7487	296	296	272 ✓ 272 ✓
EWL ✓✓✓✓	Easy World Languages	7488-7493	6	6	6 ✓ 6 ✓
FSF ✓✓✓✓	Fantasy/Science Fiction	7494-7677	184	184	184 ✓ 183 ok
JBCD ✓✓✓✓	Juvenile Books on Compact Disc	7678-7703	26	26	25 ✓ 24 ok
JBR ✓✓✓✓	Juvenile Blu-ray	7704-7731	28	28	28 ✓ 28 ✓
JDVD ✓✓✓✓	Juvenile DVD Videos	7732-8006	275	275	273 ✓ 274 ok

14366 items
14208 SHOW ALL (BIBS VS. ITEMS)

CHECKLIST MANIFESTO

Checklists of Aloha collections used to track progress while exporting bibliographic and item records from LibraryWorld

SEPTEMBER, 2016

WCCLS

- September 27 – Files of Aloha catalog records are prepped and sent to Polaris, along with final item record mapping plan
 - Bibliographic records will be deduplicated against the 02X fields
 - If an Aloha bib record finds a duplicate in the WCCLS catalog, Aloha item will be added to existing record
 - Items do not have to be linked to circulation records so will all be “in”
 - All items will be not holdable
 - All records will be not visible in PAC

SEPTEMBER, 2016

WCCLS

- September 28 – Polaris successfully completes a test load on training server
- Polaris will use standard importing process to load data, no offline work required
- Amy checks test load for errors, provides feedback to Polaris
 - Some item record subfields were missed
 - Import profile updated to create records as not visible in PAC
 - Some Blu-ray items were added to DVD bib records, prepare to find and correct in final data migration
- September 28 – October 2: Polaris staff prepare final data load



**CATALOG MERGE
AHEAD**

OCTOBER, 2016

Aloha

- October 4 – RFID tagging project begins
- October 7 – Four ACL volunteers trained on RFID book tagging procedures
- October 28 – RFID and Stingray tagging of entire collection (~14,000 items) complete with exception of checked out items
 - Check-in staff and volunteers continue to check for items that were not tagged as they are returned

WCCLS

- October 3 – Data migration
- 4 3/4 hours
- 14,366 item records
- 14,157 bib records
- 513 records found too many duplicates and were created provisionally, had to be resolved one record at a time by Polaris

OCTOBER, 2016

Aloha

- Terri & Jesse continue to order books for the collection and pre-process with the help of volunteers in preparation to catalog later
- RFID tagging continues as items are returned
- October 31 – Library closes to the public
 - Construction not yet complete
 - Unable to begin moving collection until final inspection

WCCLS

- WCCLS Automation informs member libraries that Aloha is not active in Polaris yet
 - Aloha records not visible in PAC until opening day
 - Aloha items not circulating or able to fill holds until opening day
- 3399 bib records were imported without finding a duplicate in the system



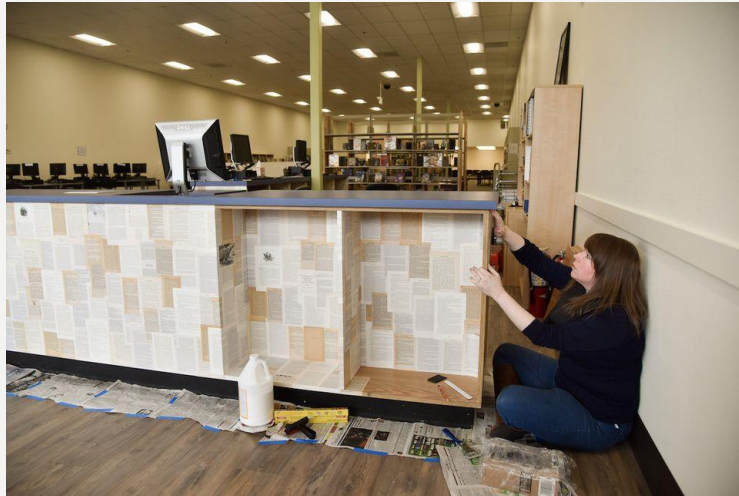
WINTER, 2016

Snow!

WINTER, 2016 (OCTOBER – JANUARY)

Aloha

- ACL staff and volunteers begin moving library to new location in mid-November
- Jesse spends most of December relaminating an old Blockbuster desk and covering it in book pages



WCCLS

- ACL_unique added as 092 field to bibs that did not find dupliates make them easy to identify
- Check WCCLS catalog - was there a duplicate that wasn't found?
- If not, search OCLC and import record to overlay LibraryWorld bib.
 - This ensures Aloha's holdings are reflected in WorldCat
- Any remaining bibs referred to Aloha staff for work with item in hand

**AS OF THE END OF OCTOBER, ALOHA'S PROJECTED OPENING DATE WAS
JANUARY 7.**

WINTER, 2016 (OCTOBER – JANUARY)

Aloha

- December 27 – ACL opens to the public with limited hours
 - Chance to practice using Polaris and test new technology
 - Closed intermittently during this time due to inclement weather
 - Some services not yet available to public at this point
 - WIFI
 - Printing
 - Holds pick up

WCCLS

- Mid-December – Amy starts making use of SimplyReports, a Polaris product that can export record sets of bib records, to create batch searches in OCLC to replace the ACL_unique bibs
 - Able to pull OCLC numbers from many LibraryWorld records
 - Next, pulled ISBN numbers from LibraryWorld records and batch searched OCLC, narrowed to DLC-created records, exported for overlay
 - Updated holdings in OCLC

WINTER, 2016 (OCTOBER – JANUARY)

Aloha

- Open with limited hours through January



WE'RE OPEN (SORT OF!)

WCCLS

- Some Aloha items manually created by Polaris had errors that brought them up on monthly clean up reports run by other libraries
- Aloha is now the first library in all dropdown lists so some libraries made accidental bulk changes to Aloha

JANUARY, 2017

Aloha

- January 7 – Grand Opening rescheduled due to inclement weather
- January 14 – 2nd Grand Opening cancelled due to inclement weather; decision made to forego celebration in favor of just opening to the public
- January 16 – ACL opens with new expanded hours to the public (weather permitting) and begins to phase in services

WCCLS

- January 6 – Aloha branch and items made visible in PAC
- January 18 – Aloha becomes a holds pick up location
- January 18 – Automation staff completed clean up of 3399 unique Aloha bibs, 76 remain for Aloha staff to resolve with item in hand



**TOOLS USED AND
LESSONS
LEARNED**

TOOLS USED

Aloha

- LibraryWorld
 - www.libraryworld.com
- Router, table saw, jig saw, belt sander, staple gun, pressurized nail gun, laminate hand shear, 2 gallons of Mod Podge....

WCCLS

- Polaris
 - Simply reports to export record sets of bib records
 - Record sets
 - Importing utility
- OCLC Connexion
 - Batch search
 - Macros
 - Exporting
- MarcEdit
- Excel
- Checklists

LESSONS LEARNED/ BULLETS DODGED/ EXPECT THE UNEXPECTED

Aloha

- Never try to move a library in winter!
- Be prepared to change and adjust your plans as you go
- Projects always take longer than you think and **it's okay**
- If it makes sense, combine projects to maximize your time
- Start early on whatever aspects of the project you can

WCCLS

- Explore and understand the capabilities of both systems
- Know the collections!
- Making sure your bibs have standard numbers is worth the effort
- Look for ways to combine human and technical solutions (such as re-registering patrons instead of migrating the data)
- Too much information can be a good thing – communicate constantly!



QUESTIONS?

Time for questions!

THANK YOU!

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- WCCLS map – WCCLS Annual Report 2015-2016:
https://www.wccls.org/sites/default/files/uploads/WCCLS%20FY15__16%20Annual%20Report%20for%20web.pdf
- Project timelines: <https://xkcd.com/1658/>
- ACL joins WCCLS – Eric Apalategui: <http://pamplinmedia.com/bvt/15-news/312478-190600-aloha-library-easing-into-wccls-membership>
- New Aloha Library – Charles Wood:
<https://www.facebook.com/AlohaLibrary/photos/a.295777450439254.96004.275419545808378/1420222454661409/?type=3&theater>
- Migration – Pixabay: <https://pixabay.com/en/birds-high-fly-flying-migrating-216827/>
- When a plan comes together: Amy Mihelich
- Checklist manifesto: Amy Mihelich
- Catalog merge – Pixabay: <https://pixabay.com/en/merging-traffic-signs-road-39400/>
- Snow: Jesse Castellanos
- Desk relamination – OregonLive:
http://www.oregonlive.com/washingtoncounty/index.ssf/2017/01/aloha_community_library_holds.html
- We're open: Jesse Castellanos
- Tools – Pixabay: <https://pixabay.com/en/tools-vintage-woodworking-saw-1209764/>
- Questions – Pixabay: <https://pixabay.com/en/question-mark-hand-drawn-solution-2123969/>

IMAGE CREDITS