ALOHA – BRINGING A NEW LIBRARY INTO A CONSORTIUM

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

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

BUILDERS WALL OF FAME

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 (relabeled)
  - Oversize (relabeled)

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

... WHEN A PLAN COMES TOGETHER

Project plans and communication checklists for the data migration

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

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
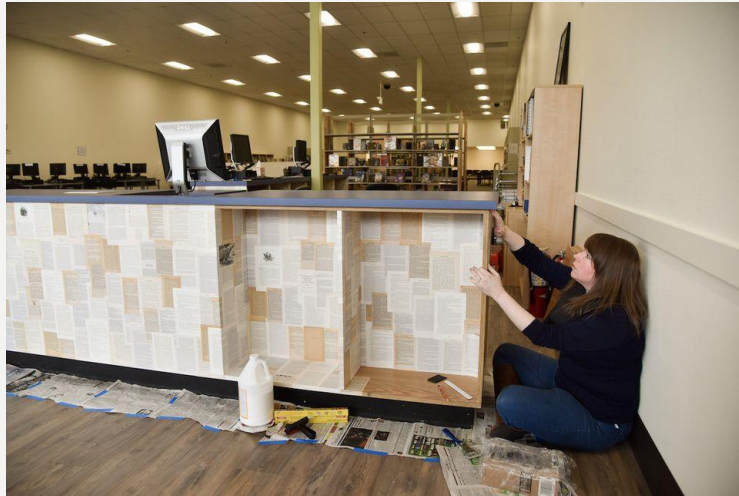
WCCLS

- ACL_unique added as 092 field to bibs that did not find duplciates 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

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- Desk relamination – OregonLive: http://www.oregonlive.com/washingtoncounty/index.ssf/2017/01/aloha_community_library_holds.html

- We're open: Jesse Castellanos

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IMAGE CREDITS