# **New Roommates:** Franklin-Urbana Merger

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### **New Roommates**

Urbana within OPAL



#### Franklin





# Background of the merger

- Franklin acquired Urbana in 2014.
- We operated as two separate libraries for three years
- Urbana left OPAL consortium in 2017.



#### OhioNET/OPAL

- OPAL Ohio Private Academic Libraries consortium
- Lost access to Sierra on July 1, 2017
  - ◆What did this mean
    - No circulation
    - No cataloging
    - No remote access
    - No WebPAC





# Merger Checklist

- Get quotes and schedule merger with III and local IT
- Verify that both libraries have access to the shared Sierra
- Updated login page, added patron types and patron record
- Reviewed/updated other policies
- III loaded record types in batch/Began using each module
- Created/updated OPAC scopes
- Setup INN-Reach functions
- Testing, testing, testing
- Check EVERYTHING



# III Merger Kickoff

 Started with quotes that included merge services, data clean and additional user licenses

- Project manager assigned and BaseCamp site created.
- Kickoff Call held
- Training session conducted and scheduled weekly calls
- Expedited scheduled Merger finished in 4 months.
   Usually plan for 6-8 months





# Sierra Upgrade

 The Sierra system had to be upgraded so both systems were on the same version.





# Login pages

- We are a Single Sierra system so we have a Single login page.
- Both libraries use LDAP, with separate directories.
- Login page contains 2 login boxes.
- Local script written for Urbana LDAP directory.
- Urbana patrons needed instructions on using the new login page and logins.



#### Login to Database and Electronic Resources

#### Franklin University Login

#### FRANKLIN UNIVERSITY

Username	
Password	

SUBMIT

The Username is your myFranklin username.

The **Password** is the same password you use when logging into your **myFranklin** account.

To access databases and Ebooks from offsite, Franklin students, staff and faculty must login using the myFranklin username and password.

Login Problems?

#### **Urbana University Login**



Username
Password
SUBMIT
The <b>Username</b> is your self-service <b>username</b> .

The **Password** is the same password you use when logging into your **self-service** account.

To access databases and Ebooks from offsite, Urbana University students, staff and faculty must login using the self-service username and password.

Login Problems?



#### Link / IP Updates

- Links were updated to use the Franklin-Urbana proxy
- Updated IP ranges with vendors for on-campus IP authentication
- Update links in Course Management Systems BlueQuill, Blackboard



### Policies reviews/updates

- Began with patron-types and patron records
- Data mapping sheets
  - ◆Mat types, Item types, item status, locations, BCODES, ICODES
- Location codes Hierarchal or one to one structure. We chose one to one.
- Updated the codes in Sierra.
- Setup two call number indexes





#### **User Permissions**

- Started with permissions from OPAL system.
- Updated continuously as new Urbana staff used shared system.
- Updated Locations Served for staff at both libraries.
- Added printers, templates, data exchange processes



### **Data Migration**

- Began migration with bib records and item records.
- Then III migrated serials records.
- Migration completed with Circ records checkouts, fines, holds
- Orders and Invoices were not migrated.
- Checked for Data loss?? Like Volumes missing??



#### INN - Reach

- We started INN-Reach prior to going live circ module
- III recommends 3-6 months before the merger to halt/change the INN Reach
- Began OhioLINK lending/borrowing
- Began SearchOhio lending/borrowing



### Scopes

- III created scopes for each library and special collections.
- Start this process early because it involves several pages in WebMaster.
- Updated Web Options for header/footer files.





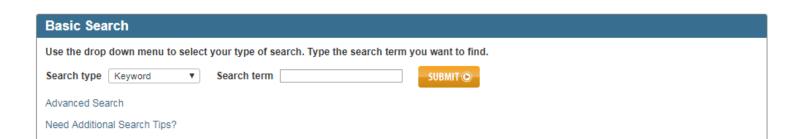
#### URBANA UNIVERSITY LIBRARY CATALOG

Basic Search
Use the drop down menu to select your type of search. Type the search term you want to find.
Search type
Advanced Search
Need Additional Search Tips?

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#### Data Clean up

- Checked for missing barcodes.
- Updated e-resource bib records to shared locations.
- Checked the Loan Rules from Urbana had in OPAL.
- Cleaned up leftover holds/INN-Reach request.



### Workload Changes

- Before
  - ◆ Tech support for Sierra from OPAL
  - ◆Everday workload
- After
  - ◆Tech support is Systems Librarian
  - ◆Shared records & resources
  - ◆Everyday workload



### Other systems to consider

- Authentication systems LDAP, Single sign on, etc.
- University Registration/Student systems Banner, Colleague, etc.
- HR/Payroll Systems staff patron record data may come from this system.
- Content Management Systems/Web Open Text, Drupal
- Course Management Systems BlueQuill, Blackboard, Moodle



#### Review

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# Remember ... be patient!





#### Questions?

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