

# 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.

**PREPARE YOURSELVES**



**TIME FOR SOFTWARE UPGRADE**



# 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



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 **Username** is your self-service **username**.

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 – Hierarchical 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

- ILL 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.



**Basic Search**

Use the drop down menu to select your type of search. Type the search term you want to find.

Search type  Search term

[Advanced Search](#)

[Need Additional Search Tips?](#)



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### Basic Search

Use the drop down menu to select your type of search. Type the search term you want to find.

Search type  Search term

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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
  - ◆ Everyday 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!

**We can be patient. We can be patient.  
We can be patient.**



# Questions?

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