

Answers to questions received prior to 5/20/15

1. Will you need our assistance in any data extractions?

Since I was able to extract most of the data for the test, we can probably do all of the extraction with a little advice from the Evergreen vendor.

2. Will you want a bibliographic or patron deduplication with this migration?

I think we've done most of the deduplication that can be done via a program. What is left are primarily bibliographic records that are too brief for matching. We should have most of the patron duplicates already addressed before we reach the data loading stage.

3. Did the libraries decide whether they wanted to migrate acquisitions or serials data?

Our plan on acquisitions is to start using Evergreen acquisitions as soon as the system is at a point where it can handle it, if possible prior to Go Live for daily operations. If the timeline of a March 2016 Go Live holds, we will then have through the end of June to complete as many open Horizon orders as possible on the Horizon software. We could discuss a migration of the remaining open orders as a post Go Live task, since it is difficult to estimate the number of POs/lines involved.

It would be desirable to migrate the serials copy, items, summary of holdings and pac_notes (EX: library retains current year). We currently have 1,998 bibliographic records with 7259 serials copy records attached. Of those, 4947 are listed as currently received, but I suspect that is not accurate and the number is actually smaller. For many of the serials we don't use the full serials capabilities with predictions and serials check in anymore. Since branches tend to only keep current 6 months to a year, they just reuse the same item records and replace the copy statement of the oldest item when a new one comes in. Full serial predictions and check in are only used at main libraries that keep substantial back issues.

4. I know you'll be using a train the trainer model. Do you have an idea of how much time you'll need between the Equinox provided sessions to get other library staff up to speed? We want to provide ample time for internal trainings in the schedule and this will help me decide where in the schedule to put the test load.

I think it would be counterproductive to have more than 5 weeks for local training after the trainers are trained. While we like to think that people will practice, in my experience they attend the training and then quickly get caught up in the regular daily work of the library.

5. What is your contract end date with SirsiDynix? Have you looked at any extensions or is this still the date to use for determining a go live date? I thought it may be in Q1 or Q2 of 2016 so this will help as we propose a schedule.

We have paid maintenance through June 2016. Our desire is to Go Live on Evergreen sometime in March 2016, so that we have at least 3 months with access to Horizon in order to address anything that was missed and to extract any statistical data that we want to retain.

6. Do the libraries within a jurisdiction tend to share common circulation, fine and hold policies? I seem to remember a lot of discrepancies with fine rules in particular. I'd just like to know how much consolidation has been done in this area to determine configuration time and pricing.

We will be pushing for shared circ modifiers and to eliminate as many of the funky one-offs as possible. There is actually a fair amount of uniformity in the circulation rules and fine rates between the 10 jurisdictions. The variation is more in the maximums – fines and number of items out allowed.

7. Will libraries within a jurisdiction use the same notice text and intervals for sending notifications such as overdues? Or will each branch need the capability to customize their own notices?

Notices are consistent with the jurisdiction. Only variation is the branch name/address/phone. Except for the notice footer, the body and language of the notices is also generally the same across all jurisdictions (for ease of administration.) Number of notices and intervals do vary between the members who are not utilizing Unique Management for collections. Notice printing for all jurisdictions is done centrally here in Fresno, so even the notice stock is the same.

8. Do you want OPACs customized/scoped to the jurisdiction level or down to the branch level?

Except for one member (Tulare Public who requires an extra click to see other's holdings), our OPACs are currently set up to display system-wide holdings, but with the local jurisdictions items first in the bib holdings display. We really look at SJVLS as one big collection as far as end users are concerned. We've got a mix within the system of members who tend to point their in-branch OPACs to the "hq" profile versus pointing to a branch level profile. The only difference between the two is where the local branch appears in the holdings and pickup locations list. We didn't spend much time on the OPAC during the trial, so we aren't as familiar with the configuration options. I'm also not sure how the work BC Libraries Cooperative is doing with the Overdrive API integration might impact how we approach the OPAC, since each of our members has their own Overdrive collections.

9. Do you plan to use San Joaquin supplied domains for the OPAC(s) or would you like Equinox to supply domains (such as fresno.evergreencatalog.com)?

We can supply our own – either the sjvls.org domain which we currently use for everyone, or the individual library domains that they use for their own websites and email.

10. Support agreements include 3 technical contacts. Will you require additional contacts? These are contacts who have direct access to Equinox to open tickets.

We might need 4, just so that one of the network guys has that capability. Otherwise there are only 3 of us who provide the support on the ILS side of the house. That is assuming that if something becomes a complicated issue with acquisitions that we could have support work directly with the local acq person if necessary.

11. Are all of your authority records full authority records or are a portion of them system-generated stub records?

We are in the process of working with Backstage right now on bib and authority clean-up, but I presume that there will still be a fair number of system-generated lousy records left, just because we have a lot of lousy bib records left.

12. Clarification on Appendix D

Our intention here is to be able to search on what is all item-level data in Horizon (location, collection, item type, creation date, last cko date, last change date, due date, cko location, source(vendor), checkin notes, item status, etc.). Obviously the database structure is considerably different in Evergreen which may make this more complicated, but the information that we wish to be able to search on, and batch edit all relate to individual items, not the bibliographic information. Bibliographic information is only involved in that we wish the title displayed in the search results/selection display. Essentially this is work that we could do in the System Office via SQL, but the demand for this type of batch editing is widespread and we only have a staff of 3. We do tightly control who is granted this type of batch search/change permission.