

Marker test of production R7.4

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SOAR is a service of RUcore, the Rutgers University Community Repository.
RUcore is developed and maintained by Rutgers University Libraries.

January	February	March	April	May/June	July 1 - live
Bib records	Item / Holdings records	Proxy Server	Installation	Training	
	Patron records			Subscription Knowledgebase	
				Materials Routing	

January

- Bibliographic database has been loaded into SIRSI test system. 99.8% of records have OCLC numbers.
- Dedupe records through mapping on OCLC number and other fields. Manually review records without OCLC numbers.
- For duplicate records, identify which records do not have MeSH subject headings and NLM call numbers. Add from UMD records.
- Deduped database becomes the *provisional* catalog database for UMD.
- Set up work team and normalize library names, locations and item types. Library names should already be established. Locations need to be disambiguated from item types but otherwise accepted "as is." Item types must conform to RUL practice, so will be mapped and normalized.
- Obtain holdings records in Excel format. Review and map to Sirsi holdings for monographic records.
- Review serials holdings records and design holdings summary statements, in collaboration with UMD.
- Determine which webscale services will be evaluated through trials. Set up trials to begin in February.
- Determine the elements, content and look and feel of UMD library website that must be recreated in the RUL template. Judy, Tibor, Yuhwei, Sam, Mary Ann, UMD ? (next Wednesday)
- Begin the Webscale RFP
- Specifications for Webscale

February

- **RFP issued at beginning of month**
- Meet to discuss proxy server strategy. (Judy, Tibor, Natalie Wadley, Yu-Hung Lin, Dave, Chris)
- Evaluate and normalize patron types, map standard categories to RUL categories. The patron category "MED" will be used to distinguish UMDNJ faculty, students, and clinical faculty.
- Meet with UMD to determine elements of the Drupal "RUL campus" template.
- Load the patron file into the Sirsi test system.
- Ensure that RUConnection barcode ranges do not overlap or duplicate UMDNJ barcodes.
- Create serials summary holdings in Sirsi test for serials records.
- Review and evaluate bibliographic and holdings records in the test public catalog.

- Reload the bibliographic database and create final holdings and serials summary records.
- ***Declare the bibliographic and holdings database authoritative as of February 22, 2013.***
- Begin revising 856 tags to reflect the strategy of dual proxy servers in the test system.
- Begin drafting UMD campus web presence in Drupal
- Configure the proxy servers for testing.
- Develop test strategy for proxy servers (Judy)

March

- Webscale trials begin and conclude in March.
- Complete revision of 856 tags.
- Inventory UMD workstations and add to inventory/replacement plan.
- Check UMD staff computers for ability to support Workflows , OCLC Connection, Illiad and Relais clients. PC Reservation for public workstations. Identify which computers need what software. Replace/upgrade as needed.
- Check UMD public computers for privacy support. Remove filtering if needed.
- Inventory and test barcode scanners. Replace as needed.
- Set up “Med” parameters and test accounts. **Extensively test the proxy server**
- Add any monthly catalog record/holdings updates
- Set up training teams; begin developing training materials and process.
- Develop integration from Docline to Illiad (Ed?)

April

- ***Provisional UMD campus web presence is available for review and test.***
- Webscale vendor select
- Develop catalog displays for UMD location portals.
- Add any monthly catalog record/holdings updates
- Install workflows, OCLC connection, Illiad and Relais, PC Reservation, NetOps.
- Develop workflow process for creating knowledgebase and train team (members from DTS, CTS, and UMD)
- Establish fund accounts for UMD
- Establish vendor records for UMD
- Load complete database – authoritative patron database established in April
- Complete training materials and process.
- Set up delivery locations for UMD

May

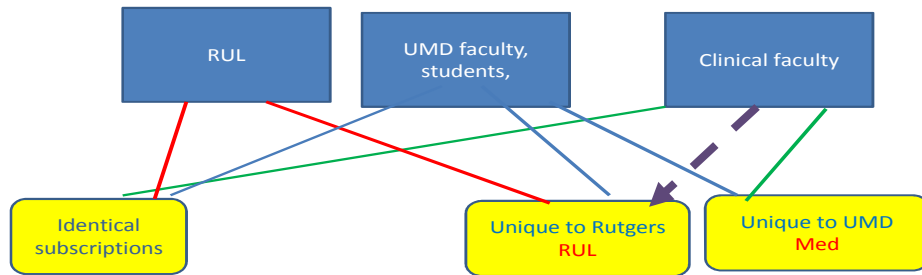
- Replace UMDNJ library codes in OCLC with NjR at end of month
- Test weekly data loads from the UMD patron Banner system via OIT.

- Create knowledgebase for webscale vendor, including the three categories – identical subscriptions, unique to Rutgers, Unique to UMD
- Provisional configuration of webscale service (through December, 2013)
- Train staff to use Sirsi Workflows, OCLC connection (cataloging processes, adds, changes, cat on the fly), Illiad and Relais
- Train staff to create patron records, circulation, holds, reserves, billing
- test UMD delivery locations in May
- Test delivery of resources to UMD locations (place holds and delivery in test)
- Close down Endeavor at end of May.
- UMD campus website in ready in May.
- Extensively test Knowledgebase

June

- **Go live on SIRSI**
- Go live Illiad and Relais
- Release public catalog with webscale discovery.
- Train UMD to place materials orders
- UMD library campus web presence goes live.
- Close down UMD catalog
- Close down Endeavor.

Note: In the interests of time, if configuring webscale is time-consuming, the public catalog will be used as the primary display until December, but the webscale knowledgebase will be used as the entry point to library subscriptions.



Can we run a separate proxy just for databases? Can we check the patron file for med and send them to the appropriate proxy server?

Proxy service is based on the following assumptions:

- The “MED” prefix is used to distinguish UMD users
- The proxy server first checks the patron file. All “med” prefix patrons are forwarded to the UMD proxy server. All non MED, non-prefixed faculty, students and staff are sent to RUL proxy server. Every other prefix uses barcode and in.
- RUL will negotiate access for clinical faculty in January, 2014 forward subscriptions.
- For unique to Rutgers subscriptions, the MED CLINFAC patron type can be used to exclude clinical faculty access to these resources **if necessary**.
- Unique to UMD titles will have the MED prefix and a prominent note explaining that these resources are available to UMD only. Only patron types with the MED prefix can access. (These go away in January?)