Migrating to the Cloud: Pepperdine Libraries at Web Scale

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Where We Started

• 521,000 records in Voyager, many of which had been migrated from an earlier system.

• Upgrades always somewhat difficult to fit into academic calendar. Usually have to do over Christmas break. Time-consuming and risky.

• Complex needs to support multiple branches, separate School of Law database, overseas programs.

• Getting systems to talk to each other always difficult: Voyager, EZproxy, Syndetics Solutions, link manager, website, e-reserves, interlibrary loan, patron management, suppliers, etc.

• Reporting so difficult only the systems librarian can do it.
Reasons for moving to WCL

• Looking for a better search interface for our patrons
• Wanted to implement Web 2.0 features
• Looking for a long term federated search strategy
• Wanted to expand access to collections outside our own
Initial Results

• Combination of WCL and ILLiad yielded increased searching (64% more searches) and borrowing. ILL volume **tripled**.

• Feedback from students and faculty was very positive.

• **BUT...**

• Patrons still had to access Voyager system to renew books, see pending orders, and view their account information.

• Library staff had to be familiar with two systems.

• Duplication of labor in cataloging and acquisitions among Voyager, WorldCat, and our PeopleSoft accounting system.

• Can we provide a Web 2.0 user experience for our staff as well as our patrons?
Why WMS? It’s the technology...

- Social computing---we had already made move to Blogs and Wikis. Confluence adoption spread from Library to entire University.
- In past year, Library also added hosted ILLiad, WorldCat Link Manager.
- Web server moved in December from Library Sun server to central Pepperdine servers.
- *We want to get out of the server management business and manage information, not technology.*
Why WMS? It’s the feature roadmap...

- Web 2.0 features like tagging, RSS feeds.
- User interface that makes life much easier for our staff.
- OCLC’s plans for integration with ILLiad, WorldCat Link Manager, ezProxy, CONTENTdm, etc.
- Shared data—vendor management, license management, statistics.
- Opportunities for 3rd party integration: widgets galore!
Why WMS? It’s a cost/benefit call...

• The addition of WorldCat Local and ILLiad has already increased circulation, tripled our ILL volume, and made our patrons happier.

• Our total system costs will drop significantly as soon as we make the transition.

• Our Acquisitions and Cataloging workflow becomes markedly more efficient.

• We won’t have to worry about replacing our near end-of-life Sun servers or upgrading software every year or two.

• Our Systems Librarian will actually have time to work on other projects besides the care and feeding of the ILS.
WMS System Data Requirements

✓ Our holdings in WorldCat should be complete and up to date.
✓ We need to send following data to OCLC:
  • Bibliographic Records
  • Local Holding and Item Records
  • Patron Data
  • Circulation Transaction Data
WMS System Data Requirements

✓ Bibliographic Records
  OCLC#s and Local system IDs

✓ Local Holding Records
  • OCLC Holding Location Code
  • Shelving Location
  • Call Number, and Item Barcode
  • 856 field for electronic records, and holdings information for serials (enumeration levels, chronology, frequency, numbering schemes, etc.) is also stored in the Local Holdings Record.

✓ Item Records
  • Item barcode should be unique
  • Item record is linked to a local holding record via barcode
WMS System Data Requirements

✓ Circulation Data
  • Items checked out
  • Bills/Fines
  • Holds

✓ Patron Records
  • Patron barcode should be unique
  • Each patron is assigned a patron type /borrower category
Data Migration Process

First Step:
Updating our current holdings in WorldCat.

Batchload Projects:

• We exported our bibliographic records and sent to OCLC
• OCLC matched our bibliographic records to WorldCat records
• OCLC added our OCLC symbol to indicate we hold the items.
• OCLC generated cross reference files including our records’ Voyager system IDs and corresponding OCLC#s.
• We added/updated OCLC#s in our records
Data Migration Process

Second Step:

• Local holding and item records
• Circulation transactions data
• Patron data
Problems and Challenges

Item public/non-public note field
Problems and Challenges

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We found the note was put to 876$z$ field in our LHR records at the Connexion site:
Problems and Challenges

Patron Group/Type

In Voyager, one patron can have multiple patron groups.

In WMS, one patron can have only one patron group.
Impact on Library Workflows: Circulation

- Look and usability of WMS is great
- Having Pull list and Cancel Hold Shelf list in real time is fabulous
- First version of Courses (Reserves system) has been fine — new version just released but not yet tested by us
- Holds were initially tricky to manage, but have been improving with each subsequent release
Impact on Library Workflows: Acquisitions

- Specify shelf location at time of order
- Scan barcodes into WMS during receiving (which receives item and creates LHR in Connexion)
- Check items out to internal “in process” patron rather than changing status (temporary)
- No longer load YBP order records (temporary)
- No longer load YBP EDI invoices (temporary)
Impact on Library Workflows: Cataloging

- No longer export bib records into local system
- No longer update holdings in OCLC
- No longer edit records in local system
- Catalog all items in Connexioin including laptops and white board markers
- Learn about Local Holdings Records (LHRs)
- Check displays in WorldCat Local
- No longer attach barcodes to items
The Path Ahead

- Integrating May 15 Release features
- Continuing to tweak KnowledgeBase and improve e-resource management
- Serials check-in
- Single sign-on support for all products
- Integration with University accounting system
- Increased use of shared data such as serial publishing pattern data and peer institution comparison data
- New apps and widgets yet to be conceived