# Patron and Item Type Reconfiguration Service

# Marmot Library Network

# Project Plan

### October 20, 2014

## Project Description

The Marmot Library Network needs to reconfigure a few of its item types and most of its patron types to prepare for INNReach Peer-to-Peer functionality and inclusion into the Prospector/Mobius INNReach Peer-to-Peer system. Marmot staff will work with an Innovative consultant to analyze and reconfigure the item types and patron types. The Innovative consultant will then review and update all appropriate item and patron records, item and patron record default templates, and all necessary circulation parameter tables.

A service kickoff call was held on October 10, 2014 between Jimmy Thomas, Brandon Cole and Amy Homick. This call yielded the following pertinent information:

* Jimmy will submit a finalized spreadsheet of all item type and patron type changes to Amy prior to the start of the project. This spreadsheet will include detailed old-code-to-new-code mapping instructions.
* Library staff will be available for consultation throughout the duration of the project.
* Amy will be responsible for creating files of the item and patron records that will need to be updated with the new item types and patron types, based on information supplied in the spreadsheet.
* Amy will be responsible for updating all item and patron records with the new item and patron types.
* Amy will be responsible for updating all appropriate tables with the new item and patron types.
* Amy will perform all record and table updates on Tuesday, January 6, 2015.[[1]](#endnote-1) During table and record updating, the library will need to suspend hold placement, hold processing, item checkout and item checkin. The library will use its offline circulation system during this phase of the project and should plan for this project phase to last the entire day.
* It will NOT be necessary for Amy to turn off patron requesting and patron updating functions in the library’s WebPAC during the item and patron record updating phase of the project. Marmot VuFind will be configured to treat Sierra as offline. It will queue some transactions (checkouts, holds), and deny others (patron record updates.) Due to a local open source and API layer on the library’s WebPAC, Amy, Jimmy and Brandon will coordinate a test on the library’s test server prior to the actual record update phase.

## Project Plan

| Responsibility | Description  | Estimated Time[[2]](#endnote-2) |
| --- | --- | --- |
| Library | Submit final spreadsheet of ptype and itype code changes to Innovative.  | Early Nov. 2014 |
| Innovative & Library | Test VuFind configuration with local open source and API layer in library’s test server for limiting patron requesting and updating functionality in the WebPAC. | Nov. 2014 |
| Innovative | Create files of patron and item records in preparation for updating to new ptypes and itypes | Dec. 22-23, 2014 and Dec. 29-30, 2014 |
| Library | Begin using offline circulation during table and record updates. Staff must ***not*** circulate anything online and should expect to use offline circulation for the entire day. | Jan. 6, 2015 |
| Innovative | - Update patron and item default record templates with new ptypes and itypes- Update Patron Type table with ptype codes- Update Item Type table with itype codes- Update item and patron records to new itype and ptype codes - Update items on course reserve with new itypes- Update Rule Determiner table with new itype and ptype codes- Update Circulation System Options 17-18 & 20 with new itype and ptype codes- Configure magnetic media field setting to new itypes (prevents de-sensitizing)- Update Float Determiner table with new itypes- Update Patron Blocks table with new ptypes- Update Collection Agency table with new ptypes- Update WAM Forward table with new ptypes- Update Prospector Patron and Item Mapping tables with new ptypes and itypes | Jan. 6, 2015 |
| Innovative | Perform testing on items and patrons. | Jan. 6, 2015 |
| Innovative | Search for item and patron records created during period of Dec. 22-30th that contain old itypes and ptypes and update records to reflect the new codes. | Jan. 6, 2015 |
| Innovative | Notify Library staff that they may cease using offline circulation and begin circulating online. | Jan. 6, 2015 |
| Library | Perform testing on items and patrons and report any issues to Amy. | Jan. 7, 2015 |

1. Innovative anticipates completion of item and patron record updates in one day. In the event that the updates to item and patron records do not complete, the library should not perform any checkins or place any holds until this process is complete. [↑](#endnote-ref-1)
2. [↑](#endnote-ref-2)