

Project Plan 2016-005

Horizon

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Description

This document describes the Project Plan for Horizon to Alma library database migration.

Supporting documents:

- **projectPlan-2016-005-Horizon.pdf**: this document.
- **lccHorizonToAlma-Migration.xlsx**: Project Plan organization with sheets:
 - **PlanToDeliver**: what data sets we will be providing
 - **Resources**: some resource that helped learn the systems/data
 - **Notes**: some misc. notes
 - **Stats**: stats from our queries
 - **Columns**: a list of all mandatory columns (per Ex Libris)
- **Horizon_Delivered_Files.xlsx**: Delivered reports.
- **Horizon_Field_Mapping_LCC.xlsx**: Fields mappings.

Ex Libris Steps

Document: [Horizon to Alma Data Delivery Specification \(Page 4\)](#)

- *[customer]* Indicate which local fields correspond to Ex Libris' expected fields using the Horizon Field Mapping form, prior to data delivery (customer responsibility).
Validate the flat files using Ex Libris' validation tool Excel. It is recommended that this step be done against a small sub-set of data to ensure that the header of each of your flat files and the filled in field mapping form match each other.
- *[customer]* Extract the relevant data elements from Horizon into flat files (customer responsibility).
- *[customer]* Upload the files to Ex Libris' FTP server along with the Horizon Delivered Files form and the executed/validated Non-ExLibris to Alma Validation Tool (customer responsibility).
- *[Ex Libris]* Transform the data elements, based on the Horizon Field Mapping form, into an intermediate

conversion XML format (Ex Libris responsibility).

- *[Ex Libris]* Load the transformed data into Alma (Ex Libris responsibility).
- Provide the Horizon data elements in flat files, and place them on an Ex Libris FTP server. Prepare the data files with the naming conventions as described in Appendix – FTP Drop Point Delivery and Form on page 28.

SQL Steps

These SQL scripts include lines for filtering a database used by multiple institutions. In this case, we wanted to filter out the records for "Lower Columbia College". See the Questions/Answers sections for our filters.

We are only including scripts for the data sets we desired to migrate, which include:

- **Fines**
- **Items**
- **Loans**
- **Patrons** (aka Borrowers)

Step: Create 'bib' record for tag='999'

Document: [Horizon to Alma Data Delivery Specification \(Page 7\)](#)

The out-of-the-box Horizon export does not include a bibliographic record key. We recommend copying the Horizon bibliographic record key from the bib_control table into the actual bibliographic record. We recommend using the 999 \$a for the bibliographic record key in the bibliographic record.

SQL Script

```
insert into bib
(
  bib#,
  tagord,
  tag,
  indicators,
  text,
  cat_link_type#,
  cat_link_xref#,
  link_type
```

```
)  
select      bib#,  
           max(tagord)+1,  
           '999',  
           '',  
           '-a' + cast(bib# as varchar) + ' ',  
           null,  
           null,  
           3  
from bib  
where      bib# not in (select bib# from bib where tag = '999')  
group by bib#
```

Step: Export Items

Document: [Horizon to Alma Data Delivery Specification \(Page 9\)](#)

SQL Script

```
select  
    i.item#,  
    i.ibarcode,  
    i.bib#,  
    i.location,  
    i.collection,  
    i.call,  
    i.call_reconstructed,  
    i.copy_reconstructed,  
    i.volume,  
    i.price,  
    convert(varchar(10), (dateadd(dd,i.creation_date,'01/01/1970')),101) as creation_date,  
    convert(varchar(10), (dateadd(dd,i.last_update_date,'01/01/1970')),101) as last_update_date,  
    convert(varchar(10), (dateadd(dd,i.last_inventory_date,'01/01/1970')),101) as  
last_inventory_date,  
    i.itype,  
    i.item_status,  
    convert(varchar(10), (dateadd(dd,i.last_cko_date,'01/01/1970')),101) as last_cko_date,  
    i.n_ckos,
```

```
        i.call_type,  
        i.internal_note,  
        i.notes,  
        i.cki_notes  
from item as i  
where i.location = 'lcc'  
order by i.bib#
```

Step: Create P2E Data (Physical to Electronic)

Document: [Horizon to Alma Data Delivery Specification \(Page 14\)](#)

Provide as CSV as: <bibnumber>,<resource type>

Example:

```
00000001,Portfolio  
00000002,DB
```

This data was provided by our Library staff.

Step: Export Patrons from Horizon

Document: [Horizon to Alma Data Delivery Specification \(Page 13\)](#)

SQL Script

borrower

```
select  
b.borrower#,  
b.name as name_reconstructed,  
b.location,  
b.btype,  
convert(varchar(10), (dateadd(dd,b.birth_date,'01/01/1970')),101) as birth_date,  
convert(varchar(10), (dateadd(dd,b.expiration_date,'01/01/1970')),101) as expiration_date,  
convert(varchar(10), (dateadd(dd,b.creation_date,'01/01/1970')),101) as creation_date,  
convert(varchar(10), (dateadd(dd,b.last_update_date,'01/01/1970')),101) as last_update_date,  
isnull(b.language,'eng') as language,  
b.pin#,  
' ' AS title,
```

```
convert (varchar(10), (dateadd(dd,b.registration_date,'01/01/1970')),101) as registration_date,  
b.borrower_note  
from borrower as b  
WHERE b.btype LIKE 'z%'
```

borrower address

```
select T1.borrower#,  
       T1.ord,  
       T1.address_type,  
       convert (varchar(10), (dateadd(dd,T1.valid_from_date,'01/01/1970')),101) as valid_from_date,  
       convert (varchar(10), (dateadd(dd,T1.valid_to_date,'01/01/1970')),101) as valid_to_date,  
       T1.address1,  
       T1.address2,  
       T1.address3,  
       T1.address4,  
       T1.postal_code,  
       T1.city_st,  
       T1.email_name,  
       T1.email_address  
from borrower_address as T1  
left join borrower AS T2 ON T1.borrower#=T2.borrower#  
WHERE T2.btype LIKE 'z%'
```

borrower barcode

```
select      T1.borrower#,  
           T1.ord,  
           T1.bbarcode  
from borrower_barcode as T1  
left join borrower AS T2 ON T1.borrower#=T2.borrower#  
WHERE T2.btype LIKE 'z%'
```

borrower burb

```
select      T1.borrower#,  
           T1.reference#,  
           T1.item#,  
           convert (varchar(10), (dateadd(dd,T1.date,'01/01/1970')),101) as date,
```

```
T1.block,  
T1.comment,  
T1.amount,  
T1.ord  
from burb AS T1  
left join borrower AS T2 ON T1.borrower#=T2.borrower#  
WHERE T2.btype LIKE 'z%'
```

borrower bstat

```
select      T1.borrower#,  
           T1.bstat  
from borrower_bstat AS T1  
left join borrower AS T2 ON T1.borrower#=T2.borrower#  
WHERE T2.btype LIKE 'z%'
```

borrower phone

```
select      T1.borrower#,  
           T1.ord,  
           T1.phone_no,  
           CASE  
             WHEN T1.phone_type = 'b' THEN 'Office'  
             WHEN T1.phone_type = 'c' THEN 'Home'  
             WHEN T1.phone_type = 'cp' THEN 'Mobile'  
             WHEN T1.phone_type = 'd' THEN 'All'  
             WHEN T1.phone_type = 'h' THEN 'Home'  
             WHEN T1.phone_type = 'm' THEN 'Home'  
             WHEN T1.phone_type = 'N/P' THEN 'All'  
           END  
from borrower_phone AS T1  
left join borrower AS T2 ON T1.borrower#=T2.borrower#  
WHERE T2.btype LIKE 'z%'
```

change borrower expiration date

```
update borrower  
set expiration_date = datediff(d,'01/01/1970','12/31/2017')  
where expiration_date = datediff(d,'01/01/1970','06/06/2016')
```

Step: Create A City Code To City/State Translation

Document: [Horizon to Alma Data Delivery Specification \(Page 14\)](#)

SQL Script

```
select DISTINCT(ba.city_st)
      ,cs.descr as city_st
from borrower_address as ba
left outer join city_st as cs on (ba.city_st = cs.city_st)
WHERE ba.city_st IS NOT NULL
AND cs.city_st IS NOT NULL
ORDER BY ba.city_st
```

Step: Export Loans

Document: [Horizon to Alma Data Delivery Specification \(Page ..\)](#)

SQL Script

```
select
      T1.circ#
      ,T1.borrower#,
      T1.item#,
      convert(varchar(10), (dateadd(dd,T2.due_date,'01/01/1970')),101) as due_date,
      '5:00PM' as due_time
      ,T1.cko_user_id
      ,convert(varchar(10), (dateadd(dd,T2.last_cko_date,'01/01/1970')),101) as last_cko_date
      ,T2.location as cko_location
      ,'10:00AM' as last_cko_time
from circ as T1
left join item as T2 on T2.item# = T1.item#
left join borrower AS T3 ON T1.borrower#=T3.borrower#
WHERE T3.btype LIKE 'z%'
```

Step: Export Fines/Blocks

Document: [Horizon to Alma Data Delivery Specification \(Page ..\)](#)

SQL Script

```
select      T1.borrower#,
           reference#,
           ord,
           item#,
           convert (varchar(10), (dateadd(dd,date,'01/01/1970')),101) as date,
           block,
           amount,
           comment
from burb as T1
left join borrower as T2 ON T1.borrower#=T2.borrower#
where amount > 0
AND T2.btype LIKE 'z%';
```

Using lccSQLDataExport To Export Data

lccSQLDataExport is a free/downloadable program to export data from SQL (or Oracle), ref: <http://services4.lowercolumbia.edu/demo/projectlid/LCCSQLDataExport>

Using this method negates any need to manually open/manipulate the data, like in Excel.

The files supplied are in the Zip file: lccSQLDataExport-templates

Provided with this Project Plan are templates on using lccSQLDataExport to export the following Data Sets:

- borrower
- borrower address
- borrower barcode
- borrower bstat
- borrower burb
- borrower phone
- fines
- items
- loans

Each Data Set consists of the following three files:

- ...bat: a batch file to run lccSQLDataExport
- ...xml: a Logic File to tell lccSQLDataExport how to connect, what to do
- ...txt: a Query file supplied to the XML file

The only modification you should need are in the XML files. Change the following:

- **[...any id you want to put...]**: this is what is reported to the SQL server as your connection workstation id. Any value can be used.
- **[...your SQL server...]**: this is the name of your SQL server

Each template set of three files work as follows:

- the '.bat' (Batch File) run lccSQLDataExport with the supplied Logic File
- the '.xml' (Logic File) contains:
 - connection settings
 - query file path
 - export file path
- the '.txt' (Query File) contains the SQL Query

When completed, the following files will be produced:

- download-horizon-export-borrower.txt
- download-horizon-export-borrower-address.txt
- download-horizon-export-borrower-barcode.txt
- download-horizon-export-borrower-bstat.txt
- download-horizon-export-borrower-burb.txt
- download-horizon-export-borrower-phone.txt
- download-horizon-export-fines.txt
- download-horizon-export-items.txt
- download-horizon-export-loans.txt

Notes

Marc Data

1. Login to the Horizon application with an admin account
2. In the drop down menu select Bib Export

3. Selected sections of records because it would error out if the output was too large (max file size was 64K)
 - a. Select: bib#
 - b. From: bib_control
 - c. Where: (each run with a different range)
 - i. Where: bib# <=5000
 - ii. Where: bib# > 5000 AND bib# <= 15000
 - iii. Where: bib# > 15000 AND bib# <= 20000
 - iv. Where: bib# > 20000 AND bib# <= 22000
 - v. Where: bib# > 22000 AND bib# <= 25000
 - vi. Where: bib# > 25000 AND bib# <= 27000
 - vii. Where: bib# > 27000 AND bib# <= 29000
 - viii. Where: bib# > 29000
4. Append the additional files to the end of the first MRC file.

Questions/Answers

What is a Bibliographic Record

It is a record that defines a type of inventory object. For each physical object of that type, an Item # is associated with that Bib #.

Example:

Bib # 123 = Computer Model ABC

Item # 001 = Computer Serial # ..., of Model ABC, and so points to Bib # 123

Item # 002 = Computer Serial # ..., of Model ABC, and so points to Bib # 123

What Filter to use on bib and item?

Items: location = 'lcc'

Bib: must be connected to Item and location = 'lcc'

What Filter to use on borrowers?

btype must start with 'z'

zs = student

zf = faculty/admin

ze = other

zc = community
zdept = department
zdp = delinquent patrons
zfe = emeritus faculty
zfr = retired faculty
zill = inner library loan

Resources

Subject Matter Expert: Database Export

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Subject Matter Expert: Product Companies

Horizon

Company: SirsiDynix

<http://www.sirsidynix.com/products/horizon>

Alma

Company: Ex Libris

<http://www.exlibrisgroup.com/category/AlmaOverview>

https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Migration_Guides/ILS_Migrations

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Definitions

866 - MARC Tag, HTML link

Alma – Microsoft Word add-on for connection to GG

ERM - Electronic Resource Management system

Horizon – (Oracle, as of 12c) Container Databases, Super Database containing Sub Databases

ILS - Integrated Library Systems

MARC - MAchine-Readable Cataloging record

Modifications

NAME	DATE	MODIFICATION
David Mielcarek	11/30/2016	Created
David Mielcarek	12/5/2016	Added lccSQLDataExport templates

End of document