

Memo

To: Montana State Library Network Advisory Council

From: Ken Adams, Montana Shared Catalog Director

Date: November 10, 2015

Re: Montana Shared Catalog Update

FY 15 LSTA authorized for MSC new libraries was \$33,066.83 and was used to cover vendor start-up costs for Chouteau County Library in Fort Benton and Geraldine branch, CJI School District in Chester, Fairfield Public Library, Garfield County Library and Roundup Elementary School. Their profiles and configurations were created over the summer and the first group migrating data; Chouteau County and Fairfield Public went live on Sept 17 and 25th respectively. The second group; CJI School District and Garfield County are currently in the test phase of their data migration and are scheduled to load final data on Nov 13 and go live on Nov 19. Roundup Elementary School is currently manually entering their records into the MSC database. With these additions, the MSC now counts 177 member libraries.

The MSC 2015 Members Meetings were held in Helena on May 1 for the spring meeting and again for the Fall Meeting on Oct 1. Key topics of the spring meeting were the MSC Strategic Plan and the FY2016 budget. The Strategic Plan, including a revised mission statement, and the budget were unanimously approved with little discussion. Two new members of the MSC Executive were elected: Wendy Campbell (Darby – small public library rep) and Kathy Robins (Billings – large public library rep), along with a new board chair: Sinda Puryer (Flathead Valley College – academic library rep). The fall meeting focused on creating goals for the MSC strategic plan derived from member surveys. The MSC by-laws and contract were also modified and approved. After much discussion, the option to enable the Symphony ILS system so that patrons can view their checkout history was approved by the majority but there were several dissenting votes and others voiced their concerns about patron privacy and staff access to checkout history.

Policies Reorganization: Progress slowed on the MSC system configuration and policies reorganization project due to staff turnover and other unexpected delays. It has been revitalized in October and now the project is expected to be more than 90% completed by the end of 2015. Currently, client logins are being reviewed and changed along with final cleanup of item categories. Cleanup of home locations won't take place until the spring of 2016 after which, the project will be complete.

Support staff: Jessie Goodwin was hired in mid-January to fill the MSC Trainer and Technical Support position that had been vacated when Amy Marchwick became the Systems Technician. Jessie has already created numerous training videos, recorded webinars along with presenting on-site training in Glendive and Missoula plus new library training in Fort Benton and Fairfield. For the first time in years, the MSC support staff seems stable and brings significant dedication, professionalism and technical savvy to the program. We are now able to tackle problems and procedures that had largely been ignored due to insufficient staff and staff turnover, particularly catalog record maintenance and training. Ken Adams has announced his retirement effective Dec 31, 2015. The search process for a new director will begin in November.

System Software and Hardware Updates: Our Symphony ILS software was upgraded to version 3.5 in June. The implementation of the "Enterprise" online catalog search interface is nearly complete. The deadline of Dec 31, 2015 has been set for when all libraries will be using Enterprise. The product continues to be developed and improves with each upgrade. Training and use of the "MobileCirc" app for mobile devices has been ramped up dramatically over the last few month mainly due to Jessie's

perseverance. The Directors Station server was taken offline in July due to its unsupported operating system (Windows Server 2003). After reviewing options it was decided the best and most cost effective solution would be for SirsiDynix to host the Directors Station server thru their SaaS (Software as a Service) program. Arrangements were made and Directors Station came back on line in late September. During this process it was discovered that our IBM servers no longer passed ITSD security scans due to incorrect settings with the AIX operating system and unsupported software (Oracle 10g). The AIX settings were corrected and SirsiDynix migrated our system to Oracle 11g. Both servers now pass ITSD security scans. The replacement product for the aging Director Station stats platform, BLUEcloud Analytics, is almost ready for functional use. Historical transaction data, bills and holds “data cubes” were added in October. The main problem with implementing Analytics will be the huge learning curve required to begin using this extremely capable and complex product. We also have had our first look at BLUEcloud Cataloging which shows great promise but is not yet ready for consortium use. Usage of catalog services for mobile devices; BookMyne, Facebook App and Shoutbomb SMS continues to increase as more libraries and patrons sign up for these services. The MSC server’s battery UPS unit failed last spring. A new unit was purchased to replace it. We also purchased a “data storage drawer” for the test server that has allowed us to remove the server from the state library’s “storage area network” and increased our backup capability.