

Consortium Update

Fall 2019

Administrative

MSL Staffing update

The Montana State Library has been undergoing a restructuring and overall flattening since June. There will no longer be a Library Development Division of the State Library, and MSC System Administrators have been moved to the Information Products segment of the library. It is our hope that this restructuring will be a benefit for the MSC overall. The main result of the restructuring as it affects the membership is that there will be a fourth system administrator, recruitment to commence soon, and Amy Marchwick has been designated as the Lead System Administrator, effective September 30th.

Congratulations Amy!

OCLC Group Services Contract RFI/RFP

MSL under the supervision of Cara Orban, is going out for RFI/RFP for the services included in the OCLC Group Services contract, for a new contract to begin next FY. In the past we have claimed Sole Source to sustain an exclusive contract with OCLC for interlibrary loan and cataloging services, as well as for our CONTENTdm and Digital Archive digital collection management software. Most likely we will have another contract with OCLC. However, we are considering what levels of services and access we need as part of this contract, especially as pertains to the MSC and to the MMP, so that we can write those details into the procurement documents. We intend to solicit separate responses for each of these respective areas rather than for an omnibus contract. This process will take place over the fall and winter, and we hope to have a contract or contracts signed in early 2020.

Stephan Licitra has been appointed the CMC/MSL's representative to the RFI/RFP committee.

New Libraries

The Ida Dockery Owen Library at Yellowstone Christian College (YCC) in Billings reached the 80% mark of their retro-cataloging project that began in 2017 and they have now gone live on the system.

Congratulations and welcome!

Closed Dates Survey 2020: Public, Academic & Specials Closed Dates Survey

If your library is **not a school** library, please take the time to fill out the [2020 MSC Closed Dates Survey](#). If your library has branches and those branches have the same holiday closed dates as the main branch, you will only need to fill out one survey.

Please also be aware that Independence Day is observed on Friday July 3rd. You will be able to indicate if your library is closed on the 3rd and/or the 4th of July in observance of Independence Day.

This year we have added a section at the bottom of the survey where you should enter your regular hours of operation. We will be using this information to update your library's information in Enterprise

and in ASPeN. This information will be of great value to patrons and MSL consultants scheduling site visits.

Please complete this survey by 11/22. For libraries that do not respond, system administrators will be entering the Montana State holidays as listed on the [Montana Association of Counties website](#), in order to ensure both that due dates are not assigned on typical closed dates and the onshelf holds wizard will not populate.

Circulation Rules Subcommittee

This committee has not started meeting because of scheduling issues. This committee will review the approved circulation rules and help create framework for approving new rules. If you are interested in serving on the committee, please open a help desk ticket.

Sharing Group Subcommittee

The MSC currently has multiple sharing groups where libraries share patrons and items seamlessly within Workflows. The existence of multiple sharing groups adds a lot of complexity to system configuration and could be prohibitive if the MSC ever decided to move to a new vendor for our ILS product. MSC staff are looking for MSC members to work on a committee to help create standards and best practices for a single unified sharing group that would make it more feasible for the existing groups to merge. We especially need committee members who are in a sharing group or are interested in joining a sharing group. If you are interested in serving on the committee, please open a help desk ticket.

BLUEcloud Analytics

With a mind toward the future, staff are beginning to prepare the system for a cloud-based ILS. SirsiDynix is developing additional BLUEcloud products for circulation, cataloging and beyond which will take the MSC away from the WorkFlows client into a browser-based solution in the next three years (give or take). As part of this process, we are evaluating reports currently used in WorkFlows. This year, our goal is to replicate statistical reports presently in use by the membership so that they can be run on demand or scheduled from BLUEcloud Analytics. Notices and reports that make changes to the system (e.g. moving collections) will remain in WorkFlows.

Milestones for this project are as follows:

1. Analyze the reports currently in use and prioritize those used by most libraries. (Nov 2019)
2. Develop reports in BCA that capture the same statistical information. (Dec 2019 – Feb 2020)
3. Place shortcuts to replacement reports in each library's folder in BCA. (Feb 2020)
4. Offer a tutorial on scheduling statistical reports in BCA. (Mar 2020)
5. Communicate with libraries so that they know where to find reports in BCA. (April 2020)
6. Clean the WorkFlows schedule of duplicative statistical reports. (June 2020)

Public Access & Discovery

Enterprise

We deployed Harvest Unleashed, an Enterprise enhancement in August. This enhancement will insert authority references and attributes into harvested catalog records. Name, title and subject authority references will be searchable and will appear in the facets. The work will also remove commas from before |e and remove commas and full stops from after |e in authority control fields. This will prevent Enterprise from generating duplicate facet navigators due to the presence or absence of a trailing comma or incorrect punctuation. Other improvements include a “date created” subfield, public note display, and dummy copies for “on-order” and “bound-with” child records.

Syndetics upgraded their code which will change the experience of book summaries and reviews. These items now display under the accordion, “Explore Summary.”

Enterprise online payments are now live and available to the broader membership. Thank you to North Lake County Public Library District and Belgrade Community Library for testing the new functionality.

In September, we upgraded our Enterprise development server which will allow us to begin testing mobile profiles. See the section below on E-Resources/Apps.

Recycled Barcodes – Known Issue

A bug in Enterprise causes an unexpected error for recycled user barcodes. When a barcode was previously connected with any other user, it prevents the present user from logging in to their Enterprise account, and the resulting database error must be resolved by SirsiDynix. The only way to prevent this issue is to not recycle user barcodes. If you encounter this error, please open a help desk ticket.

Mobile App

SirsiDynix’s BookMyne was recently removed from the Google Play store because of security vulnerabilities discovered in the version of Apache Cordova that is used in the app. Users that already have the app installed will be able to continue to use it. As mentioned during the spring membership meeting, an update in BLUEcloud Central also broke volume level holds. BookMyne is now considered a legacy product and future development will be slow and limited. With this in mind, the Montana Shared Catalog is considering BLUEcloud Mobile as a replacement product, SirsiDynix’s new app. BC Mobile will allow for account management, digital cards, and general catalog searching.

Concurrently, the staff is testing mobile profiles on our Enterprise development server. Mobile profiles present an optimized version of our online catalog for smart devices. Pending testing, we hope to schedule a prod upgrade for March 2020.

Also this fiscal year, the Montana State Library is piloting a product from the Digital Public Library of America for managing digital content. The project includes three components, an e-content market place, a hosted server, and a mobile application. The app will allow borrowers to discover digital assets including MontanaLibrary2Go, books in the public domain, government documents, and individual library subscriptions (e.g. Hoopla). MSL partnered with two MSC member libraries (Missoula and Sheridan County) and two independent libraries (Great Falls and Butte) to test and evaluate the product.

System Maintenance

Security & Patron Information

The Network Technology Survey that staff circulated this spring only had 49 responses. Now that a lead system administrator is in place, we will be following up with all the member libraries about network security needs including system-wide implementation of a VPN (Virtual Private network) to ensure that no patron data or PII (Personally Identifiable Information) is traveling across the internet unencrypted to or from SaaS. Our data at rest in the SirsiDynix SaaS servers in Atlanta meet all state and federal security requirements for user information.

Related to this security project, staff would like to advise members to not collect PII unless absolutely necessary. Sensitive PII includes social security numbers, driver's license numbers, and dates of birth. General PII includes phone numbers and addresses including email addresses. System administrators are removing social security and driver's license numbers where we encounter them for the entire consortium. We are aware that many libraries need to collect dates of birth especially if they are using debt recovery agencies, but libraries that may not need this information (school and special libraries) are encouraged to request that dates of birth be removed in batch. If your library does not need physical address, phone numbers, or private email addresses, we encourage you to open a help desk ticket and request a batch removal of this data.

A good rule of thumb when registering and maintaining existing patron records is to not gather any information about patrons that you do not need to satisfy policy requirements in your library or to facilitate communication with patrons about overdue/lost items.

Technical Services

OCLC Reclamation Project & Catalog Cleanup

OCLC began working on our Reclamation project on June 5. They had initially projected a 90 day turn around on this project, and there was expected to be no impact on our holdings in WorldCat during the process. Unfortunately, OCLC had some internal miscommunications that resulted in incomplete data being used for the Reclamation and the majority of our holdings in WorldCat being removed. OCLC is aware of the problem and has now begun processing the correct holdings data. Most MSC libraries now have accurate holdings reflected.

Once the reclamation concludes and the cross-reference file is returned from OCLC, system administrators will evaluate the records to see what parts of cleanup can be automated and which will need to be passed to members and CMC volunteers.

Compliance Intervention Policy & Procedures

Due to the catalog cleanup project to follow the OCLC Reclamation, actual enforcement of the [Compliance Intervention Policy](#) will be delayed. Every library will have some records to cleanup or enhance and then adjust OCLC holdings. Therefore system administrators decided to do reclamation cleanup first before pressing compliance intervention issues. There is likely to be overlap in libraries not participating in post-reclamation cleanup and intervention libraries.

Since our last meeting there has been no appreciable change in either the specific libraries whose data suggest they need intervention or the percentage of records constituting attachment rules violations. The first round of interventions letters are scheduled to be sent in January of 2020. Notified members will have one calendar year to complete training and restore compliance.

Acquisitions Pilot

Missoula Public Library continues to move toward being live with pre-processing and EDI ordering/invoicing. Draft versions of the Standard Acquisitions Procedures will be available in the Knowledge Base soon.

Imaginelf Public library will be conformed to the [Functional Descriptive Policies](#) in October and the State Law Library will be conformed in November. If you are interested in adopting these policies in your library it will enhance your library's statistical accuracy for Public Library Statistics. Please enquire by opening a helpdesk ticket under Cataloging. You do not need to use the Acquisitions Module to change to these policies.

WorkFlows Browse by Title Search – known issue

Our catalog has reached a size where titles with numerous holdings (such as Harry Potter where nearly every library has more than one copy) sometimes disappear from the browse index even though they are not shadowed or in a shadowed location. The titles can still be found by keyword search and in Enterprise. The issue is that there are too many characters (over 60,000) in cumulative authority records for a browse search to return a result.

System administrators have a solution for this problem. Please open a ticket if you encounter a record that you can see is not shadowed at the title, call number or item level, and will not appear in a WorkFlows browse search. Staff are tracking this issue in order to determine its scope.

Training Update

MSL Workshops

MSC staff presented "[Collection Development with the MSC](#)" at the MSL workshops in Bozeman (07/24) and Sidney (09/17), which attracted attendees from nearly 40 libraries. The presentation slides are now available on SlideShare.

Travel

The MSC trainer recently accompanied the consortium coordinator on a trip to Wolf Point for the Golden Plains Federation Meeting. They stopped in to visit Stillwater County Library in Columbus, Roundup School-Community Library, and Petroleum County School-Community Library in Winnett.

Forums/Help Desk

The MSC and other teams from the MSL are deploying a new community forum available through the help desk. Forums can be used to offer peer support and are limited to those that create a help desk account. As questions arise in the [forums](#), please feel free to participate.

If you have not yet set up an account with the new help desk, we highly recommend it.

Lost Item Overview

The article [Circulation – Lost Item Overview](#) is now available in the help desk. It covers the lifecycle of a lost item and explains what happens in the system when an item is lost, returned, paid for, or neither returned nor paid for. This lifecycle occurs regardless of whether a library is fine-free or fining.

Workplan MSC/MSL Staff FY2020

In order to provide the MSC member libraries with transparency about the work staff will be focusing on this fiscal year, we are sharing our top-level workplan objectives for Consortia Director, System Administrators and MSC Trainer.

- Build a mobile-friendly catalog (DPLA app, Enterprise mobile profiles, BC Mobile research)
- Configure and migrate new libraries (application re-opening for spring/fall migration schedules)
- Establish Lead responsibilities (train new staff, security project, admin team goals)
- Establish Annual MSC Road Trip (visit libraries)
- Phase 1: Migrate to cloud-based ILS (WF stat report transition to BCA, standardize configuration for BLUEcloud implementation in later phases)
- Phase 1 & 2: Standardize Sharing Groups (establish committee, identify opportunities for standardization, recommendations to sharing groups)
- Standardize technical services infrastructure (establish post-reclamation cleanup plan, complete Acquisitions manual and Pilot, Serial control manual and training, identify and intervene with non-compliant libraries, support CMC's SCP audit subcommittee)
- Streamline customer support (establish helpdesk forum, post knowledge base articles in content areas, create SysAdmin knowledge base articles)
- Provide ongoing support (four in-person training, regular ticket support, recurring/cyclical projects)
- Demonstrate value in collaboration and shared infrastructure (board and sub-committee support)