MSC Admin Systems Update – CMC Fall 2019

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 MSC is that we will be getting a fourth system administrator and one of the current system administrators will be designated as the lead. When we know more about the staffing changes, that information will be passed on to the membership.

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's representative to the RFI/RFP committee.

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. This most likely will restart the clock on the 90 days before the Reclamation is complete.

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.

Project Gutenberg Removal

The 464 bibliographic records from Project Gutenberg loaded into our system in 2011 for 36 libraries were removed. Libraries that wish can request a link to Project Gutenberg on their Enterprise profile.

E-Resources/Apps

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 will need to consider a replacement product.

MSC system administrators recently received a product demo for BLUEcloud mobile, SirsiDynix's new app. BC Mobile will allow for account management and general catalog searching. To include digital resources, we would need to purchase an additional service, eResource Central.

However, the Montana State Library is currently in the early stages of a pilot project with the Digital Public Library of America and LYRASIS which will address digital resources. 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.

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

Since go live, the Lewis & Clark Library (LEWIS) staff have been working very hard on their REVIEW list (items with REVIEW in the Cat 5 that did not match on load). They only have about 20,000 review items remaining, meaning that they have resolved close to 6,000 duplicate items since May. Also of note specifically to the CMC, Lewis & Clark was configured using the Acquisitions Pilot derived Functional Descriptive Categories, they are using the Serial Control Module, and will be configured to the Debt Collect and Acquisitions Modules. The majority of their collection is pre-processed with Baker & Taylor in a similar way to the Acq Pilot libraries Missoula and ImagineIF but they are not yet using EDI or 9XX ordering.

Security & Patron Information
The Network Technology Survey that MSC system administrators circulated this spring only had 49 responses. When a lead system administrator is selected, she will be responsible for 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, system administrators 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 number 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.

Forums/Helpdesk

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 cataloging questions arise in the forum, please feel free to participate. As CMC members, you may also want to initiate discussions for the broader membership.

If you have not yet set up an account with the new help desk, we highly recommend it. Please also take a look at the new format for the SCP and the Functional Descriptive Categories, on the [Cataloging page](#). With the next version of the SCP, the pdf link to the SCP's current version will redirect to this page. The MSC trainer and system administrators are interested in making specific procedures more transparent in the Knowledge Base. At present time, each SCP section of the Knowledge Base corresponds to one numbered section of the SCP. We are considering the efficacy of this structure as it related to browsing by function for the membership, but because the SCP is maintained by the CMC, we have been reluctant to make any edits.

We would like to have discussion about subdividing the procedures from the standards section of the SCP with standards continuing to be maintained by the CMC and procedures being overseen by the MSC trainer and system administrators in order to better standardize procedures for all members, especially new members.

Enterprise Update

We are working with SirsiDynix to deploy Harvest Unleashed. 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.

We've received requests to review various display codes in Enterprise, and there is a general need to review our descriptions in Enterprise for clarity, consistency and inclusiveness. The following changes are proposed. Minor capitalization and hyphenation issues will be resolved and are not listed below.

Home location descriptions:

- "Foreign Languages" to "World Languages" (member suggestion for inclusivity)
- "General Display area" to "On display – see staff." (member suggestion for multiple displays)

- "Music CD Collection" to "Music CDs"
- "New items shelving location" to "New"
- "New juvenile books-fiction" to "New juvenile fiction"
- "New juvenile books-nonfiction" to "New juvenile non-fiction"
- "Being acquired by the library" to "On-order"
- "Oversize Area" to "Oversize"
- "Parenting resource materials" to "Parenting resources"
- "Picture Book Collection" to "Picture books"
- "Standard Shelving Location" to "On Shelf" OR "Available" (member suggestion for clarity)
- "Young Adult Materials" to "Young adult"
- "Young Adult Fiction Area" to "Young adult fiction"
- "Young Adult Nonfiction Area" to "Young adult non-fiction"

Item Category 1

- "Blu-ray Disc" to "Blu-ray"
- "Book Kit" to "Kit" (member suggestion for kits that include more than books)
- "Laptop Computer" to "Laptop"
- "VHS video" to "VHS"

Item Category 3

- "General Fiction Materials" to "Fiction"
- "Foreign Language" to "World Languages" (member suggestion for inclusivity)
- "Non-Fiction Materials" to "Non-fiction"
- "Short Story Collection" to "Short Stories"
- "Spanish Language Materials" to "Spanish"

Acquisitions Pilot Project Update to Content Management Committee

The last few steps of this project are taking much longer to complete than originally projected. MSLA has completed it's EDI testing, mapping and is working on test ordering. Once the test order has come through, final configuration and training will conclude. Missoula will be live. ImagineIf's mapping to the Acq Pilot Policies (Functional Descriptive Categories) is scheduled to occur in August. They have been using pre-processing for several years, so the Acq Pilot changes represent only conforming to the Acq Pilot Policies within their holding codes, mapping changes for CollectionHQ, and local annual reports.

The Standard Acquisitions Policies are in rough draft and will need to be finalized through the training process with Missoula before their maintenance can be passed on to the CMC for final approval. Then the document can be added to the Knowledge Base and maintained by the CMC and system administrators as changes in technology and member needs require.

Circulation Rules Subcommittee

This committee has not met since the last CMC meeting. The committee currently consists of Amy Marchwick, Carly Delsigne, Abbi Dooley, and Brooke Weiss. Now that the committee is formed, work will begin in the late fall.

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.