ILS Report October 6, 2021

LibLime Server Move followup
The LibLime Server Move take took place at the end of July caused a number of problems, especially with GetIt Acquisitions. First of all, GetIt stopped loading EDI Acknowledgements and POs. This problem was fixed by LibLime in mid-August. However, LibLime eventually confirmed that they could not locate the missing files that should have been loaded during the approximately three-week period in which EDI was not fully working. GetIt libraries were advised to contact vendors to have the missing Invoice files re-posted or to create the Invoice files manually. The server move also caused problems with loading files of vendor MARC records into GetIt in order to create Purchase Order Lines. This problem was fixed when LibLime applied the 6.02.14 point release to Bibliovation.

SCLS staff updated the report server address for the reports that are run outside of Bibliovation and other services that use the report server for authentication. Cindy created documentation and communicated with the libraries so library staff could update the selfcheck and sorter SIP information and she updated the security software settings for the security software that gets the title information. SCLS staff coordinated with the vendors of electronic resources that use SIP authentication to get that information updated as well.

Bibliovation 6.02.14 point release upgrade
The 6.02.14 point release was applied to Bibliovation on August 23, 2021. The fixes included in the upgrade are detailed in the release notes. This upgrade included critical GetIt Acquisitions bugfixes for problems caused by the July Bibliovation and GetIt server moves.

Unfortunately, the point release upgrade caused additional GetIt problems with the "send to catalog" feature, which is an important part of GetIt as it allows libraries to create BSEs and on order item records for newly-ordered materials. LibLime explained that the problems were caused by changes to the interaction between "send to catalog" and "catsource." When we migrated to Bibliovation, LibLime put into place a temporary workaround to allow GetIt purchase orders to "send to catalog" even though these bibs created by GetIt did not have a catsource field. The catsource field is a bibliographic "ownership" field that we use that allows library staff to edit BSE records. (When we were using Koha, library staff couldn't edit BSE records after they were created, but we were able to change this in Bibliovation.)

In this last upgrade, LibLime removed the temporary catsource workaround. (It was very unfortunate that the change was not detailed in the upgrade release notes that SCLS received from LibLime, and that SCLS did not have the opportunity to do the regular pre-upgrade testing in the sandbox because the sandbox is on a different version than production.) Then, after the upgrade, LibLime applied another fix (a "Default Catsource" GetIt system preference) to allow GetIt Purchase Order Lines to "send to catalog." (Moving forward, the GetIt records that are sent to the catalog will have a BSE catsource until they are overlaid with a full OCLC record, at which point the catsource changes to MARC and the bib record edits are restricted to Madison Cataloging staff and SCLS staff.)

Bibliovation 7.0 upgrade and testing
SCLS staff has continued to test in the 7.0 sandbox. Library staff are also assisting by doing module checklists. We are currently waiting on some additional bugfixes before we can schedule the production upgrade. As soon as we have received these bugfixes and confirmed that they are working, we will schedule the production upgrade.

Mobile App Update
Solus completed the custom template setup for the libraries who purchased templates. Each library has its own login and can customize its own template. If a patron's home library is set to a template library, then the patron will see the customizations when they log in to the app. Libraries have the opportunity to make changes and customize the template before the template goes live, and libraries can continue to make changes after the template is live as well.

Also, there were a number of response time problems with the mobile app. Solus, the app's vendor, had a recent DDoS attack and had to change their IP addresses to resolve the problem. (SCLS was one of a few American sites affected by this change.) In order for the app to continue working with Bibliovation, LibLime had to make the change in its API configuration. Unfortunately, the IP address change was done on very short notice and happened over a weekend, so the app was down over the weekend on September 18-19, but SCLS staff wasn't aware of this problem until Monday morning, 9/20. SCLS staff notified LibLime about the change on September 20, and LibLime made the change that day. This resolved the response time problems with the app, but there are lingering problems with pulling data from Bibliovation and displaying it properly in the app. Solus is working on this problem.

Rio and Marshfield migrations to LINKcat
The cleanup of Rio bibliographic records that were imported is continuing. We have completed searching and matching bib records that had duplicate ISBNs and UPCs, as well as serials and TV series bib records. We will now be reviewing the remaining RIO bib records, merging any records if possible, and then passing on the unique RIO bib records for Madison for cataloging.

The Marshfield LINKcat go live took place on September 13, 2021. Of their approximately 115,000 bibliographic records, around 76,600 were merged automatically during the migration (based on OCLC number). There has been ongoing cleanup and merging of the remaining 38,500 bibliographic records. As of 9/24/21, approximately 2,100 bibliographic records have been merged into an existing record in Bibliovation. Most of these records were records that had an ISBN or UPC number that matched an existing record in our database. We are currently going through reports of duplicate ISBNs and UPC numbers and we are halfway through the ISBN report. When we have finished the duplicate ISBNs and UPC reports, we will review the MFD bib records and search for additional duplicates. Not everything will be merged, because MFD does own materials that are unique to MFD.

Response to Recent Customer Support Issues, Part 1
We have received several reports that customer support for the ILS services has been less than satisfactory. We are taking these reports seriously and we are working to improve. Our relationship with our member libraries' staff is the most important component of our service. We acknowledge that the relationship is damaged. Suggestions for improvement were provided and we will be implementing these suggestions. We are currently working through all of the reported issues and you will see more changes in how we respond in the near future. The most noted gap is communication during service outages. Here are some of the requests and the SCLS response.

- Request: Update the status wiki more frequently; a 5:00 PM update would be great so that evening staff can be updated.
  - SCLS will: Update the status wiki
    - When the problem first occurs, and as follows until the issue is resolved

- o In the morning
- o Around noon
- o Around 4 pm
- o When it is resolved
- Request: Send email as soon as possible even if you don't have much information
  - o SCLS will: Send an email to the appropriate list announcing the problem. The email will include a link to the status wiki and provide information that updates will be posted there and that a final email will be sent once the problem is resolved.
- Request: Post an All Clear on the status wiki when things have returned to normal (i.e. libraries should stop using offline circulation)
  - o SCLS will: When the problem is resolved, send an "all clear" email to the appropriate list stating that the problem is resolved and asking libraries to report further problems. If possible, we will explain the cause of the problem—particularly if it was a major outage.
- Request: Send an email explaining what happened
  - o SCLS will: If we are not able to provide a reason for the problem with the "all clear" email, and we find out later, we will send out another email.
- Request: Use less jargon and state the problem more plainly
  - o SCLS will: We will attempt to use less jargon.

Subcommittee and Workgroup Meetings
- Circulation Services Subcommittee: September 14, 2021
- Collection Maintenance Subcommittee: September 8, 2021
- Discovery Interface Subcommittee: September 15, 2021
- Delivery Workflows Workgroup: September 23, 2021

Other ILS Staff Meetings
- Meetings with LibLime: August 10, 2021; August 17, 2021; September 21, 2021
- Meetings with LibLime about RIO/MFD migrations: August 2, 2021
- MPL Catalogers Meetings: September 14, 2021

Multi-part DVDs Packaging Workgroup
- The workgroup met on September 30 to discuss next steps.

Self-Check and RFID installations
- MFD is working on RFID tagging

Fall training and documentation
ILS Staff continue to update recorded tutorials, webinars, and written documentation. See more information below:
- We will be scheduling virtual User Groups in the coming months.
- Serials training (Receiving and Maintenance) is being worked on.

Top Bugs and Statuses

Top 5 with LibLime: We anticipate a new point release in the sandbox at the end of the week of 9/27 which may address some of these issues.

Hold requests on Holds Queue report blocking walk-in check out on self check unit [SC 60559; SW 21080]. [Critical bug, not in voting]. Status: Being worked on by LibLime.

Circulation: Patron data in left sidebar not cleared when using Clear screen button. [SC 57753; SW 20217] [From 1st 5 of voting]. Status: Being worked on by LibLime.

Circulation: Canceled holds on Holds Awaiting Pickup Report. [SC 58218; SW21024] [From 1st 5 of voting]. Status: Required further discussion with LibLime.

Discovery Layer: Advanced search option "Only items currently available for loan or reference" includes items not available for loan. [SC 58270; SW 21206] [From 1st 5 of voting]. Status: Not yet being worked on by LibLime.

Discovery Layer: In transit holds not counted as "active" holds on Patron Dashboard page. [SC 58502; SW 21580] [From 2nd 5 of voting] Status: Fix applied to the sandbox.

Still in Queue:

Partially fixed in production. Checking out a hold on behalf of another patron (hold authorization) does not clear hold: A patron can check out a hold on behalf of another patron but the hold is re-queued, not filled. [SC 58115; SW 20812] [Original bug list post-migration] Partially fixed in production. Changing priority of an item in transit or on hold shelf: Partial fix: As of 9/11/2020 staff can manipulate the Priority of a hold on the hold shelf to change the pickup location. Items in Transit cannot be re-prioritized. [SC 58182; SW 20939] [Original bug list post-migration]

Custom Statuses not cleared when checked out or in via SIP connection. [SC 60561; SW 21576] Post migration, but newly reported.

Not fixed in sandbox or production. Circulation: Check in. Pop-up about item barcode not in system. [SC 57149; SW 19177] [From 2nd 5 of voting]

Not fixed in sandbox or production. Caching / retaining search parameters problem. (6 votes). [SC 58180; SW 20933] [From 2nd 5 of voting]

Renewal statistics problem: New setting in version 7.0 may have fixed this issue with how statistics are attributed but testing on SCLS end is incomplete. [SC 59286]

Authority Control and Database Maintenance

August 2021 Authority Control/Batch Deletes

- 12,144 bibliographic records were newly cataloged and/or updated in the database between 6/17/2021 and 8/17/2021.
- 32,049 items and 4,457 bibliographic records (with only withdrawn items attached) were deleted in the monthly batch deletion of withdrawn items (July was skipped due to server move).

- 1,534 bibliographic records with no items attached (that were created before 4/1/21) were deleted from the database.

September 2021 Authority Control/Batch Deletes
- 5,875 bibliographic records were newly cataloged and/or updated in the database between 8/19/2021 and 9/28/2021.
- 23,971 items and 3,677 bibliographic records (with only withdrawn items attached) were deleted in the monthly batch deletion of withdrawn items