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State of the RSA Report

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A quick, stream-of-consciousness, grammar optional, look from the top.

It is holiday time again and RSA is getting really busy. We have lots of work to do for the upgrade as well as supporting you on the current system. The reality of the magnitude of work the upgrade is going to entail has finally set in. We are going to have to be very productive next year to make this all work.

Section A: The Upgrade

We signed the contract and released press released to the world this month. Yea! Feel free to share the news with whomever you'd like. The only thing I'd ask you not to discuss is the price we paid for the system. We got a terrifically good deal from SirsiDynix and part of that was contingent on us not talking much about what we paid.

I've had lots of questions about computer requirements, membership levels, and training over the past month. The consultants are also getting pinged quite heavily on these issues as well so I'll try to cover them again here.

Computer requirements: The new system has higher requirements than our current system. All four of the proposed systems required more powerful computers with lots of RAM. There is no getting around this in a modern ILS. The good news is that RAM is really cheap these days and very easy to install. Those with low end computers (1,000 Mhz or 1 Ghz Pentium IIIs and below) are going to want to think very hard about replacing them. There are a few reasons to do so instead of just adding more RAM. Mostly because computer parts have a shelf life, hard drives start to die at the 3 or 4 year mark, processors and other electronics start to have weird problems at that same time as well. Lori Bell is going to be looking into grant money opportunities early next year. In addition, our largest member libraries have all said they were willing to share the computers that have been replaced and are no longer needed. While these would be older computers, they still work great as internet terminals or word processing boxes. RSA can also run a group purchase for hardware to get a lower price from Dell. Again, more information as we learn more. As far as we can see, this should be the only cost a local library might have to make outside of moving up from a webcat to either an online or basic online library.

If you are shopping or looking to see if your computers are good, here is the checklist:

Operating System: Windows 2000, XP, Vista, or Mac OS X 10.4 or higher

Processor Speed: 1.5 Ghz (for Macs it works on both PowerPC and Intel Macs)

Memory: 512 MB RAM, 1 GB RAM is better

Video and Monitor: 1024 x 768 or higher video and a 17 inch monitor. It will work on smaller monitors if run at 1024 x 768 but the text is small

You will also want a high speed internet connection such as DSL, Cable, T1, etc.

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Membership levels: There will be three levels of RSA membership, Online, Basic Online, and Union Listing (Webcataloging is no longer the correct term since you will be able to catalog in the new system). Here is a breakdown of what each level has access to in the new system (subject to change of course).

Online: Access to everything we have in the new system. This includes:

- Cataloging
- Authority Control
- Backup (Offline) Circ
- 3 Reporting Tools
 - Built in Unicorn reports (many available to output to Excel)
 - Web Reporter (more visual reporting than basic reports)
 - Directors' Station (live analytical statically reporting tool)
 - Normative Data Project (more in-depth reporting based on location)
- 9XX Order Interface for Acquisitions
- Acquisitions and Fund Accounting
- Academic Reserves
- Collection Agency Reports
- Electronic Data Interchange (EDI)
- OPAC - Enterprise Portal System (EPS)
 - Lots of enhanced content (book covers, reviews, best seller lists, etc)
 - SingleSearch Federated Searching
 - Rooms Builder
 - Rooms Starter Pack
 - Best of Web
 - Library's Favorite Sites
 - Rooms Consulting Workshop
 - Spanish Language Interface
- Hyperion Digital Media Archive (should be searchable from the OPAC)
- Materials Booking
- Outreach
- ReferenceLibrarian
- Serials Checkin and Control
- SIP2 consortium license (no more SIP2 fees if your vendor is an SD supplier and most are)

Basic Online (targeting \$1,300 - \$1,500 membership cost per year): Access to core automation functions which closely mirror our current CARL online services. These include:

- Fully automated circulation system via the Unicorn system. No more stand alone systems.
- A backup (offline) circ system
- Patron IDs/Barcodes. Allows your patrons to access their account online to renew items, etc. This will also allow them to put holds and reserves on items in accordance with their patron type.
- Cataloging via the staff client software. Do your own adds, deletes, changes, etc.
- Full access to reports built into the Unicorn system. There are many, many, many reports available and many are available in a form that exports directly into excel.
- 24/7 access to materials via OPAC with up-to-date status of individual items (on shelf, reserved, checked out, etc)
 - Lots of enhanced OPAC content (book covers, reviews, best seller lists, etc)
- Authority Control for database

Union Listing: Access to limited cataloging functions and OPAC functions including:

- Doing your own cataloging (adds, changes, deletes) using the same software as the Online and Basic Online members.
- Access to your catalog via the OPAC 24/7.
 - Lots of enhanced OPAC content (book covers, reviews, best seller lists, etc)

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- Simplified item holds and requests. You will be able to do these from within the staff client verses having to fax or email your requests. The system will then handle the routing of the holds/requests.
- Access to reports run by RSA staff.
- Authority Control for database.

Training for the new system: The RSA staff and selected trainers will begin training on the system in March. A second week of training happens in mid April. These two training classes will start to get the RSA staff and our trainer core group up to speed. We will use this training to troubleshoot any issues that we find in the system. This training is also required to allow us to look at the first dataload of our database to see if it imported correctly. All training will be done on the RSA Unicorn system and RSA data imported into Unicorn. When you do your training at your local library or at RSA Central, you will be working on your data using your login name and privileges. In other words, you'll get trained on the system you'll use. I can't think of a more realistic way to do it than that. I'll be looking for lots of feedback from our members about when, how, where, and the effectiveness of the training. Your feedback will be key to ensuring we do our training right.

While we don't yet have actual dates for local library staff training, here is how I think we are going to end up rolling it out. Once I get more actual data, I'll put together a training plan which will be available to every RSA member so you know what the system is providing. I'll also notify you once I hear how you can access the online training Sirsi has available to us. These modules are a really good informational training tool and will be available up to the date we go-live with the new system. I'd suggest you have your staff look over some of the basic Staff Client modules prior to hands-on training. In addition, we plan to record short movies and make them available online showing how to do tasks like check out/in a book, add a new patron, etc. These will show the staff client software screen, the mouse moving as it would when you do things, and a voice over explaining the procedure.

The initial training will likely be a mass training overview of the system. After most everyone has had this overview, we will switch to hands-on training. This will be limited in class size because we want people to actually use the software during this training. We will do a lot of training here at RSA Central (East Peoria) in our computer lab. We also plan to do training at some member libraries where larger computer labs are available to be used for this purpose. We'll run daytime training, night time training if we have enough folks interested, and weekend training, again if we have enough folks interested to run a class. Once we get to hands-on training, if you have a group or 12 – 24 that want's training Saturday afternoon, we can adjust our schedules to run that. Times and days will depend on scheduling full classes to make it feasible. Likewise, if we can barrow a room with 6 computers or more at a member library (or someplace else) we could provide training to a group at that location. This would save a lot of member library staff driving time, so please be thinking of places we might be able to train. We would need computers connected to the internet that meet the above minimum computer requirements and have high speed access. We can test these computers prior to training staff (with your help of course) to make sure they will work.

In other words, we are going to knock ourselves out training to provide ever RSA library staff member with good, hands-on training prior to go-live. We realize it's mighty hard to use a system you haven't been trained on. Training will continue after go-live to ensure everybody is trained and understands the system. We will also be rolling out new modules after go-live so training for these will occur later as well.

We are looking at starting member library staff training in late August or early September, and continuing through October and November. Training will be ongoing after that. RSA staff members and selected, volunteer member librarians will be providing the in person training. The Sirsi supplied online training will be available up to go-live and any RSA provided online training will be available forever.

Final Upgrade Notes: We should have working Unicorn servers with our data installed and being reviewed by the end of April if not much, much sooner. From Jan – April, the RSA Staff is going to be incredibly busy supporting the migration and all that goes with it. Please be patient with us. Thank you.

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Section B: Issues / Projects

1. My thoughts on the Director's Survey on Monkey Survey: I was pleasantly surprised by the results. There appeared to be one consistently upset person who took the survey, but in reviewing the results by participant, I found that they left positive comments but negative scores. So I'm conflicted about the input. If you had a hard time following some of the more whacky comments, my friends in the ALS Consulting Department were having a bit of fun at my expense. Other than that, it looks like we are doing an ok job of supporting you. I also appreciate the fact that 80+ people took the time to take the survey and leave comments. The consensus is that I need to go back to school and learn some English!

Believe it or not, I have taken many English and composition courses over the years (average grade A, with an A+ in English 101 and other composition courses). I also spent a year writing training manuals and 3 years editing 28 other writers. In other words, when needed, I can do this correctly. Yes I make mistakes and rely on my spell checker way to much, but I strive towards timeliness vs. correctliness (just made that word up). I do, sometimes, leave intentional mistakes to see if anybody is reading what I've written. I've said before and I'll say again, I take no offense to anyone correcting my spelling, grammar, diction, vocabulary, writing style, choice of font size or/and color, telephone answering machine message, office décor, haircut, tie color, size, shape, or pattern, or if my socks match (and they usually do). In other words, I am VERY hard to upset. Many of you have, in the past, emailed or called to ensure that my writing is up to par. I spent 5 minutes just now verifying the word 'patient' in the paragraph above because I have used it incorrectly a number of times prior, and was 'educated' on the error of my ways. I tend to defer to Word's built in Encarta Dictionary which has led me astray in the past (including correct definitions of the words patients and consortium). Please continue to inform me of my abuse of the English language.

Questions about night support also were posed by more than one person. Specifically, why we don't always have somebody covering night hours. We started night support a year ago in the middle of November and I think it has worked out OK for most involved. We were able to do so because we had the chance to reorganize what we did internally and hire a person specifically for night support. Unfortunately, we just aren't staffed to cover DiAnn when she needs to shift her work hours or is out of the office for various reasons. I think the majority of the concern over her hours results from her attending ALS events or training. RSA merged with ALS on paper several years ago. However, then I started last year, there was still a big divide between RSA and ALS staff, even though we are supposed to be on the same team (taking into account that we are funded differently of course). RSA staff fall under ALS for all administration and personnel policies and this saves us huge money by not having to hire a person to do admin type work for us. But it also means that RSA should have been attending ALS training, staff days, and other events targeted at building a cohesive team in ALS. One of the first goals I set for the RSA staff was to become, in fact, one team with the rest of ALS. Over the past year we have done a great job of this to the point where we get a 1,000% more support from ALS then we did when I started. You get much more help when you are asking a valued friend for help verses a co-worker that you rarely see. So while DiAnn sometimes worked in the morning to support things like the ALS Health and Safety Committee, what we got in return more than made up for those hours. We are no longer seen as the 'outsiders' in the building and it's helped immensely, especially during the summer when we were running vendor demos and such. While we will continue to support ALS (and they RSA) as much as possible, we will look to minimize the disruptions.

2. 3% Inflation Increase on RSA Fees: CARL blessed us with their typical 5% increase again this year. At the December Users Group Meeting, the members voted to impose a 3% increase in fees. So here is the breakdown of the new, FY08 fee structure. Note, the membership fee of \$500 is not increasing, only the usage and capital development fund portion of your fee. I'll list the major price points, if your amount isn't show just calculate it as: $\{[FY07\ Fee - \$500] \times 1.03\} + 500 = FY08\ Fee$

| | <u>FY07 Fee</u> | <u>FY08 Fee (rounded to nearest Dollar)</u> |
|--------------------------|-----------------|---|
| WebCats (Union Listers): | \$904 | \$916 |

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|---------|----------|----------|
| Tier 2 | \$2,262 | \$2,315 |
| Tier 3 | \$4,081 | \$4,188 |
| Tier 4 | \$6,738 | \$6,916 |
| | \$7,682 | \$7,894 |
| Tier 5 | \$10,128 | \$10,417 |
| Tier 6 | \$16,231 | \$16,703 |
| | \$17,041 | \$17,537 |
| Tier 7 | \$21,505 | \$22,135 |
| | \$22,013 | \$22,658 |
| | \$23,029 | \$23,705 |
| Tier 8 | \$43,328 | \$44,613 |
| Tier 9 | \$51,643 | \$53,177 |
| | \$54,688 | \$56,314 |
| Tier 10 | \$67,250 | \$69,252 |

3. WebCat Deletes (reprinted from the last issue): We have TONS, let me repeat, TONS, of deletes to do. Here's the deal, the web cataloging libraries send their database deletions to us to be deleted from the online system. Much of Vicky Edwards' job is to help the web catalogers' troubleshoot issues and do their database additions and deletions. However, when there are 90+ libraries sending 10's, 100's, or 1,000's of deletes to one person who works on them part of the time, work tends to pile up. And pile up it has. About 6 months ago, ALS pitched in to help 2 days a week allowing us to reduce the backup about 50%. While we still have Judy helping 2 days a week, we have not been able to catch up. The solution is to get more help. We have 2 computers set up here at RSA HQ (and it must be done here at HQ) ready for volunteers to do deletions. In September, volunteers deleted 4,375 out of 5,411 total records. As you can see, the volunteers are contributing greatly to our cause. Please volunteer 2 hours of your time in either the morning or afternoon (weekdays) to help us with your efforts. Just call or email myself or Vicky to volunteer. Thank you in advance.

4. RSA Paperwork Upgrade and Modernization Program: I wrote a new draft set of RSA By-Laws using the draft by-laws the Planning Committee was working on last summer and the by-laws of other Illinois Consortium (plural). I also included most of the relevant text from the member library contract so that it would be in one place for easy reference and updates. The Planning Committee is reviewing this document and will ultimately forward it in whatever form they wish to the Users Group to approval. Next up is the membership contract. Our current contracts are very CARL oriented and out of date. After the contract and by-laws are both done, the two documents will form a single new document that serves as contract and rules for our members.

5. The blog (<http://alsrsa.blogspot.com>): I've added another new feature to the blog, an instant message (IM) window that connects you immediately to my work IM account. You don't need any software or even an IM account to use it. Just go to the blog, see if I'm online, and start typing. Note: I'll be out of the office until 3 Jan 07, so the box will show that I'm offline until then. Your message will show up as an anonymous IM in the software on my computer. This is the type of thing you might want to consider putting on your library website to serve your patrons better. I'm also updating the recommended reading box just below the IM window. Click on 'Read More' to see the entire article or blog posting I linked to.

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Section B: Budget

Here are the Year to Date (YD) numbers (as of 30 Nov).

| <u>Item</u> | <u>YD Actual</u> | <u>Budgeted</u> |
|-------------|------------------|-----------------|
| Revenue | \$406,897 | \$680,096 |
| Expenses | \$365,533 | \$507,400 |

We are right on track this year. Jon, Martha, and I will spend up our travel budget attending conferences for our new system. Our Capital Development fund is sitting at about \$1,200,000. We are paying a tad over \$800,000 for the new system meaning we have \$200,000 to spend on extra costs (like redoing the power in the server room) if we need it. The other \$200,000 we hope to keep back to populate our new fund and for emergencies. This will give us starting money to purchase any new technology the membership needs.

Section C: Interesting and Informative Information

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Questions with membership wide interest, websites of importance or interest, and other generally fun items. If you have anything you'd like to see here, please send an email with your questions, thoughts, or great websites and web links and I'll pass them on to the group.

Question: What is the difference in membership levels in the new system and what computer do I need to run the new software?

Answer: See above, lengthy response.

Interesting Websites:

This is long enough as it is this month. Please see the recommended reading box on the blog for interesting links to articles and programs.

More next time.....