



Kendal Orrison
Information Technology Director
(309) 694-9200 ext 2133

State of the RSA Report

May 2007

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

Upgrade, upgrade, upgrade. All we do is upgrade work. While that is not 100% true, there are many days that it certainly feels true. We are keeping our heads above water right now and the amount of upgrade work is currently in a bit of a lull. By the end of next week that ends and it's back to the grindstone.

A quick note on the current Carl system. We are keeping it running, there aren't many really bad issues at the moment, and we see no reason to have to do a software upgrade again before we turn it off in November. If you have issues with it, please let us know as we still spend a great deal of time keeping it up and running and the database clean.

The RSA staff still has some vacation time to use up before 1 July, and a couple days in July and early August as well. After the middle of August, we will be work on the new system with no real vacation time until after go-live. That means that we are going to have to take a lot of vacation early next year, but we'll worry about that then. Also, the staff will be putting in huge numbers of hours in the coming months, hours we can't take as comp time due to all the upgrade work or get paid overtime for. I'm currently looking for at good alternative to partially repay those hours in kind by running a skeleton crew on Fridays next summer (2008). We shall see if that works out, but that's the plan for now.

This is a long report, but since the last one was in Dec 06 I have a lot to talk about.

Section A: The Upgrade

Believe it or not, we are right on schedule at the moment. Unfortunately, the 'schedule' is also a cruel master as it shows that we'll be working almost non-stop for the next 7 months or so. The hardware is all installed, the software is mostly installed on the new hardware, and the data is currently being migrated from Carl to Unicorn and put on the servers. By the end of May, we will have all the data from our Carl system (as of the end of April) loaded on the Unicorn system. We will also have the online catalog running for you to look at your collection data and selected libraries will have access to the staff client to look at both collection and user data.

Data checking will be very important over the summer and fall. We'll be putting out instructions on what to look for and how to do it once everything is ready. You will also have a sheet to fill out that notes all the errors you find and things you'd like to change for the next data loads. As a reminder, we are doing a second test data load in August to correct anything we find prior to that. Then we'll be looking at the data again in late September and October to find and document anything else you want changed. The final data load in November will be the operational pull and will include any changes made to the first two data loads.

For those who didn't return the data migration forms in March, your data will be moved based on the defaults we put together earlier in the year. If you are a webcataloger, your data will look just about

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exactly the same as in the Carl system. Basic online and online members will need to let me know how you items circulate so I can set up the system. I'll be calling libraries in June to talk about this if I don't have your data. The forms and instructions are still available on the RSA website (www.alsrsa.org) under the migration tab. There are the top documents on that migration page. At some point in the fall I'll have to go through all the library circulation maps again and they must be complete or you will not be able to circulate items.

Just so you know and expect it, the Carl system will be turned off in Nov. We have to do this in order to pull the last batch of data. It could take anywhere from 2 to 3 weeks to translate that last data pull into Unicorn format and drop it on our server. During that time, you will be working with the Unicorn offline client (online and basic online libraries) to capture all your transactions. Those transactions will be uploaded and processed by the system after it's ready for go-live. We HOPE that this will result in no data lost during the transition. During this period between systems, you will not have reports or overdue lists.

The next big, manpower intensive, project will be filling out the questionnaires for the federated pay database searching. Our project manager at SirsiDynix tells us that this is a lot of work, so I'm not looking forward to this. The online members will be getting emails about this project as soon as I know what information we need to collect. Basic online and webcats don't have to worry about this.

Here is a teaser about the upcoming migration milestones:

- Week of June 4: load staff client (WorkFlows) on training computers and RSA staff computers. RSA staff begins to pay with new system.
- Early June: working on federated searching continues
- Mid June: Confirm training dates with those in the courses
- All of June: Examine data in Unicorn
- July 9 – 12: First week of Unicorn training
- July 17-20: Second week of Unicorn training
- Aug 14-17: System Admin training for Kendal, Jon, DiAnn
- Aug 20-22: EPS/Rooms/Rooms builder workshop (fully online libraries only)
- Week of Aug 13th: Pull data from CARL system for second test data load
- Early Sep: One day seminar on how holds and demand management work in Unicorn. Will begin to setup holds parameters at that time
- Sep, Oct, early Nov: Unicorn staff client and EPS training run by RSA and RSA librarians.
- Oct 15 – 18: Last week on Unicorn training
- Nov 11th OR 18th: Turn off CARL system
- Nov 12th OR 19TH: Pull all data off CARL system and send to SirsiDynix
- Dec 3 -7: Go live week.
- Jan, Feb, March: add new modules and features as time allows
- Apr or May: RSA Day! We will do exciting things and perhaps even roll out new features (Directors Station?) and generally have a great day.

If you would like to get a head start on staff training, there are a couple of good modules on the SirsiDynix site for you to look over. The training worksheets we did a few months ago were for the old SirsiDynix training, and we did intend to use them. However, after I looked over the training, I decided that might not be the best idea since that training is based on an older version of software and does not include EPS (the new online catalog). As a result, we aren't going to do this training. There is brand new training slowly trickling out on the SirsiDynix website. Most importantly, the training we really need right now is available: Unicorn Essential Skills and Unicorn Circulation Basics. You can access this training at any time (from any computer) at the following link: <http://sirsidynix.webex.com> then click the "Recorded Sessions" link under "Attend a Session." On the list that comes up you will see the Unicorn GL 3.1 Circulation Basics Training and Unicorn GL 3.1 Essential Skills for Workflows. You should take the Essential Skills training first. These training modules will walk you through the staff client and have you do some exercises as well. Make sure your speakers are on (if you have them) as there is some speech in them as well. Here is a screen shot of the page where you select the training modules.

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Training Center Meeting Center Event Center Support Center More Services My WebEx Log In

Recorded Sessions

Search for: Search

Requires password

Recording Topic	Fee	Presenter	Date	Duration	File Size
FTP (File Transfer Protocol) and SirsiDynix Files in a Unix Environment	Free	SD Client Care	10/18/06	30 minutes	9.19 MB
FTP and SirsiDynix files in a Windows Environment	Free	SD Client Care	11/9/06	30 minutes	10.2 MB
Horizon v.7x Offline Circ Admin 1	Free	Jeff Olsen	5/10/06	10 minutes	11.52 MB
Horizon v.7 Offline Circ Admin 2	Free	Jeff Olsen	5/10/06	10 minutes	11.18 MB
Horizon v.7x Offline Circ End User	Free	Jeff Olsen	5/10/06	15 minutes	10.48 MB
SVA Administration: Tips and Hints	Free	SD Client Care	9/15/06	30 minutes	6.85 MB
Unicorn GL 3.1 Circulation Basics Training	Free	SirsiDynix Education Services	3/15/07	45 minutes	4.41 MB
Unicorn GL 3.1 Essential Skills for Workflows	Free	SirsiDynix Education Services	2/15/07	20 minutes	5.84 MB
Unicorn GL 3.1 Offline Circulation	\$50	Jeff Olsen	4/17/07	1 hour	1.63 MB
Webinar - Toolbar and Property Management: Understanding the Relationship Between Java™ WorkFlows Client and Unicorn Server	Free	SirsiDynix Client Care	7/25/06	40 minutes	4.72 MB
Your Introduction to the Unicorn and DRA Classic Client Care Site	Free	SirsiDynix Client Care	8/8/06	30 minutes	13.75 MB

Requires password

To take the training click on the course you'd like to take (both are free), then in the page that comes up click the 'View' button. In the new page that opens, enter is your first and last name, email address, and the customer number for RSA: 3096949200 (our phone number), then click the 'Register' button.

As you know, the migration is adding a third level of membership to RSA. Here are the figures on our membership numbers per level in the new system. I expect more movement from the webcataloging members into the basic and full online members.

- Webcataloging members: 65 main libraries and 3 branches
- Basic online members: 23 main libraries and 1 branch
- Full online members: 74 main libraries and 33 branches

I'd love to see the basic online number grow even more, we have room in the contract for almost all the webcataloging libraries to move up to that level of automation. See the Dec 06 State of the RSA Report for more info on the levels and services provided to each.

Section B: Issues / Projects

1. ALS group purchase of computers: You should receive an email from Judy Mont early next week with all the details on how to order. If you need new computers, this will be the best deal you'll be able to find. The price will be available through go-live, so you can order now or later. You will order directly from the Dell site via the ALS group purchase page and receive about a 50% discount. The computer will be shipped directly to you and you will be billed directly by Dell. All the systems have a full 3 year, next day onsite warranty (Gold level) and are designed specifically to meet our RSA specifications.

2. Fees for FY08 (repeat from Dec issue): 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] x 1.03} + 500 = FY08 Fee

	<u>FY07 Fee (current)</u>	<u>FY08 Fee (new)</u>
WebCats (Union Listers)	\$904	\$916
Tier 2	\$2,262	\$2,315
Tier 3	\$4,081	\$4,188
Tier 4	\$6,738	\$6,916
	\$7,682	\$7,894

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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. ALS is working on finalizing the programming behind the new RSA website. This website will be a subpage of the ALS website and will give us the ability to dynamically update content much easier. It will also have a better layout and hopefully, more logical organization than our current website. When it's ready for us, we'll let you know and put a redirecting link on the current RSA website. Here is a screenshot of the test site to give you an idea of what the layout will be like. I'll keep the upgrade blog as well until go-live since everybody is used to going there or gets the email updates.

The screenshot shows the Alliance Library System website. At the top left is the logo, a red 'A' with a diagonal line through it, followed by the text 'Alliance Library System'. To the right is a search bar with a 'Search' button. Below the logo is a navigation menu with dropdown menus for: About Us, Member Support, Continuing Education, Communication, Publications, Links, Resources, and Our Projects. The main content area is titled 'Welcome to Resource Sharing Alliance - RSA' and contains a post titled 'Delete Me Please' dated Thursday, April 26, 2007, by Sandy Albrow. The post contains a list of 18 items, each starting with 'Yet another testing item'. Below this is another post titled 'test' dated Tuesday, March 13, 2007, by Sandy Albrow, containing the word 'test'. At the bottom is a post titled 'Testing 1, 2!' dated Wednesday, February 28, 2007, by Kendal. The right sidebar is titled 'RSA Resources' and contains several sections: 'RSA Support' with links for Staff Hours, Programs and Files, and Documents; 'RSA Information' with links for Membership List, Users Group, Planning Committee, and Steering Committees; 'RSA Migration Info' with links for General Migration Info, Migration Documents, and Migration Programs; 'RSA Links' with links for Database Search, ID Label, Things to Check Out; and 'RSA Reports' with links for User Counts, Item Counts, State of the RSA, and Click & Fill Reports. Below this is a section titled 'RSA Staff' listing: Kendal Orrison - Information Technology Director (309-694-9200 ext 2133); Jonathan Whited - RSA System Consultant (309-694-9200 ext 2132); Martha Troxell - RSA Database Administrator (309-694-9200 ext 2131); DiAnn Sances - RSA Programming Assistant (866-327-8877 then say 309-694-9200); and Vicky Edwards - RSA Customer Advisor (309-694-9200 ext 2137).

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4. Webcataloger Deletes: Send us your deletions. We have the equivalent of 2 full time summer students for 12 weeks this summer specifically to work through all the deletions and other database issues. If you have any deletes to do, please send them BEFORE 1 AUG 07! After the 1st of Aug, we will not accept deletions anymore, we'll be too busy to do them. If you delete items after the 1st of Aug, please hold on to the paperwork since you will be able to do your own deletions in the new system. After the last email we sent in March, we received a ton of deletes, if you have more, send them to us to add to the pile.

Section B: Budget

The budget for FY07 is right on track. I got so busy doing the upgrade parameters and paperwork that I forgot to do the FY08 budget until about a week before it was due to the ALS boards. Opps, that's not supposed to happen. Fortunately we were able to modify last year's budget with minor changes to reflect real expenditures and turn it into the FY08 budget. The hardest part was redefining all the categories to match the new(?) state guidance for setting up library budgets. We'll be talking about the budget at the June Users Group but here are the highlights as compared to FY07.

Item	FY07	FY08	Change FY07 to FY08	Notes:
Total Revenue	\$680,096	\$661,604	+ \$11,508	3% inflation increase
Expenditure: Personnel	\$220,000	\$243,004	+ \$23,004	Increased due to raises, summer student help, and an 18% insurance increase in health care
Expenditure: Travel	\$4,000	\$9,200	+ \$5,200	Increased to cover extra training for the new system
Expenditures: Misc	\$5,000	\$11,500	+ \$6,500	Increased for PR, Unicorn Conferences
Telecommunications	\$9,000	\$9,000	\$0	Mostly for the 2 T1 lines
Equipment Maintenance and repair	\$200,000	\$105,000	- (\$95,000)	We are only paying for ½ a year of CARL fees. Unicorn continuing fee's start 1 year after go-live
Professional Services	\$6,900	\$28,500	+ \$21,600	Most of the increase is for SirsiDynix onsite or distance learning training expenses
Contractual Services	\$42,000	\$63,000	+ \$21,000	\$40K Rent/Vehicle/Utility/Etc payment to ALS and \$23K for the 2 nd data load we added to the contract
Miscellaneous	\$500	\$0	- (\$500)	Category removed to show actual expenses in correct areas
Capital Outlays	\$20,000	\$480,000	+ \$460,000	Year one fee's for Unicorn System. Note: the FY07 amount was used to purchase new networking equipment for the new system
Total Expenditures	\$507,400	\$949,204	+ \$441,804	Increase mostly due to Unicorn year one fees
Excess Revenues over Expenditures	\$172,696	-\$287,600	-\$460,296	Any excess revenue not used is moved to the Cap Dev fund
Budgeted Capital Development Fund Revenues	\$127,530	\$130,586	+ \$3,056	We will 'add' \$130.5K to the Cap Dev fund as usual this year. We will 'remove' the \$480K in Unicorn expenses. In other words, we are still funding the Cap Dev fund even while we are pulling money out of it to pay for the new system.

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Capital Development Fund: As of 30 June 06, the fund had \$1.2 Million. We are adding an additional \$127K this FY and \$130K in FY08. We will use between \$900K and \$1 Million in total to pay for the upgrade. My projection for the end of FY08 (30 Jun 08) is that the fund will have between \$450K and \$500K in it. We skipped a system upgrade to the current CARL system a few years ago so we saved some funds there, and we saved about \$500K in the contract negotiations over what we thought we'd have to pay. This puts us in good standing for hardware upgrades in a few years and any new system additions we need to make. It will also allow us to make wise decisions during the fee structure revision process. More on this in the future.

Section C: Interesting and Informative Information

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: How busy are you guys?

Answer: Very, very busy.

Actually the most asked question is how is the upgrade going and do we have enough time to do the upgrade and keep the current system running. The answers are: good and on track, not really but we don't have a choice.

Interesting Websites:

Note: please see the recommended reading box on the blog for interesting links to articles and programs. That is updated on a frequent basis.

Note 2: in the future, this section will be removed since I added a "Things to check out" link on the new website. Once that site is running, I'll add the link and descriptions there instead of putting them here. That way you will have them in a more timely manner.

- Ever have a patron trying to figure out what this HDTV thing is all about? Here is a great website that goes into some detail (including pictures) about all the different types of HDTV, what the ideal viewing distance is for each type, etc. Very informative.
<http://forum.ecoustics.com/bbs/messages/34579/284986.html>
- The Directorship website is your source for all kinds of business information from a directors point of view. <http://www.directorship.com/index.aspx>
- Need to keep the kids busy with some coloring? Here are a bunch (over 2,100) of free coloring pages ready for you to print out. <http://www.freeprintablecoloringpages.net/>
- Wondering about instant messaging (IM)? Here is a talking points page on IM.
<http://walkingpaper.org/358>
- Need a library and information science search engine? I thought so, here's one: <http://liszen.com/>
- Do not, under any circumstances, open this page unless you have time to waste. This is a little web based game called linerider. It's the most addictive thing ever.

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- Need a fun way to announce summer reading or other kids or young adult events? Try the concert ticket generator and make your own cool event tickets or announcements. <http://www.says-it.com/concertticket/>
- Who doesn't like free clipart? Especially when it's high quality clip art. Here is a good source for kids or adults for school projects and more. <http://www.dorlingkindersley-uk.co.uk/static/cs/uk/11/clipart/home.html> Here is one from the 'Flight' section:



- Research Beyond Google: 119 Authoritative, Invisible, and Comprehensive Resources: <http://oedb.org/library/college-basics/research-beyond-google>
- Librarian's Ultimate Guide to Search Engines is available here: <http://www.degreetutor.com/library/research-tools/librarian-searchguide>
- 33 reasons why libraries and librarians are still important: <http://www.degreetutor.com/library/adult-continued-education/librarians-needed>
- And of course you need some free fonts. <http://www.searchfreefonts.com/>

More next time.....