How fresh eyes on Leeds Beckett’s system revealed the need for major reconfiguration, extensive clean-ups, and rigorous new maintenance policies.
Leeds Beckett Library

- 2 Campus Libraries
- 139 staff
- 350,000 items
- 795,000 transactions
- 90% via self-service

- Open 24 / 7 / 365
- 1.3 million visits
Meet the Conductor...

★ Involved with Symphony since procurement in 1999/2000
★ Mostly supporting eLibrary and Language customisations
★ Previously principal focus was tech support for in-house website CMS
★ Move to LibGuides freed up development time to be used for greater tech support of Symphony
The Auditorium

- Migrated to Symphony in 2000 - self-hosted
- Significant changes since then include:

  - Complete turnover of senior staff about 10 years ago - vital knowledge lost
  - Introduced 24/7/365 opening nearly 10 yrs ago
  - Harrogate College left us 7 years ago
  - URL Resolver: SFX ➔ EBSCO
  - Name: Leeds Metropolitan ➔ Leeds Beckett (and leedsmet.ac.uk ➔ leedsbeckett.ac.uk)
Prelude in API minor

- 2013 - URL Resolver SFX ➔ EBSCO
- 2014 - Leeds Metropolitan ➔ Leeds Beckett

★ Changes required to 856 field for both events.
★ (And second picked up some missed in first!)
★ Staff vacancy meant knowledge gap
  ● (But notes left behind)
★ Needed tech-savvy, API-trained person....
Prelude in API minor

→ Developed API command sequence to dump relevant item records
  (selitem/selcatalog/sort/uniq/catalogdump)

→ Search/replace for changes needed

→ Marc Import wizard and URL Update report to apply changes
Requiem for Ebooks

★ 2014/15 - Ebook trials (PDA and other)
★ Tagged in unstructured ways using Item Cats
★ Identified titles not purchased using various custom API methods ➤ lists of Item IDs
★ Use Item IDs to change location to DISCARD
★ Then Remove Discarded Items report
Harmony from Discord

At various times, have needed to add a new report or alter an existing one.

★ No record of scheduled reports, other than in Workflows

✘ Monthly reports, and ones at other intervals, only show on next scheduled date

✘ Hard to work out times which have no/few clashes on any day

✘ No overview of all reports, no record of when/why added, no way to add extra notes
Harmony from Discord

★ Some reports seemed possibly obsolete, and scheduled at odd times

✔ Built new spreadsheet of all reports
✔ Possible to easily see busy spots and dead spots
✔ Colours to highlight various frequencies

● Just have to remember to keep it up to date
<table>
<thead>
<tr>
<th>A</th>
<th>Report Name</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Remove messages</td>
<td>ADMIN</td>
<td>Weekly</td>
<td>Sun</td>
<td>00:03</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>ILL count - BP (i)</td>
<td>ADMIN</td>
<td>Monthly</td>
<td>1st</td>
<td>00:04</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>ILL count - CC (i)</td>
<td>ADMIN</td>
<td>Monthly</td>
<td>1st</td>
<td>00:05</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Update User Delinquency Status</td>
<td>ADMIN</td>
<td>Daily</td>
<td>Daily</td>
<td>00:05</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>ILL count - CPT (i)</td>
<td>ADMIN</td>
<td>Monthly</td>
<td>1st</td>
<td>00:06</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Expire Holds</td>
<td>ADMIN</td>
<td>Weekly</td>
<td>MTWTF</td>
<td>00:07</td>
<td>holdcancelled</td>
</tr>
<tr>
<td>7</td>
<td>Expire Available Holds</td>
<td>ADMIN</td>
<td>Weekly</td>
<td>MTWTF</td>
<td>00:08</td>
<td>holdcancelled</td>
</tr>
<tr>
<td>8</td>
<td>List Purchase Alerts - BP</td>
<td>ENQ-REP</td>
<td>Weekly</td>
<td>Tue</td>
<td>00:11</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>List Purchase Alerts - CC</td>
<td>ENQ-REP</td>
<td>Weekly</td>
<td>Mon</td>
<td>00:12</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Add Items to Beckett new books</td>
<td>ADMIN</td>
<td>Monthly</td>
<td>1st</td>
<td>00:14</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Add Items to City new book</td>
<td>ADMIN</td>
<td>Monthly</td>
<td>1st</td>
<td>00:15</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Underdues</td>
<td>ADMIN</td>
<td>Daily</td>
<td>Daily</td>
<td>00:18</td>
<td>reminder</td>
</tr>
<tr>
<td>13</td>
<td>Underdues (IC)</td>
<td>ADMIN</td>
<td>Daily</td>
<td>Daily</td>
<td>00:20</td>
<td>reminder, footerIC</td>
</tr>
<tr>
<td>14</td>
<td>Export Item Information for previous day's issues</td>
<td>ADMIN-MF</td>
<td>Daily</td>
<td>Daily</td>
<td>01:00</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Consolidate Daily Logs</td>
<td>ADMIN</td>
<td>Daily</td>
<td>Daily</td>
<td>01:45</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Statistics Log</td>
<td>ADMIN</td>
<td>Daily</td>
<td>Daily</td>
<td>01:50</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Outstanding Firm Orders</td>
<td>ACQ-REP</td>
<td>Monthly</td>
<td>1st,29th</td>
<td>02:16</td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>Outstanding Urgent Orders</td>
<td>ACQ-REP</td>
<td>Monthly</td>
<td>1st,29th</td>
<td>02:17</td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>Holds In cataloguing</td>
<td>ADMIN-KB</td>
<td>Weekly</td>
<td>Thu</td>
<td>03:06</td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>Orders Cancelled by month</td>
<td>ENQ-REP</td>
<td>Monthly</td>
<td>1st</td>
<td>03:07</td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>Orders 2015 rec not inv 4 wks consolidated</td>
<td>FIN-REP</td>
<td>Weekly</td>
<td>Mon</td>
<td>03:46</td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>ERF monthly report</td>
<td>ADMIN-EC</td>
<td>Monthly</td>
<td>1st,25th</td>
<td>04:13</td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>Reorganize Text Dictionary</td>
<td>ADMIN</td>
<td>Weekly</td>
<td>Sat</td>
<td>04:30</td>
<td></td>
</tr>
<tr>
<td>24</td>
<td>Orders 2015 paid not rec</td>
<td>FIN-REP</td>
<td>Weekly</td>
<td>Mon</td>
<td>04:43</td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>Orders 2015 rec not inc 4 wks non-consolidated</td>
<td>FIN-REP</td>
<td>Weekly</td>
<td>Mon</td>
<td>04:45</td>
<td></td>
</tr>
<tr>
<td>26</td>
<td>Orders 2015 inv not paid</td>
<td>FIN-REP</td>
<td>Weekly</td>
<td>Mon</td>
<td>04:47</td>
<td></td>
</tr>
<tr>
<td>27</td>
<td>Orders 2015 received not invoiced or paid</td>
<td>FIN-REP</td>
<td>Weekly</td>
<td>Mon</td>
<td>04:50</td>
<td></td>
</tr>
<tr>
<td>28</td>
<td>Bill Totals by Payment Type for preceding week</td>
<td>ADMIN-MF</td>
<td>Weekly</td>
<td>Mon</td>
<td>05:01</td>
<td></td>
</tr>
<tr>
<td>29</td>
<td>List of EPAY payments for previous day</td>
<td>ADMIN-MF</td>
<td>Daily</td>
<td>Daily</td>
<td>05:30</td>
<td></td>
</tr>
<tr>
<td>30</td>
<td>List Credits</td>
<td>ADMIN-DAVID</td>
<td>Monthly</td>
<td>Sat</td>
<td>05:52</td>
<td></td>
</tr>
<tr>
<td>31</td>
<td>Change Loan Parameters</td>
<td>ADMIN</td>
<td>Weekly</td>
<td>Sat</td>
<td>06:00</td>
<td></td>
</tr>
<tr>
<td>32</td>
<td>Notify Users About Favourites</td>
<td>ADMIN-MF</td>
<td>Daily</td>
<td>Daily</td>
<td>08:01</td>
<td></td>
</tr>
<tr>
<td>33</td>
<td>Invoice - staff - BP (new)</td>
<td>BP-CIRC</td>
<td>Weekly</td>
<td>Fri</td>
<td>06:05</td>
<td>staffinvoice, footerBP</td>
</tr>
<tr>
<td>34</td>
<td>Invoice - staff - CC (new)</td>
<td>CC-CIRC</td>
<td>Weekly</td>
<td>Fri</td>
<td>06:09</td>
<td>staffinvoice, footerCC</td>
</tr>
<tr>
<td>35</td>
<td>2015 Funds as at 1st Month</td>
<td>FIN-REP</td>
<td>Monthly</td>
<td>1st</td>
<td>06:08</td>
<td></td>
</tr>
<tr>
<td>36</td>
<td>2015 Gen funds at 1st Month</td>
<td>ENQ-REP</td>
<td>Weekly</td>
<td>SuM</td>
<td>06:09</td>
<td></td>
</tr>
<tr>
<td>37</td>
<td>2013 Fac funds at 1st Month</td>
<td>ENQ-REP</td>
<td>Monthly</td>
<td>1st</td>
<td>06:11</td>
<td></td>
</tr>
<tr>
<td>38</td>
<td>2012 Funds at 1st Month DW</td>
<td>ENQ-REP</td>
<td>Monthly</td>
<td>1st</td>
<td>06:16</td>
<td></td>
</tr>
<tr>
<td>39</td>
<td>2012 Funds at 1st Month</td>
<td>ENQ-REP</td>
<td>Monthly</td>
<td>1st</td>
<td>06:17</td>
<td></td>
</tr>
<tr>
<td>40</td>
<td>2012 Funds at 1st Month DY</td>
<td>ENQ-REP</td>
<td>Monthly</td>
<td>1st</td>
<td>06:18</td>
<td></td>
</tr>
<tr>
<td>41</td>
<td>2012 Funds at 1st Month DU</td>
<td>ENQ-REP</td>
<td>Monthly</td>
<td>1st</td>
<td>06:18</td>
<td></td>
</tr>
</tbody>
</table>
Duet: RATS! and RARR!

Routine Administrative Tasks Schedule Required And Recommended Reports

★ No proof we were running reports to SD recommendations
★ RATS and RARR include guidance for daily, weekly, monthly, annual reports
★ RATS in Support Centre, RARR part of Symphony Helps
★ Occasionally, they clash(ed)!
Duet: RATS! and RARR!

➔ Another spreadsheet, comparing RATS/RARR schedules with ours

★ Found we were running at least one obsolete report!
★ But missing reports to purge old reports, loan (charge) histories and others

➔ Added reports to Purge Finished Reports, and Purge Loan History of users who have left
<table>
<thead>
<tr>
<th>Report Name</th>
<th>Workflows Frequency and Suggested Time</th>
<th>RATS Notes</th>
<th>Our Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Correct User Information</td>
<td>Weekly, Saturday at 03:00.</td>
<td>×</td>
<td>Not-scheduled because of daily Rebuilds</td>
</tr>
<tr>
<td>Correct Hold Information</td>
<td>Weekly, Sunday at 03:00. Reduce the frequency of few corrections are made on a weekly schedule.</td>
<td>×</td>
<td>Daily, 00:10.ONLY 1 ITEM corrected in 2016 so far, how important is correction within 24 hours?</td>
</tr>
<tr>
<td>Add, Delete, Update Metadata</td>
<td>Each night at 03:00. Used only with Hyperion.</td>
<td>×</td>
<td>Not-using Hyperion</td>
</tr>
<tr>
<td>Add, Update Full Text Content Database</td>
<td>Each night at 04:00. Used only with Hyperion; when content searching is enabled.</td>
<td>×</td>
<td>Not-using Hyperion</td>
</tr>
<tr>
<td>Rebuild Metadata Database</td>
<td>Weekly at 04:00. Used only with Hyperion.</td>
<td>×</td>
<td>Not-using Hyperion</td>
</tr>
<tr>
<td>Rebuild Content Database</td>
<td>Weekly at 05:00. Used only with Hyperion; when content searching is enabled.</td>
<td>×</td>
<td>Not-using Hyperion</td>
</tr>
<tr>
<td>Most Popular Items</td>
<td>Weekly, Scheduled by SisalDynx when the e-Library is installed.</td>
<td>×</td>
<td>Not-using Best-Sellers/Rec-Reading</td>
</tr>
<tr>
<td>Index Content Titles</td>
<td>Weekly, ×</td>
<td>×</td>
<td>Not-using Best-Sellers/Rec-Reading</td>
</tr>
</tbody>
</table>

**Recommended Reports**

The following reports are recommended for your system to run properly.

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Workflows Frequency and Suggested Time</th>
<th>RATS Notes</th>
<th>Our Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check Text Database</td>
<td>Weekly or biweekly. (But Workflows Online Help also says “Run this report only with the advice of SisalDynx Customer Support.”)</td>
<td>×</td>
<td>Not-scheduled</td>
</tr>
<tr>
<td>Assumed Lost</td>
<td>Weekly or biweekly; when this method is used for managing overdue items. Frequency varies according to activity.</td>
<td>×</td>
<td>“Invoice” reports... MTWTF various</td>
</tr>
<tr>
<td>List Odue Items with Holds</td>
<td>Daily, 07:50 06:07:51</td>
<td>Daily</td>
<td>MTWTF 00:07</td>
</tr>
<tr>
<td>Expire Holds</td>
<td>After-midnight; Frequency varies according to hold-activity; monthly to average.</td>
<td>×</td>
<td>After-midnight; not currently scheduled; executed manually (coloured bookmarks)</td>
</tr>
<tr>
<td>Clean Shelves</td>
<td>After-midnight, after the Expire-Holds report runs. Frequency varies according to hold-activity; monthly to average.</td>
<td>×</td>
<td>After-midnight; not currently scheduled; executed manually (coloured bookmarks)</td>
</tr>
<tr>
<td>Notice for</td>
<td>After-midnight, after the Expire-Holds report runs. Frequency varies according to hold-activity; monthly to average.</td>
<td>×</td>
<td>After-midnight; not currently scheduled; executed manually (coloured bookmarks)</td>
</tr>
</tbody>
</table>
Carnival of the Notices
Looking at newly constructed spreadsheets suggested problems, including reports:

- badly timed
- misconfigured
- using out-of-date settings
- poorly targeted (especially notices)
- Inconsistent between campuses
Carnival of the Notices

Overdues/Underdues particularly poor

★ Not been reviewed for probably at least 10 years (if ever!)
★ Reports run quite late in day - appropriate for old opening hours, but can do better now 24/7
★ No advice of items with Holds - not renewable
★ Obsolete User and Location selections
★ Same notice texts for all users - many ifs & buts
Carnival of the Notices

★ By shifting reports around, can run all Overdues and Underdues by 01:00 (suits night owls and early risers!)
★ Duplicating reports with different User Profiles allows more specific Notice wording
★ Separating out loans from Offsite team answers request: longer Underdue notice for postal loans
★ Opportunity also taken to revise all Notice text to current standards (Plain English, CSE)
Carnival of the Notices
Advice of items which MAY be non-renewable also made possible with additional changes to notices:

★ Use “Hold Overdue” for Underdues with Holds
★ Pick up other Underdues with regular “Overdue”
★ But means Underdue notices must “Count as Notice Sent” (hadn’t been before)
★ Required all existing Notice Counts to be bumped on implementation - dummy notice
Carnival of the Notices

Post-implementation review:

★ Working smoothly and achieving goals
★ One problem - no underdues for some loans (by design), so needed “pick-up” report to bump their notice count
★ ILLs and Short Loans not included - separate reviews to follow
★ PHEW!
Double Concerto

Historically, Library has used unique IDs - since 2013/14, project to change to Uni standard ID

★ 10-character Library IDs - LIBERTAS legacy
★ But staff/student records use 6-/8-digit numbers
★ And login IDs are c+7 digits for students and (e.g.) ford01 for staff
★ eLibrary connected to LDAP, and IDs also stored in Symphony Web ID - so login accepted using standard ID and password!
Double Concerto

★ Old-style IDs effectively redundant, so sensible to consider replacing completely

★ Library ID encoded on staff/student cards, used for swipe entry, self-service stations

★ So any change must be co-ordinated with feed to card issue system

★ Holds for collection filed using (part of) 10-digit ID - liaison with staff to change process in advance
University name-change offered opportunity, as all staff/student cards to be replaced en masse with new name on.

But massive workloads from name-change and migrating Library website squeezed other non-essential changes out.

Benefit: extra year of thorough testing and co-ordination with IT services.
Double Concerto: Da Capo

2015

- Extra testing - 3M self-service terminals unable to handle shorter (and variable length!) IDs
- Reprogramming by 3M needed - took several attempts over extended period
- Into September before complete, missing most of new student cohorts
- Reluctantly postponed again!
Double Concerto: ...al Coda

2016

✓ IDs for new students finally changed from August

✗ But unexpected staff absences and turnover meant staff IDs unable to change on same day as planned

2017

❓ Changeover for Staff IDs this summer...??
Contrapuntal Crescendo

Closer examination of User records revealed some obvious issues:

★ No proper expiry regime - a number of users who left long ago
★ >11,000 with home Library of Harrogate College
The Auditorium

- Migrated to Symphony in 2000
- Significant changes since then include:

★ Complete turnover of senior staff about 10 years ago - vital knowledge lost
★ Introduced 24/7/365 opening nearly 10 yrs ago
★ Harrogate College left us 7 years ago
★ URL Resolver: SFX ➤ EBSCO
★ Name: Leeds Metropolitan ➤ Leeds Beckett (and leedsmet.ac.uk ➤ leedsbeckett.ac.uk)
Contrapunctal Crescendo

Closer examination of User records revealed some obvious issues:

★ No proper expiry regime - a number of users who left long ago
★ >11,000 with home Library of Harrogate College
★ Data protection issues - personal data retained (much) longer than necessary
★ But Finance regulations may require retention of Bill information for longer (especially unpaid)
Contrapuntal Crescendo

University data protection rules: discard personal data 1 year after student/staff left

Finance: mostly discard after 6 years (but we keep printed copies of Invoices - may be OK)

Out of 256,000 user records:
- 168,000+ have expiry dates over a year ago (63%)
- 95,000 more than 6 years ago (35%)
- 2 users left more than 15 years ago!
Discussion still ongoing about policy to adopt, but commitment is in place.

Also need to decide how often to remove old users, but most likely is once a month.

Lesson to be learned:

- review policies and procedures more often
Rallentando

... What Next?

★ Under/Overdues for ILLs and Short Loans
★ Items at Harrogate?
★ Scheduled purging of old Bill records
★ Look at DISCARDed Items
  ● Generally purged manually each summer
  ● DISCARDs un-DISCARDing selves - investigating!
★ Eliminating shared logins?
★ Automatic Renewals
... al Fine

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