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Tuning up the Symphony

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

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with

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Library Systems Team Manager



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

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

Duet: RATS! and RARR!

Routine **A**ministrative **T**asks **S**chedule
Required **A**nd **R**ecommended **R**eports

- ★ 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

Reorganize-User-Text-Dictionary×	Weekly (minimum); Saturday at 03:00.×	×	Weekly; Saturday 21:20.×
Correct-User-Information×	Weekly; Saturday at 03:00.×	×	Not-scheduled--because-of-daily-Rebuild?×
Correct-Hold-Information×	Weekly; Sunday at 03:00. Reduce the frequency if few corrections are made on a weekly schedule.×	×	Daily; 20:10.4 ONLY 1 ITEM corrected in 2016 so far--how important is correction within 24 hours?×
Add, Delete, Update-Metadata×	Each night at 03:30. Used only with Hyperion.×	×	Not-using-Hyperion×
Add, Update-Full-Text-Content-Database×	Each night at 04:00. Used only with Hyperion; when content searching is enabled.×	×	Not-using-Hyperion×
Rebuild-Metadata-Database×	Weekly at 04:30. Used only with Hyperion.×	×	Not-using-Hyperion×
Rebuild-Content-Database×	Weekly at 05:00. Used only with Hyperion; when content searching is enabled.×	×	Not-using-Hyperion×
Most-Popular-Items×	Weekly. Scheduled by SirsiDynix when the e-Library is installed.×	×	Not-using-Best-Sellers-/Rec-Reading×
Index-Content-Titles×	Weekly.×	×	Not-using-Best-Sellers-/Rec-Reading×

¶



Recommended Reports ¶

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

Report-Name×	Workflows-Frequency-and-Suggested-Time×	RATS-Notes×	Our-Setting×
Check-Text-Database×	Weekly or biweekly. (But Workflows online help also says "Run this report only with the advice of SirsiDynix Customer Support".)×	×	Not-scheduled×
Assumed-Lost×	Weekly or biweekly, when this method is used for managing overdue items. Frequency varies according to activity.×	×	"Invoice" reports--MTWTF-various×
List-Onshelf-Items-with-Holds-1×	×	Daily×	Daily 07:50 & 07:51×
Expire-Holds-2×	After-midnight. Frequency varies according to hold activity; monthly is average.×	×	MTWTF-00:07×
Clean-Holds-Shelf-3×	After-midnight, after the Expire-Holds report runs. Frequency varies according to hold activity; monthly is average.×	After-midnight after Expire-Holds×	Not-currently-scheduled--done-manually-via-coloured-bookmarks×
Notice-for-4×	After-midnight, after the Expire-Holds report runs. Frequency varies according to hold activity; monthly is average.×	×	Not-scheduled×



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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

Double Concerto

2014

- ★ 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

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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
- ★ 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!

Diminuendo ma non troppo

- 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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