



NORTH CAROLINA COMMUNITY COLLEGE SYSTEM
H. Martin Lancaster, President

MEMORANDUM

TO: Selected Presidents

FROM: Brenda H. Rogers
Vice President for Administration

SUBJECT: Library System Implementation

DATE: August 15, 2000

System Office staff have been working diligently to resolve implementation problems with the new library automation system. I am attaching the memorandum from Pam Doyle, Director of Library Resources, that describes in detail the nature of the problems and the actions that are being taken.

You need to understand that the CCLINC Steering Committee and Implementation Team have made the implementation decisions and that our staff work with the Sirsi system administrator and other Sirsi staff to carry out those decisions.

I ask your support through this difficult period and urge your library staff to respond to our requests for information so that problems can be identified and resolved. These are complex problems with no simple solutions.

I assure you that our staff will do all that they can to correct the problems and implement the other modules of the library automation system.

BHR:sh

Attachment

c: President Martin Lancaster
System Office Vice Presidents

S00-037

E-Mail



NORTH CAROLINA COMMUNITY COLLEGE SYSTEM
H. Martin Lancaster, President

August 15, 2000

MEMORANDUM

TO: LRC Directors
CCLINC Consortium Colleges

FROM: Pamela B. Doyle
Library Resources

SUBJECT: Library System Implementation – Status Report

The System Office recognizes that there are ongoing problems with the implementation of the Sirsi Unicorn library system and that these problems are impacting the services provided by your library. We are working with Sirsi and the CCLINC Implementation Team to resolve these problems as quickly as possible.

As we briefly describe the problems, please keep in mind that we had anticipated the migration taking a minimum of six months to complete. Because of a vendor protest and our need to make financial arrangements to pay for the system, the contract with Sirsi was not signed until March. Sirsi agreed to work with us to meet our July 1 cutover date, so we would not have to extend the old contract with epixtech, inc. You should also keep in mind that migration to the Data Automation Center (DAC), our previous library system, was completed by adding one library at a time and spanned 18 months. If a college experienced problems, they were corrected immediately following the migration. Because 22 of the DAC colleges had been previous stand-alone Dynix users, there was an existing familiarity with the DAC software and many setup decisions had already been standardized. The Sirsi Unicorn system is an integrated system based on client-server technology. The colleges had limited familiarity and experience with Sirsi Unicorn and client-server technology. Because we are in the consortial environment, we have to learn what the Sirsi Unicorn software will allow us to set up individually and what must be set up globally.

The initial problems with the Sirsi Unicorn library system related to the data loaded. When the library data was extracted from the DAC by epixtech, inc., bibliographic and holding information was missing and a significant amount of cataloging and database maintenance work completed in May was not present. It was not until the new Sirsi Unicorn library system became operational on July 1 and the colleges began checking the database on July 3 that the extent of the problems was realized. Because the dataload did not have all the bibliographic and holdings information, many of the circulation transactions could not be linked to specific items and were not added to the circulation files. Epixtech, inc. was contacted and they provided a new tape in late July containing all the bibliographic and holdings information as of May 31.

The issue then became how best to correct the problems with the database and circulation files. Because the colleges had already begun to use the Sirsi Unicorn system to circulate materials, those circulation transactions were linked to specific barcodes contained in holdings records. If Sirsi had deleted all the bibliographic and holdings information and reloaded the data from scratch, the circulation links may not have worked properly. Several colleges had made changes in barcodes during May that were not present after the initial dataload, so circulation transactions were linked to the old barcodes. It was the decision of the Implementation Team to have Sirsi run a process to match the records already loaded in the database against those on the tape and to load everything that was missing. A second process was run to identify those items contained in the database that were missing from the May 31 tape, so items withdrawn from the collections in May could be removed from the database. After completing these two processes many of the errors were corrected, but they did not recover all the activities completed in May and some bibliographic records were still missing. Circulation transactions that could not be loaded initially were run against the updated database and added to the circulation files.

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The dataload problems and the subsequent circulation data problems meant that the library staff may or may not be able to locate accurate circulation records to check materials in when students returned them to the library. Items that students wished to checkout may have information that must be corrected in order to accurately identify the item. It is also believed that inaccurate fine information is associated with the dataload problems.

Also at issue are the differences between what local library personnel could do on the DAC and what they can do on the Sirsi Unicorn system. The difference relates to system design. Report generation is a major issue and includes everything that you would want to print on paper, such as overdue notices, bills for outstanding fines, bibliographies of materials instructors or students need for teaching and doing reports, purchase orders, book spine labels used to organize and shelve new materials, and more. When the colleges used the DAC, they had access to a reports menu. They could select the reports to be run at scheduled times or upon request. They could also generate special reports using Recall/Inform statements. In the Sirsi Unicorn system, all reports are in one master list which contains the reports listed above and all the reports used by the System Administrator to maintain the Sirsi Unicorn system. Sirsi is concerned about damage that could be done to the library system if the wrong report is run and also the overall impact on system performance and response time if a significant number of reports are run simultaneously.

Where are we now with the implementation? What is being done to address the problems and issues? System Office personnel has had several telephone meetings with Sirsi in the last few weeks to address these issues. Sirsi is committed to working with us to make the migration a success and the system work as it should. To this end, the following steps have been taken.

Sirsi has set up a team of people to work with us on these migration/implementation problems and to resolve them as quickly and efficiently as possible. The team will include our Project Manager, our System Administrator, a person knowledgeable of the software, and a dataloader. Getting the problems resolved in this project will be their top priority.

By August 14 the settings in the test server will have the same settings as the production server, so the colleges can test all options before making decisions about setups and procedures to be implemented. Because the migration was on such a fast track, the test server was shipped with many default settings and a limited amount of bibliographic and holdings information. Sirsi will be using the test server to test changes in setup and processes before making the changes in the production server. Colleges should use the test server for training and testing new procedures, rather than using the production server.

During the remainder of the implementation and until most of the problems have been resolved, Sirsi will set up one person at each college to run circulation, requests, and bibliographic information reports one day each week. When they receive setup information from the colleges, Sirsi will set colleges up to run overdue notices and holds each day. Sirsi will be able to monitor the impact report generation by so many colleges will have on the overall system response. After these initial problems with migration and implementation have been resolved, we will work with Sirsi in making decisions about generating reports in the future.

In an attempt to resolve the problems with the bibliographic and holdings information and subsequent circulation problems, Sirsi agreed to provide the resources needed to set up a second production server, load in the bibliographic and holdings information from the last tape received from epixtech, and allow the colleges 3 days to review the information and decide if it was better than the original dataload. The Implementation Team decided not to do the second production server. Many of the colleges have already begun to correct the data in the existing system and are using the circulation system fully. Colleges that did not complete a lot of cataloguing and database maintenance activities during the month of May do not seem to have a significant number of database problems. By running the two processes to correct the data errors, a large percentage of the problems seems to be resolved. There were some problems created as a result of the processes being run, but Sirsi is working with us to identify and resolve those problems.

In order to closely monitor progress of this situation, the colleges are being asked to send all problems, requests for assistance, responses to requests for information, etc. to the Sirsi Help Desk mailbox that has been set up in GroupWise, with a copy to Ruth Bryan. Our System Administrator monitors that mailbox all day and will act on or direct the message to others to get a response. The colleges are also being asked to send a copy of all emails to Ruth Bryan, the Coordinator of Library Information Technology in Library Resources. Ruth does not automatically get these messages, but needs the information in order to track progress on problems that you have submitted.

What do we need to do to help correct the situation and bring the implementation to completion? Sirsi has asked that the colleges provide them input about the problems that still exist after the two processes were run. We are gathering that information now, and the Sirsi team is taking each one to analyze what happened and how it may be corrected, if possible. In some instances, the information may not be available to correct problems. (Examples: The prices contained in the holdings records for each item owned by a college were not included in the final tape received from epixtech. Sirsi is doing some analysis to determine how many records this will affect and if there is a way to load in those prices if we could get a new tape from epixtech. Also, the bibliographic and holdings records for reference materials owned by the majority of the colleges were not included in the last tape from epixtech. These records may have to be entered from scratch.)

Colleges can help Sirsi by responding to requests for information within the time allowed. Many of the items still to be set up relate to things that must be set up globally. Sirsi cannot set up anything until everyone responds. We cannot hold Sirsi accountable for things not done, if we do not provide them with the information to do it.

Colleges also need to understand that there is a difference between the DAC software/technology and the Sirsi Unicorn software/technology. The Sirsi Unicorn software, like the DAC, has the capability to do many things, but because of the system design differences, the ability to do these things may not be granted to library personnel. As these issues arise, we will work with Sirsi to address them.

Not only has the migration and implementation been on a fast track, but the learning has also been fast track. When decisions had to be made, they were made based on past performance and functionality of the DAC and a limited knowledge of Sirsi Unicorn. The Implementation Team, with input from the colleges, did a very good job of making decisions to get the Sirsi Unicorn system set up before the cutover date. The Sirsi Unicorn system did come up on July 1 with the bibliographic and holdings information, and colleges were able to use the patron and circulation files to circulate materials. Unfortunately, the majority of the initial problems resulted from data that was missing from the tape received from epixtech, inc. Resolving those problems has hindered implementation of the remaining functions of the system and the ability of the libraries to prepare for the students arriving within the next few days.

Sirsi has worked with us to correct as many problems as possible resulting from the dataload and is now working with us to resolve problems related to codes and mapping. The test server is being updated so colleges can test processes before making final decisions and before preparing information for students to use. Sirsi is gathering information from the colleges to set up reports they need to run and to identify problems with setups that Sirsi needs to correct.

We will continue to monitor progress on all of these issues, Sirsi's compliance with the terms of the contract, and advise the Administration and the CCLINC colleges of the progress being made. If you have questions or need additional information about the current status of the library system implementation, please contact Ruth Bryan (bryanr@ncccs.cc.nc.us) or me (doylep@ncccs.cc.nc.us).

c: Presidents, CCLINC Colleges
Larry Smith, Sirsi
Terry Jarnigan, Sirsi