



Reports Ride-along

a journey through the invisible, intricate world of ILS reports



Just to be sure...

ILS = Integrated Library System

Users, circulation, catalogue, orders, bills, serial control, reserves, bookings, e-Library (public catalogue)

By “ILS reports”, I mean the reports that interact with/produce results in the ILS

Dedication (ILS Team)





Why ride-along?

First-hand experience

A chance to safely observe

Open the lines of communication

Demonstrate and educate



Why Scott?

8 years in various cataloguing capacities + 5 years in public services (circulation/reference)

= stakeholder in many report inputs/outputs

(bonus: used to monitor “lawinfo” inbox, which caught all NEOS replies to library notices)

Big fan of reports!

Not the expert, but this is a labour of love



Learning objectives

Increased awareness

Make personal/institutional connection

- Users, materials, catalogue records, tech/systems



Exceptions

Reports on demand (e.g. bulk catalogue work, spine label generation, scripted queries/modifications)

BlueCloud Analytics

Day in the life - focus is on reports running on a typical weekday (not weeklies, monthlies, yearlies)

Presentation timeline is ambitious - may not have time for questions

- Jot things down and catch me later!

A few basics



What are reports?

Tools to interact with the Symphony database at large

Report as passive (query) or active (modification)

Input, selection, action, output

Report Log for Notices - HeadsupALL
Report overdue scheduled as Notices - HeadsupALL
Headsup notices for all - email only

Symphony charge selection 3.5.3 started on Friday, May 31, 2019, 0:50 AM
The charge file will be read sequentially by primary key.
The item key will be written to standard output.
The user key will be written to standard output.
The charge key will be written to standard output.
The charge library will be written to standard output.
The number of overdue notices will be written to standard output.
Charges will be selected if the date due is not earlier than 6/3/2019 and not later than 6/3/2019.
Charges will be selected if the date claims returned is NEVER.
Charges will be selected if it is NOT overdue.
Charges will be selected if charge location is not LOST-CLAIM.

```
*** SQL ***  
SELECT catalog_key,call_sequence,copy_number,user_key,charge_number,library,numb  
er_of_overdue_notices FROM charge WHERE (trunc(date_claims_returned) = to_date('19000101','YYYYMMDD')) AND (overdue = 0) AND (trunc(date_time_due) >= to_date('20190603','YYYYMMDD')) AND (trunc(date_time_due) <= to_date('20190603','YYYYMMDD')) AND date_time_due > to_date('19000101','YYYYMMDD')) AND location NOT IN (146)  
*** SQL ***
```

73870 charge record(s) considered.
540 charge record(s) selected.
Symphony charge selection finished on Friday, May 31, 2019, 0:50 AM

Symphony item selection 3.5.3 started on Friday, May 31, 2019, 0:50 AM
The item key will be read from standard input.
The string from standard input will be written to standard output.
540 item record(s) considered.
540 item record(s) selected.
Symphony item selection finished on Friday, May 31, 2019, 0:50 AM
Symphony user selection 3.5.3 started on Friday, May 31, 2019, 0:50 AM
The user key will be read from standard input.
The user key will be written to standard output.
The string from standard input will be written to standard output.
The user ID will be written to standard output.
The user key will be written to standard output.
540 user record(s) considered.
540 user record(s) selected.
Symphony user selection finished on Friday, May 31, 2019, 0:50 AM
Symphony catalog selection 3.5.3 started on Friday, May 31, 2019, 0:50 AM
The catalog key will be read from standard input.
The catalog key will be written to standard output.
The string from standard input will be written to standard output.
The title key will be written to standard output.
540 catalog record(s) considered.
540 catalog record(s) selected.
Symphony catalog selection finished on Friday, May 31, 2019, 0:50 AM

Sort: sorting by LIBRARY, USER ID, USER KEY, NOTICES, TITLE
Duplicate records, based on the sorting key(s), will not be printed.
Symphony charge notice printing 3.5.3 started on Friday, May 31, 2019, 0:50 AM
The charge key will be read from standard input.
The library address will be included in the notice.
5 lines will be skipped before each user address.
10 spaces (columns) will be skipped to indent the user address.
The patron's user ID will be included in the notice.
The notice text from /u/sirsi/Unicorn/Notices/headsup will be used if the
number of overdue notices previously sent is 0.
The call number will be written to standard output.
The brief author and title will be written to standard output.
Notices will be combined
Library address in the patron record will be used.
The date due will be written to standard output.
The charge notices will be written to standard output.
0 charge item(s) printed.
253 user record(s) processed.
Symphony charge notice printing finished on Friday, May 31, 2019, 0:50 AM
Symphony userstatus selection 3.5.3 started on Friday, May 31, 2019, 0:50 AM
The user key will be read from standard input.
The string from standard input will be written to standard output.
users will be selected if library group is ALL
540 userstatus record(s) considered.
540 userstatus record(s) selected.
Symphony userstatus selection finished on Friday, May 31, 2019, 0:50 AM
Combining Notices sorts by: USER ID, USER KEY, NOTICES, TITLE|

Library Notice - Reminder to Renew/Return

NEOS Library Consortium <sirsi@ualapp.library.ualberta.ca>

Thu, Jan 31, 2:22 AM

to me ▾

Thursday, January 31, 2019

University of Alberta Libraries
University of Alberta
Edmonton AB
CA
780-492-4174

ID: 1010284300017

Scott Richard Davies

Heads-up notice:

This library notice is being sent to you as a courtesy reminder that according to our records the following material is due today.

If you wish to renew, you may do so using My Account at
<http://catalogue.library.ualberta.ca/myaccount/>

Please note: Some items are not renewable online.

1 call number:PZ 7 B97 K19 1943 ID:000031082662
Katy and the big snow; story and pictures by Virginia Lee Burton.
Burton, Virginia Lee, 1909-1968.
due:1/31/2019,23:59



How do they run?

Workflows

- Configured and scheduled within Workflows admin and other selected logins

Cron job

- Scheduled commands/scripts on the server to carry out actions or produce output



Who's involved?

- Elaine Coupland - ILS Team Lead
Coordinates operations and activities of the ILS team, ensuring maximum system up-time, service performance and data integrity
- Jim Hamilton - ILS Systems Analyst
Responsible for the development activities and programming required to extend the functionality of the ILS, modify or enhance reports, and enable data exchange with external systems
- Peggy Morgan - ILS Application Specialist
Provides top-tier support to internal and external stakeholders; leads implementation of new application features and functionality at the single site and consortia level



Who's involved?

Everyone else!

Once a library begins the process of joining NEOS, they begin collaborating on making systems work

This is ongoing as systems and needs evolve



Let's go!

10:00 pm





10:00 pm: cpLoadUsers (cron)

12 institutions use an automated process to batch load users

User data files are prepared and delivered by each institution to dropboxes

This job copies the files from to our system for overnight loading (stay tuned)



10:16 pm: (1)resetmybistro & (2)syncpolicy (WF)

(1) E-library (public catalogue) can track authors and subjects of checkouts to deliver “favorites” data

- We have this disabled for privacy, but it is initially enabled for new users
- This report deactivates it

(2) Synchronizes policy file with database file

- Each time policy definitions are created or modified in WorkFlows, the corresponding policy tables are not updated automatically - this report does the update
- Changes made one day in production the next (e.g. holding code, new location, term loan due date)



10:30 pm: pullonshelfhd (WF)

Hold picklist preparation (list of on shelf holds)

Identifies active, unavailable holds with items available to pull (not checked out, in transit, etc.)

Considers which libraries are closed the next day and ensures their copies are not selected

Report produced for each library/branch: your list of on shelf holds to pull every morning

Must be run before recalls...



10:45 pm: newholdrecall (WF)

Selects checked out items requiring recall to fill holds and sets recall due date

- >2 week loan period + checked out for at least 7 days + item with most renewals + soonest due

Should never be run without the on shelf holds report running first

- Would recall items even if available somewhere else
- E.g. New hold on title with 2 copies - 1 checked out. Previous report selects the on shelf copy to fill hold. No recall will occur for the checked out copy.



11:01 pm: recallntc (WF)

Recalls have now been set (previous report) - this report formats and sends the notices to users

Gives notice for items due in 7 days



11:30 pm: fines2neosDaily (cron)

Copies lists of fines paid/unpaid for subscribing NEOS libraries

To be used for placing/clearing encumbrances

Each library is responsible for scripting the data so their institutional systems can read in the information



12:04 am: (1)consolidate & (2)statlog (WF)

(1) Merges and compresses all daily batch, history, print, scanner, statistics, system, WebCat, OPAC transaction, Z39.50 connect, and Z39.50 history logs

To create statistics logs, this must be followed by the statlog report

(2) Creates statistical transaction logs that contain history transactions from which specific patron and title information is removed, and in which user and item demographics are substituted

These are the basis of analytical reports



12:48 am: headsup (WF)

New day = new set of heads-up notices to be sent to users

Four reports:

- 3-day reminder for “all”
- 3-day reminder for recalls
- Day-of reminder for “all”
- Day-of reminder for recalls

Recall status and due dates are a totally different layer of information, necessitating own reports



12:53-5:36 am: loadusers (WF)

Various reports to load & update user info for 12 institutions are scattered throughout this timeframe

Reports copied earlier from dropboxes

Those reports must take data from registrar's offices and prepare it in a specific format for Symphony

Figuring this out is a big step for libraries joining NEOS - lots of testing

Newly-loaded users should all be ready for use that day



12:57 am: expireholds (WF)

Changes hold status to inactive for active holds with an expiry date on the previous day

Also sets “hold inactive reason” to expired (vs. expired on shelf, cancelled, etc.), which can provide useful information if users inquire about their holds



1:02 am: setdelinq (WF)

Selects users with fines, overdues, and/or recalls

Sets appropriate status as delinquent or blocked

Marks charged items as overdue so the items can be selected by overdue notice reports

For recalls on holds, it sets the “recall due period” (the date the user has to return the recalled item before it is considered an overdue recall) that is used to calculate the date for delinquency or blocking

Must run before overdue and lost notices



1:05 am: noverdue (WF)

New day = new set of overdue notices to send to users

Four reports:

- 1st overdue (day after due)
- 1st overdue recalls (day after due)
- 2nd overdue (week after due)
- 2nd overdue recalls (week after due)



1:11 am: expshlfholds (WF)

Identifies available holds (awaiting pickup) with an “available expiry” (last day to pick up) of the previous day

Deletes the hold and sets the “hold inactive reason” to expired on shelf, again providing useful information if users inquire about their holds

Must run before clean holds shelf report...



1:15 am: clnhldshlf (WF)

Identifies expired holds plus cancelled holds that had been available for pickup

Puts items belonging to other libraries, or needed elsewhere for a hold, into transit

Produces report for each library/branch to clean their holds shelf



1:16 am: assumedlost (WF)

Identifies items overdue for 31 days and sends notice to users

Two reports (based on regular due dates and recall due dates)

Sets charge status to inactive, adds \$150 bill, and sets current location to assumed lost

The last of the across-the-board overnight circulation notices



1:18 am: RCRFpicklist (WF)

Runs separately from other picklists

UA's RCRF (compact storage; formerly BARD) uses a custom inventory/warehouse management system (Bookie) to manage location of each item

Bookie uses the data to construct an optimized picklist for efficient retrieval

ADUTEXT (dun dun dun...)

—



1:24 am: adutext (WF)

Full name: Add, Delete, Update Databases report

If this runs long, we have issues

- Inability to find records
- Locked records (“The records are currently in use”)

Stopping the report risks serious corruption of our database



More about adutext

Re-indexes bibliographic and authority records

- Headings and words for searching and browsing in new/modified records
- Updates holdings, text indexes, and authority thesauri when items are removed

Required to run daily and at night (when staff is not working in the system)



More about adutext

SirsiDynix recommends running no more than 5000 keys (records) through adutext daily

We deal in the thousands regularly due to bulk loading/updating/deleting

NEOS Tech Services Committee members get an email notification (“Re-indexing of Some New/Modified Titles Will be Delayed”) which should be shared with others as needed

Stretch break while adutext runs!



1:30 am: remfavorites (WF)

As mentioned earlier, e-Library (public catalogue) can track authors and subjects of checkouts to deliver “favorites” data

- We have deactivated for privacy reasons, but it is auto-enabled for new users (and deactivated by an earlier report)

Removes any existing “favorites” that were gathered



5:37 am: aduuserHIR (WF)

This is symbolically the last report in the overnight sequence

Like adutext (reindexing added, deleted, and updated info) but for user records

Customized to finish with a halt, initialize and run (HIR) - aka halt & run

- We need a nightly shutdown and restart of Symphony - resets a number of things, re-reads the policy database



6:10 am: IDpins (cron)

Produces lists of user IDs and PINs and copies lists to dropboxes

Provides the information needed for EZproxy authentication as used by TAL, AHS, AGL, and UA's eResources for Alumni service



7:10 am: rcrbills (WF)

Produces the Report of Cash Receipts reports

A record of all fines payments from the previous day

Report for each library/branch

To be duplicated in BCA and eventually retired here



7:15 am: abnormaladutext (cron)

Checks that adutext ran overnight and checks if "abnormal" terminations occurred

Searches adutext log for keywords

Catches errors that Symphony doesn't by default (report status shows "OK"!)!

Served up for ILS Team to check first thing in morning



7:15 am: rebootwatch (cron)

Reports when a server reboot has occurred, noting whether it is expected or not

Scheduled server reboot every Tuesday

Another report for ILS Team to check first thing and follow-up with sysadmins if necessary



7:15 am: bookingpullist (WF)

The first NEOS libraries open at 7:30, including AGL, which uses bookings module

Like holds but allows user to reserve library material for a day and time period

This report delivers a picklist for booking material requested for this day

- Also runs with a report to produce packing lists and labels



7:20 am: finishedReports (cron)

Lists Workflows Admin reports that have ran overnight and if they had any errors

Jim developed this to check - a report of reports (typical programmer!)

Others check by looking at list of reports and reviewing emailed logs

ILS Team members regard 7:30-8:00 as an important time to review reports and plan action if intervention needed (e.g. halt further reports so things don't get worse)

7:30 am





7:44 am: tallyLoadUsers (cron)

Counts and sums all the various Load Users Reports

Peggy has an idea of what numbers to expect, and when to expect bigger numbers

- E.g. if it's the start of a new term, and it's noted that a library hasn't sent a full load's worth of users, there would be follow-up inquiries to see if something has broken



7:50 am: pinnotice & userIDnotice (WF)

Welcome message, user ID / PIN sent to users created the previous day

5 libraries currently using this for their users

UA has phased these out for privacy/security considerations



7:55 am: fines2oasis (cron)

All UA user fines paid/unpaid from Workflows sent to PeopleSoft dropbox

1 hour intervals

Causes the placing or lifting of negative service indicators in PeopleSoft

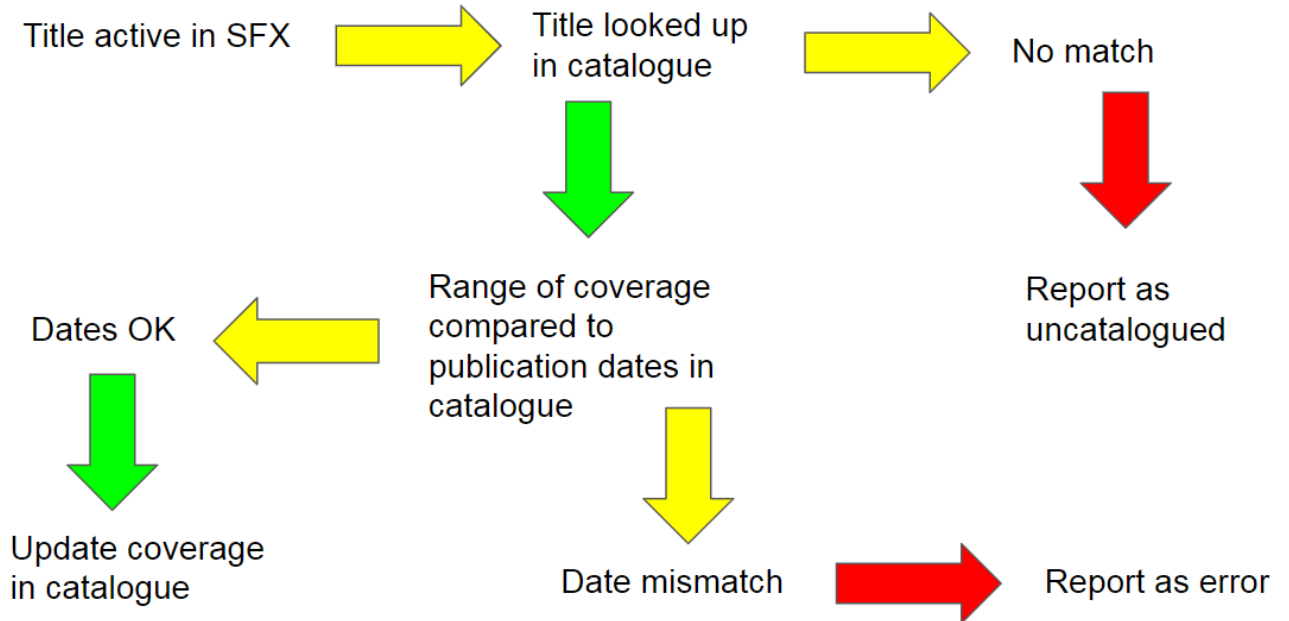
- Negative service indicators block course registration, applying for graduation, etc.

High visibility problem when this is not working - can break if registrar's office changes something

8:00 am: sfx2sirsi (cron)

UA link resolver
synchronization &
holdings update

Needs to run after the
other biggies (adutext)
but early in the day





8:07 am: userlistLost (WF)

MacEwan and UA offer a library pass for students to get EPL membership (L-Pass)

The EPL account is based on the student ID card barcode

This report sends EPL a list of users that had a lost card replaced the previous day, containing the old and new barcode number



8:15 am: setmaxreportsto4 (cron)

Allows up to 4 reports at once for daytime hours

At night, so many reports - must run in sequence and one-by-one

During the day, it is considered safe to allow multiple reports

Allowing multiple reports enables cataloguing activities (loading/updating records), spine label printing, and ad hoc maintenance to proceed concurrently throughout the day and without delay



8:16 am: userlist for corrections (WF)

A report of manually registered users created on the previous day

Each library is to check their own creations to ensure quality

Errors will lead to users not showing up in the correct reports



8:40 am: oclcDelCust (WF)

Identifies deleted items from the previous day for OCLC member libraries in NEOS

Reports the deletions to OCLC via scripted login and upload to an OCLC server

Ensures holdings removed from Worldcat



8:55 am: pickup reminder (WF)

Identifies available holds for which a pickup notification was sent four days prior (i.e. that expire the next day)

Sends email notification to user



9:00 am: itemMssHld (WF)

Identifies items in current location missing or lost, lost-claim, etc. that were charged the previous day

Produces the daily lists of missing items for each library

Includes information on holds associated with these items, where applicable



9:10 am: tckLastDayRan (WF)

Selects catalogue records created the previous day

Attempts to set the Title Control Number/Key to one based on the ISBN, ISSN, LCCN, or OCLC number, unless record has been marked for exclusion to this process (039 field = exclude)

The Title Control Number/Key is used as a match point for SmartPort and bulk loading - this report improves the precision of that matching



9:20 am: rsvovrdue (WF)

Reports listing overdue UA reserve items for areas wishing to monitor and take action on high demand items (such as laptops in the Tech Lending Program)



9:45 am: proquestExtract (cron)

Actually a bit stumped about this one!

Possibly a catalogue dump for use in the AHS discovery system?

[Following presentation, I learned that this may be an extract of UA's holdings for use in OASIS]



10:45 am: oclcExtract (cron)

Incremental catalogue extract (new/updated records in a file)

To update holdings for display in OCLC WorldCat



12:28 pm: pickup (WF)

Holds selected if available and notification not previously sent

Combines, formats, and emails users a hold pickup notice



12:30 pm: RCRFpicklist (WF)

A second run for the day

Get more holds out for distribution, with respect to truck schedule and RCRF's position as the distribution point for NEOS libraries



Speaking of RCRF...

calltitle2RCRF has been running every minute of the day

Receives barcodes and returns call numbers and titles to Bookie (RCRF warehouse software)

Used for ingesting items - associates call number and title with a barcode in Bookie

Runs every minute, all day and night (dates back to the move, with shift work / odd hours; some work occurs on weekends)



1:30 pm: macEwanSFX (cron)

MacEwan also uses the SFX link resolver to manage ejournal holdings

Likely a huge oversimplification, but this starts an import process for adding/updating MacEwan's ejournal holdings in the catalogue based on their SFX information



4:00 pm: pickup (WF)

Holds selected if available and notification not previously sent

Another run to catch items put on hold since 12:28



5:15 pm: holdcancelntc (WF)

Identifies holds made inactive by cancellation on this day

Lets users know of this (there was a time we didn't do this)

System does not differentiate between user cancel and staff cancel, and staff cancel for different reasons (missing, reserve, oops) - it's all CANCELLED

This is why the notice cannot give any more specific information

5:30 pm





5:46 pm: killreport (cron)

Looks for any Workflows report still running and stops it so that the critical administrative reports will not be delayed

- E.g. blank spine label report - printing labels for entire database, running all night



6:00 pm: setmaxreportsto1 (cron)

Sets the maximum number of reports running to one

Ensures the critical administrative reports run one-by-one and in sequence



6:05 pm: ckey001pm (WF)

Identifies catalogue records created or modified on this day

Checks the 001 (catkey) field to see if it matches an internal record number, and sets it to this number if not

The 001 is initially set to a different value for newly loaded or overlaid (replaced) records

This report sets it to the familiar 7-digit number



https://catalogue.neoslibraries.ca/catalog/2775595?lib=lakeland

Lakeland
COLLEGE

NEOS Catalogue

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Place Hold

Inside poetry, 2nd ed.

Author: [Davies, Richard \(Richard Delmar\), 1949-](#)

Additional authors/performers: [Wowk, Jerry.](#)
[Kirkland, Glen.](#)

Format: Book

Bookmark

[Email Me this Item](#)

Inside poetry *2nd ed.*

Davies, Richard (Richard Delmar), 1949-

000: : am a0c a

001: : 2775595

003: : CaMWOCL

005: : 20030707114111.0

008: : 020417s2002 onca b 001 0 eng



6:10 pm: ebscoextractdaily (cron)

Incremental catalogue extract (new/updated records in a file)

For use in presenting results from the library catalogue in Ebsco discovery systems



6:30 pm: emailserialsmissing (cron)

RCRF's Bookie system does not recognize when an item is either missing or in transit when it is newly processed into the RCRF

This report notifies when such an item is ingested so we can discharge it in Workflows



7:50 pm: mergeOCLC (cron)

Receives pairs of catkeys and OCLC record numbers as matched by OCLC's Data Sync process (synchronizing local holdings with holdings represented in OCLC WorldCat)

Inserts OCLC number into 035 field of catalogue records - important match point and indicator of this synchronization



8:23 pm: macewan_fines_export (cron)

Copies a list of MacEwan user fines to their server for their use



Speaking of MacEwan...

macEwanID has been running every 5 minutes all this time

Copies a list of MacEwan user IDs, PINs, and altIDs to their server for their use

Reports written outside the ILS Team would be checked over by Jim and run for that library, remaining their responsibility



8:30 pm: remdiscard (WF)

Removes items set to discard from the system

Ejournals - MacEwan and UA items with itemcat1=e-journal and home location=discard (i.e. manually-set discards)

Ebooks - items with home location=internet, current location=discard (i.e. items marked discard through automated process)

Ebook cataloguers (dealing in bulk) need discards purged daily for various tasks to progress



9:59 pm: pickup

Holds selected if available and notification not previously sent

A final run to catch items put on hold since 4:00

10:00 pm





Weeklies, weekends, monthlies, yearlies

Database housekeeping/maintenance

Orphaned MARC holdings for UA

Transits 10+

Remove discards (all)

Authority record updates



Weeklies, weekends, monthlies, yearlies

Discarding ON_THE_FLY items

Statistics

Reserve prep

Serial control claims notices



Takeaways

Importance of sequence

Importance of completion

Importance of innovation through collaboration

Importance of responsible stewardship

Dedication (Reprise)





Dedication: ILS Team past and present

In praise of the stability and maturity of our system

Not an overnight success - ups and downs

Took several years since migrating from DRA (2003) to get things running smoothly and to implement desired features

Never a state of perfection - always new things to discover, always improving

Reports Ride-along

Scott Davies, University of Alberta

NEOS Miniconference, June 7, 2019