Getting Started Using Gary Strawn's Software in I-Share Libraries

Revised by the CARLI Office
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Mr. Gary L. Strawn, whose self-penned job title is "Authorities Librarian, etc." at Northwestern University, has written a series of computer programs for NWU cataloging department staff that work in conjunction with a Voyager database. Mr. Strawn graciously makes these programs available to other Voyager customers around the world. The CARLI Office supports the Strawn utilities listed below for I-Share participating libraries:

> Cataloger's Toolkit for Voyager (general purpose "client")
> Correction Review (used for reviewing batch changes to headings in bibs)
> Correction Receiver (used to submit batch changes to headings in bibs)
> Spine Label Printing (used for printing spine labels from item records)
> Location Changer (conceptually similar to Voyager's Pick and Scan, but with more functionality)

Many I-Share library staff are currently using some or all of these programs, to some extent. Many cataloging staff members from I-Share libraries and beyond believe that these programs work better than Voyager to perform certain cataloging tasks. The CARLI Office does not require the use of these programs, but they are an option available to I-Share libraries that wish to use them.

This handout is intended to be a supplementary "map" to the steps needed to install and begin using the Strawn utilities in the I-Share environment. It is not intended to replace the more complete documentation for each program, described below.

Where to get the Strawn and I-Share documentation

All documentation for the Strawn programs supported by the CARLI Office is available from the CARLI website at the URL below:

> http://www.carli.illinois.edu/mem-prod/I-Share/secure/execute.html

This is the same webpage used for downloading the Voyager clients. If staff are accessing this page from within an I-Share library, no login/password should be required if the workstation's IP address is properly registered for Reverse DNS lookup.

Scroll to the section of this page entitled "Strawn Programs and Documentation." On this webpage, near the top of the Strawn Programs and Documentation section, is a very important piece of documentation entitled "Installing and Configuring Gary Strawn's Software in CARLI/I-Share Libraries" <http://www.carli.illinois.edu/mem-prod/I-Share/secure/execute/strawn/strawn_install.pdf>.

This is a large document that includes step-by-step instructions on how to install and configure each of the Strawn programs in I-Share participating libraries. It is imperative that whoever is doing the installation and configuration of the Strawn programs in the local library follow these instructions carefully. Library staff that are responsible for learning and training others in the use of these programs should also review this document, as it contains some valuable information about use of the programs in the I-Share environment.

The CARLI website also includes links to the documentation authored by Mr. Strawn for each of the programs listed above. The documentation for each program is found beneath each ZIP file, although Correction Review and Correction Receiver share the same documentation (called "Making Changes to Headings," found under Correction Receiver).

Where to get the Strawn programs

All of the Strawn programs supported by CARLI are also available for download from the CARLI website at the URL below. Scroll to the section of this page entitled "Strawn Programs and Documentation." Downloading the programs from the CARLI website assures that the I-Share library uses the correct versions of the Strawn software for our technical and support environment.

> http://www.carli.illinois.edu/mem-prod/I-Share/secure/execute.html

There is a section for each of the different Strawn programs listed above. The programs are downloadable ZIP files. Libraries do not have to use all of the programs available here. Many libraries use only Spine Label Printing, or only Cataloger's Toolkit. However, Correction Receiver and Correction Review are used in conjunction with each other to make batch changes to headings. Location Changer has many useful features, but its primary function is to change item and MFHD locations efficiently, either on a record-by-record basis or via the program's "big batches" option.

NOTE: the Correction Review and Correction Receiver programs should only be installed on the workstation of the library staff member(s) who will be reviewing and approving batch heading changes in the local database. The CARLI Office recommends that only a single staff member have access to these two programs at the beginning of a library's implementation of the Strawn utilities.

IMPORTANT NOTE: Any errors made in correcting batches of records using any of Mr. Strawn's programs are the responsibility of the library to correct locally. The CARLI Office will not restore any database because of errors made to records by imprudent or incorrect use of Mr. Strawn's utilities.

Technical requirements (pre-requisites) for using the Strawn utilities

NOTE: All of the Strawn programs require that an ODBC connection to the I-Share reports server be established on the workstation prior to configuration of the Strawn program(s). This is the same ODBC connection that is needed when a workstation is used to run the prepackaged or customized Access reports against the Voyager database. As of February 27, 2008, staff must use an Oracle 10g ODBC connection.

In addition, the individual staff member running these Strawn programs must also have an Oracle account for this ODBC connection. If the staff member already has an Oracle account for running Access reports, that account can be used for the Strawn programs. If the staff member does not have an Oracle account already, the library's I-Share Liaison or Security Contact must file a WRO to get this account established.

I-Share-specific instructions for installing the Oracle 10g client and ODBC driver connections are found in the document entitled *CARLI I-Share Oracle 10g/ODBC New Installation Guide*, which is available from the URL below:

> http://www.carli.illinois.edu/mem-prod/I-Share/secure/execute/oracle/newinstall_10g.pdf

IMPORTANT NOTE: Oracle 10g and the ODBC driver <u>MUST</u> be installed and functional before any installation of any of Mr. Strawn's programs can take place.

Unique Strawn program functionality in the I-Share environment

There are a few things that are unique about the I-Share environment that affect functionality and workflow when using the Strawn programs. The information below is an overview of these unique "features."

(1) Voyager record "read" is from the Reports server

All of the Strawn programs use an ODBC connection to "read" records from the Voyager database. In the I-Share environment, for security and system performance concerns, all ODBC connections (other than to the training databases) point to the I-Share reports server rather than to the live, production server. However, when records are changed/edited in any way by the Strawn programs, the "write" is to the production server.

On March 1, 2010, the Reports server hardware and software environment was upgraded, so that the data are now updated on the server at least every 15 minutes. Updates from the production server are sent to the Reports server at :00, :15, :30, and :45 of every hour. If there are many edits taking place in an individual library database, the data on the Reports server may be updated even more frequently during that period of activity, as soon as the number of changes reaches a set threshold on the production server. Updates are also continuously being sent to the Reports server every 15 minutes as outlined above.

Also as of March 1, 2010, the Reports server is available 24 hours a day, 7 days a week. When maintenance is required on the server, CARLI staff strive to announce it in advance and to schedule it during our regular server maintenance window on Sunday mornings between midnight and 10 a.m.

If there is ever an error with updates to the Reports server, CARLI staff expect that the problem will be limited to a single library's database, and while the data may stop refreshing, the database will remain online for use. In the event that continuous data updates are interrupted, information will be posted to the CARLI Systems Status page at http://blog.carli.illinois.edu/sys-status/ .

While this server change has provided performance improvements for Access reporting and use of the Strawn utilities, it should be noted that this new Reports server configuration is not the equivalent of a live production database.

Below are some workflow implications of the new Reports server on each of the Strawn utilities currently supported by the CARLI Office for I-Share libraries.

Spine Label Printing:

Users of the Strawn Spine Label Printing program will be able to print labels no later than 15 minutes after a new item record has been added to the database, as opposed to the one-day delay imposed by the previous reporting environment. This Strawn program should see the most improvements in daily workflow due to the new Reports server.

Cataloger's Toolkit:

Users of the Cataloger's Toolkit (CTKV) program will be able to use functionality such as BAM no later than 15 minutes after a new bibliographic record has been added to the database.

Correction Review:

The March 2010 reports server change had no impact the use of the Correction Review program.

Correction Receiver:

The Correction Receiver (batch headings change) program should continue to operate as it did prior to March 2010. However, with the new Reports server, it is expected to produce fewer instances of "incomplete" headings changes at the bib level when an individual record has more than one heading change per batch. For example, bib record 1234 has two different headings that are to be changed (e.g., Aged men and Aged women) in the same run of the program. As long as the Reports server data are refreshed from production between the time of heading change 1 and heading change 2, both headings on the same bib will be updated during the evening's run.

For this scenario prior to March 1, both changes could never happen during a single run of the program, because when the "read" was done from the 3am static copy of the database for the second heading change, the first change is not present in that copy, and change 1 was essentially wiped out when change 2 was processed. However, even after March 1, 2010 if change 2 is processed before the data on the Reports server have been refreshed from production to include change 1, change 1 could still be eliminated by the second change. Therefore, I-Share library staff are still encouraged to review all changes processed in a single day's batch, to look for instances of these "incomplete" headings changes.

Location Changer:

Users of the Strawn Location Changer program will be able to use functionality such as changing item status or changing locations on records with no more than a 15 minute delay after the records have been added to the database. Using this program in Record-by-record mode (as opposed to "big batches" mode) will see the most change in efficiency due to the new update frequency of the Reports server.

One common use of Location Changer is to delete batches of items, MFHDs, and/or bib records. Because the reads from the new Reports server are still not "live," I-Share users must continue to divide the records to be deleted into separate files (one for items, one for the linked MFHDs, one for the linked bibs), because of course, a MFHD can't be deleted until all items linked to it have also been deleted.

After March 1, in theory, the program needs to wait no more than 15 minutes after an item record has been deleted in batch mode before the linked MFHDs can be deleted. However, there is no change in the I-Share requirement that Strawn batch jobs must wait until 10 p.m. to begin (see below for more details), so unless the user is manually starting the program after 10 p.m., the start time of the individual jobs can't be adjusted to force the program to wait for 15 minutes between processing different "profiles" for different batch jobs. As a result, depending on the number of deletes in any one particular file, it could be possible that the deletion of a file of MFHD IDs following the deletion of the linked item records would work fine, if the MFHD deletes don't

start until at least 15 minutes after the items have been deleted. However, since this can't be guaranteed to be the case (the MFHD delete process may begin before the Reports server has been updated with the deleted item information), CARLI staff recommend that libraries using Location Changer to delete batches of items/MFHDs/bibs continue to process the separate files based on record types (items, MFHDs, bibs) on different, subsequent, days.

A similar caution should be exercised when using Location Changer's Big Batches functionality, when a file of record numbers to be changed is NOT supplied to the program. For example, cataloging staff set up two Big Batch changes where Location Changer selects the records for editing. The first big batch job is set up so that item records in location Main with the status of Missing will have the status of Withdrawn applied. The second big batch job is set up so that items in location Main with a status of Withdrawn are moved to a location called Withdrawn. If both of these jobs are performed within the same 15 minutes, the items in the first job (location Main and status of Missing) may not end up in the location Withdrawn because when the second job reads information from the copy of Voyager on the reports server, the status change performed in the first job may not have been applied to the Voyager data from which the select "read" takes place.

However, using this same conceptual example, if the Big Batch changes both are ones where the staff member enters data in the "Records to be changed are defined in this file" box, which points to a file of record numbers that match the criteria for the change, the change should be completed as per each job's specification, because Location Changer isn't using criteria for selecting the records to be changed that is dependent on a read of the data from Voyager at the time the job is performed. The jobs will perform the desired change on the records pre-selected for processing by virtue of their inclusion in the file of record numbers to be changed. Using this same example, both item statuses would need to be accounted for in the queries that are used to generate the input files for the Big Batches jobs.

Another issue related to Location Changer's option to allow the program to select records for processing rather than supplying a file of records numbers is that the select process can often take significantly longer to run. This is more noticeable in larger databases. Therefore, because of these two concerns regarding Location Changer's select records functionality, the CARLI Office strongly encourages I-Share libraries to supply a file of record numbers for any Big Batches change, rather than relying on Location Changer to select the records to be processed. The file of record numbers can usually be easily generated from Access query results.

(2) Voyager batch changes scheduled for non-prime hours; test/preview runs available anytime

In the CARLI I-Share environment, batch jobs are scheduled to run after normal business hours, to minimize the impact these jobs can have on response time/performance on the production server. This policy applies to batch jobs run by CARLI staff, such as circulation notices, bib record loads, etc., as well as batch jobs run by local library staff using Strawn's Correction Receiver or Location Changer programs that can edit many records per change request/job.

To accommodate this CARLI policy, Mr. Strawn added code to his Correction Receiver and Location Changer programs so that when I-Share libraries run the program in "production" mode (as opposed to test mode) to change data, the program won't actually start submitting changes to the production server until the batch change time (currently 10 p.m. daily) has been reached.

It is important that users of Correction Receiver and Location Changer for production batch changes leave their PCs unlocked and available for use when the programs begin the actual processing at 10 p.m. Users should not manually lock the PC when leaving the office on days when a Strawn batch change has been scheduled. In addition, CARLI staff recommend that the PC's Power settings (depending on Windows version, probably in Control Panel/Display/Screen Saver/Power options) be set to:

Turn off hard disk: Never
System standby: Never
System hibernate: Never

In CARLI staff testing, screen savers don't appear to be problematic, so they can be left on.

Below are some workflow implications regarding production vs. test runs using both of the Strawn programs that offer batch change functionality.

Correction Receiver tests:

Test vs. production runs are controlled within the Correction Receiver program, on the Options/Output handling tab. There are no start time limitations on test runs, since the test runs do not send any records to the production server. Test runs can be performed during normal business hours.

After the test has been run, reviewed, and approved by appropriate library staff, then the Output handling option can be changed to "Write changed records to Vger." In the I-Share environment, when this option is selected, the Correction Receiver program will not actually begin submitting the changes until the appropriate batch job time on the production server (currently, that window is 10 p.m. to 2 a.m., seven days a week). This means the PC must be left on and the Correction Receiver program must be running after normal business hours.

The staff member running Correction Receiver in production (i.e., non-test) mode must also select Start (from the main menu) to initiate the batch changes. The program will display "Active" and will wait until 10 p.m. to submit the first (and subsequent) change request to the production database.

It is not necessary to have the Voyager cataloging client also running in conjunction with Correction Receiver's production runs of batch changes. Correction Receiver does its work without the use of the cat client.

Location Changer tests:

As is the case with Correction Receiver, test runs do not send any records to the production server, so there are no limitations on when during the day the test runs can be performed.

In Location Changer's Record by record functionality, test runs are controlled by checking/enabling the "Show all items before changing" box.

In Location Changer's Big Batches functionality, test runs are controlled on the Change to tab, by selecting the Preview button after the details of the job have been specified.

To schedule a production run of a Big Batches job, I-Share libraries will need to create a Profile for each change request. One way to do this is to set up the details of the batch job, and then selecting Save As from the Change tab. A description of the profile is required at the prompt; a short name for the profile is optional. Click OK once the profile has been named.

To test a single Big Batch profile or a queue of multiple Big Batches changes, go to the Profiles tab and highlight and then click the Copy button to move the desired profile(s) to the box on the bottom of the screen. Then click the "Preview" button. In both scenarios (single profile preview or multiple profile preview), the log file from the test runs will show what changes would be made, if the jobs were to be run in production mode.

The CARLI Office STRONGLY encourages a test run of every Big Batches change the library is considering running, especially at the beginning of a library's use of Location Changer. Because of some of the logic built into the program, as well as its flexibility in changing MFHDs as well as bib records when, for example, a file of item barcode numbers is being used as the input criteria, there are times when a Big Batches job could result in undesired changes. A careful review of the logs from the test runs should help the library catch these unintended consequences before the records are changed in the Voyager database.

For Big Batches jobs ready to be run in production mode, after the profiles have been tested, click the "Do it all" button. A dialog box will appear with a Cancel button. If the operator decides not to continue with the Big Batch changes, click Cancel.

If Cancel is not selected, the PC will wait until 10 pm and then start processing the profiled jobs in the order they appear on the screen. The jobs will continue to be processed until the end of the server's window for batch jobs has past. Staff should check the log files from the Big Batches jobs to verify that the desired profiled jobs ran to completion

As with Correction Receiver, it is not necessary to have the Voyager cataloging client also running in conjunction with Location Changer's production runs of batch changes. Location Changer does its work without the use of the cat client.

Where to go for help with the Strawn programs

Although Mr. Strawn is very generous with his time in writing, supporting, and sharing his programs with libraries other than his own (Northwestern University), he prefers that users of his programs try to find answers to questions about his programs from local sources before they contact him directly for help. In this way, he can spend his valuable time enhancing his programs rather than dealing with questions that others may be able to answer. In addition, Mr. Strawn is not familiar with the unique aspects of the I-Share environment, so he would not be the appropriate person to answer all questions from I-Share library staff.

In the I-Share environment, the CARLI Office has been designated by Mr. Strawn as the first line of contact for questions/problem reports with any of the Strawn programs we support. If you have questions, please send an email to:

> support@carli.illinois.edu

Please describe the question/problem report in as much detail as you can provide, including any error messages that you might receive from the software and specific records on which you encountered the problem. CARLI staff will do their best to answer your questions or provide solutions to the problems. However, if the question is one that we can't answer, we may need to forward it on your behalf to Mr. Strawn for assistance.