

CPALS

1992-2010

an overview

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It is hard to believe that CPALS has served the Library Service for nearly twenty years. When Grizéll asked me to write an overview of the CPALS saga it immediately took me back to 1991 when the Library Service decided to go out on tender for a computerised library system. The evaluation team consisted of Library Service staff members, a Commission for Administration representative, Brenda Faye, and representatives from Bureau Sinergis (which became Central Computer Services (CCS) in 1992. In 1999 the name was once again changed to State Information Technology Agency (SITA)). André Steenkamp, the then deputy director, headed up the library section. Since none of the library staff actually knew how library computerisation worked in practice, thinking back we did a remarkable job, although I must admit it was touch and go or some other system may have been selected. Eventually the fact that Unidata (now Unisys) was prepared to provide a project leader to assist with the implementation led to PALS being selected as the system the Cape Provincial Library Service would use. Our Service was appointed as the principal by the other provinces and this meant that they also had to use PALS, which eventually led to the largest PALS implementation in the world in terms of geographical area covered. The next thing that the shell-shocked Library



◀ (Ltr): The team, Kobus Pieters, Louise (van onbekend), Gwynne Foster, Paul Meyer, André Steenkamp with stalwart Liesel de Villiers in the front

Service staff encountered was the project leader appointed by Unidata, Gwynne Foster. She arrived like a whirlwind and held countless meetings and information sessions with the staff. When we left these meetings we had no idea what she was on about, although it all made perfect sense while she was explaining it! Judging from the minutes of meetings and the questions asked by the staff, the staff did not actually have a clue what computerisation entailed.

In November 1991 we had the 'Red Ribbon Run' to test the Central Organisation's readiness. Paul Meyer from Unisys assisted the sections and reported back at a management meeting that the test run was a great success.

In January 1992 a three-week training session was presented by Becky Bell, the system administrator of a PALS consortium in the United States. The principle was that of training the trainer; where a core group



▲ Becky Bell from the USA during a training session



▲ Cataloguing staff with Liesel de Villiers and Gwynne Foster after uploading the first bibliographic record



▲ *The preparation section going live under the watchful eye of Lettie Cedres*



▲ *The data typist team led by Klasié Swart (front right)*

of Library Service staff was trained and they then had to go and do specific training in their sections.

In February 1992 we were ready to go live, although I must admit when Gwynne announced during a training course in Beaufort West the previous week that this was to happen, my immediate reaction was, 'Can't be done!' This obviously led to an argument with both of us storming off to continue the argument in the cloakroom. Needless to say Gwynne prevailed and on 24 February we popped the champagne cork to celebrate the first online bibliographic record to be entered on PALS.

The existing records were captured by a team of data typists from June/July 1991 and by the time we went live, there were 150 000 retrospective records on the database. Initially we only captured books and, as a large quantity of the manual records were of additional copies which was only captured once on PALS, the number of items were reduced from 215 000 to 150 000 unique records. The work that cataloguers Estelle Jakobsen, Riana Fourie and the cataloguing team did to ensure that the records were at least retrievable, has never been fully appreciated. They did all the hard work, while the chief cataloguer (me!) was fully occupied with the PALS implementation.

What we did not actually realise was that once the books were catalogued and processed and issued to the regions, the regions also had to have procedures in place to receive the books and issue them to the libraries. The first computerised despatch was on 24 March 1992. The Head Office regions did not have a problem, but the Platteland had no connectivity whatsoever. Gwynne and André did a round trip to the Eastern Cape and other regions (we were still part of the old Cape Province which included Eastern and Northern Cape). Back at Head

Office, Delia O'Meara (systems administrator) came to the rescue and virtually became eight regions as she had to discharge and upload all the books issued to the Platteland regions.

In 1992 nobody knew about overtime pay or any other benefits. We worked till 19h30 virtually every evening and then continued our implementation plans in the nearby watering hole, the Fireman's Arms! I can remember when getting home at 8 or 9pm the phone would ring and Gwynne would be issuing instructions for the following day. No wonder the spouses of the implementation team had a hard time during this period!

One of the biggest challenges of the CPALS implementation was the barcoding of the seven million items in stock. The implementation initially focused on the Central Organisation, but from mid-1992 the regions felt the full impact of the computerisation of the Library Service. To co-ordinate this massive task Tjaart Steenekamp was employed on contract by the Library Service. Central Computer Services (CCS), (now State Information Agency (SITA)) offered to print the barcodes on their laser printers and a whole system was developed by Tjaart to capture the item records on CPALS. The project was going at the rate of knots until some libraries reported that the barcodes reacted with the plastic covers of the books and were unusable. Damage control had to be done and all the existing and future barcodes had to be covered by overlaminates, creating additional work for the regions. The memos Tjaart wrote as the quality of the barcodes deteriorated were heart-breaking, but because of the low cost of these barcodes the Library Service decided to continue using them. The situation improved briefly while John Franklin of SITA was put in charge of the printing of the



▲ *Gwynne Foster training outside regions*



▲ *The Red Ribbon Run, which required a toast to the first book that went through the process from A-Z*

barcodes, but when he left it started to go downhill very fast.

The regions were faced with a massive task to rebarcode and overlamine the troublesome barcodes - no wonder they became slightly demoralised - but in spite of that they rallied and continued with the barcoding with the result that 4,7 million items were barcoded and linked by the end of the first CPALS year.

As part of the tender the Library Service purchased Welch Allyn barcode readers which were attached to the keyboards with keyboard wedges.

These barcode scanners were used internally by the Preparations Section (the Belt) and the regions and could scan virtually all barcodes despite the poor quality of the CCS barcodes. At the end of 1992 the Library Service had to buy additional keyboard wedges, which were delivered on a Friday afternoon, but when Monday came there was no sign of these wedges. Of course accusations flew hither and thither and the Library Service even offered a R50 reward for information! About eight years later these keyboard wedges were discovered amongst the redundant books - this is still one of the intriguing mysteries of the Library Service.

With the barcoding exercise nearing completion, the issue of stocktaking suddenly became relevant. The Library Service therefore also purchased portable data terminals (PDTs) to be used during stocktaking and library tours. The Timewands were purchased as part of the original tender and was put in storage until 1993. Paul Meyer of Unisys was then instructed to write a user manual, which was in English - at that stage the Platteland regarded English as a foreign language! But worse was to come - it turned out that the Timewands lost all its data when switched off or when the battery ran out. Their inability to scan poor quality barcodes was also a major setback. At this stage Wouna Rabe of Bellville Region and I went to Parow Library to scan a random selection of books. We then submitted a report that declared that the Timewands were unusable and that the printing of the CCS barcodes must be stopped immediately. The report was accepted and we started with the arduous procedure to source new PDTs and subsequently bought the Symbol Barcode scanners.

Regular meetings were held with Kobus Pieters of Unisys where he would be puffing away on his (stinking) pipe and address problems (Yes! Smoking was still allowed). The only problem was that he never believed any of us when we blamed CPALS or reported that something that worked previously no longer worked. But he had an exhaustive knowledge of PALS and even as he huffed and puffed, he made the changes requested. He even developed the Allocation Module espe-



▶ Delia O'Meara discharged and uploaded all books issued to Platteland regions

cially for the Western Cape Library Service. Kobus made a huge contribution to the successful implementation of PALS that was mainly due to the vast number of customisations he made to make CPALS acceptable for the users.

On 27 January 1993 Tokai Library became the first CPALS library, although everyone expected Bellville Public Library to be first. Very soon other libraries in the Metropole and the Eastern Cape followed suit and there was a steady growth of CPALS users. The need for a forum to discuss mutual problems was put on the agenda at a meeting held at

Tokai Library on 18 January 1993. This was the beginning of the CPALS User Group, chaired by myself with Delia O'Meara as secretary. The constitution of the User Group was only completed in 1997 and despite the provision for the election of a new chair and secretary, De-

lia and I remained in the seats until we both retired. Eventually the User Group did not only cover the metropole and other local municipalities but expanded to include the libraries in the Southern Cape.

After the first hectic months of implementation in 1992, the day dawned when the new selection database was introduced to the users. The access to selection records complete with reviews now made it possible for public librarians throughout the province to look at these records and give input on the books they wanted. The Selection Module (SEL) remains one of the most popular institutions of CPALS and with the input of selectors such as Margaret Iskandar and Johanna de Beer it has been further refined and streamlined to improve productivity.

The other major change in the work of the Library Service was the use of the Acquisitions Module (ACQ) to order library material. Treasury visited the Library Service for an onsite demonstration of this module and to our great relief approved the use of the system for ordering library material. Luckily we had two very bright staff members, Alta le Roux and Anna Groenewald, who jumped right into the thick of things and very soon 'PALS-speak' like TAR and PPO, CPA fund structure, subcodes, et cetera, became part of our vocabulary. The ACQ module was possibly the one that had the greatest impact on productivity and the ordering of library materials speeded up dramatically. The greatest surprise of all was the ability of the Belt to adapt to the new procedures. The fact that the Belt had a 00,1% error rate for the first computerised despatch boded well for the future.



▲ Tjaart Steenekamp, datacapture project manager, correcting datalink errors



▲ The elusive keyboard wedges (computer components) that went missing for eight years



▲ Barcoding in the Bellville region: Wouna Rabe (left) and staff



▲ Alta le Roux who dealt with acquisitions (later assisted by Anna Groenewald)



▲ Jaco Greeff, otherwise known as Mr PALS

▲ Frances Tertia busy testing the Fargo printer



This was the most exciting time to work for the Library Service. Suddenly the activities of the central organisation, the regions and public libraries were interlinked. The understanding of the various functions increased and communication with the public libraries led to a greater understanding of problems. PALS definitely had a positive influence on the service as a whole and the staff have to be complimented for their enthusiasm and willingness to adopt changes which led to the success of PALS.

However, just when we thought everything was in place and the staff was enjoying PALS, the 1994 elections came and the Cape Province was divided into three separate provinces.

This obviously led to great changes as the stock had to be divided and Central Reference (SN) suffered the most, because all the central collections, books, art, music, films and videos had to be divided into three. SN has never quite recovered from the loss of some wonderful material. And the work this separation entailed! All the locations had to be changed, material removed from the CPALS database and institutions created for the Eastern Cape and Northern Cape. In fact, the last of the art print bibliographic records were only removed from the CPALS database in 2008! I also had to spend a week each in Kimberley and Grahamstown to train the new provinces in the Head Office functions.

I personally feel that the Library Service was privileged to get the support of Unisys during this period. They appointed Paul Meyer of the University of Cape Town (UCT) to continue the support structure after Gwynne had left. He eventually became a recognised PALS expert and was a valuable member of the PALS support team until he left to form his own company. Although Unisys and CCS (SITA) supported the Library Service, it was always felt that we were at risk because the programming of the application software was the responsibility of only one man, Kobus Pieters. It was thus a great shock when Kobus resigned in 1999 to emigrate. To our great delight a new Mr PALS, Jaco de Greeff, took over where Kobus left off. Jaco soon became the darling of the

librarians and is fortunately still involved in PALS and now, also of the proposed new system, SITA Library Information System (SLIMS), now powered by BROCADE.

In further developments Unisys outsourced the PALS support team and in January 2001 Libtech was established with Derek Manser, Deric Smith and Paul Meyer. Johan Marais from Edulis joined them in May 2001. Libtech is responsible for PALS support in all the provinces and has played an invaluable role in the marketing and expansion of PALS in South Africa.

In January 2000 the Library Service finally appointed a systems librarian, Lynette Prent (Peters) who soon became known as a PALS expert of note. Unfortunately Edulis 'stole' her and she left the Library Service at the end of 2001.

As a result of the participation of eight of the nine provinces in PALS, as well as the implementation of PALS in the provincial education departments, it was felt that a national PALS forum must be created. The first PALS System Administration Workshop was held in November 1997 and subsequently two workshops were held every year. It was at this forum that the replacement of PALS was first discussed in 2005. At several of these workshops this issue was discussed with great emotion, because the provincial library services felt very strongly that the provinces should select the best system and SITA should not force the provinces to select a system chosen by SITA. Tenders were called for and an evaluation team of the Western Cape Library Service, Edulis, the City of Cape Town and Mpumalanga Provincial Library Service spent three long weeks in the SITA offices in Pretoria. Eventually SLIMS was selected as the preferred system. I hope that this new system will bring as much joy as PALS brought us through the years.

