

# **AUTOMATED SERVICES COMMITTEE MINUTES**

March 25, 2003

**PRESENT** (voting): Tim Burke(APL); Ginny La Juene (ALTM); Geoffrey Kirkpatrick (BETH); Joe Makowiec (BRUN); Richard Naylor (COLN); Patricia Nonamaker (EGRN); Barbara Nichols-Randall (GUIL); Patricia Sahr (NASS); Judy Felsten (RCSC); Jane Minotti (SNLK); Barbara Kubli (STEP); Carol Reppard (TROY); Karen Nuckolls (UHLS); Gail Sacco (VOOR)

(Non-voting): Rob Carle, Rawdon Cheng, Sara Dallas, Jonathan Koppel, Peter Kowalski, Marcia Middleton, Mike Sweeney, Mary Trev Thomas

9:00 a.m. – Meeting called to order by P. Ritter, Chair.

## **I. Minutes**

Minutes of the February 25, 2003, meeting were accepted as written.

## **II. Automation Services Report - Karen Nuckolls**

Her report had been sent out in advance of the meeting. No questions.

## **III. Technology Services Report - Rawdon Cheng**

His report had been sent out in advance of the meeting. He added the following items from the Tech Advisory Council meeting:

- the Advisory Council will be looking at a way to develop an automatic notification to UHLS when a library uploads files from PC Reliance.
- R. Cheng would like any system problems to eventually be reported in electronic format via an online form. This would allow him to send the reports to multiple recipients, if necessary for resolving the situation.
- KidsPac is not yet available. He will be discussing the possibility of a "homegrown" version with the Youth Services Advisory Council.

G. Sacco asked the status of the duplicate database. R. Cheng noted that a "clone" database will be created and will be used for training and testing. It will also, eventually, be used for running reports and Item Group Editor since these processes slows down the production database. He has not yet developed a schedule for the cloning process.

**MOTION:** G. Sacco moved that R. Cheng should create at least one clone of the production database to be used for experimenting with changes, training, etc. R. Naylor second. Unanimous.

B. Nichols Randall asked about the status of browse scoping. R. Cheng noted that it has been turned off at this time because it was slowing down the entire system. It will stay off until he has determined that it can be used successfully. She also asked if the Firewall has been set up yet. R. Cheng responded that he is still working on it.

Discussion regarding Item Group Editor (IGE). Consensus that it can't be turned off since it is being used for basic processing. R. Cheng noted that there is a possibility that using IGE also slows down the system. B. Kubli suggested that a date and time should be selected and then several libraries should use IGE simultaneously to determine if there is an impact on the system speed.



#### **IV. Dynix concerns - John Rose**

J. Rose reported that he spoke with Patty Pray at Dynix and she wants UHLS to upgrade to the 7.23 service pak. This should take care of some of the browse scoping and crashing problems currently being experienced. Dynix technicians will no longer be available to customize "fixes" and "patches" for the current version that UHLS is using. There is no additional service cost to UHLS for this upgrade. K. Nuckolls noted that some of the comments on 7.23 on the HorizonL list serv were not favorable. J. Rose responded that HorizonL was not supported by Dynix and contained many misunderstandings and errors.

M. Middleton noted that the Tech Advisory Council was hesitant about the service pak because problems in this version had not yet been fixed and they didn't want to introduce new problems. In addition, the Council had not been aware that Dynix would no longer assist in fixing the problems in the current version.

B. Kubli questioned whether the service pak could be trusted to function properly when Dynix had already shown that the current version had problems they couldn't fix?

**MOTION:** G. Sacco moved that UHLS should upgrade to the Horizon 7.23 service pak as soon as possible. G. La Juene second. AYES: 13 NAYES: 1 (B. Kubli) Motion passed.

Consensus that the upgrade should take place on Tuesday, April 1<sup>st</sup>.

Discussion regarding the fact that the libraries would need sufficient warning regarding the day and time that the upgrade would take place and will need instructions in making the appropriate changes on their workstations.

Discussion regarding other problems with the software and the migration process.

- G. Sacco noted that the training, implementation and customer service from Dynix have not been satisfactory.
- B. Kubli noted that her staff members are very frustrated and are finding it difficult to handle the increased amount of time that it takes to accomplish anything in the new system.
- P. Ritter noted that everyone has become very apprehensive about the Horizon software. People are no longer reporting problems because they have become so commonplace.
- G. Sacco noted that the automation system architecture is opposed to the easy handling of reserves. The system does not allow for independent institutions without any consistency in policies. The staff at VOOR is upset with an automation system that should have been much more stable - not prone to all of these problems.

J. Rose noted that he had been hoping that UHLS would become a reference site for a consortium's use of Horizon. He is distressed that this has not been the case and that the system is not working properly. The Vice-President for Global Operations at Dynix was relieved of his duties due to the problems with the UHLS migration.

J. Rose also noted that the Horizon system was designed to be very flexible and that a lot of things are possible, including the reserves, but the customization requires a lot of data entry for each location. He suggested waiting until 7.23 has been functioning for a while and everyone is familiar with it - then make the request parameter changes. Dynix can make the changes for UHLS but he suggested that the changes should be done here because it would give UHLS more confidence in the system. G. Sacco noted that there should be support from Dynix during these request parameter changes; Dynix should not try to shift the whole load onto UHLS. M. Middleton noted that making these changes will require work from a System-level person as well as from the technical administrators in some of the larger libraries. J. Rose noted that Dynix would be willing to write scripts to help with the parameter entry.

Discussion regarding the appropriate collections to use for local request experiments. The "clone" database should be used for experiments. Consensus that New Fiction would be a good starting point.

B. Nichols Randall pointed out that this decision should be made at the Directors Association level. M. Middleton suggested that the Directors Association should consider this on a collection-by-

collection basis and should consider a trial implementation. Consensus to table this for discussion by the Directors Association.

G. Kirkpatrick noted that local request can be based on either pick-up location or home library.

J. Rose will email K. Nuckolls and P. Ritter with information regarding a site, for an example, that uses the local request system the way that the UHLS member libraries would like to use it.

- C. Reppard asked if there was any reason why the scroll key on the mouse couldn't be used for up or down instead of the cursor arrows? J. Rose responded that there was no way to change it at this time.
- C. Reppard asked about the status of the label-printing program. K. Nuckolls responded that it has not been easy to set up and not much work has been done on it to date.

M. Middleton reported that she will be meeting with a salesman who is offering a label printing program that is compatible with Horizon. She will let everyone know when that meeting will take place.

- J. Rose asked if there has been any improvement in the system functioning following recent corrections. Consensus that the crashing and freezing have not been fixed. People are now so used to it crashing that they aren't even bothering to report it. There has only been some minor, but not acceptable, improvement.

P. Ritter asked what should be done about monitoring and reporting problems following the installation of 7.23? Libraries should reiterate to their staff members that reports need to be made immediately on paper forms that will be created. R. Cheng suggested that the reporting period should be April 1-April 7. No need to report anything more until April 1st.

- R. Naylor noted that in the contract with Dynix (epixtech), UHLS was promised a report that would produce the statistics needed for completing the State Annual Report. When will this be ready? R. Cheng responded that Eric Graham will be coming to work on reports and this will be included in his work. J. Rose noted that if the member libraries are not satisfied with the reports created by E. Graham, Dynix will create the reports that are desired. Dynix will support and maintain any of the programs created by E. Graham.

- R. Naylor noted that the 12-hour ReportSmith training schedule is too long - there needs to be better planning and more "lab time" for practical experience. R. Cheng noted that planning the training sessions are difficult because of the wide range of expertise in the libraries. J. Felsten noted that she is completely confused about which Reports workshop she should attend.

Consensus that R. Cheng will work with E. Graham on the reports and will then re-evaluate the types of reports and the kind of training required to use them.

## **V. ADULT SERVICES ADVISORY COUNCIL RECOMMENDATIONS**

Report by M. Trev Thomas. In-depth discussion regarding the recommendations and the solutions that were developed by P. Kowalski:

1. Remove the Home/Welcome page.  
? consensus to change as per P. Kowalski's recommendations
2. Initial search list should be Keyword (any word), Title (starts with), Author (last, first) and subject (starts with)  
? already done by P. Kowalski
3. There should be Basic Search and Advanced Search only.  
? consensus to table this recommendation
4. At any point, be able to select "All Libraries" to extend a search  
? consensus to change as per P. Kowalski's recommendations
5. If the results are not satisfactory, provide an option to search other libraries.  
? see #4 above
6. On the results page, should be icons identifying materials  
? already done by P. Kowalski
7. On the item list, have a link to member library information  
? consensus to ignore at this time
8. Group browsing results should show media type  
? already done by P. Kowalski

9. On the initial iPAC screen, show "Search all libraries or select one. Click begin."

? consensus to change

10. On the Welcome screen and results screen allow an option to select another library for searching.

? see #4 above

11. On the first screen, use multiple input boxes rather than drop down boxes.

? consensus to refer back to the Advisory Council for further discussion and clarification

12. Put the book symbol under the title on the Search results

? consensus to change

13. Put the limit option above the search boxes so people can choose the type of item first

? P. Kowalski will discuss with Dynix if this is possible

14. Change the "Next" link to "Next Page" and makes the words bigger.

? consensus to change

15. After each title, put (location/details) as a clickable option

? consensus to change

16. Change the order of "Add to My List" and "Request Items" buttons.

? consensus to change as per P. Kowalski's recommendations. i.e. remove from search summary page and add underneath the availability section on the item information page.

17. Call your library to verify this title on shelf...

? consensus to remove the statement completely

18. Make "details" a clickable feature and remove Subjects from the item record since it is in the information column already

? see #15 above and consensus to remove Subjects

19. Enhance the email feature

? known bug in the Dynix system being worked on at this time

20. For the borrower ID prompt, add the words "no spaces" after the entry box

? consensus to make the change

21. Make the session time out automatically after 4 minutes  
? consensus to make the change

22. Remove withdrawn items  
? Dynix working on a global program

23. Ask Dynix to provide a hot key for Other Locations  
? J. Rose to check on this

12:00 Noon - meeting adjourned

**NEXT MEETING: Tuesday, April 22<sup>nd</sup> at 9:00 AM at UHLS.**

**Note: John Rose will attend**

Heidi A. Fuge  
3/25/03

## **Automation Services Dept Report - Karen Nuckolls MARCH 25, 2003**

### **HORIZON IMPLEMENTATION**

#### Valerie Chase Visit

On March 4 & 5, Valerie Chase from Dynix visited UHLS to discuss reporting on Horizon using ReportSmith. While here, she also set up some reports, and helped resolve some nagging problems with Security and withdrawn items. An overview of ReportSmith was attended by several library directors and staff. The default replacement prices for library Collection codes were also added. All the Withdrawn items were given a status of ""Staff Use Only"" so that they would not show up in the iPac (although still in StaffPac).

Valerie will be sending UHLS a ""weeding program"" that will purge these from StaffPac. She is currently on an assignment and will send this to us as soon as she can. I found her visit extremely valuable and fulfilling.

#### Unresolved Issues

Dynix is currently working on several outstanding issues:

- PINs --- Why are so many patrons unable to use them? (A work in progress.....)
- Block Deletion --- Problems in being unable to delete patron blocks (Sent to Dynix)
- Specific patron Btypes --- They have all been entered into Horizon. (Still working with Grant Pearson to move remaining generic ones into respective specific library Btypes.)  
LIBRARIES SHOULD BE USING THEIR LIBRARY-SPECIFIC BTYPES ONLY.
- Merge profiles --- setting up NEWCAT merge profiles for catalogers to use (record overlay)
- Call no. Istats entry (Working with Kathy Cunningham on entering for all libraries ---adds additional statistics [like scat codes])
- Request Parameters entry --- waiting for decision from Directors Association (and help from Eric Graham from Merrimack Valley Lib. Cons., here on 3/26-27.)
- Overdues & Reports (Eric Graham)

#### Resolved Issues

- Price Transfer --- Prices entered by library staff during DRA linking have been moved into the Horizon item record. If no price is entered during item additions, the system enters ""\$0.00"" and

takes the price from the default replacement price as entered in the library collection codes. (This works like DRA.)

- Parent/Guardian Information — This has been moved into the patron record from DRA.
- Date entered - Item addition information has been added to Item Detail Status screen—for both DRA and Horizon.
- Item Group Editor — Fields have been expanded (Valerie Chase)
- Replacement Prices — Price sheets were passed out at the March Directors Association meeting so that libraries could compare DRA material code prices with Horizon Collection code prices.

## **TRAINING**

### Horizon Circulation

The Resource Sharing Advisory Council met on March 20. Request system terminology was discussed, and all agreed that it is very difficult to know exactly what the system means. Rob will put together a Horizon dictionary of the terms most commonly seen in Circulation and Request.

There is a problem with some libraries deleting requests from the system, and therefore the patron's list. "Keep List" should be answered with a "Yes" as it just means to keep the item on the patron's request list. If a library does not wish to fill a request, it just leaves it on the Pull List for the next library to fill, if it wishes. "Renew Request" should be answered with a "Yes" if the library does not wish to fill it. This term means that it will keep the request (renew) on the patron's list. We are working with Dynix to see if the default for this can be changed to "Yes" rather than "No."

Rob is traveling to member libraries with followup Horizon training, which is adjusted to serve individual needs as requested by the library directors, but generally, the agenda includes topics not covered in the initial training sessions that took place prior to the Horizon "go-live" date. These topics include Item Group Editor, Item Report, and accessing the Z39.50 databases for cataloging purposes. In addition, any questions or topics related to Horizon are answered or reviewed upon request. Any library needing additional training is invited to contact Rob (x 238) and he will schedule an appointment at your convenience.

**Technology Dept Report - Rawdon Cheng**  
**(Preview version)**  
**March 25, 2003**

**Horizon**

We have been receiving logs from member libraries about client crashes and slowdown. I have forwarded to Dynix for their review.

We are still having sporadic slow down, crashes on client's end. We cannot pin point the cause of it. We have turned on and off browse scoping to determine if it has relationship with the slow down. It is inconclusive. Browse scoping has been turned on again on March 19. As of this time of writing (Friday 21), we have not noticed any slow down on the server. Dynix support suggests us to look at the use of Item Group Editor(IGE). This is cited from his email:

Item Group Editor can place a big load on the system if several people are on it and searching the item table. It may actually lock chunks of rows of the item table causing slowdowns of other functions in Horizon. Plus, other reporting tools, or SQL Queries may add a load on the database that could be alleviated if they were done in a duplicate database. Plus you could use this database to test upgrades, etc. before doing it on the live database.

You have plenty of space on your server to create a duplicate and I can do this if you wish. Plus, I can create a script that will automatically update the database every night with a copy of the production.

He has a good point there but to test if it is the case, I suggest we stop using IGE for 7 days and notice if there is any slow down on the clients. If we agree to test, ALL libraries must not use the IGE during the week or the test will be meaningless.

Also, reports can be run off this clone and it will reduce the stress from the production database. This clone will have identical structure as the production database except usernames.

On March 12 evening, we had a slow down on the server level. The cause is unknown. We stopped the browse scoping and restarted Sybase and iPAC server to bring the system back.

**Email patrons notices**

In Horizon, emailing patron notices is an option but we just found out there is no mechanism to send email directly from the Sun server. An intermediate server is needed to query the notice table and email patrons from there. At this time, I do not recommend to go this route. Currently, there are 36 patrons has notification type set to email. Libraries should change those patrons back to standard.

**Circ Reports**

We are working on circ reports for libraries. Valerie Chase of Dynix was here to work on reports and demonstrated ReportSmith. She submitted some sample scripts for us to use. Eric Graham is also helping us to do monthly reports. Unfortunately, the two scripts are incompatible that we cannot adapt one to another.

Eric Graham's scripts will run on the server which we can upload to intranet; however, his script is so sophisticated that it is beyond our knowledge to modify it.

ReportSmith/EasyAsk is easy to set up but at this time, reports are run one library at a time. It is a labor intensive job for UHLS staff because each report will be run 36 times (one for each location), and we have to manually save it to intranet. There is also room for error in placing these reports on the right library. Option two is sending the script to each location and staff can run it off their workstation at the time they need. There is down side of this method. UHLS will continue to look at the best solution to balance the workload of library staff and UHLS staff.

**ReportSmith Training**

We will schedule a ReportSmith training session via iLearn for libraries that are interested in learning this tool. ReportSmith is a powerful reporting tool. The training is an intensive 12-hour course, broken down into 3-4 days. The training session allows up to 10 students to participate. Libraries who have no experience in ReportSmith may audit the session at UHLS. You can do the iLearn session at your library provided you have a solid Internet connection, a free phone line and ReportSmith installed on a workstation. UHLS has room for 4 additional participants if your library does not meet such requirement. We will broadcast the dates the training is scheduled.

**Firewall**

We will perform the initial test on Firewall functionality on Sunday 23rd night. Upon the result of the test, we will select a day to implement it.

**Remote Patron Access**

UHLS will implement RPA after the firewall is rolled out.

**3-part Notices**

We will start printing overdue/hold notices on 3-part forms in April. Libraries who have been receiving them thru email will receive it thru email as usual.