

**AUTOMATED SERVICES COMMITTEE
MINUTES**

April 22, 2003

PRESENT (voting): Jeffrey Cannell(APL); Nancy Pieri (BETH); Joseph Makowiec (BRUN); Richard Naylor (COLN); Patricia Nonamaker (EGRN); Barbara Nichols Randall (GUIL); Judy Felsten (RCSC); Barbara Kubli (STEP); Paul Hicok (TROY); Karen Nuckolls (UHLS); Gail Sacco (VOOR)

(Non-voting): Rob Carle, Rawdon Cheng, Sara Dallas, Peter Kowalski, Marcia Middleton, Carol Reppard, Mary Trev Thomas

VISITOR: John Rose (Dynix)

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

I. MINUTES

Minutes of the March 25, 2003, meeting were accepted as written. B. Kubli noted that she had difficulty printing the entire document.

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 reminded the libraries that DRA information and software have been deleted from the server.

Reports/Notices

G. Sacco did not understand the section relating to email in R. Cheng's report. He explained that he was trying to duplicate what DRA did for each library regarding notices - some received notices via email and some received paper notices. Unfortunately, the email part of Horizon is not working at this time and Dynix recommends that it not be enabled because it would cause a security hole in the system.

G. Sacco noted that security is a problem - at VOOR they had a patron coming in and putting pornographic material on one of the public computers.

M. Middleton suggested that the situation be re-evaluated when the firewall is in place and then the System staff could make a decision.

Further discussion regarding security and the firewall. R. Cheng noted that, to a certain extent, the libraries are protected because the

outside world must go through UHLS to get to the libraries. If they do get through, they cannot cause any physical damage, but could crash the system and make it temporarily inoperable. If that happens, the operating system just has to be reloaded.

R. Cheng noted that there were bugs in the overdue notice program developed by Eric Graham. These have been corrected and overdue notices will be printed as of Wednesday, April 23rd .

B. Kubli asked if there was any way for the libraries to access these notices without printing? R. Cheng will ask R. Carle to write up some instructions and post them on the Intranet.

G. Sacco asked why there was a discrepancy between the numbers in the daily reports and the numbers in the special reports? It was explained that the statistics for circulation by collection code (cko location) and circulation by collection code (owning location) should not be the same.

J. Felsten asked if there could be a list with definitions of each of the different types of Reports.

R. Cheng noted that there are no Reports for items loaned out, at this time. M. Middleton noted that the statistics are there, you just have to know how to get to them. You can do it by going to each library location and looking at the reports for that location for all items loaned that are owned by someone else, then finding the items loaned to them by your library.

G. Sacco asked if it would be useful to have another meeting just to discuss reports and statistics. R. Naylor suggested that there should be something distributed prior to the meeting for discussion. Consensus to hold a **special "Reports" meeting on May 13th at 9:00 AM** at UHLS. R. Cheng will ask his staff to develop a list of Reports with definitions that will be distributed at least one week before the meeting.

Item Group Editor (IGE)

B. Kubli asked how using Item Group Editor (IGE) ties up the system?

R. Cheng responded that it is his understanding that when someone is working on a record, it ties up that record as well as at least ten before and after it. He requested ASC permission to perform a test on the database using IGE to determine exactly how it affects the system. He will contact several libraries including a 56K, a T1, and a RoadRunner user to experiment.

G. Sacco asked why this is our problem rather than something that Dynix should solve? R. Naylor suggested that R. Cheng get a Dynix person to work with him on the test and if they can prove that IGE is the problem, then it is up to Dynix to solve it.

MOTION: B. Kubli moved that R. Cheng should perform a test on the system to determine if IGE is causing the slowdowns and/or other problems and a Dynix staff member should be involved in the test and the solution. J. Makowiec second. Unanimous.

IV. DYNIX CONCERNS

P. Ritter and K. Nuckolls reported that they have been unable to contact John Rose and have not heard back from him regarding his attendance at this meeting.

P. Ritter reported that the Board of Trustees asked the UHLS attorney to send a letter to Jack Blount, Dynix CEO stating their position that the system has not been installed properly and therefore the 90-day trial period has not yet started. The 10% final installment has been forfeited. There are two options at this time:

1. Work with Dynix to solve the problems
2. Sue Dynix for a refund of the money spent so far and then move to another system.

AT THIS POINT, John Rose arrived to join the meeting.

J. Rose reported that he hasn't been receiving any updates and so assumed that everything was going okay. He was not aware of the Trustees letter to Jack Blount.

M. Middleton asked J. Rose if he understood the IGE slowdown issue? He has seen this happen in other locations.

G. Sacco asked if UHLS was unique in these problems? J. Rose noted that UHLS came up on a release that is "buggy" and these same issues have happened in other locations that came up on this release. H. Fuge asked if Dynix couldn't just remove the 7.23 release and put UHLS back on an earlier release that works? J. Rose said "no" - instead, just keep plugging away and upgrading until a point is reached where everything works. The 7.3 release will be coming out in June and these problems will ultimately be solved.

R. Naylor noted that there should be someone at Dynix who is working with UHLS consistently to correct these problems. P. Ritter noted that

communication with Dynix has just stopped. In addition, crashing and freezing are not just "bugs", they are major defects in the system.

R. Naylor noted that we need one of the technical people at Dynix working with us. R. Cheng shouldn't have to be trying to solve all of these problems.

G. Sacco noted that waiting until June for a new release is not good. That is the beginning of an extremely busy time for the libraries. Besides, waiting to get something fixed is not good customer service. She would like to see a Dynix person on-site until the problem is fixed. R. Cheng's job is not correcting or fixing a flawed product.

N. Pieri asked if Dynix was at all concerned about the rotten PR that was resulting from all of these problems? J. Rose said "yes", however, Dynix needs their technical people in their offices working on the problem, not out helping customers. J. Rose noted that there are people who are working on fixes and patches for the current version and he will make sure that UHLS gets a higher level of resource personnel.

R. Cheng asked for a "known bug" list from Dynix so that, possibly, certain functions can be avoided if possible.

J. Rose noted that the slowdowns are part of the problem with the 7.2 release. The 7.23 release was supposed to fix that, and it did at some sites.

G. Sacco noted that at this point, we don't know if the problems are due to the system not working or if there is something that staff members are doing incorrectly. If the system is fixed, we would then be able to tell if the problem is at the staff level.

M. Middleton noted that the basic functionalities are not working - information is entered and then disappears.

P. Ritter noted that the UHLS Board of Trustees will be meeting again on May 14th and would like some re-assurance that there have been improvements. J. Rose noted that improvements will take longer than two weeks.

P. Nonamaker noted that 7.23 did not resolve the problems. There must be a specific person at Dynix assigned to us to work on the situation. J. Rose noted that other libraries are experiencing these problems and so Dynix is working on them.

M. Middleton noted the following:

- we need a "Known Bug List"
- we cannot trust the results we are now getting on the system because nothing is consistent; we need to be able to give explanations (not excuses) to our customers

J. Rose noted that he can tell Dynix that Patti Pray (the current Dynix liaison) is not working out well. K. Nuckolls responded that she would be more effective if she had a specific time for calls and therefore a list of problems could be prepared. Instead, she calls at various times without forewarning the UHLS staff.

M. Middleton noted that when a system doesn't work, no one knows if they are doing something right or not. J. Rose suggested that perhaps the staff haven't been trained properly or need more training? G. Sacco noted that you can train the staff all you want, but we are training on a system that is broken. It is not acceptable to have a system that doesn't work, and this reflects very poorly on the libraries - especially at a time when budget votes are coming up. This is just not acceptable.

P. Hicok asked why we have not heard back from Dynix following the attorney's letter? They don't care, and UHLS should be looking for another system. Discussion about looking for another automation system. J. Makowiec suggested that the ASC should be planning an exit strategy and should take another look at the Triple I automation proposal.

J. Cannell noted that there are two levels of customer service here: Dynix to UHLS libraries, and libraries to patrons. Every time something goes wrong, it impacts the funders to the libraries. He would like to see the establishment of a "drop dead" date after which UHLS would look for another system.

P. Hicok asked what are the implications of leaving Dynix? Can there be a list for consideration, i.e. can the database migrate? What are the equipment implications?

M. Middleton and R. Naylor suggested that UHLS should keep going with Dynix and try to make it work. There needs to be a structure to keep Dynix on top of the problems which are: slowdowns, crashes, freezes, indexing, iPac blank screens during searches, and inconsistent circulation functions.

J. Rose noted that this is what can be expected from Dynix:

- a "Known Bug" list
- a contact person for R. Cheng

V. RECOMMENDATIONS FROM THE ADULT SERVICES ADVISORY COUNCIL (ASAC)

1. Remove *Add to my list* from the search results page.
2. There should be *Basic Search* and *Advanced Search* only. The Advanced Search should look like the Power Search. Remove the other search options.
3. Use **bold** and *italics* for (location/details). Remove the parentheses. Make it look like an actual button so people know to click on it. Move it closer to the title.
4. "Click on title for more information" – put this in center just below Search Results.
5. After you click on the *Hours* tab, it should say which library's hours are listed. Put this up where it says *iPAC by epixtech*.
6. Underline each title so people know they can click on it to get more information.
7. Remove the author name after the slash. It is a duplication of the author name that comes below the title.
8. Add a *Kids* button up at the top along with the *Basic Search* and *Advanced Search*.
9. For libraries with branches, they want to be able to see ownership of an item by all their branches without having to constantly change screens.

MOTION: R. Naylor moved to implement all of the recommendations from the ASAC. J. Makowiec second. Discussion. G. Sacco amended the motion - implement all of the recommendations EXCEPT #8. Amendment accepted. Unanimous.

P. Kowalski will begin working on these as soon as possible.

VI. OTHER BUSINESS

N. Pieri asked about sending email Notices to patrons. R. Cheng noted that Dynix does not recommend using this at this time due to security problems. He has a work-around from Eric Graham, but Dynix won't support it.

R. Cheng asked for the ASC priorities for problem solving? Consensus that he will email a list of options to the Directors. List will include (in no particular order):

- system functionality

- email notices
- overdues
- reserves
- firewall (safety and security of the system)
- telecirc

G. Sacco suggested that a priority could be determined by asking the questions: Is this a core library service? Does it affect the public?

Consensus to table discussion of local request.

K. Nuckolls pointed out that on the New Borrower screen, there is an area for the 4-letter location code. It is important to enter the correct location code - i.e. the home library. When a registration card is completed for a new patron, that card must be sent on to the home library so they can enter the correct code. The home library code is tied to loan periods, local request, fines, and a variety of other functions. S. Dallas and K. Nuckolls will develop a complete description of the areas affected and send it out for discussion.

Discussion regarding telecirc. R. Cheng does not want to enable this function without the firewall in place.

Consensus to re-schedule the May meeting to June 3rd at 9:00 AM. J. Rose will attend.

NEXT MEETING(s):

Tuesday, May 13th at 9:00 AM at UHLS - "Reports"

Tuesday, June 3rd at 9:00 AM at UHLS - ASC

12:15 PM Meeting adjourned.

Heidi A. Fuge
4/24/03

AUTOMATION SERVICES DEPARTMENT REPORT - Karen Nuckolls APRIL 22, 2003

HORIZON IMPLEMENTATION

Tweaking

This best describes what has been going on during the last month. (Rawdon will speak to the networking and hardware issues.) New Borrower screens have been developed based, as close as possible, on the paper registration card. Information needed first has been gathered on the first screen, such as barcode & name and address.

Clarification of these fields became a part of this redesign:

Location: This four-letter code is for the *registering* location -- initially. A decision has to be made whether this should be for the former, or the patron's home, library. The Location code controls each library's parameters and circ privileges.

County Codes: one is for the *registering* library and one is for the patron's (county) location, broken down by the town or city where the patron lives. (*Sara will speak further about this at Tuesday's meeting.*)

In the **iPac**, the listing of library pickup locations is now sorted alphabetically. I will point out that this was done through the Horizon Users Group Horizon-1 list, and not through Dynix. This should make it easier for the patron to find the proper location to send his request to.

Karen has been learning more about the **mq_views**, which control the makeup of various Horizon screens.

Cleanup of generic Btypes has been completed. All Btypes are now library-specific, so each library's max fine rate will take effect.

Bstat numbers without descriptions (those DO NOT USE ones) are being corrected on patron records. There are over 32,000 patron records with "001" instead of "101" as a County code.

Rob participated in ReportSmith training through a webex session with several others from UHLS and member libraries.

Unresolved Issues

Dynix is currently working on several outstanding issues:

- PINs -- Why are so many patrons unable to use them? (*A work in progress.....STILL*)
- Block Deletion -- Problems in being unable to delete patron blocks (*STILL being worked on*)
- 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*)
- Withdrawn items -- We were *STILL* waiting for the "weeding" program from Valerie Chase or Mark Derrick; spoke with Mark this week about it, and there is now hope on the horizon (no pun intended). Mark has sent some programming that will enable us to work around the fact that the "weeding" program is not in release 7.23. Stay tuned for further news.....

Resolved Issues

- Item Group Editor -- “No. of CKOs” has been added.
- See under “Tweaking.”

TRAINING

Throughout the months of March and April, Rob continued follow-up training at member libraries. Some of them requested review on basic circulation workflow, and others received Item Group Editor (IGE) training, as well as other miscellaneous topics not covered in previous training sessions. Rob has also observed daily circulation activities at some member libraries, and is willing to visit any library for training on any topic related to Horizon. He is also available for multiple visits upon request.

Technology Dept Report - Rawdon Cheng

Apr 22, 2003

Horizon upgrade (April 1)

We did the upgrade on April 1. The upgrade took around 90 minutes. Horizon application was designed to push the upgrade files to workstations. We were forewarned that we might have a network issue after the server was back online - with so many clients being push at the same time, we would have network congestion. To avoid this problem, UHLS sent 7.23 CDs to libraries with more than 10 workstations and 56k libraries. Other RR/DSL libraries would do their upgrade thru their Internet link.

We did not know the upgrade would download a 40+MB file. Even with only a small number of workstations needed to be pushed the client down, it created a huge slow down on the database server. Some libraries reported that it took more than 5 hours to get the upgrade. During that time, all libraries report a significant slow down.

In the future, UHLS will send the CD out ahead of time to all libraries for the upgrade.

Post Upgrade

We still have a lot of freeze up and slow down after the upgrade. I will send in the log sheet to Dynix for analysis.

The slow down on April 7 might be caused by a 56k library using IGE. It created a block process which prevented other process to go thru. Upon killing that process, other libraries reported the response time was back to normal.

Dynix support recommended us to set up different server login name for each library. Each process is tied in with that login name. If there are block processes in the future, we can pinpoint which library is causing the problem. All libraries should have changed their login name by this time. Dynix will discontinue the original login name, staff, at any time.

The slow down on April 14 was caused by an infected PC at a member library. It sent out huge number of packets to the Internet which clogged up our internet link and its connection to UHLS.

Question to the committee: should we test the IGE as suggested at my last report? Does bandwidth and IGE cause general slowdown? My understanding of IGE is it locks up few rows in various tables and that will create a traffic jam. Slower link may compound this problem.

Clone Databases

Dynix support has set up two additional databases - clone and train723. Clone will be cloned daily. It is intended for use to run reports and to do quick test. Any changes to the clone will be overwritten daily. Train723 will be reloaded at will. It can be used for long term testing. The access to those databases have not been released to us yet.

Notices

Eric Graham spent two full days at UHLS working with Rawdon on notice reports, and circ reports. Now, UHLS is printing notices to libraries. Hold notices are printed daily(when UHLS is open) in the morning and Overdue/Bill notices will be delivered to all libraries on Wednesday.

E-notice requires Sendmail service on the database server. Dynix strongly recommends not to enable it citing possible threat to the server. After judging the pros and cons, we decide to turn it on. There are still some issues preventing mail to be sent out. We are working with Dynix to fix it.

When it is fixed, libraries which choose to receive e-notices will get their printout via email. The email will be sent to the library's generic email account, xxxx1@uhls.lib.ny.us

Eric is aware there is a bug in his script. Sometimes it prints patron address twice. When it happens, it will throw the print alignment off. The rest of the printout will be useless. We have lost a lot of forms because of it. Peter is working to find a way to realign paper automatically if it happens.

Circ reports

There are 5 circ reports available on the intranet: circ by itype, circ by btype, circ by bstat, circ by collection code (cko location) circ by collection code (owning location).

In the future, some reports will be run from staff workstations instead of from the server. It will provide you timely information you need- you may run it anytime you want. The first one will be Request Reorder report. You do not need any report writer such as ReportSmith or EasyAsk. You will need Sybase SQL Advantage, a module in Sybase. Sybase is required when you install Horizon, so you may have the application you need to run those reports already. If not, you can reinstall Sybase.

Those report scripts will be in zip format and will be mounted on the UHLS ftp server. You will need to download the zip file and unzip it. It will create the report and the script to run the report. Double clicking on the script will run the report and write it to a file. You may view or print the file. More information will be available when they are ready.

PcReliance

Library should clear the existing data when you launch PcReliance. A branch library did not clear the data file since they started PcReliance in January causes a big problem. Patrons will get overdue/bill notices for items they have returned.

ReportSmth Training

Dynix has provided ReportSmith training for APL, BETH, BRUN, GUIL, VOOR, and UHLS staff. It was a 3 day 12-hour session.

Supplement

As per SIRSI's demand, we have destroyed DRA software and manual.