

# **AUTOMATED SERVICES COMMITTEE MINUTES**

June 3, 2003

**PRESENT** (voting): Tim Burke (APLM); Ginny La Juene (ALTM); Nancy Pieri (BETH); Carol Trager (BRUN); Darlene Miller (CAST); Richard Naylor (COLN); Patricia Nonamaker (EGRN); Barbara Nichols Randall (GUIL); Pat Sahr (NASS); Sharon Hodges (PTRB); Jane Minotti (SNLK); Barbara Kubli (STEP); Paul Hicok (TROY); Karen Nuckolls (UHLS); Gail Sacco (VOOR)

(Non-voting): Rob Carle, Rawdon Cheng, Sara Dallas, Jonathan Koppel, Peter Kowalski, Joe Makowiec, Marcia Middleton, George Ramson, Carol Reppard,

**DYNIX VISITORS:** Mike Ashcraft, Tim Hyde, Jeff Olsen, Patti Pray

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

## **I. MINUTES**

Minutes of the April 22, 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. No questions.

## **IV. DYNIX CONCERNS**

### **Dynix Team**

P. Pray introduced the Dynix staff and noted their areas of expertise:

- Mike Ashcraft: focusing on network issues and the infrastructure between UHLS and the member libraries.
- Tim Hyde: will be monitoring the server
- Jeff Olsen: will deal with data issues and Horizon work flows.

P. Pray noted that the Dynix staff will start with the freezing and crashing problems being encountered by all of the libraries. There is a possibility that it is caused by a connection to RoadRunner or the use of the LincSys box. If LincSys is the problem, they will try to develop a work-around. G. Ramson noted that he has tested the system and has proven that LincSys is part of the problem.

G. Sacco noted that there have been consistent universal slowdowns and freezing. How will Dynix address this? T. Hyde responded that

they will be looking at the server and at the network. They can track the block processes and determine the cause(s).

P. Pray noted that there are a lot of issues to be examined. They will try to identify all of the problems and resolve as many as possible while they are here or make suggestions for the corrections. They might end up taking some of the data back with them for further investigation.

P. Ritter asked the Dynix team to have a report for the Directors Association meeting on June 6<sup>th</sup>.

R. Naylor said that, while Dynix is working on the system, it is important to make sure that all of the libraries call in all of their problems. P. Ritter noted that sometimes people just give up and don't call in the problems since they are so frequent.

B. Kubli asked if the calls are usually logged when libraries call in with problems? Yes. They are.

Discussion regarding the library sites to be visited by Dynix. They have already decided to go to BETH and GUIL as these are the sites that have reported the most problems. In addition, BETH can reproduce the problems that they have been experiencing so that Dynix can see them first hand.

**MOTION:** G. Sacco moved that the following five sites will be visited: GUIL on 6/3 afternoon; BETH on 6/4 morning; ALTM on 6/4 afternoon; BRUN on 6/5 morning and PTRB on 6/5 afternoon. C. Trager second. Unanimous.

M. Hyde noted that one of the things that Dynix will be checking is the bandwidth usage. He might ask the libraries to turn off their Internet computers for a length of time to see if that affects the Horizon connection and vice-versa.

B. Kubli asked exactly what they hope to accomplish? When John Rose and Valerie Chase visited the libraries, they did a lot of testing. P. Pray responded that the work done by J. Rose was inconclusive and there was some user data error; that is why they are here.

### **Application issues**

Committee members detailed the problems that they have encountered with the system.

- B. Kubli: when she prints out the overdues, it prints many additional pages
- G. Sacco: items are not clearing properly.  
J. Olsen asked if this happens in relation to a PC Reliance upload?  
B. Kubli noted that it happens at STEP also and they do not use PC Reliance. J. Olsen asked if there was a certain BType or IType that caused this to happen? He noted that when the system crashes, it does have the capability to catch up with the past transactions so these should not be lost.
- P. Sahr: when scanning an item, the system beeps but the barcode does not show up on the screen until scanned a second time.
- G. Sacco: reserves don't act the way that they are supposed to. When borrowers designate VOOR as a pickup spot, they don't always rise to the top of the VOOR list.
- J. Minotti: would like SNLK patrons to get SNLK books first before these are loaned out to other patrons on the request list.
- M. Middleton: would like to set priorities so that patrons in the APLM branches have the same request status as APLM patrons.

J. Olsen noted that when entering exceptions into the system, they should be kept as simple as possible. Inconsistencies in system response are usually problems in the circulation parameters. They will try to replicate the problem and see if the parameters are too complex and are "stepping on each other."

- B. Kubli : is this system truly designed to adapt to many different locations? J. Olsen: Yes. The circulation parameters are customizable for each location but it is best to keep them as simple as possible.
- G. Sacco: we were told that the fines had to be standardized because the system would not accept a lot of entries. J. Olsen: the fine rates can be set with the circulation privilege. He will check into the way that the Borrower types have been set up. Each library can set up how much they charge per day. (Max fines are set in Itypes, which are generic).
- J. Minotti: can the system handle it if each library has its own I-types? Will it slow down the system? J. Olsen: Yes. The next release, 7.3, due out on July 30<sup>th</sup>, will have the capability to do "cluster holds" and this will allow for the grouping of exceptions in the database. Each library makes their own exceptions and can add them to the database.
- C. Trager: when items are made non-request, it seems like it should take the materials out of the loop, but it doesn't; it goes through the whole routine and slows down the system.

- B. Kubli: we have had patrons returning items from another library and the fines aren't assessed. Discussion regarding grace periods, etc. There are complications due to the flexibility of the system.
- B. Nichols Randall: GUIL has experienced browse scoping problems in the iPac. When an item isn't in GUIL, it makes it seem like there is no such book.
- G. Sacco noted that there is a problem with the shaded screens for vision-impaired. The poor contrast makes them difficult to read. S. Hodges noted that at PTRB they took care of this problem by changing the settings in their computer. Discussion about the fact that this is probably a Windows function, not a Dynix function.
- B. Nichols Randall: there are withdrawn items that are still listed in the database. When will these be removed? K. Nuckolls noted that batch withdrawals will not be possible until Horizon Release 7.3. At this time, the items can be made invisible by using "staff only" status to show them only in the Staff Pac.
- C. Trager: a lot of time is spent in searching for items in transit. In the block window, it doesn't say where the book is waiting to be retrieved by the patron.
- C. Trager: the settings cannot be saved on the workstations. She will address this when Dynix comes to BRUN.
- C. Trager/C. Reppard: there is a problem with sorting when cataloging on Z39.50.
- C. Trager: it is not always immediately obvious what items are non-request. Dynix: there is no other way to handle this.
- K. Nuckolls: will the "notes" field be enlarged in the next release?
- C. Reppard: in 7.3, will the scroll function on the mouse work?  
Dynix: don't know.

P. Pray noted that Dynix is still searching for a fix for the white screen problem. Version 2.03.01 will partially fix this. G. Sacco wanted a message on the white screen. P. Pray - it can't be done.

B. Nichols Randall: what other things might or might not be fixed in 2.03.01? P. Pray noted that when Dynix puts out a release, it is mostly fixes but sometimes there is functionality included. It is hard to work on a problem if the site hasn't gone on to the most recent release. G. Sacco responded that if it is not a good fix, and deletes much of the prior customization then it is not worth it.

P. Pray noted that if the customization was done through the Admin tool, it will remain through the fixes but anything done outside of that will be lost. P. Kowalski responded that ¾s of the customization so far has been done outside the Admin tool and will therefore have to be re-done.

Discussion regarding the iPac report presented by P. Kowalski.

- Consensus that #1 (White Screen Bug) and #2 (listing all authors) will be addressed at the Directors Association meeting.
- Consensus that #3 (items checked out limitations) is a Dynix problem and will have to be resolved by them.
- M. Middleton noted that APLM is not ready to discuss #4 (Displaying Branch locations) so that will be tabled for future meetings.

**MOTION:** B. Kubli moved that , in response to P. Kowalski's suggestions for #5 (click "Other locations" button) he should be allowed to make the changes that he thinks are acceptable, including enlarging the "Other Locations" button. Then everyone will make their opinions known on his changes. R. Naylor second. Unanimous.

Discussion regarding "request first available copy."

**MOTION:** C. Trager moved to add an additional "request first available copy" button at the top of the page. B. Kubli second. Unanimous.

G. Sacco noted that she has never seen her staff so upset by the problems with the basic functions in a system. They feel that they can't rely on the circulation functions or on PC Reliance. This is the third migration her library has experienced and it is the worst.

P. Kowalski handed out a list of the hot fixes that are included in 2.03.01. B. Nichols Randall requested that this information be summarized and sent to the Directors for discussion.

Discussion regarding implementation of upgrade 7.24. Consensus to leave this decision to the Directors Association.

P. Pray noted that Release 7.24 is available for testing and they can load it on some computers for trial but will remove it when they leave. P. Ritter asked if 7.24 had to have been installed prior to loading 7.3? P. Pray thought all fixes through 7.24 would be included in 7.3.

Information Portal 3 (iPac) will be available in 2004.

**NEXT MEETING: Tuesday, June 24<sup>th</sup> at 9:00 AM at UHLS.**

Heidi A. Fuge  
6/5/03

## Technology Services Department Report June 3, 2003

### **IGE test**

Four IGE tests were performed on May 9 at APLM, MEND, STEP and EGRN. 1025 items was selected and were changed in IGE. During the test, Rawdon monitored the system and had found no slow down at all. A slow down occurred during that time but it was not caused by the IGE. The conclusion is IGE does not pose system slow down as speculated.

### **Horizon crashes/fixes**

On May 1st, Tim Hyde of Dynix changed a Sybase TCP setting to 15 minutes. When a client has lost it's connection to the server, Sybase will try to contact the machine repeatedly. If it doesn't respond within 15 minutes, Sybase will kill its connection. The previous setting was 2 hours. It is believed that such a long delay will cause hung process.

After the setup was changed, a number of RR libraries have reported constant crashes after their workstation has idle for about 15 minutes. This happens more to RR libraries with Linksys router installed than 56k/T1 libraries. We have done a number of tests and have concluded that it has something to do with the settings of the Linksys router. We have contacted Linksys support to ask for solution.

### **Pager problem**

On May 8, a problem on the server level caused a slow down for all users. Many libraries had called the pager but our on-call staff did not return call. We found out the on-call staff's pager did not go off. When we questioned our paging service, we found out it has removed that pager from the call group by mistake. Now, all the staff in Technology Service dept will keep the pagers on at all time. If the primary on-call person does not return page within half an hour, the other staff will call in to provide backup support.

### **Network test**

I want to do a different test to eliminate the cause of block process. Dynix had leaned towards block process/slow down was related to libraries access UHLS via internet. I suggest to set a 6-hour period, from 9am to 3pm on one day that no libraries using RR/DSL to access

Horizon. During that time, they will go on pcreliance; they can still use email, internet or ipac – just no Horizon running from their workstations. If Internet libraries are the major cause of block processes, that test should review some findings. I will discuss this proposal at the ASC meeting.

**Telecirc**

Telecirc was scheduled to setup on May 14 but due to unexpected Horizon problems, we have cancel the setup. The new date will be on June 5.

## AUTOMATION SERVICES DEPARTMENT REPORT JUNE 3, 2003

### HORIZON IMPLEMENTATION

#### **Tweaking**

This best describes what has been going on during this month (so far). Edit and New Borrower screens have been further tweaked, separating the County Code and Library Code into 2 separate areas on the New Borrower screen. This should make it easier (and clearer) to fill these in. Unfortunately, it has raised some problems on the Edit Borrower screen, which at this date (May 21) are still in a state of being resolved by Dynix.

Karen is working on a number of mq\_view edits that have been requested by member libraries.

STAFF USE ONLY ITEM STATUS – Library staff can prevent items with statuses of Withdrawn; Missing; Lost (etc.) from showing in the iPac by assigning the “Staff Use Only” status to them in the item record. Until the weeding program exists (see below), they will still show in the StaffPac.

#### **Reports Meeting and Training (Rob)**

Rob’s training agenda this month has covered a variety of topics, including: Item Group Editor, Item Report, adding borrower records, searching skills, taking short-cuts, reviewing, and interpreting circulation reports. Rob also had the opportunity to observe the workflow at some of the busier circulation desks at a few of the larger libraries. APLM, GUIL, and COLN have all seen Rob around their libraries, and he offered suggestions about any Horizon topic he was capable of answering. He also offered support by sending questions he could not answer to other staff at UHLS and Dynix. Rob also designed a test for Rawdon (May 9) to help determine whether running Item Group Editor is responsible for any of Horizon’s deficiencies.

Rob focused heavily on report training this past month. He conducted a Reports Training Workshop on May 13<sup>th</sup>, and with help from Sara and Rawdon, designed a program on interpreting circulation reports generated monthly at UHLS by Rawdon. He began the workshop by defining what the NYS Annual Report allows as valid circulation and interlibrary loan statistics. He then proceeded to relate these definitions to how Horizon counts circulation transactions and how Rawdon’s reports reflect the retrieval of these statistics. Rob ended the workshop by demonstrating how these reports can be combined to identify interlibrary loan statistics. The workshop also provided a forum for member libraries to offer suggestions to the UHLS staff on data they wish to have available in future reports.

Rob intends to travel to member libraries and help staff interpret reports as he did in his workshop. In addition, member library staff should feel free to send Rob any questions they have about Horizon software, especially those regarding Circulation, Requests, Reports, and Item Group Editor. He is always glad to visit member libraries for any training that might be needed, including refresher training for new and veteran staff.

#### **Unresolved Issues**

Dynix is currently working on several outstanding issues:

- G Block Deletion – Problems in being unable to delete patron blocks (STILL being worked on)
- G Call no. Istats entry (*Working with Kathy Cunningham on entering for all libraries –adds additional statistics [like scat codes]*)
- G Request Parameters entry – (*waiting for decision from Directors Association; John Rose is supposed to be helping us with this also*)

- G** Withdrawn items – Since the “weeding program” this is supposed to be designed for is not due out until Release 7.3, Rawdon is currently working with Mark Derrick on a work-around.

**Resolved Issues**

See under “Tweaking.”

## ASC iPAC Report 6/3/03

### 1) White Screen bug

It was reported that Dynix had a fix for the white screen problem that many have been complaining of since going live on Horizon. To fix the problem, we needed to apply a Hotfix upgrade to the iPac server. Doing this would cause us to lose almost all of the customization that we have done to the iPac. It would take 20-25 hours of UHLS and Dynix time (for their custom work) to restore all of the customization. However, we've discovered with Dynix' help, that applying this Hotfix will not solve all of the white screen problems. Our white screen problems will not be addressed until iPac version 3.0 (we are currently at version 2.01, and there is no date on 3.0).

### 2) We've had a few complaints from patrons about searching for a book by multiple authors and only 1 author is displayed, or searching for a secondary author and only the books' primary author is displayed (making patrons wonder how their search was relevant). I can change the iPac to show all of the authors if you like. The trade off would be screen space.

### 3) Items checked out limitations

We discovered that one particular patron has over 500 items checked out, but they will not always show up in the iPac for him to renew. Dynix *thinks* that there is a software limit, though they have still not been able to give me a limit number or a workaround.

### 4) Displaying Branch Locations (StaffPAC and iPAC)

Some staff members of libraries with branches want the main location and all branches holdings to show up when you do a search. Others want it as it was, with only the location searched displayed (then you click Other Locations to view branch holdings). Still others want the central location to display holding for central and branches, while a branch search only displays branch holdings. I informed all involved that had an opinion to let their ASC representative know what to vote for today so that we can do this fairly.

### 5) Notice to click "Other Locations" button

One of the problems patrons encounter at Colonie when using the iPac is that they don't understand the search results when there are no items at their local search location. There are simply no copies listed. In other words they get all the signals of a search without an item. Is there any way to get a message such as, "There are no copies of this title at this location, you could hit the other locations button, try another edition of the title, or see the librarian". (Wording or options to be worked out).

We can do this, probably next to the "Other Loc" button.