

**AUTOMATED SERVICES COMMITTEE
MINUTES**

September 23, 2003

PRESENT (voting): Tim Burke (APLM); Nancy Pieri (BETH); Joe Makowiec (BRUN); Deb Canzano (COHS); Richard Naylor (COLN); Patricia Nonamaker (EGRN); Lisa Pitkin (GUIL); Barbara Kubli (STEP); Carol Reppard (TROY); Philip Ritter (UHLS); Gail Sacco (VOOR)

(Non-voting): Mary Ellen Bena, Rob Carle, Rawdon Cheng, Geoffrey Kirkpatrick, Jonathan Koppel, Peter Kowalski, Marcia Middleton

9:00 a.m. – Meeting called to order

I. MINUTES

Minutes of the August 26, 2003 meeting accepted as presented.

II. TECHNOLOGY SERVICES REPORT

R. Cheng's report was sent out in advance of the meeting. P. Ritter asked if there were any questions or comments. R. Cheng was asked to review his report.

Implementation of Horizon release 7.3

R. Cheng reviewed the 4 Phases for the implementation of the 7.3 upgrade to the Horizon system. He noted that on Wednesday, September 24th, the 7.3 release will be installed on the clone database and on Thursday, September 25th, a group of testers will work with the clone. Any problems will be identified and corrected before moving to Phase II.

He pointed out that, until Phase IV, release 7.3 will only be available for testing. He warned that, once 7.3 is available on staff computers, people must be very careful and not have both 7.2 and 7.3 open at the same time. The screens are similar and it would be very easy to confuse them and try to enter information into 7.3 before it is ready for actual use.

Discussion regarding the necessary hardware to support 7.3. R. Cheng noted that after 2003, Microsoft will no longer support Windows 98.

KidsPac

The program has not been customized yet. P. Kowalski will discuss this with the Youth Services Advisory Council.

Remote patron authentication (RPA)

R. Cheng suggested that committee members go to the link <http://www.uhls.org/rpa/webauth.exe> and test it. Discussion regarding frames or no-frames on the RPA screen. Consensus that the Adult Services Advisory Council will be asked for their input on this (the Advisory Council could seek input via email) and to prepare a recommendation for the October 28th ASC meeting and a decision will be made at that time.

Discussion regarding the rules/parameters allowable in the system. N. Pieri noted that the ASC should limit the parameters so that there are not a lot of exceptions that will slow down system performance.

Discussion regarding the databases that are subscribed to by individual libraries. P. Kowalski noted that these show up in the frames screen; they do not show up in the non-frames screen. These particular databases can only be accessed through the homepage of the subscribing library and are therefore not available to all patrons. G. Sacco noted that it is important to be aware of presentation so that the libraries don't look like they are denying access to information.

Telecirc

J. Koppel reported that he is working with a test group and it appears that all of the correct calls are being made. He would like to expand the size of the test group and also needs to make sure that once the calls are made, the notices associated with those calls are not being printed. The members of his test group are staff from those libraries that have expressed an interest in using telecirc. M. Middleton suggested that during this testing, the titles feature should be turned on so that anyone receiving a call will know to which book it refers.

Email filtering

J. Koppel noted that the instructions for setting up filtering rules for individual email have been posted on the Intranet and are easy to use.

Discussion regarding broadcast emails. M. Middleton requested that any broadcast emails with technical instructions should contain a sentence directing the recipient to check with her/his Director or Technology department before making any changes.

iPac message

R. Cheng reported that the Technology Department is working with Dynix to modify the message that appears on the screen when patrons are trying to do online requests for a non-requestable item. There is

also a problem with online renewals and loan periods; these have been added to the issues list for discussion with Dynix at the bi-weekly telephone conference calls.

III. DATABASE MAINTENANCE ADVISORY COUNCIL

R. Carle and L. Pitkin presented the first series of recommendations from the Council. Discussion regarding the role of the Advisory Council in enforcing the standards and guidelines and in overseeing the assignment of various levels of access to aid in accountability. (All of the following Recommendations include the approved amendments)

Recommendation #1:

Every staff member involved in the cataloging process should have a core set of skills. These skills differ based on the type of cataloging tasks expected from staff:

- *Linking items to bibliographic records.*
- *Copying, editing, and merging bibliographic records.*
- *Original cataloging.*

Each of these skill sets will require specific training and security levels designed for the individual needs of staff that will be expected to perform these tasks.

MOTION: G. Sacco moved to accept Recommendation #1. R. Naylor second. Unanimous.

Recommendation #2:

Cataloging standards, based upon but not limited to, AACR2R and Library of Congress guidelines, need to be written for all UHLS member libraries willing to commit to the responsibility of any aspect of the cataloging process. Maintaining quality cataloging and timely input are the overriding principles to best serve the patrons of the UHLS member libraries.

L. Pitkin noted that the Committee is also looking at the cataloging standards used by other library systems and will be trying to keep the UHLS standards as simple as possible.

T. Burke asked how the database monitoring will take place? L. Pitkin noted that it will consist of peer-monitoring as well as assistance from outside catalogers such as Sue Rahn from CDLC.

L. Pitkin also noted that not all of the libraries are expected to undertake cataloging; UHLS will continue to provide cataloging for any libraries that are not able to do it or do not have the time.

MOTION: D. Canzano moved to accept Recommendation #2 as amended. P. Nonamaker second. Unanimous.

Recommendation #3:

In order to meet these new guidelines, catalog training and continuing education will be offered to UHLS member library staff. Training will be provided to the member libraries by the Training Specialist at UHLS, or coordinated by the Training Specialist in cooperation with other agencies qualified to offer cataloging training.

MOTION: N. Pieri moved to accept Recommendation #3, noting that implicit in the statement is the fact that training and continuing education will also be offered to the UHLS staff. J. Makowiec second. Unanimous.

Recommendation #4:

The UHLS Training Specialist will be responsible for compiling all cataloging instructions and procedures into a Cataloging Training Manual. The manual will include instructional material for all the skill levels mentioned in the previous recommendation. The Cataloging Training Manual will be reviewed and revised every three years or as needed.

MOTION: D. Canzano moved to accept Recommendation #4 as amended. N. Pieri second. Unanimous.

Recommendation #5:

UHLS will search the database for bibliographic records that do not meet the standards. Once these lists are generated, changes will be performed by UHLS so that the records conform to the conventions established by the Database Maintenance Advisory Council and approved by the ASC.

MOTION: P. Nonamaker moved to accept Recommendation #5 as amended. D. Canzano second. Unanimous.

Consensus that the Database Maintenance Advisory Council and the subcommittee have done an exceptional job.

IV. SECURITY SUB-COMMITTEE

M. Middleton reported that the Sub-Committee is working on creating template accounts that will then be used for testing purposes.

G. Kirkpatrick noted that the Sub-Committee was waiting for the Database Maintenance Advisory Council recommendations before proceeding too far. He also expressed serious concern about the security of the database and the MARC records.

Discussion regarding the best way to address this concern. Should the Security sub-committee have the power to determine who will be given what level of access to the database at this time?

MOTION: N. Pieri moved that the Security Sub-Committee should have the temporary authority to determine who will be allowed to edit and/or delete MARC records. This authority is given to preserve the integrity of the database while the Database Maintenance Advisory Council works on the guidelines and standards. R. Naylor second.

AYES: 9; NAYS: 2 Motion passed.

V. MANAGER OF AUTOMATION SERVICES SEARCH

P. Ritter reported that UHLS has received 43 applications to date and the Search Committee has selected 3 potential candidates. The Committee will conduct telephone interviews with these candidates on Thursday afternoon (September 25th) and will then determine if any will be invited for an in-person interview. Applications will continue to be accepted until the position is filled.

At this time, the Interview process will also include open presentations on a selected topic by the candidates. Staff from all of the member libraries will be invited to these presentations. G. Sacco suggested that this might not be the best process in that it solicits comments from people who are not in a decision-making position.

P. Ritter noted that he is open to advice and comments from anyone but he will be making the final decision.

VI. OTHER BUSINESS

R. Cheng asked for direction in introducing new staff members to the advantages of the UHLS Horizon list serv. Consensus that he should send out a broadcast email about subscribing to the list and then any new user names would get a canned message offering them the opportunity to subscribe.

11:00 AM meeting adjourned.

NEXT MEETING: Tuesday, October 28th at 9:00 AM at UHLS.

Heidi A. Fuge
9/23/03

Technology Services Dept Report
Sep 23, 2003

Horizon Upgrades: Horizon 7.3/ipac 2.1/Kidspac

Horizon 7.3 is scheduled to be upgraded on Sept 24. This release has many new features and requirements. UHLS will do the upgrade in four phases. Phase I will upgrade the server. Phase II will consist of software functionality testing by a selected group of testers. Phase III will consist tests on member libraries existing hardware. Phase IV will go live on 7.3.

Phase I (Sept 24) - Server upgrade. The server upgrade is scheduled for Sept 24. A test database will be upgraded to 7.3 while the production database will remain at 7.2. Member libraries will continue to use 7.2 to access the production database.

Phase II - testing functionalities of 7.3 in test database. A test team consisting member library staff and UHLS staff will conduct functionality tests on 7.3. Based on the test results, the team will recommend when we go live on 7.3 (Phase IV).

Phase III - hardware test. Member libraries will install 7.3 on their workstations. Members are encouraged to test their workstations especially those below the minimal hardware specifications. If there are problems, we will determine whether they are caused by hardware or software. Libraries will continue to circulate in 7.2. Any work done on the test database have no impact on the production database.

Phase IV - Live on 7.3. We will upgrade the production database to 7.3. Libraries will uninstall 7.2 from their workstations, and will circulate on 7.3.

Horizon 7.3 Installation CD has been distributed to member libraries thru the courier. Installation instructions are available on the intranet.

Ipac 2.1 is upgraded and is in production.

Kidspac is also installed. You may check it out at:
<http://ipac.uhls.org/ipac20/ipac.jsp?profile=all-kids>

Second T1

The circuit has been installed and tested. It is working. I have sent the new IP address to online database vendors to update their record. As of this time, two database vendors do not have our new ip address on file. We have followed up on it. The tentative cutover date is on Oct 6.

Members do not need to do anything for this cutover unless they have subscribed their own online database. If so, they should notify their vendors as soon as possible. The new IP address is on intranet:
<http://www.uhls.org/intranet/databases/ip.cfm>

Remote patron authentication (RPA)

It is installed and ready for production. We will like to have some

feedback from members before rolling this out. There are still two databases not working in RPA. Peter is working with the vendors to resolve the problems. RPA is a robust software which interacts with Horizon patron database. Libraries can customize who can access what databases for their patrons, based on the location code in the patron record. Rules can be based on btype, outstanding fine etc. There are two ways to set up RPA in the webpage: frame and no-frame.

Advantage of using frame are:

- ? greeting patrons by name,
- ? customized list of databases available to that patron. Any database shown on the list is accessible by that patron (for a view of how this works, check it out at: <http://www.uhls.org/rpa/webauth.exe>)

Advantages of using no-frame are:

- ? look and behaves exactly as it is now, no new look,
- ? no side scroll on database pages,
- ? can have database description and click on it right from there to get access, if a patron cannot access that database, a message will pop up saying why.

RPA processing is based on rules. There is a general set of rules for all libraries. Each library can have its own set of exceptions. As a general rule of thumbs, it is not recommended to set up too many exceptions because it will reduce the speed to access the page.

UHLS will like to seek feedback from users to decide on how the page be displayed (frame or no-frame). This page will be shared for all members.

Telecirc

Telecirc server is almost ready. It was held up due to a data transfer problem between the Horizon server and the TeleCirc server. Telecirc did not get the information required to generate a complete call list from the Horizon server. This has been fixed. Telecirc has made a few calls since then. Jonathan will monitor the server and check on the dial-out reports.

Horizon unusual behaviors

On Sept 12 to 14, there were some strange behaviors on Horizon. The first instance was on Sept 12 at 8pm. We received a page from a library complaining that when ipac returned a hit list, clicking on any item will return items not found. At the time we troubleshot the problem on the server, the problem had corrected itself. On the 13th, we had received complaints that Horizon was very slow; but again, by the time the support staff logged on to the server, 20 minutes later, the problem corrected itself. On Sept 14, again we had a problem on Horizon. It was quickly discovered there was a block process. After killing the block process, the problem went away. At the same time, Ipac had the same behavior as on the 12th. This time, we could quickly checked on it and discover a process was not running. After restarting the ipac server, it was working. Since then, we have not received any complaints.

Email filtering

UHLS stopped filtering spam mail based on keywords on Sept 15, though we will continue to monitor inbound email. If it is suspicious, the mail server will insert X-head to the subject. Users can use this to set up

rules to filter out those messages. Instructions of setting up rules are available on the intranet. UHLS will continue to block certain types of file attachment that are known to as a vehicle to carry virus.

Ipac message

If a patron attempts to request non-request items, ipac will display this message:

Unable to place a request on this item. The maximum requests for this item type has been exceeded.

We have requested Dynix if there is any way to change the wordings to make it more meaningful. We are waiting for response.

I want to clarify one point about kidspac in my monthly report. It is the out of box version and has not been configured. My intention was to inform the committee Kidspac is delivered. Youth Service Advisory Council will be working with Peter on changing the look of Kidspac. It will present they recommendations to the ASC when it is ready. I apologize I did not make it clear in my report.