

# **AUTOMATED SERVICES COMMITTEE MINUTES**

December 9, 2003

**PRESENT:** Marcia Middleton (APLM), Geoffrey Kirkpatrick (BETH), Joe Makowiec (BRUN), Richard Naylor (COLN), Pat Nonamaker (EGRN), Judy Felsten (RCSC), Jane Minotti (SNLK), Barbara Kubli (STEP), Carol Reppard (TROY), Rawdon Cheng (UHLS), Gail Sacco (VOOR)

(Non-voting): Rob Carle, Jonathan Koppel, Peter Kowalski

9:00 a.m. – Meeting called to order by Phil Ritter

## **I. MINUTES**

Minutes of the October 28, 2003 meeting accepted as presented. (No meeting in November)

## **II. HORIZON 7.3 UPDATE**

R. Cheng reported that on December 11<sup>th</sup> at 9:00 AM he will upgrade the system to 7.3. All of the tests on the upgrade have been completed and it has performed satisfactorily.

He reminded all of the libraries that they should log off at 8:55 AM on Thursday. The system will be down for about three hours, and during that time the libraries should use PCReliance.

R. Cheng emphasized the following:

- **make sure that all of the circulation computers have Horizon 7.3 installed.**
- **practice using PCReliance and clear all existing data before using it on Thursday. Use PCReliance for check-out only - don't use it for check-in. Please remember that PCReliance does not do any data validation so all barcode numbers entered must be correct.**
- **during the down time on Thursday, uninstall Horizon 7.24 to free space on the computers. 7.24 will not be functional once 7.3 has been turned on.**

R. Cheng will email UHLANusers with the above reminders. He will also send out an email when the upgrade is complete.

During the downtime, the clone database will be available with the test iPAC. R. Cheng will put a message on the iPAC noting that certain functions have been disabled while the upgrade is taking place. G. Sacco asked for an email to be sent to all of the Reference Librarians noting the temporary disabling of certain functions.

### **III. ANNUAL REPORT INFORMATION**

Dynix has assigned a technician to work with R. Cheng on creating the program to gather the Annual Report statistics. The most difficult part of the program will be the section on circulation statistics. R. Cheng has been in contact with Dynix and is waiting for a response. The statistics will be needed early in January.

Discussion regarding call# Istats. R. Naylor wants a program to run at the beginning of the year to capture these so that they can be used for collection development. He suggested that Dynix could create this program while working on the one for the Annual Report.

Further discussion regarding statistics and the possibility that the type of information that the state will require on the Annual Reports can change and the program should be flexible and able to accommodate these changes.

### **IV. RIDER E #2**

This program notes any status changes (i.e. item no longer available for some reason) on requested items.

**MOTION:** M. Middleton moved that this program should be run once a week. B. Kubli second. Unanimous.

Discussion regarding the wording on the printed notices generated by this program.

**MOTION:** G. Sacco moved acceptance of this wording: "The following items are no longer available. For more information, please contact the library listed above." The notice will contain both the title and author of the item(s). R. Naylor second. Unanimous.

### **V. ISTAT/COLLECTION CODES**

R. Cheng reported that he deleted all of the Istats without items attached. In the process, he noticed that some Istats have several collection codes attached - this is incorrect. Istats and collection codes should be exact matches: one-for-one. (He suggested that COLN should check their Istats and collection codes.)

He noted that there is a program on the ftp server that will allow each library to show all of their collections that have less than five items in a collection. Libraries should use this program to determine the viability of these small collections.

## **VI. STANDARDIZE LANGUAGE IN PRINT NOTICES**

**MOTION:** J. Makowiec moved acceptance of the following:

1<sup>st</sup> notice: "The materials listed below are overdue. Please return them promptly."

2<sup>nd</sup> notice: "This is your second notice that the materials listed below are overdue. Please return them immediately."

Bill: "The materials listed below are now considered lost. Please pay the following replacement charges."

Hold: "The following item is now available. You may pick it up before the expiration date."

If there is space, the words "For more information, please contact the Library listed above" will be added to the notices.

B. Kubli second. Unanimous.

## **VII. LAST COPY DELETE WEEDING PROGRAM**

R. Cheng explained that this is a program that deletes, from the database, items that have been withdrawn. G. Kirkpatrick proposed that this program should be run on the 2<sup>nd</sup> business day of every month. Proposal accepted by consensus.

## **VIII. ITEM SPECIFIC REQUESTS**

P. Kowalski noted that, as requested, he removed the item specific request button from the iPac and now some library staff members have asked that it be added back in. He noted that he could quickly (and with no cost), add a note to the patron that they can request a specific copy in the request screen's comment field. The comment would then be displayed on the Pull List for the staff.

M. Middleton noted that this would not be acceptable because it would not show up at the circulation desk when the items are being checked in or out.

Discussion regarding the cataloging options for "episodes" and "series." There should be some cataloging standardization for these types of items so that patrons can request a specific episode without having to check out a whole package of CDs, videos, DVDs, etc.

G. Sacco asked when the serials module would be activated? P. Ritter noted that serials and acquisitions must be activated before June 30, 2004.

Consensus to leave the iPac as it is now.

#### **IX. BLOCK DISPLAYS IN IPAC**

G. Kirkpatrick asked if it was possible to mask blocks of information in the patron record that isn't appropriate for the patron to see? P. Kowalski noted that this could easily be done.

**MOTION:** G. Kirkpatrick moved that P. Kowalski be authorized to mask certain blocks in the iPac (i.e. duplicate hold notifications, notice regarding holds deleted and re-inserted). J. Felsten second. Unanimous.

M. Middleton asked for a list of the masks once they have been inserted.

#### **X. TELECIRC**

J. Koppel reported that TeleCirc appears to be functioning correctly, except for the holds program. Any holds that were placed prior to a library going on TeleCirc will be sent by mail. ALTM, COLN, TROY (and branches) are currently using TeleCirc. Seven more libraries have indicated a desire to use it and they will be enabled, on a staggered basis, during the first quarter of 2004.

R. Cheng noted that there might, at some time, be a charge to the libraries for TeleCirc based on the number of lines needed to support this program as well as the costs for additional licenses. Currently, UHLS is licensed for two lines.

Discussion regarding APLM and its branches. M. Middleton asked if the branches could be enabled before the Main Library? J. Koppel noted that this was possible.

Once a library is enabled for TeleCirc, the library can offer that program to its patrons and the patrons may individually select whether or not they wish the service.

**MOTION:** J. Makowiec moved to authorize R. Cheng to enable all of the libraries for TeleCirc and then allow the libraries to enable patrons on an individual basis. G. Kirkpatrick second. Unanimous.

**XI. EMAIL NOTICES**

J. Koppel reported that he is working with Kathy Cunningham at Dynix. They have discovered that part of the problem with the email notices is that some email addresses have been entered incorrectly and he cannot print a batch report until all of the addresses have been corrected.

The options for email notices are:

1. Email can be the default notice if an email address has been entered in the patron record.

or

2. In the patron registration, the patron must select for email notices.

G. Kirkpatrick proposed that all email addresses now in the database should be deleted and that patrons be allowed to re-enter their email addresses. Many of the addresses are probably incorrect anyway, since they were entered in patron registration several years ago. Proposal accepted by consensus.

**XII. PATRON REGISTRATION CARDS**

R. Naylor reported that he spoke with several attorneys regarding the need for signed patron registration cards. They all told him that it is necessary to have a signature on file in the library showing that the patron accepts the library policies. Consensus that UHLS member libraries continue to ask patrons to sign patron registration cards.

**XIII. OTHER BUSINESS**

R. Cheng reported that he has developed a 3-column report for circulation statistics that will be divided by 15 categories.

M. Middleton asked for another workshop on creating the canned reports. R. Carle will schedule a workshop in January.

M. Middleton also asked for a ReportSmith users group workshop.

11:10 meeting adjourned.

**NEXT MEETING: Tuesday, January 27, 2004 at 9:00 AM**

Heidi A. Fuge  
12/10/03

## Technology Dept Report Dec 9, 2003

### **Horizon 7.3 upgrade**

7.3 upgrade is set on Dec 11 at around 10am. Based on previous experience, it took 3-4 hours to do the upgrade. During that time, Horizon will not be available. Libraries will use PcReliance or other offline circulation procedure to handle check out. A new version of PcReliance Users' Guide is available on the intranet, <http://www.uhls.org/intranet/Epixtech/pcreliance.pdf> . If you will use PcReliance during the downtime, please go over the User's Guide with your circ staff to refresh their memory of using PcReliance.

By the time upgrade is finished, libraries should have installed 7.3 on their staff workstations. After the upgrade, the existing version, 7.24, cannot access Horizon.

### **TeleCirc**

TeleCirc is in production. At this time, ALTM, COLN, TROY and branches are using it. We are working on to fine tune the notice program for those libraries which patrons may opt out to be contacted by TeleCirc.

### **NYS Annual Report**

Steven Orton of Dynix was assigned to do the programming for our state annual report. I have been in touch with him what deliverable we expect form him. The most likely approach will use istat by collection to calculate the annual circ. Since each library has their own set of istat by collections, we will ask libraries to assign each istat to one of the 15 categories NYS requires.

### **Rider E #2 (notify patrons when requested items are not available)**

In the original version of RiderE program, it did not display item information. Dynix has redone the program and the new version has corrected the problem. The new version was run on Dec 4 and the information is displayed properly. Libraries will have a choice of having those notices printed on 3-part mailers or emailed to library email account.

At the last meeting, ASC deferred the voting on the frequency and the language used in the printed notice. I want to revisit this issue:

1. Language appears on the printed notice – I highly recommend a standard language for all libraries using print option.
2. How often to run. On average, there are around 30-40 unfillable requests per month among all libraries.

Note: Because it is a custom program, TeleCirc will not call patrons on this block type.

Sample print notice for unavailable items

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# 1

[library name and address]

2814000000000

Oct 24 2003

The following items are no longer available. For more information, please contact the library listed above.

Stranger in a strange land / Heinlein, Robert

[patron name and address]

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### **Istat/Collection codes**

We have deleted unused collection codes and istats associated with those collection codes. We strongly urge libraries to evaluate collections with very small holdings. There is a utility report on the ftp server, which lists items information for those collections. The default criterion is 5 items in any of a library's collection. This value can be changed to fit individual library's needs.

### **Standardize Languages in print notices**

With TeleCirc enable, there are 14 versions of notice programs to generate notices for all overdue and holds. With some libraries having their own language, maintaining these notice programs is a nightmare to system staff. This was brought to the last Resource Sharing Advisory Council meeting and it agreed to standardize notice language. These are the recommended languages:

1st notice: The materials listed below are overdue. Please return them promptly.

2nd notice: This is your second notice that the materials listed below are overdue. Please return them immediately.

Bill: The material listed below is now considered lost. Please pay the following replacement charges.

Hold: The following item is now available. You may pick it up before the expiration date.

### **Last copy delete weeding program**

Last copy delete is a weeding program to delete bib without items attached. It also removed items with 'wdn' status. It was run in late November. We will observe how many orphan bib records over a period of time and determine how often we will run this program.