

**AUTOMATED SERVICES COMMITTEE  
MINUTES**

January 27, 2004

PRESENT: (Voting) T. Burke (APLM), N. Pieri (BETH), J. Makowiec (BRUN), R. Naylor (COLN), P. Nonamaker (EGRN), B. Nichols Randall (GUIL), B. Kubli (STEP), C. Reppard (TROY), J. Thornton (UHLS), G. Sacco (VOOR)

(Non-voting): M. Middleton, G. Kirkpatrick

9:17 AM meeting called to order by P. Ritter

I. MINUTES

Minutes of the December 9, 2003 meeting accepted as presented.

II. INTRODUCTION OF NEW MANAGER

P. Ritter introduced Joe Thornton, the new Manager of Automation Services.

III. UHLS STAFF AT MEETINGS

J. Thornton will, generally, be the only Automation Services staff member at the ASC meetings. He urged all of the Committee members to be sure that they contact P. Ritter with any issues for the meeting Agenda and, if necessary, J. Thornton will bring in any staff member to discuss specific items.

IV. RELATIONSHIP OF CONSULTANTS TO UHLS

J. Thornton noted that the relationship with George Ramson (Comnet Technologies) will change to an "as-needed" basis. There are enough staff members in the Automation Department to cover the weekend rotations and take care of technical issues.

M. Middleton noted that G. Ramson is a valuable resource and APLM would like to continue to call on him if necessary. She noted that now is the time to clarify UHLS' role in technology support. J. Thornton will meet with individual Directors and staff members to begin clarifying this. He noted that it is sometimes difficult to respond to technical questions if the libraries have problems with equipment or a network that UHLS did not know they had.

M. Middleton noted that the policy so far has been that the libraries own the equipment in their libraries and are responsible for maintaining it. The alternate

method would be for UHLS to coordinate purchases and set a standard for equipment and networks.

G. Sacco noted that she would like to know if the libraries can ask for more technical services from UHLS or should they contact an outside consultant? P. Ritter noted that the libraries should contact J. Thornton first and he will see if UHLS can handle the situation. Even if UHLS cannot, and the libraries call in other assistance, J. Thornton should be apprized of the situation.

#### V. VISITS TO MEMBER LIBRARIES

The Automation staff will establish a schedule for periodic visits to the libraries.

B. Kubli asked J. Thornton to sensitize his staff to the fact that they sometimes give the impression that STEP is too far to travel.

G. Sacco would like to have the UHLS Automation staff spend some time behind the circulation desk to see how everything functions.

Discussion regarding calling each library to notify them that there is a problem with the automation system and UHLS staff are working on it; this will let the libraries know that it is a system problem not a local problem. Discussion regarding the establishment of an extension at UHLS that libraries can call to check on the system status.

#### VI. ANNUAL REPORTS

J. Thornton noted that 3-column reports containing some of the statistics needed for the state annual reports are now available on the intranet. He pointed out that for the correct statistics, the information in these reports needs to be combined with pre-Dynix information. J. Thornton will send out an email reminding libraries where to look for the pre-Dynix statistics.

B. Nichols Randall asked if there was any quality checking on the new reports.

P. Ritter noted that libraries are going to have to accept the 2003 statistics because Horizon data is all we have. These are the statistics that will be used to establish the UHLAN charges for 2005. He will be sending out that information in the next couple of weeks. The ASC will discuss the next three-year contract which will begin in 2006.

T. Burke asked how long it would take to run the monthly reports and when the libraries can expect to receive them? M. Middleton noted that R. Cheng's email suggested that they will be run on the first of each month and available immediately thereafter.

#### VII. WEB REPORTS

J. Thornton wants to move all of the reports that can be accessed by the libraries to the Web. He noted that they will be much easier to retrieve and use. There are some security issues that have to be dealt with and he has installed some of the initial application software. He will be training P. Kowalski in using the software and creating the reports.

B. Kubli wants to keep the custom program on her computer that allows her to download daily circulation statistics. J. Thornton noted that her program will not be affected.

#### VIII. REQUEST TRACKER

The Request Tracker program will be used to formalize the reporting of problems with the automation system. The Automation Department is testing the program now and if they are satisfied, will use some of the libraries as test sites. J. Thornton noted that he doesn't want to be absolutely rigid about problem reporting but this program will help to ensure that problems will not fall through the cracks, will help him to monitor the response time of his staff, and will provide a referral site for dealing with similar problems.

Problems will be entered either by the reporting library or by UHLS staff if the library does not have the time or is unable to enter the information.

#### IX. TELECIRC

This program is not working as well as expected. Some people who requested telecirc notification are also getting mailed notices since the telecirc system is not updating the tables to note when successful calls have been made. Discussion. Consensus that this is not a major problem and no changes will be made at this time.

Discussion regarding changing the voice on the telecirc recording and the opening message. J. Thornton will look into the situation.

#### X. EMAIL NOTICES

This program is not working and J. Koppel is trying to figure out why. J. Thornton noted that UHLS could use a custom program to do this, however this would be straying from the regular Dynix program, a situation that can easily cause more problems.

B. Nichols Randall suggested contacting other Horizon users on the listserv and see if anyone has been able to use the program successfully.

Discussion regarding the use of Eric Graham's custom program until Dynix fixes their program, then E. Graham's program can be discarded.

#### XI. HORIZON iPAC - now known as HIP - HORIZON INFORMATION PORTAL

J. Thornton noted that there are still problems with HIP crashing. The system is now running on Windows. Several other Horizon users have reported that it is more reliable when running on a SOLARIS system. He is considering changing to SOLARIS which will probably mean purchasing a new server.

M. Middleton asked the status of KidsPac? P. Ritter reported that Mary Fellows is working on that now, gathering information from the libraries to determine what features they want installed.

June 30, 2004 - acquisitions and serials modules will be loaded on to the system.

#### XII. ZOOMTEXT

This is a screen magnifier that will make monitors ADA compliant. UHLS staff will install it in any library that requests it. The computers on which it is installed will need sound capability. J. Thornton will email the libraries to see who wants to have it installed and if they want to do it themselves or have the UHLS staff install it.

P. Nonamaker noted that EGRN tried it several years ago and found it very difficult to use. She suggested that Rob Carle should learn how to use it because there will be a training issue when it is installed.

### XIII. REPORT SMITH

J. Thornton will be ordering the licenses for this. T. Burke asked if there were more licenses than libraries, if APLM could have some of the additional licenses for their Branches. P. Ritter said okay.

M. Middleton noted that this is a very technical program and difficult to learn. If libraries are not going to use it frequently to become familiar with it then they should just stick with the reports provided by UHLS.

### XIV. OTHER BUSINESS

B. Kubli had several questions:

- *What can be done to make the next upgrade easier?*

J. Thornton noted that all upgrades have the potential for being catastrophic and all problems cannot be anticipated, but we do everything we can to minimize them.

G. Sacco noted that her staff is now very insecure in using the automation system. They do not have any faith in it. Stabilizing the HIP is a priority. J. Thornton noted that he has to see the evidence of the problems to correct them.

B. Nichols Randall suggested a publicity campaign based on "iPAC bad, HIP good."

- *Are there any recommendations from the Database Maintenance Advisory Council?*

J. Thornton noted that the Database Subcommittee is looking into better cataloging rules and more helpful screens for the Item Request button. They will probably have some recommendations for the next ASC meeting.

- *Are other libraries finding that it is taking longer to get the Pull List than before the upgrade?*

J. Thornton has discussed this with Dynix and they have determined that the Pull List screen cannot be left open for an extended length of time because this causes problems. B. Kubli did not accept this explanation and wants proof that the length of time is causing the problem.

Discussion regarding the fact that whoever opens the Pull List first will get tagged to provide an item for which there are multiple copies.

C. Reppard asked what UHLS staff members have been assigned to the TROY router problem? J. Thornton noted that J. Koppel spent a day at TROY working on the problem and R. Cheng is working on it now.

Discussion regarding the next ASC meetings. The following meetings have been canceled - Feb. 24<sup>th</sup> and March 23<sup>rd</sup>.

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

11:00 AM meeting adjourned.

Heidi A. Fuge  
1/28/04

## **Automation Services Report January 26, 2004**

### **Annual Reports**

We had Dynix create a new Sybase table to enable the grouping of the libraries' many collections into sixteen categories, as requested by ASC. We provided a method for libraries to map their collections to these sixteen categories, by downloading a spreadsheet from the intranet, editing it, and returning it as an email attachment to UHLS. We used those spreadsheets to generate the 3-column, 16-category circulation report, which we will run monthly, and which can be used to gather the circulation statistics for the six categories required by New York State. The "3-column" circulation reports are now available on the intranet for all libraries.

We also created and ran Holdings reports for all libraries, which we'll run once a month, and which are now available on the intranet.

### **Site Visits**

We will act on the excellent suggestion of Tim Burke, and visit all libraries on a regular basis. We have yet to work out the details, such as who goes where and how often, but we all agreed that this will be a useful way to identify problems and possible improvements in the quality of our service to the libraries.

### **Moving Reports to the Web**

We will try to simplify the process of running reports by moving them to the web. Instead of the current process by which libraries download a script to run on their workstations, most reports will be available on the web. In addition to increased ease of use, this method will insure that everyone always runs the latest version of each report. We installed most of the required software on the server - the Perl DBI and the Sybase DBD - but need to install SSL, since some reports will contain confidential information, and therefore will need to be encrypted.

## **Request Tracker**

We installed a “helpdesk” application on the horizon server, which we hope will allow us to track our support activities and problem resolutions more efficiently. The application is *Request Tracker*. It’s used by NASA, Merrill Lynch, and The University of West Bohemia, among many other organizations, and it’s open source (i.e. free). We’re testing it now and hope to open it up to general use soon. Our hope is that this tool will replace many of the phone and email exchanges that occasionally lead to confusion for both the libraries (“Who do I call?” “What’s the status of my problem?”) and Automation Services (“Who’s working on this problem and what’s the status?”). It can also serve as a knowledge base to help eliminate unnecessary calls for known problems.

## **Telecirc**

We’ve identified a problem with Telecirc - evidently it does not always correctly update its log after making a successful call, causing print notices to be generated for patrons who have already been notified by phone. We have informed Dynix of this problem. We’re considering two options to deal with this problem while Dynix works on it: 1. we would print a notice for everyone, whether or not they were “Telecirc-enabled,” and 2. we would never print a notice for Telecirc users, regardless of whether they were called or not.

## **Email Notices**

Jonathan reports that email notices still do not work. At our last Automation Services meeting we discussed an alternative method of emailing notices, using *sendmail* on the horizon server and a script similar to the one now used to generate print notices. One concern is that we’re doing a lot of local workarounds that may be difficult to support through future Horizon upgrades.

## **Horizon Information Portal (HIP, formerly iPAC, formerly JBoss)**

We continue to experience occasional crashes of HIP, and have reported the problem to Dynix. There is a long, ongoing discussion in Horizon-L about the relative stability of HIP under Solaris versus Windows. We run under Windows, and discussed briefly at

our last Automation Services meeting the possibility of moving HIP to a Solaris or Linux server.

### **ZoomText**

This is Magnifier/ScreenReader software. We have 25 licenses, 15 CD's. and 29 libraries. We'll be distributing and/or installing this software as soon as we determine the interest and needs of the libraries.

### **ReportSmith**

In response to UHLS's offer to subsidize the purchase of one ReportSmith license for any interested library, we've heard from almost everyone and will purchase the licenses very soon. There have been requests for ReportSmith training in the past, and that will be an agenda item of our next Automation Services meeting.

*Joseph Thornton, Manager  
Automation Services*