

AUTOMATED SERVICES COMMITTEE
MARCH 9, 2004
MINUTES

PRESENT voting: Tim Burke (APLM), Nancy Pieri (BETH), Joe Makowiec (BRUN), Richard Naylor (COLN), Patricia Nonamaker (EGRN), Barbara Nichols Randall (GUIL), Barbara Kubli (STEP), Paul Hicok (TROY), Joe Thornton (UHLS), Gail Sacco (VOOR)

non-voting: Geoff Kirkpatrick (BETH)

Meeting called to order by Phil Ritter at 9:05 AM.

I. MINUTES

Minutes of the January 24, 2004 meeting accepted as presented.

J. Thornton reviewed his written report, submitted prior to the meeting:

II. ANNUAL REPORTS

B. Kubli is not satisfied with the registered borrowers figure reported by Horizon. Discussion. There is a difference between the report on the Intranet which shows just those patrons registered to a particular library, and the figure actually requested by the State in the Annual Report. B. Kubli will meet with J. Thornton to discuss this further.

P. Nonamaker noted "garbage in, garbage out" and suggested that there needs to be a further discussion, at some point, on how to record the borrowers. B. Nichols Randall pointed out that information about registered borrowers is supposed to be sent from the registering library to the home library and this does not always happen.

In further discussion about the Annual Reports, P. Ritter noted that there is still one library that has not submitted its Report. If it is not submitted by the time that the State budget is passed, this will hold up the state funds for the UHLS and all of the member libraries.

III. SITE VISITS

The Automation Department staff will visit five libraries per month. The staff have started the visits and it seems to be working well, they are letting the libraries drive the agenda of the visit. It will be a couple of months before he can report on any trends that they might notice.

IV. MOVING REPORTS TO THE WEB

J. Thornton wants to move away from using the Intranet for Reports since it requires people to download programs to their PCs in order to use the forms. The advantage of this is that they will be available at any time and will not have an impact on the server performance. Instead, they will be available on the UHLS webpage and will require passwords to use. He demonstrated some of the reports that would be available.

G. Sacco noted that she likes to compare her statistics to some of the other libraries and would like to continue to have that capability. N. Pieri likes to be able to look at the circ stats for all of the libraries for one day in order to identify trends. J. Thornton can produce web reports that will answer these requirements. Discussion regarding the ability to manipulate these reports in an Excel spreadsheet.

G. Sacco complimented J. Thornton on the production of these reports.

V. REQUEST TRACKER

The Automation Services Department is ready to roll-out the Request Tracker software and program. This will provide J. Thornton with the ability to oversee the resolution of any automation problems that are called in, or emailed in, to his staff. Once entered into the program, a ticket is generated with a project number and all emails and information associated with that project are kept online.

In addition to providing a way to track problem-solving, this will eventually help to create a knowledge base to which staff members can refer in order to correct anything that has already been solved once.

Discussion regarding access to the Request Tracker. P. Ritter suggested that J. Thornton operate on the assumption that everybody (in the member libraries) wants to see what everyone else is doing and all of the problems that have been reported. T. Burke suggested that the member libraries have to start getting away from the idea of constantly monitoring UHLS and learn to trust them and let them do what they have been hired to do.

B. Nichols Randall noted that people want to know if the problem that they are encountering is unique or if it is something that is being experienced by other libraries. P. Nonamaker suggested that UHLS should be pro-active about complaints

and should send out an email if there is a general problem affecting the majority of the libraries. J. Thornton noted that there is another system in place, the 411 line, to answer that concern. The Request Tracker is being used to help with the workload in his department so that staff members are not duplicating work. It will allow him to track the situations and make sure that questions are answered and solutions found. He noted that telephone calls may still be made to the Automation Department staff and then the staff will enter the ticket information.

T. Burke suggested that communication skills between the UHLS staff and its customers is important.

J. Thornton explained that the 411 line at UHLS has been established so that library staffs can call in to find out if there is an overall system problem.

G. Sacco asked for a written explanation of the communication tools, as well as a procedures and policies manual. J. Thornton will send out an email explaining the tools available and how they should be used. He proposed something like the following:

- HorizonL - for general discussion purposes.
- Request Tracker - for email and telephone calls regarding non-critical problems
- Telephone calls - to UHLS staff members, for urgent/critical problems

Discussion regarding the use of "uhlanusers" in email. Who should use this and why? J. Thornton proposed that "notifications" should be an agenda item for the next ASC meeting.

MOTION: J. Makowiec moved that J. Thornton implement the Request Tracker interface at his discretion. R. Naylor second. Unanimous.

VI. TELECIRC

UHLS has modified the telecirc program so that if a patron call fails, the system will automatically generate a mailed notice. J. Thornton is putting together a Helpful Hints list for using telecirc and will be encouraging all of the libraries to use this benefit. G. Kirkpatrick reported that Bethlehem is very happy with telecirc. P. Nonamaker reported the same for East Greenbush.

VII. EMAIL NOTICES

J. Thornton reported that the Automation Department is working on eliminating some of the steps required in the Dynix program. He is working on a process whereby the email notices will be generated every night.

Discussion regarding the field in the Borrower Record where the email address should be recorded.

VIII. HORIZON INFORMATION PORTAL (HIP)

A change has been made in the programming so that the HIP will re-start daily at 5:00 AM. There have not been any iPAC crashes since this program change.

IX. ZOOM TEXT (screen magnifier)

Rob Carle will take the software with him and install it when he visits the libraries for training.

X. ReportSmith and Web Reporter

UHLS is on the list to receive the trial versions of Web Reporter when Dynix makes it available. There is a possibility that using the Web Reporter will require a new server.

XI. 411 LINE

A special line has been added at UHLS to notify libraries if there is a general problem with the automation system (437-9880 ext. 411) R. Naylor asked if it would be possible to enter an extension in order to notify someone if the problem is not mentioned on the 411 line? J. Thornton will look into this.

XII. ITEM SPECIFIC REQUESTS

MOTION: N. Pieri moved that Dynix be asked for 8 hours of custom programming in order to accomplish the item specific requests. B. Nichols Randall second. Unanimous.

This programming will come from the 13 days of programming/training that are still available to UHLS and must be used before June 30, 2004.

XIII. SOURCE OF MARC RECORDS

z39.50 provides an insufficient source of records for cataloging. OCLC's Cat Express appears to be the most comprehensive; it costs 93¢ per record. P. Ritter noted that if UHLS purchases OCLC, there would have to be some *quid pro quo* and the libraries should be prepared to do more of their own cataloging. If UHLS is spending more money on a cataloging source, then there won't be money available to hire a full-time cataloger and the libraries will have to do more of their own work.

Discussion regarding the cataloging standards. B. Nichols Randall noted that if the UHLS standard is consistent with the OCLC standard, and doesn't require a lot of extra notes and information, then the catalogers in the member libraries should be able to handle this. She suggested that there should be individual user-names, not library names, in order to help monitor the quality of the cataloging and determine who might be doing inappropriate work.

Discussion regarding other possible changes or trade-offs, including interlibrary loan being done by UHLS versus the GAC libraries.

MOTION: B. Nichols Randall moved to recommend OCLC as the primary source for cataloging. T. Burke second. Unanimous.

XIV. DATABASE STATISTICS

The Automation Department is working on creating a log tracking the use of the online databases, including which libraries are represented by the patrons using the databases.

XV. NETWORK

The network seems to be stable at this time. In the near future, J. Thornton will begin an assessment of the network structure, including the equipment used in the libraries.

XVI. EMAIL LIMITS

The email limits have been increased to 40 megabytes per user. There is one mailbox that is over the limit and mail is bounced back when that address is used. J. Thornton will clear that box after informing the user, Ken Ryder, at the Rensselaer Library.

XVII. SERVER SECURITY

Some holes have been opened in the firewall in order to run the Request Tracker

program and web reports. However, these are not serious concerns and other holes have been plugged. Dynix recommends that the Horizon software should run on its own server but there are, currently, several other lightweight applications running with it. These do not present a problem at this time.

XVIII. ACQUISITIONS & SERIALS

Dynix will conduct on-site training the week of April 26th for these modules. The training will include UHLS Automation staff and selected staff from the libraries (only 8 people per session). Sybase training for the UHLS Automation staff will also be conducted at this time. The training credits (hours) that UHLS purchased from Dynix will expire on June 30th.

B. Nichols Randall noted that the serials records currently in the database might have to be upgraded because they are not complete.

XIX. KIDSPAC

The Youth Services Advisory Council has requested some special programming in KidsPac. The addition of the collections to a drop down box will not impact system functioning and speed. It will require some custom programming and a re-indexing of the database.

MOTION: J. Thornton moved to allow the addition of six collections to the drop-down box in the KidsPac search screen. The programming can be done by UHLS Automation staff. R. Naylor second. Unanimous.

11:20 AM meeting adjourned.

NEXT MEETING: Tuesday, April 27, 2004

Heidi A. Fuge
3/9/04

Automation Services Report March 4, 2004

Annual Reports

It wasn't easy, but the process worked. We should be in a much better position next year, since we won't need to combine DRA and Dynix numbers, the report program has been completed, and the libraries have mapped their many collections to the sixteen used by the report.

Site Visits

We started our site visits. In February we visited APLM, BRLN, GUIL, RCSC, and TROS. In March we're scheduled to visit APLD, BRUN, HOOF, RENS, and TROY. We will give the libraries some advance notice, and the agenda, if any, is entirely up to the libraries.

Moving Reports to the Web

We have all the pieces in place to provide web access to some common reports. At this time we have four reports available at <https://horizon.uhls.lib.ny.us/reports/>. There is no username/password challenge, but we will probably want to implement one to ensure that only UHLS users can access the data. The site uses SSL, so the reports are encrypted and therefore secure.

Request Tracker

We're ready to roll out Request Tracker (RT), a "helpdesk" application on the horizon server, which we hope will allow us to track our support activities and problem resolutions more efficiently. Users will send all requests to rt@horizon.uhls.lib.ny.us, and a ticket will be created automatically in RT and an email sent to the entire Automation Services Department. One of us will claim ownership of the ticket (or it will be assigned by me), and all communication among our staff and the requestor will be recorded in the ticket. This should allow us to keep track of outstanding problems and also to build a knowledge base of resolved issues.

Telecirc

We fixed the problem with Telecirc where it did not always correctly update its log after making a successful call, causing print notices to be generated for patrons who had already been notified by phone. At this time there are three outstanding issues with Telecirc:

1. Phone renewals are using incorrect circ policies. For example, Telecirc allowed a renewal of an overdue magazine for APLM, which is not allowed by APLM's policies. It also renewed the magazine for 28 days instead of APLM's allowed seven days. We reported this apparent bug to Dynix.
2. We need to clarify how the notice options available to the libraries interact. Print, email, and Telecirc can be used exclusively or in some combinations.
3. We will provide a description of how Telecirc works, as well as suggestions for configuration, in order to help libraries (and encourage them) to implement it.

(Thanks to Richard Naylor and Marcia Middleton for their input on this issue)

Email Notices

Email notices are now working as Dynix intended them to, but because there are several steps required to generate the notices, we're looking into writing our own, automated email notification system, similar to our printed overdue notice program.

Horizon Information Portal (HIP)

We continue to experience occasional crashes of HIP. Dynix advised us to stay with Windows rather than switch to Solaris as we had suggested. They are working to fix the problem and offered a workaround, which we began implementing on Saturday 3/6, and which requires the daily restarting of the HIP server. We chose 7:00 AM because the restart takes several minutes and we wanted to interrupt as few users as possible. Also, Joe Thornton is usually in the building shortly after 7:00 M-F and could manually fix problems with the restart, if any.

ZoomText

We've heard from most libraries about the installation of this Magnifier/ScreenReader software. Rob Carle will deliver and install the program when he visits most libraries this spring, and he will also train the library staffs in its use.

ReportSmith & Web Reporter

When we called to order ReportSmith, Dynix informed us of the availability of a new product named "Web Reporter," which is intended to replace ReportSmith for most users, costs about the same, and is reportedly easier to use, install, and maintain. With two exceptions (BETH and BRUN), libraries opted to wait for our evaluation of Web Reporter rather than to proceed with their ReportSmith order.

411

We set up an Automation Services Information Line to report system problems. The number is **437-9880 x411**. A question arose almost immediately: at what point does a problem require an update of the 411 message? The question came up because of our frequent HIP crashes. We usually learn about the problem from a library, so we can't update the message till the problem is already known. And in the case of HIP crashes, we know that the system will be back up five minutes after we learn of the problem. As a general guideline, we decided to use five minutes as the maximum time to allow to resolve a problem without updating the 411 message.

Item Specific Request

At the request of the Database Maintenance Advisory Council, we investigated our options related to the addition of a JavaScript popup window to better explain the operation of the Item Specific Request function when a user chooses that option. Dynix would need to add the JavaScript and they estimate that it would take eight hours of custom programming. We should schedule this as soon as possible, since we still have 13.5 days of programming owed to us by Dynix, but which we must use by 6/30/04.

Source of MARC Records

Rob Carle and Mary Ellen Bena have researched and tested several sources of MARC records, with the goal of replacing our inadequate (by all accounts) Z39.50 cataloging tool. The clear favorite is OCLC, due to the quality of its records, the size of the database, and the efficiency of its tools. The cost is \$0.93 per record and our estimate of titles added each year is around 25,000. To try to minimize the annual cost, we discussed possible workflow adjustments, such as trying other sources first and using OCLC as a last resort, but in the most recent Database Maintenance Advisory Council meeting we agreed unanimously that the added cost in staff time of using multiple tools to add or enhance MARC records would cancel the savings from avoiding OCLC. We recommend that ASC approve the selection of OCLC as the primary source of MARC records.

Database Statistics

We are investigating the use of EasyAsk on the RPA server to provide statistics of online database use. At this time we rely on vendor-supplied statistics, which are not always available, occasionally difficult to configure, and not always reliable.

Network

We (Rawdon and Jonathan) helped TROY, EGRN, and APLM with network changes, including switching to RoadRunner, installing new routers, etc.

Email

We set an email limit of 40MB per user, which should be plenty for everyone for a long time. The limit was originally 20MB, was reset accidentally by an upgrade to 'unlimited,' and now is set to 40MB to avoid disturbing the users who are already using more than 20MB, while also making sure we don't eventually run out of space.

Security

We made some major changes to the Horizon server in order to increase security, and we also opened some ports to allow web and email access from outside (potentially insecure). We shut down many services such as ftp and telnet, the most dangerous

security holes, but opened the web and email ports in order to support web reports and Request Tracker.

Snow Days

To prevent fines from accruing on days when a library has an unscheduled closing, we offered to create "snow day" exceptions in the calendar_exception table. Several libraries took advantage of this offer this winter.

Acquisitions & Serials

We scheduled Dynix on-site training for Acquisitions and Serials the week of April 26. We will invite a few libraries to participate in the training. The invitations will be based on the expected use by the libraries of those modules, as well as their ability and willingness to help others.