

# AUTOMATED SERVICES COMMITTEE

May 25, 2004

## MINUTES

### PRESENT

(Voting): Tim Burke (APLM), Nancy Pieri (BETH), Deb Canzano (COHS), Richard Naylor (COLN), Deborah Shoup (EGRN), Barbara Nichols Randall (GUIL), Jane Minotti (SNLK), Paul Hicok (TROY), Joe Thornton (UHLS), Gail Sacco (VOOR)

(Non-voting): Geoff Kirkpatrick (BETH)

9:05 AM Meeting called to order by Philip Ritter, Chair

### I. MINUTES

Minutes of the April 27, 2004 meeting accepted as presented.

### II. TRANSIT SLIPS

Discussion regarding the slips that can be generated from the Horizon program. The advantage of these slips is that they are more accurate and legible than the handwritten ones. The main issue was the size - some of the libraries are printing them too small and they get lost.

**MOTION:** N. Pieri moved that the Transit Slips should be modeled after the ones being used by Bethlehem which are at least 7 inches long and use a large typeface. J. Minotti seconded. Unanimous.

J. Thornton will ask R. Carle to learn how BETH does their formatting of the slips so that he can assist other libraries in producing them.

### III. RESOURCE SHARING ADVISORY COUNCIL REQUEST

The Council has asked the ASC to re-consider their position on allowing patron records to be modified by anyone other than the home library. The Council did not feel that it was good customer service to refuse to assist a patron in editing their records regarding methods of notification for hold, overdues, etc.

J. Thornton noted that the notification method is on an individual patron record basis. For example, if a library has chosen to not use telecirc for all of their patrons, but a single patron requests it, telecirc can be enabled for that individual patron.

**MOTION:** G. Sacco moved that the method of notification (email, telecirc, print) is part of the patron record and can be edited at any library if the patron requests it. R. Naylor seconded. Unanimous.

Discussion regarding the fact that J. Thornton will custom program a web page that would let patrons sign up online for their preferred method of notification. Their library barcode will be used for authentication.

#### IV. EMAIL NOTICES

J. Thornton noted that these seem to be working properly.

#### V. NOTIFICATION METHODS

J. Thornton noted that if telecirc fails to connect with a patron, the system will then automatically generate a printed notice for the patron.

J. Thornton introduced a matrix for methods of notification to be selected by the patron. He reported that the Resource Sharing Advisory Council recommends that patrons be allowed to select only one method of notification for each type of notice.

**MOTION:** N. Pieri moved that bills for lost materials should always be printed and mailed. R. Naylor seconded. Unanimous. NOTE: this motion removes bills from the matrix.

Discussion regarding the removal of phone as a choice for the patron. It will still be a choice in the library's default profile.

**MOTION:** D. Canzano moved that each library should set up a default profile for notification and then the patrons, through the web interface, can select a single notification method for holds (either telecirc, or email or print) and a single notification method for overdues (either telecirc, or email or print) if they prefer something other than the library's default. N. Pieri seconded. Unanimous.

J. Thornton will send out a chart to the libraries for their default selections. If he doesn't get a response, he will just continue with the methods already in place for that particular library.

#### VI. CATEXPRESS

J. Thornton reported that CatExpress is working well and everyone seems pleased to have access to it. There was a problem with the 690 field but that can be cleaned up.

#### VII. CUSTOM PROGRAMMING

J. Thornton noted that there are several custom programming requests in to Dynix and he doesn't have anything to report on those at this time. The deadline for use of the paid-for custom programming is June 30, 2004. He thinks that requests for programming can be made until that date, the actual programming will be done after June 30<sup>th</sup>.

B. Nichols Randall suggested a program to database maintenance to clean up the database. She thought that Dynix might have such a "canned" program but would consider it custom programming to activate it. She recommended contacting other Dynix customers to see if anyone else had requested such a program.

#### VIII. ACQUISITIONS AND SERIALS

J. Thornton reported that UHLS is moving slowly toward implementation of these modules. There is still some paid-for Dynix training time and he might use it for WebEx training on these modules.

P. Hicok asked if J. Thornton had any idea how many libraries would use these modules? J. Thornton noted that the majority would be more likely to use the serials rather than acquisitions.

G. Sacco needs someone to walk her through a flow chart in order to see how the acquisitions module impacts orders and billing. G. Kirkpatrick noted that the program is so customizable that a flow chart would not be comprehensible.

B. Nichols Randall noted that R. Carle is working with Guilderland to customize the program and that he will be learning it as they go along and will eventually be able to assist other libraries with it.

#### IX. SIP LICENSES

These are licenses that allow a third party application to interact with the UHLS/Horizon database. The individual libraries pay for their own license in order to use SAM or Self-Checkout. The license costs \$1,000. Some of the libraries have to purchase a server on which to load the license.

#### X. TECHNOLOGY ADVISORY COUNCIL

J. Thornton reported on the Council's recent meeting (full explanation in the Report attached to these Minutes)

During the discussion regarding the pop-up emergency notices, N. Pieri noted that she thinks that the UHLANusers designation in email should be reserved for systemwide emergencies only and is troubled that it seems to be used for inconsequential email. J. Thornton noted that UHLS will monitor the use and will make sure that it is used correctly or will remove that designation.

#### XI. REPORTS

J. Thornton will mount a report for "How many reserves per copy"

#### XII. OTHER BUSINESS

P. Ritter noted that at the next meeting (in July) the ASC will have to begin considering the UHLAN contract for the three-year period 2006-2009. He noted that the contracts are moving toward an agreement where the member libraries will eventually cover ½ the cost of the automation system. The contracts will continue to be based on usage.

10:45 AM Meeting adjourned.

NEXT MEETING - Tuesday, July 27<sup>th</sup> at 9:00 AM. JUNE MEETING CANCELED.

Heidi A. Fuge  
5/25/04

## Automation Services Report May 20, 2004

### Email Notices

We started sending email hold and overdue notices in May. We send a hold notice the day after the requested item is checked in. All holds for a borrower are included in one email. Requested items are listed beneath the pickup location's name, address, and phone number, and we include a link to that library's 'Hours' page.

Overdue notices are sent two days after and two weeks after an item is due. All overdue items for a borrower are included in one email. The items are listed beneath the owning library's name, address, and phone number, and we include a link to the 'My Account' page so the borrower can go there directly to try to renew items.

We discovered that borrowers were receiving printed notices even if they had selected Email as their preferred notification method. The 'print' scripts were not checking the setting of the 'Notice By:' field. This has been corrected, and email recipients no longer receive printed notices for holds or overdues.

We also noticed that borrowers who had a Phone Type of 't' (TeleCirc) were receiving TeleCirc calls in addition to email notices. The TeleCirc scripts also ignore the 'Notice By:' field and look only at 'Phone Type.' This raises the following issue:

### Notification Methods

We have the ability to send notices by multiple methods (TeleCirc, email, etc.). Do we want to? The Resource Sharing Advisory Council discussed this question and recommends that borrowers be notified by one method only for each type of notice.

	Holds	Overdue s	Bills
TeleCirc			
Email			
Print			
Phone			

For example, a single borrower could receive hold notices by TeleCirc, overdue notices by Email, and bills by printed notice, but could not receive both Email and TeleCirc notices for holds.

We plan to send this matrix to the libraries to solicit their preferences after ASC discusses the Resource Sharing recommendation.

## CatExpress

We started to use OCLC's CatExpress cataloging tool on May 1. Nylink gave a demonstration of CatExpress at UHLS on May 11. To date we've cataloged over 2,200 records on CatExpress. Phil chose to pay for CatExpress up front rather than in monthly installments, and that choice earned us a month of free cataloging. This applies only to the first year of our subscription, and May is our free month. At \$0.93 a record, we've saved over \$2,000 in cataloging costs so far. Everyone is encouraged to catalog as much as possible before June 1. We've had a few occurrences of unexpected results from CatExpress, and we're working to identify and rectify the cause, but overall people seem to be very satisfied with the tool and with the quality of the MARC records.

## Custom Programming

We're still waiting for Dynix to complete the custom programming that we requested for "Item Specific Request," "Request First Available Copy," and KidsHIP.

Related to email notices, two libraries have requested that the block notice that's displayed when a requested item is checked in be changed to include the "Notice By" setting. These libraries bypass the Horizon notices and make personal phone calls to anyone who would otherwise receive a printed notice. They would skip the phone call for anyone receiving email. This would have to be done through custom programming by Dynix.

## Acquisitions & Serials

Dynix came to UHLS for Acquisitions and Serials training April 28 – 30. Staff from APLM, BETH, EGRN, GUIL, TROY, UHLS, and VOOR attended. GUIL seems to be the most interested in using the Acquisitions module soon, and Rob Carle is working with them and Dynix to get things started.

## SIP Licenses

Dynix installed one SIP license on our HIP server for use by APLM's SAM server to authenticate users against the Horizon patron database. The SAM system is not yet operational.

We had planned to use the same license for GUIL's 3M SelfCheck system, but will not be able to because of the different circulation parameters of APLM and GUIL. We've asked Dynix to install the GUIL SIP license on a Windows 2003 server at GUIL, and we'll open a port in our firewall to accommodate it.

## Technology Advisory Council

We had a meeting of the Technology Advisory Council, which Rawdon heads, and whose membership consists mainly of the "techie" from the libraries. Two projects that were discussed in that meeting, and that involve, or will involve, Automation Services, are Rawdon's emergency broadcast system and John Love's (BETH) new book list. Rawdon's project would cause Windows popup messages to appear on specific workstations in the libraries when UHLS has an urgent message to deliver, such as a request to logoff immediately for emergency system maintenance. John Love's new book list (<http://www.uhls.org/bethlehem/riv.asp>) is a really attractive and useful set of pages that we would like

to adapt for use by all interested libraries. It's not trivial to create, however, so we're exploring ways of simplifying its creation and distribution.

### **Trial Databases**

We cleaned up the "Trial Databases" page on the intranet, and have arranged with three vendors for trial subscriptions. At this time just one, "**Delmar eCourses,**" is available.

### **Reports**

We added new reports to the web Reports page (<https://horizon.uhls.lib.ny.us/reports/>). Among them are "Claims Returned," which lists all of a library's borrowers who have claimed that they returned an item, and "Loans per Borrower," which shows, in descending order of outstanding loans, all borrowers who have at least ten items out.

### **Timeout problems**

We're experiencing a problem with Circulation workstations that are idle for a while (about an hour). When trying to perform a new function, they display a SQL error and must be restarted. We've reported the problem to Dynix, but it appears to be a non-Horizon issue.