

AUTOMATED SERVICES COMMITTEE

November 16, 2004

MINUTES

PRESENT

(Voting): Tim Burke (APLM), Nancy Pieri (BETH), Joe Makowiec (BRUN), Richard Naylor (COLN), D. Hobert (EGRN), Barbara Nichols Randall (GUIL), Jane Minotti (SNLK), Joe Thornton (UHLS), Gail Sacco (VOOR)

(Non-voting): Marcia Middleton (APLM)

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

I. MINUTES

P. Ritter noted that the date on the Minutes was incorrect and should say September "28." Minutes of the September 28, 2004 meeting accepted as corrected.

***NOTE: for a more complete description of the following items,
see the Automation Services Report beginning on page 4.***

II. UPGRADE

J. Thornton reported that the Horizon upgrade on October 28th went relatively well. He noted that there will be a MAJOR upgrade to Horizon 8 in approximately one year from now.

III. LOCAL REQUEST

J. Thornton is looking through the Dynix RFP and contract to see what was promised for a "Local Request" function. Consensus that even if nothing was promised, this type of feature is very desirable and should be developed.

IV. SYSTEM SLOWNESS

J. Thornton reported that the cause of the system slowness is still being investigated. The cpu usage averages about 50% - 70% which is high, and has periodically peaked at 100%.

V. NEW ITEMS LIST

The list is now available as a tab on the HIP.

VI. REPORTS SUBCOMMITTEE

The Subcommittee is discouraging people from using the ad hoc reports until they can determine from where the data is being drawn.

VII. KIDSEARCH

M. Middleton asked if a link could be added from the KidSearch page back to the Adult

screen in the HIP. J. Thornton said "yes."

VIII. SECURITY SUBCOMMITTEE

The Committee has recently started meeting again. At this point they are mainly dealing with Horizon permissions.

IX. RESOURCE SHARING ADVISORY COUNCIL

Discussion regarding the recommendations from the Resource Sharing Advisory Council. The Council felt that the pop-up message on the "Request First Available Copy" button was too confusing and was causing too many problems.

MOTION: B. Randall moved to eliminate the pop-up message that explains the "Request First Available Copy" button on the HIP. T. Burke seconded. Unanimous.

The Council recommended that the "Request Cannot be Filled" notices, which were not used by any libraries represented at the Council meeting, were not necessary and should be discontinued. Discussion. R. Naylor suggested that this needed further investigation to determine if these notices are used by any of the member libraries. Can this feature be available to just a few libraries or is it an "all or nothing" feature?

G. Sacco asked if there was a chart showing the Horizon features that were available for individual library selection? J. Thornton said this did not exist. It might be possible to begin such a chart (including the names of the libraries who selected each feature) from this time forward. He would consider whether it was worth the workload in keeping it updated.

X. CATALOGING

J. Thornton reported on the SELCO "zcf" file to help in downloading easily available item records. This will help to keep down the cost of the CatExpress cataloging.

XI. LOST IN TRANSIT

J. Thornton reported that he ran a list of items that have been "in transit" for an extended period. The list is available, by library, on the Intranet at:

<http://horizon.uhls.lib.ny.us/reports/lit>

Consensus to encourage all of the libraries to print out their list and do a shelf-check against the list. This should be finished by the beginning of the new year. Then, another list will be run and those libraries who took the time to check their first list, will be asked to assist in checking for the remaining "in transit" items.

XII. VIRUSES

B. Nichols Randall suggested that emails regarding serious situations such as the viruses should be addressed to UHLANusers.

M. Middleton suggested that we consider establishing certain guidelines for emails, such as sending an email alerting the recipient that the following email will contain an attachment or a link.

XIII. CALENDARS

J. Thornton demonstrated the new web interface for updating the libraries' calendars in Horizon. When the libraries make their calendar changes, the change is made immediately in Horizon. Discussion regarding making this interface password protected.

XIV. OTHER BUSINESS

G. Sacco requested an update on the Serials and Acquisitions modules. B. Nichols Randall reported that Guilderland is still testing the Acquisitions module and it should be available for general use after the beginning of the year. Discussion regarding the need for a workshop, possibly held at Guilderland, devoted to introducing and training on the Acquisitions module. The workshop would be announced to the Directors but would be open to any staff member wishing to attend.

The Serials module is being tested at Voorheesville. Rob Carle has finished the prediction patterns for 95% of the serials. A workshop will also be scheduled for introducing and training on the Serials module. It will be announced to the Directors but will be open to any other staff members.

G. Sacco was concerned about the quality of the database and wants more oversight of the cataloging standards. J. Thornton assured her that the problems she was seeing on the screen were leftover serial cataloging problems - not related to the new Serials module. UHLS is working hard at database clean-up.

J. Makowiec asked if the ASC should be considering a new vendor since the contract with Dynix expires in one year. Consensus to continue with the current system.

M. Middleton thanked J. Thornton and the Automation staff for making the October upgrade as painless as possible. <applause>

10:35 AM meeting adjourned.

NEXT ASC MEETING: Tuesday, December 14th at 9:00 AM

Automation Services Report November 11, 2004

Upgrade

On October 28th we upgraded Horizon and the HIP to Horizon 7.3.2 and HIP 3.04, respectively. A short summary of the experience is attached.

Local Request

At the Directors meeting on November 5, the attendees affirmed the importance of "Local Request," which was a very useful feature of DRA and promised, but not delivered, by Dynix. UHLS will press Dynix either to add this functionality to their system or to help us to reconfigure our system to simulate DRA's "local request" with the tools already available to us in Horizon.

System slowness

Since the upgrade we've experienced occasional periods of 100% CPU usage on the Horizon server, evidently caused by Horizon activity that we have not yet identified. Dynix specialists in Sybase and HIP monitored the system during a slow period and were not able to trace the slowness to its source. They suspect that the problem may be due to "browse scoping" in the HIP, which allows patrons to search just the collection of a selected library. However, that function has been in use for years, is an essential part of our system, and is not clearly the cause of the problem. We continue to investigate.

New items lists

On the Search tab of the HIP, we added a link to the "New Items" page (<https://horizon.uhls.lib.ny.us/reports/newbooks/>). We also changed the default period for an item to be considered "new" to fourteen days. Also, each library can select whatever time period it wants for its "new items" list.

Reports

The Reports Subcommittee met on November 9. Among the topics we discussed:

- Horizon Adhoc Stat Reports. We don't know precisely what they count. They take forever to run (many hours for some). The results don't agree with the numbers we compile ourselves. The consensus of the subcommittee is to ignore these reports entirely.
- Intranet reports. Many of these will need to be run by UHLS and placed on the intranet for libraries to view, as they are now. Some might be candidates for moving to the web reports page (<https://horizon.uhls.lib.ny.us/reports/>) so they can be run interactively whenever a library wants.

- All reports should be available as HTML documents or as text files suitable to be imported into Excel.
- The reports that are on the FTP server, and which librarians download and run on their PCs, should be moved to the web reports page.
- We will compile a list of all available reports and describe what they do, and try to determine the cause of any discrepancies in reported statistics.

KidSearch

We made KidSearch available on October 15. Mary Fellows announced its availability and sent the URL to the libraries, but we did not put a link to KidSearch on our existing web pages, per the instructions of ASC. Libraries can choose whether or not to use the interface at their sites.

Rensselaer

Jo-Ann Benedetti and the Automation Services staff are encouraging, equipping (with a generous donation from CDLC), and training Rensselaer to participate more actively in our automated system.

Security Subcommittee

The Security Subcommittee met on October 19th for the first time in more than a year. Much time was spent getting back up to speed, reviewing previous discussions and plans. We discussed profiles, templates, user accounts, documentation, recommendations to ASC, enforcement, and training. There is a lot of work to do and we will meet monthly to do it.

Recommendations from Resource Sharing Advisory Council

1. The "Request First Available Copy" popup message is causing more problems than it's solving. Patrons are still confused, often choosing the wrong option when making a request. The council recommends eliminating the popup message for "Request First Available Copy." The other popup, for "Item Specific Request" is useful and should stay as it is.
2. "Request Cannot be Filled" notices are not used by any of the libraries that are represented on the Resource Sharing Advisory Council, and we recommend that UHLS no longer print and send them to the libraries.

Cataloging

In five months of paid use, we've downloaded 13,044 bibliographic from CatExpress. Our estimate was 25,000 records a year.

We created a new SELCO "zcf" file for libraries to download from the UHLS FTP site. This will enable libraries to use the Horizon Z39.50 tool to download records (especially for paperbacks) from SELCO, thereby saving precious CatExpress dollars.

Lost in Transit

We ran a script to identify items that have been "in transit" for more than 28 days. The report lists 5,911 such items, and we broke the report into HTML and Excel-ready documents for each library (each library can see their own items regardless of where they were last or where they were headed when they were lost).

Viruses

We continue to fight the flood of email viruses that seems to be increasing. On November 3rd Jonathan reported: "... since April, the mail server has been catching an average of 68 virus laden messages a day. Yesterday, November 2, it caught 382."

REPORT ON THE HORIZON UPGRADE

The upgrade went relatively well. After several attempts at perfecting a seamless, transparent upgrade using two test servers, we faced reality and did a straight upgrade to both Horizon and the HIP. The original plan was to upgrade the test servers and let the libraries use them while we upgraded the production servers during normal business hours on 10/28. Complications arose when we learned we'd have trouble quickly applying our HIP customizations to the production server on the 28th, and that re-synching the test and production servers after the upgrade, to accommodate circulation transactions that day, would be a problem. So we decided just to upgrade the production servers, starting very early in the day.

Rawdon started the upgrades at 1:00 AM on Thursday 10/28 and they were finished by 5:00 AM. However, all HIP searches generated an XSL error until Peter investigated at 6:30 AM and found that the upgraded HIP used the default port of 4444 instead of 4445, our local customization to address a security issue. At 8:00 (6:00 MDT) we had a scheduled call to our Dynix upgrade specialist, who was pleased to learn that we had done the upgrades ourselves, but wanted to login and check things out before declaring it finished. By 9:00 we were satisfied that the upgrade was a success and notified the libraries that they could start working.

When some libraries (starting with VOOR) reported that they were unable to place requests through the stafpac, we contacted Dynix immediately. They located the problem pretty quickly, but the restart of services that was required caused the HIP to be unavailable for

more than twenty minutes, at around 11:00 AM.

Due to the last minute change of plans described above we omitted the transfer of some HIP customizations, which caused some temporary, minor problems such as incorrect colors in KidSearch, and broken links in the "Change Notification Method" function of the "Profile" section of "My Account." Because Rawdon had carefully backed up everything (in multiple places), we quickly located and restored the missing pieces.

There are still one or two very minor changes that need to be made, which should be completed by tomorrow (11/3).

The libraries were very patient and cooperative, and I think generally satisfied with the process and result.