

AUTOMATED SERVICES COMMITTEE
January 25, 2005
MINUTES

PRESENT

(Voting): Tim Burke (APLM), Nancy Pieri (BETH), Deb Canzano (COHS), Richard Naylor (COLN), Deb Shoup (EGRN), Lisa Pitkin (GUIL), Judy Felsten (RCSC), Jane Minotti (SNLK), Paul Hicok (TROY), Joe Thornton (UHLS), Lorraine Smi (VOOR)

(Non-voting): Geoff Kirkpatrick, Marcia Middleton

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

I. MINUTES

Minutes of the December 14, 2004 meeting accepted as presented.

II. ACQUISITIONS

J. Thornton reviewed the acquisitions emails included in his Report. He thanked L. Pitkin and GUIL for testing the software and working through the bugs. They have discovered a problem with the software that won't be corrected until the next major Horizon upgrade in 2006.

L. Pitkin gave an overview of the acquisitions module and its features. The module includes the ability to use a computer protocol to communicate with the online ordering computer at a book vendor. The module also has the capability of taking full MARC records from the vendor and importing them into Horizon; eventually it will have the capability of interfacing with accounting software. The module encumbers funds when the orders are placed and then moves the funds to the spent column when the order is received. The problem that GUIL is encountering is that when the order is received, the feature that allows for automatic notation of spent funds isn't working. Also, there is a problem when the pricing is at a discount. L. Pitkin noted that Horizon was promising features in this module that are not actually available.

III. PICKUP LOCATIONS

J. Thornton noted that following the recent Horizon upgrade, the pickup locations in the Horizon Information Portal now default to a patron's home library. If they want to pick up an item at a different location, they must select that location from a drop-down menu. Consensus to keep the default at the home library.

IV. PC SUPPORT

Discussion regarding UHLS' role in PC support in the member libraries. Consensus that UHLS is not responsible for the equipment in the member libraries but does provide as much support and assistance as possible in an advisory capacity. The responsibility for the hardware and operating systems rests with the owners (i.e. the member libraries).

P. Ritter asked J. Thornton to produce a policy statement regarding this for discussion at the next ASC meeting.

V. WIRELESS ACCESS

J. Thornton reported that wireless users who have been given access via a member library, can potentially cause some security problems with the system. This applies only to those wireless users working through a library that is directly connected to UHLS (i.e. T-1 line) NOT libraries using DSL or RoadRunner. Rawdon is working with the directly-connected libraries on a way to control this access and protect the system.

VI. COURIER

J. Thornton reported that the change to a new courier company has required the Automation Department to make some changes:

- they are working on designing a suitcase with appropriate padding for moving CPUs back and forth from UHLS to the member libraries
- it now takes an extra day for the notices to be delivered to the libraries. J. Thornton will poll the members to see if they want to add time to on-hold items because of the delay in receiving and sending the notices.

VII. EMAIL

The problems with the bouncing email seem to be corrected.

Discussion regarding the quantity of spam that everyone is receiving. J. Thornton prefers to use client-based spam filtering rather than on the server. There is an Outlook plug-in that is free and can be trained to recognize and remove spam emails. J. Thornton will send out an email with recommended spam filters.

M. Middleton suggested that UHLS put some information on the Intranet with some basic instructions on avoiding spam, i.e. a spam tutorial to which the libraries could direct their staff.

VIII. CIRC POP-UPS

Dynix completed a custom programming request regarding circ pop-ups when a requested item is checked in. Rob Carle sent out an email to the libraries explaining how to implement the new procedures.

IX. KIDSEARCH

Dynix has finally completed a very long-term programming request. It should be installed and usable very soon.

X. DATABASE CLEAN-UP

Barbara Nichols Randall and J. Thornton are working on strategies for the clean-up.

As part of this process, the Database Maintenance Advisory Council has recommended that catalogers should always overlay an existing record with an imported Baker and Taylor record. This should greatly reduce the number of duplicate records. Baker and Taylor generally takes their records from OCLC.

P. Ritter asked who will make the decision to re-import the original record if it is better than that taken from the vendor? G. Kirkpatrick noted that eventually a cataloger in one of the larger libraries will probably see that record and will import an OCLC record if it is better.

Determining "better" is one of the jobs of the Database Maintenance Advisory Council - they are developing the guidelines for cataloging.

XI. CIRCULATION POLICY

Discussion regarding the fact that the cards for all library patrons who were in the database when it moved from DRA to Horizon will expire since they were set for three years. N. Pieri noted that the 3-year expiration date was an attempt to keep the patron database clean. Discussion - it will be a real problem in the libraries if everyone's card expires on the same day, could cause a real back-up at the circulation desk.

MOTION: J. Makowiec moved to run a one-time annual program to change the expiration date to three years from the last time that a library card was used. R. Naylor seconded. Unanimous.

MOTION: N. Pieri moved that after inactivity for three years, a patron record should be labeled as expired and not be counted in the number of registered borrowers but still be retained in the database. (The rationale for retaining it in the database is that it could be easily retrieved should that patron wish to become active again). D. Canzano seconded. Unanimous.

Discussion about what to do about the pop-up screen when a patron card is expired? There is a button on the screen to renew the record after asking patron verification.

J. Thornton will get numbers on the expired patrons and the discussion on expired records versus purged records will continue.

XII. OTHER BUSINESS

J. Thornton will be sending out an email with a summary of the types of reports now available on the system. The Reports Subcommittee needs another library member - D. Shoup volunteered to work on the subcommittee.

D. Canzano expressed dissatisfaction with the reports in relation to the type of information needed for the State Annual Report. She noted that Dynix was supposed to have created a report that would fit the categories in the Annual Report. Discussion. P. Ritter noted that this was a verbal agreement and agreed that Dynix has not done what they promised.

10:30 meeting adjourned.

Heidi A. Fuge
1/26/05

Automation Services Report January 21, 2005

Acquisitions

Attached is an email exchange that details some of the issues.

Cataloging

A Cataloging Training Workshop will be held at UHLS on January 26th, 2005 at 9:00am. The purpose of the training will be to provide basic instructions for the following procedures:

- Linking item records to bibliographic records in the Horizon database
- Searching CatExpress for bibliographic records
- Editing the MARC record after bringing the record from CatExpress

Please bring to the workshop your library's copy of the Upper Hudson Library System Cataloging Standards Manual. If more manuals are needed, please let Rob know by January 14th. In case of cancellation, a snow date will be scheduled for February 2nd.

Pickup locations

After the last Horizon and HIP upgrades, patrons who request items through the HIP see their home libraries as the default pickup locations. Before the upgrade they were forced to choose a pickup location. A result of this change has been that some patrons have requested that we change their default pickup locations to someplace more convenient for them, regardless of where they originally registered. Should we let them?

PC support

A question from Cohoes (the city's computer support person):

Is the UHLS now providing no charge computer consulting, support, maintenance and configuration for the Libraries? I have been informed by a few that this is the case and want to make sure I understand your services.

I guess I always assumed that we do provide this service. I told him yes.

Wireless

The Technology Advisory Council discussed wireless access in the libraries. It's essential that we keep laptop users (patrons) isolated from our servers and staff machines. Rawdon is working with BETH and GUIL to install access control lists on the routers that would serve this purpose.

Courier

The switch to the new courier created two new issues for us:

1. Moving PC's back and forth between UHLS and the libraries will take a little longer than in the past. And we need a stronger container to hold them as they move. We'll experiment with a suitcase and foam padding.
2. The printed hold and overdue notices now take an extra day to reach the libraries. Question: do we want to increase by one the number of days that requested items stay on hold shelves?

Email problems

We had a DNS problem that caused some emails to bounce. The problem was with an AT&T DNS server and has been resolved.

Like everyone else, we're receiving a lot of spam. We have a server-based spam filter that Jonathan has experimented with, but I asked him to disable it, since it's inevitable that it will stop some legitimate email. We will recommend spam-fighting tools and techniques.

Circ popups

Dynix completed one of our custom programming requests, and popup messages on circulation workstations now display the following when a requested item is checked in:

- If the requestor gets Email, the message says, " The requestor will be notified by Email."
- If the requestor gets Telecirc calls, the message says, " The requestor will be notified by Telecirc."
- Otherwise, the message says, " The requestor will be notified by mail."

KidSearch

Simultaneously, Dynix and Peter Kowalski produced separate solutions to the KidSearch interface problem, where adult material was shown as well as kids'. Peter decided that the Dynix solution was closer to what the Youth Services department had requested, and advised us to go with that. It is not yet installed.

CatExpress update

For the first seven months that we've used CatExpress, our total number of records downloaded is 16,727. If the current rate continues we'll end the year (5/31/05) at 28,675.

Database cleanup

Barbara Nichols Randall and I met to plan some reports, strategies, and questions for other Dynix users, all aimed at helping us to clean up our database.

The Database Maintenance Advisory Council continues to explore ways to fine tune the import procedures to minimize the duplication of bibliographic records by our use of the Acquisitions module. We decided that we will now always overlay an existing bib record with an imported MARC record from Baker & Taylor or other vendors, since the benefit we get from eliminating duplicates outweighs the disadvantages of potentially replacing a great record with a good one.

Circulation policy change

A lot of libraries reported getting prompted to verify patrons' addresses when they checked something out. The choices we had made at migration were:

1. if a patron's expiration date < today's date, then prompt to verify address, OR
2. if a patron's "last update date" + **btype_value** < today's date, then prompt to verify address.

The **btype_value** in #2 was set to 730 days, which is why the prompts appeared. We raised it to 32767 days, which means the criterion in #2 will generate prompts ninety years from now. Note, though, that most of our patron records will expire in one year, at which time #1 takes effect, and the prompts reappear.

Monthly reports

Rawdon found a way to combine the branches for APL* and TRO* in seven out of eight monthly reports. The 3-column report has yet to be modified.