

**AUTOMATED SERVICES COMMITTEE**  
**February 22, 2005**  
**MINUTES**

**PRESENT**

(Voting): Tim Burke (APLM), Nancy Pieri (BETH), Richard Naylor (COLN), Lisa Pitkin (GUIL), Paul Hicok (TROY), Joe Thornton (UHLS), Gail Sacco (VOOR)

(Non-voting): Marcia Middleton (APLM), Carol Reppard (TROY)

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

**I. MINUTES**

Minutes of the January 25, 2005 meeting accepted as presented.

**II. PC SUPPORT and DEPLOYMENT**

Discussion regarding the level of support that the UHLS Automation Department can provide to the various libraries. J. Thornton noted that he can't recommend a formal policy because UHLS cannot provide the same level of support for the large libraries that is provided for the small libraries. He pointed out that UHLS requests that any computers purchased by the small libraries should come here first so that the Automation Department can ensure that they meet the UHLS guidelines and have the appropriate security software; it is in everyone's interest to do this to protect against viruses. J. Thornton is working on a list of all of the software that should be on all of the computers within the UHLAN system.

G. Sacco suggested that UHLS should consider charging a token fee for the support that UHLS provides to the libraries - this would encourage the smaller libraries to put a computer support line in their budget and then if UHLS experiences further limitations on funds and can no longer provide the current level of support, the libraries will be prepared to take on some of it themselves.

J. Thornton explained that this discussion followed on the question from the City of Cohoes regarding the computer equipment in the Cohoes Library. He informed them that the City is responsible for the equipment; UHLS will provide support when it can but accepts no responsibility for any of the equipment.

Discussion regarding the statements in the UHLAN contract regarding the individual libraries' responsibilities for their own hardware and software. M. Middleton disagreed with charging a fee and noted that the Automation Department should be allowed to set its own priorities, and it should be made clear to the libraries that they are responsible for maintaining their own equipment and that UHLS simply provides assistance and support as it can. P. Ritter noted that the libraries have to understand that due to priorities, sometimes UHLS may say "no" to a technical support request.

**MOTION:** P. Hicok moved that the UHLS Automation Department should continue with the current policy of doing as much as can be done for any of the member libraries who request assistance, within the limits of the UHLS resources. T. Burke seconded. Unanimous.

### III. ASC APPROVAL

Discussion regarding what types of actions require ASC approval. G. Sacco suggested that if something is a procedural change it does not need to come before the ASC, however a policy change should be brought to the Committee. R. Naylor suggested that if it is a change that one library has requested but it affects other libraries and their workflow, it should be brought to the ASC prior to the change being made.

**MOTION:** J. Thornton moved that any change to the automation system that involves a System-wide change in workflow and/or policies and procedures should come before the ASC for approval. R. Naylor seconded. Unanimous.

R. Naylor suggested that this motion should be appended to the ASC By-Laws.

Discussion on the implemented new block to the Circulation module regarding the "Lost Claims Returned" and how the fee should be collected from the patron and sent on to the library that owns the item.

**MOTION:** P. Hicok moved that the new "Lost Claims Returned" block to the Circulation module is acceptable. N. Pieri seconded. Unanimous.

### IV. RESOURCE SHARING RECOMMENDATIONS

N. Pieri noted that the role of the ASC and the Advisory Councils is for the Councils to bring issues back to the ASC for decisions. J. Thornton pointed out that this will frequently delay actions that the Councils want until the next ASC meeting. Consensus that this kind of delay is acceptable.

**MOTION:** P. Hicok moved approval of all five recommendations from the Resource Sharing Advisory Council (see page 5). T. Burke seconded. Unanimous.

### V. SPAM

J. Thornton explained that the only spam filtering conducted by UHLS is a low-level filtering conducted at the server; this only stops messages that UHLS is certain are obviously spam. He also noted that he will be improving the Spam filtering information on the Intranet.

P. Ritter noted that he installed the SpamBayes on his computer and it is very fast and very good. It is highly recommended for Outlook users.

### VI. SYSTEM SLOWNESS

J. Thornton reported that UHLS and Dynix are still unable to find the cause of the periodic system slowness. They are continuing to work on it. It is a Sybase problem, not a hacker-type problem.

### VII. DATABASES

J. Thornton reported that UHLS is working on smoothing out the process for access to the online databases.

### VIII. REPORTS

G. Sacco asked for a Report comparing the circulation trends among the libraries on a daily

basis. This way she can see if daily substantial increases or decreases in their circulation are reflected in the other libraries. J. Thornton will bring this request to the Reports Subcommittee. He noted that all of the reports have been removed from the ftp site and are now web-accessible.

G. Sacco recommended that there should be an  Information box that people could click on and it would explain what each of the Reports covers.

#### **IX. TERMINAL SERVICES**

J. Thornton reported on the planned test of Windows Terminal Services. There are hardware implications for UHLS with this technology. Horizon 8.0, due out in the Fall of 2005, will require a different server configuration at UHLS, and it will probably provide the same performance improvements that we hope to see with Terminal Services in the meantime.

#### **X. BIB RECORDS WITH NO ITEMS ATTACHED**

J. Thornton asked for ASC approval to delete 26,000 bibliographic records with no items attached. No records which have been added in the last 30 days will be deleted.

**MOTION:** R. Naylor moved to delete the bib records with no items attached. P. Hicok seconded. Unanimous.

#### **XI. BAD COLLECTION CODES**

J. Thornton asked for ASC approval to automatically send an email to any library that owns, and tries to use, a collection code that does not map into the sixteen categories created for the State Annual Reports. He will send another email to the Resource Sharing and Database Maintenance Advisory Council members explaining the procedures for adding a new collection code.

**MOTION:** G. Sacco moved approval of the automatic email regarding the bad collection codes. R. Naylor seconded. Unanimous.

#### **XII. CatEXPRESS UPDATE**

It is estimated that by the end of the contract year for the CatExpress (5/31/05), UHLS libraries will have downloaded around 27,400 records. This is in the ballpark of the estimate.

#### **XIII. OTHER BUSINESS**

Discussion regarding ways to notify all of the necessary people involved in decisions made at the ASC meeting. P. Ritter noted that it is the responsibility of staff members in the libraries to read the Minutes of the ASC meetings. J. Thornton noted that he sends out emails to various staff groups regarding decisions they need to know. N. Pieri reported that she holds meetings with her staff members who need to know about certain decisions.

**NEXT MEETING: March 22<sup>nd</sup> at 9:00 AM**

Heidi A. Fuge  
2/23/05

## **Automation Services Report February 22, 2005**

### **PC Support**

Our role: We're finding it difficult to formalize our responsibility for desktop computing support at the libraries. We make every effort to support all hardware and software at all libraries if we're asked. We do not have a maintenance schedule or lists of supported systems or eligible problems. However, this policy is viable only as long as it's informal and our resources are not overtaxed. A small library with no technical staff should feel free to ask us to install and/or troubleshoot any device or software application, but we can't offer the same services to large libraries because we don't have the resources to provide them. The primary areas of support are:

- Desktop applications
- Operating systems
- All hardware, including peripherals
- Networks
- System re-builds -- hardware, software and operating system
- Anti-virus and spyware/mailware assistance

For large libraries we spend a lot of time and do as much as we can to help with projects that may not apply to small libraries, such as server configuration and router installation and maintenance.

So our policy is to do as much as we can for anyone who asks, within the limits of our resources.

### **PC Deployment**

This is related to the previous topic. We request that prior to the deployment of new PC's, small libraries send them to UHLS so that we can prepare them with a set of troubleshooting and protective applications in order to reduce future system problems and correct them if they occur. Our installation would include Windows updates and anti-virus, anti-spyware, and remote-support applications.

### **ASC Approval**

When is it and when is it not required to get ASC approval before making changes to the system? For example, the Resource Sharing Advisory Council recently recommended, and the Automation Services Department implemented, the addition of a block to the Circulation module. From the email to Resource Sharing that described the new block:

The block can be selected from the Add Fee code lookup box under the pull-down menu 'blocks'.

[The requester] defines this block:

"Lost Claims Returned is for an item we searched for 60 days and did not

find. We bill the patron for that item. It is like a lost item payment. The owning library should get the money for it. Example: If a BETH patron

is at Bethlehem Library going to check out a book and LCR is on their block screen for an East Greenbush item and the patron decides to pay it. BETH should do it as a lost payment and send the money to EGRN because they are the owning library. Basically a Lost Claims Returned is considered to us as a lost item."

If anyone objects to the new block, please give us a call and it will be removed and will then become a topic for discussion at the next Resource Sharing meeting.

### **Recommendations of Resource Sharing Advisory Council**

-*Size of Comment Fields*: enlarge all comment fields that are enlargeable, especially in the “Edit Current Block” windows.

-*Check for Existing Patrons Records When Creating a New One*: submit an enhancement request to Dynix to check the birth dates and names (or whatever information that would suffice) of “new” patrons, when creating records for them, against the database to help reduce the number of patron records per person.

- *Circ History Display*: include patrons’ phone numbers on the Item Detail Status screen and remove Btype if necessary to make room.

-*Request Confirmation Display*: move the “Select a location...” option line up one, so it’s clearer to patrons that they have to pick a location if they don’t want the default (their home library). Reduce the size of, or eliminate, the “Comment” text area.

-*Increase the ‘request period’ for all Btypes*: To accommodate pre-publication requests for very popular items such as the Harry Potter books, we recommend that the request period be extended from 180 days to a full year, so requests don’t expire before the books are even published.

### **Spam**

We are rewriting the Email page on the intranet with updated information on recommended email clients and anti-spam tools. Our general policy is to block at the server only the most offensive messages, and to monitor those to ensure that no legitimate email is stopped. For the spam that gets through, we strongly recommend the use of Microsoft Outlook with the SpamBayes plugin, or the Thunderbird email client, which comes with an integrated Bayesian spam filter.

Unfortunately, in our efforts to fine-tune spam-filtering at the server, we inadvertently enabled a function that created a server-based Spam folder for all users, and routed suspected spam there without notifying the intended recipients (i.e. you). Some important emails were not seen and for this we apologize. The configuration has been corrected.

### **System slowness**

We continue to experience sporadic slowness on the Horizon server, the effect of which is very long login times, and very slow performance of all staffpac functions. We are working closely with Dynix to solve this problem. We have database, operating system, and Horizon experts working on it but as yet have not been able to locate the cause. Please continue to report slowness as soon as you experience it.

### **Databases**

We’ve started to work with Jo-Ann Benedetti and Polly Farrington to simplify and otherwise improve access to our online subscription databases. For instance, the individual EBSCO databases are not visible to patrons until they’ve connected to the EBSCO site, and access to some databases requires multiple logins in our current configuration.

## **Calendar**

We added a link on the web reports page (<https://horizon.uhls.lib.ny.us/reports/>) that enables intranet users to view the monthly meeting schedules for the UHLS meeting rooms.

## **New Items**

We rewrote the “Newitems” script so that it uses Collection Codes instead of Itypes to group the libraries’ items. We also added Call Number to the display.

## **Reports**

We transferred the reports that had been on the UHLS ftp site to the web reports page, and added a few more. Among them: Request Reorder (All), Request Reorder (Excluding Videos), Request Reorder (Just Videos), Collection Cleanup.

## **Terminal Services**

We’ve started to plan a test of Windows Terminal Services as a possible solution to network bottlenecks and Horizon server slowness. The technology involves a server running the Horizon application at a central site (UHLS) and thin clients at remote sites that do little processing while maintaining the same look and functionality of full Windows clients.

## **Library Security**

We worked with EGRN and GUIL to advise and help configure their routers to prevent public laptop users from accessing our internal network.

## **Withdrawn Items**

We recommend that libraries start using Batch Item Delete to delete withdrawn items. The Dynix script that we’ve used till now stops as soon as it encounters a bib record with a hold against it, even if there are other (non-withdrawn) item records attached. Please note that the monthly Item Holdings Reports will be different than in the past. Previously we counted all computer records, including withdrawn items. The new total will reflect actual item holdings.

## **Bib Records with no Items Attached**

We have approximately 26,000 bibliographic records with no items attached (for unknown reasons). We plan to delete them if ASC approves. We can’t estimate the impact on database performance, so we’ll try an incremental approach if possible – 1,000 records at first, then 2,000, etc.

## **Bad Collection Codes**

Some collection codes have been created that do not map into the sixteen categories used by the state for our annual reports. We wrote a script to send email automatically to any library that owns a collection code that does not map properly, if ASC approves.

### **CatExpress update**

For the eight months we've used CatExpress so far our total is 18,277. If the current rate continues we'll end the year (5/31/05) at 27,415.

### **Database cleanup**

Pursuant to the discussion that Barbara Nichols Randall and I had related to database cleanup, we wrote a report that displays bib records that share ISBN numbers:

<https://horizon.uhls.lib.ny.us/reports/isbn.html> (it's long and loads slowly). Also, we've nearly completed a report that displays new bib records that should contain a 245\$h subfield but don't. Also, we looked for Dynix canned reports that help with database cleanup but found none. And, we researched the question of periodic re-indexing of the database, and according to Dynix it's unnecessary.

### **Monthly reports**

Beginning March 1, APL and TROY will get summary totals for all eight monthly reports, as requested.