

AUTOMATED SERVICES COMMITTEE
April 26, 2005
MINUTES

PRESENT

(Voting): Tim Burke (APLM), Nancy Pieri (BETH), Deb Canzano (COHS), Richard Naylor (COLN), Debbie Shoup (EGRN), Barbara Nichols Randall (GUIL), Daryl McCarthy (NGRN), Jane Minotti (SNLK), Paul Hicok (TROY), Joe Thornton (UHLS), Lorraine Smi (VOOR)

(Nonvoting): Mary Fellows, Geoffrey Kirkpatrick

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

I. MINUTES

Minutes of the March 22, 2005 meeting accepted as presented.

II. SUMMER READER

M. Fellows brought a report from the Youth Services Advisory Council regarding the purchase of a new software program, *Summer Reader*. The Council members saw a demonstration of the program which would greatly enhance services provided in the Summer Reading Program by providing the following:

- online registration for the Summer Reading Program
- allow Program participants to post online reviews of the books that they read
- allow the libraries to keep track of the participants and print lists sorted by a variety of informational factors

Discussion regarding the purchasing and hosting of the software. M. Fellows will be discussing possible statewide use of the software at the next PULISDO Youth Services meeting. The cost of the software is based on the population served by the library. If UHLS were to purchase it for use by all 29 libraries, it would cost \$15,000 per year.

B. Nichols Randall expressed concern about the confidentiality of the addresses, names, and reading lists of the children in the Summer Reading Program.

J. Thornton noted that if any libraries want to purchase the program, UHLS could host it on the server. D. Canzano noted that this would be an appropriate use of the server if the program is purchased by, and being used by, more than one library.

MOTION: P. Hicok moved to allow the *Summer Reader* software to be hosted on the UHLS server if it is purchased by, and being used by, more than one library. D. Canzano seconded. Unanimous.

(NOTE: see the Automation Services Report which begins on page 5 for more information regarding other issues that were discussed at the meeting. The following deals only with those issues that required action by the ASC.)

III. SECURITY SOFTWARE

Discussion regarding security software. J. Thornton noted that the Technology Advisory Council is testing several programs and will soon make a recommendation to the ASC. He explained the differences between the various programs: *DeepFreeze* and *Cornerstone* restore a PC to a clean/pristine condition every time it is re-booted. *Fortres* protects the PC while it is running. *Public Web Browser* can limit the buttons or tools that are available for use on a public PC and can be set so that a user cannot add websites to a Favorites list. It can also be programmed so that an OPAC cannot be used for web browsing. He recommends purchasing a license for this program.

MOTION: R. Naylor moved that UHLS should purchase two site licenses (one for each county) for Public Web Browser at a total of \$200 and it should be made available to whichever libraries want it. D. Shoup seconded. Unanimous.

IV. FAST-ADDS

Discussion regarding the problems with Fast-Adds and the fact that they are not being updated/corrected when the items are returned and therefore inadequate and incomplete records are staying in the database. J. Thornton noted that the solution would be to add in default options to certain fields so that a collection code cannot be entered in a fast-add and this would therefore force the owning library to start the cataloging process when the item is returned because the fast-add item record would automatically be deleted from the database when the item is checked in.

MOTION: D. Canzano moved to set up the default options so that a collection code cannot be entered in a fast-add and a fast-add item record would automatically be deleted from the database when the item is checked in. D. Shoup seconded. Unanimous.

V. SERIALS CATALOGING

J. Thornton noted that in his Report he gave three examples of acceptable Serials cataloging methods. These methods are used now by the majority of the libraries and are easier than previous methods. The Serials Subcommittee recommends that all of the member libraries should use one of these three methods - nothing else. Rob Carle will hold a workshop to introduce these cataloging methods to those libraries that are not familiar with them.

MOTION: N. Pieri moved that the member libraries should be restricted to using one of these three options no later than June 1, 2005 and that there should be a workshop to explain these options before that date. R. Naylor seconded. Unanimous.

VI. DATABASE PAGE

Discussion regarding the re-design that Polly Farrington did of the online databases page. UHLS has a page showing the databases available. Libraries who have purchased additional online databases want their own pages rather than linking to the UHLS page. Consensus that the design is now acceptable. J. Thornton noted that Polly Farrington is available to re-design any online databases pages for the libraries and that she is paid through a grant from the State Library. R. Naylor noted that the COLN page was re-designed by Polly and he would like it moved from her server to the UHLS server.

MOTION: B. Nichols Randall moved acceptance of the re-designed online databases page. This is now the generic UHLS page that libraries without additional databases can link to. Any libraries that have additional databases, and would like a similar design, should contact Polly Farrington (who is being paid by a grant to do this work) and then their pages would be hosted on the UHLS server. R. Naylor seconded. Unanimous.

VII. PATRON AUTHORIZATION

Discussion regarding the proof of residency required to apply for a library card. Everyone has to have a permanent, physical address in the library's service area in order to obtain a library card. If the person's address is a PO Box number, they would be required to submit proof of residency, however that information would not be added to their record. D. Canzano noted that when a library staff member sees a PO Box address on a patron's record, they are assuming that the library who issued the library card verified the physical address.

Consensus that this issue should be sent to the Resource Sharing Advisory Council for clarification and a policy statement and the Council's recommendations should then go to the Directors Association for discussion.

VIII. 856 \$u (URL)

J. Thornton noted that subfield 856 \$u was originally disabled in the OPACs but the Resource Sharing and Database Maintenance Advisory Councils have now recommended that this subfield should be enabled so that patrons encountering a website link in an item record can now access that link - i.e. it might be a link to a *New York Times* website to read back issues, etc. He noted that not all libraries will be authorized to use the website resources since they might not be paying for that particular access.

MOTION: N. Pieri moved that subfield 856 \$u (URL) should be enabled in the OPAC. T. Burke seconded. Unanimous.

IX. AUTHORITY CONTROL

P. Ritter noted that the UHLS Board of Trustees will not be able to consider any vendor recommendations until their July meeting.

X. PINs

Discussion regarding the issue of a patron forgetting their PIN and trying to access the online databases or requesting items via the HIP. Consensus that patrons requesting their PIN should have to contact their local library - concerns that putting an explanation of the PIN on the website might lead to identity theft or confidentiality problems.

MOTION: P. Hicok moved that a pop-up screen should be added to the HIP noting that if a patron has forgotten their PIN, "click here" - this will take them to an authentication screen asking for their patron barcode number, 5-digit zip code, and an email address. Once those are entered, their PIN will be emailed to them. If they don't have a PIN in the database, they will be told to "Contact your local library." R. Naylor seconded. Unanimous.


Discussion regarding patron records that are missing a PIN (default is the last 4 digits of their telephone number). J. Thornton will write a script that will run periodically and will add in that PIN for any patron records where it is missing.

XI. NICHE

J. Thornton asked for suggestions regarding the NICHE resources on the UHLS website. Consensus that the name should be changed to something that is easier to understand such as Digitizing Local History Resources. Consensus to send this to the Adult Services Advisory Council and ask them to review the Information Sources items on the website and re-name or suggest removal as needed.

MOTION: J. Minotti moved that J. Thornton should delegate a staff member to look through the UHLS website and remove any outdated calendar events and information. T. Burke seconded. Unanimous.

10:36 AM meeting adjourned.

NEXT MEETINGS: Tuesday, **May 17th** at 9:00 AM  Note date
Tuesday, June 28th at 9:00 AM

Heidi A. Fuge
4/27/05

Automation Services Report April 26, 2005

Reply-to field in email notices

We changed the "Reply-to" field in all hold and overdue email notices from the "us" email account (monitored by Automation Services) to circulation staff contacts at the patrons' home libraries.

We also wrote a script that sends a list of bounced hold and overdue email addresses to those same circ staff contacts once a week.

Day End Processing update

We moved Day End Processing to a different server on March 23 because we were experiencing almost nightly crashes. Since the move we have not had a single error with Day End.

Sybase upgrade

On April 6 Dynix upgraded Sybase (Horizon's underlying database management system). We did this upgrade now for two reasons: 1) to prepare for the next Horizon upgrade, which requires Sybase 12.5, and 2) to try to solve the "slowness problem" that has plagued us for several months. The upgrade went smoothly and did not require any changes on the libraries' PCs.

HIP changes

Following Dynix's strong recommendations, we made some changes to the HIP. These changes were also made to address the "slowness problem," and should not be noticeable to HIP users in any way other than (hopefully) improved response time.

Sybase training

Dynix came to UHLS to give two days of Sybase training to the Automation Services Department and two staff members from the libraries. The training was not focused directly on Horizon but rather on Sybase itself. This training should help us to diagnose and fix database problems, including the ongoing problem with slowness.

DBCC

The Database Consistency Check (DBCC) is a process that we run once a week, following Dynix's recommendation, to find and fix any errors in our Sybase tables. As our database has grown, DBCC has taken longer to complete, and lately has interfered with other functions such as Day End Processing and the printing of notices. We were running DBCC on Thursday mornings starting at 3:00, but moved it to Sunday morning. We wrote a

script that checks every fifteen minutes, starting at midnight, to see if Day End has finished, and starts DBCC as soon as it has. The script has started DBCC at 12:45 AM the past two Sundays, and it has completed by 5:00 AM.

At our Sybase training session, we told the Dynix trainer about the increasing amount of time it takes for DBCC to finish. Dynix has a new method that will allow us to run DBCC without excluding all other users from the database. We have requested them to provide us with that method and when it's installed we will no longer have to shutdown all other database access (including Horizon and HIP) when DBCC is running. This will give us 100% uptime, other than for maintenance and crashes.

Upgrades

At Sybase training, the instructor strongly encouraged us to upgrade to Horizon 7.4 and HIP 4.0. Our tentative plan had been to wait for Horizon 8.0, but the instructor said that there are enough bug fixes and added features in 7.4 and 4.0 to justify the upgrade before the bigger upgrade to 8.0.

DeepFreeze, Cornerstone, Fortres, Public Web Browser

The Technology Advisory Council has been evaluating DeepFreeze and Cornerstone as security software for library PC's, and added Fortres to the mix following the recommendation from ASC at the last meeting. We have more work to do before making a final recommendation (which we'll have after our May 18 meeting), but it's likely that the recommendation will include Fortres, Public Web Browser, and either DeepFreeze or Cornerstone.

Public Web Browser is used to restrict browser functions on public PC's. Some of our libraries use it now and are very satisfied with it. The price is \$100 per site, and a "site" is defined by the vendor as a county. UHLS could purchase two site licenses for \$200, which would cover every PC in all our libraries, and I recommend that we do this.

Local Request

At the request of the Directors Association, our department has made local request a high priority, but we're finding it difficult to implement. Geoff Kirkpatrick suggested a new approach and he has been working with us to try to make it work. It's not done, or guaranteed to be done, but we're optimistic.

Fast-Adds

Rob proposed a change to the "fast-add" process, which would limit the input options on some fields such as location and collection code, and thereby keep fast-adds under control.

Serials

The Serials Subcommittee recommends that each library use one of the three methods of handling serials described in the attached document: *serialproposal.doc*.

Permanent circulation history

We created a new table called *uh_circ_hist* to contain the item#, cko_date, cko_location, and no_renewals of all items that are checked in. We also wrote a script to update this table every morning at 12:05 with the previous day's checkins. The end result will be a very large table of all circulation transactions, without borrower data, that we can use for reports.

Terminal services

We've started our test of Windows Terminal Services with EGRN, COLN, and BETH. So far the results have been very encouraging. We have a problem with local printing that Dynix is helping us to resolve.

Database page

Polly Farrington designed a new database page that I displayed at the last ASC meeting. It led to a discussion of the aesthetics/usability of our web site in general, which I think we should discuss as a separate issue. After making the new page public, COLN discovered some problems accessing some databases. Polly fixed those problems and created a new page for COLN (<http://www.pafa.net/colonie.html>). Do we want to use this page as our new database page (after Polly adjusts it for general use)?

Patron authorization

We had a patron complain that she was refused a loan because she did not have a permanent address in her borrower record. She had registered at a different library than the one she was trying to borrow from. After much discussion, my understanding is this: the library that adds a patron to the database is responsible for verifying her permanent address (i.e. eligibility), but that address does not need to be added into the database. Any other library should trust that the patron has been authorized to borrow from our collection, even if her record has no permanent address. Is this the official UHLS policy?

856 \$u

To prevent public HIP users from using PC's for non-library activities, we have disabled the use of the 856 \$u (URL). Another issue with this subfield is that not all libraries will be authorized to use the resource that the URL points to. However, the trend in library services is to provide more and more information on the web, and a direct link from OPACs to those resources is important. The Resource Sharing and Database Maintenance Advisory Councils recommend that ASC allow us to enable the use of the 856 \$u.

Authority control

Rob and Mary Ellen have identified three vendors - Backstage Library Works, Library Technologies, Inc. (LTI) , and The Library Corporation - as good candidates for our authority cleanup project. We have not yet received cost estimates from all three vendors. When we do (by the next ASC meeting) we'll present the costs, included services, and a recommendation to ASC.

PIN's

An excellent suggestion from Mike Whitney at EGRN:

I find that many patrons are uninformed about what exactly their pin number is. It is a consistent, daily confusion for patrons. Why don't we put a small hyperlink next to the request login (where patrons are prompted to type in their number and pin) that says: "What is my borrower ID and PIN?" This would link to a short explanation. I've seen this in other interfaces and it works well. Does ASC approve?

NICHE - what is it?

A library requested that we update their NICHE pages. I found this:

<http://www.uhls.org/NICHE/> Are we still supporting this?

CatExpress Update

For the ten months we've used CatExpress so far our total is 22,884. If the current rate continues we'll end the year (5/31/05) at 27,461.

Proposal: Three methods for processing magazines at UHLS member libraries

Choose one of the following;

Magazine Item Entry

Using a special "serials" username and password for logging into Horizon, libraries will process the magazine by permanently attaching it as an item to a bibliographic record. By using a library specific bibliographic record for magazines, these records will then be hidden from the patron. Since the item record will be assigned a periodical collection code, it will be counted for reporting how often the magazines circulate.

{See Magazine Item Entry Procedure}

The screenshot shows a web-based form for editing a library item. The title is "Bethlehem Magazines". The item barcode is "3B1131#0127932". The item number is "452363" and the copy number is blank. It was created on "01/05/2001" and last updated on "02/07/2003". The "Staff-Only" checkbox is checked. The item type is "PER" (Periodical), the location is "BETH" (Bethlehem Public Library), and the collection is "BTPER" (Periodical). The call number is "MOTOR TREND SEP 2001". The price is listed as "2.00". The item status is "Checked in". The form includes buttons for "Close", "Save", "Page Up", and "Page Down". The status bar at the bottom indicates "Page 1 of 2" and the user name "Robert Carle".

We recommend this method only for those libraries that circulate their magazines.

Fast-Add Option

At the circulation desk, fast-add the magazine, as you would fast-add any item. This will ensure that the magazine record will be deleted when the item is checked in. A fast-add item is configured so both the bibliographic and item record are deleted at checkin. The purpose of this method is simply to hold the borrower accountable for the item when taken out of the library. Your library will be awarded the circulation statistic as a fast-add. There will be no other reporting information telling you that this is a periodical.

Serials Module

Below is Summary of Holding information for *Newsweek* magazine owned by two of our member libraries as it is displayed in the HIP:

East Greenbush Community Library

Location: East Greenbush Community Library
Collection: Periodical
Call No.: East Greenbush Community Library
Status: Currently Received
Media Type: *egrmag*
Main run: *EGRN Retains current year.*

Show all items

Guiderland Public Library

Location: Guiderland Public Library
Collection: Periodical
Call No.: Guiderland Public Library
Status: Currently Received
Media Type: *guilmag*
Main run: *GUIL Retains current year.*

Show all items

Summary of Holding information should exist for every magazine subscription held by every member library regardless of which of these methods (item entry, fast-add, etc.,) your library adopts. Because of the open-ended description of the *Main run*, "GUIL Retains current year", we need only to be concerned about the accuracy of our own subscriptions. It is the library's responsibility to keep this information up to date.

Upper Hudson Library System will generate a report on the Reports website where local libraries can check this list against their current subscriptions for accuracy. If a member library wishes to use the serials checkin component of the Serials module, they should refer to Rob for training. Because of the complexity of the serials checkin process, we do not recommend this for smaller libraries.

Magazine Item Entry Procedure

Log in to Horizon using serial username and password.

Press **F2** and type in '*library name* magazines'.

(Upper Hudson will create these bibliographic records for your library. Let us know what *library name* you would like before 'magazines'.)

Press **F10**, and select 'copy/item'.

Click 'New'.

Enter the required fields. These fields should follow a recommended format (see below).

Note: 'Item Barcode' (scan), 'Staff Only', 'Call No.' will need to be entered for each magazine check in. All libraries for each magazine should use the format for 'Call No.'. (The special serials username allows us to save the default information in the item fields, and hide the records from the patrons)

Click 'Save'.

The screenshot shows a web-based interface for editing an item record in the Horizon system. The window title is "Arville E. Diver Mem. Library (Schaghticoke) - [Edit: Items for Dib 531550]". The interface includes a menu bar (File, Edit, View, Tools, Window, Help) and a toolbar with various icons. The main form contains the following fields and values:

- Title:** Schaghticoke Magazines
- Item Barcode:** 00001234567890
- Item#:** 1854210 **Copy#:** (empty)
- Created:** 04/06/2005 **Updated:** 04/06/2005 **Staff-Only:**
- Item Type:** PER *Periodical*
- Location:** SCHG *Arville E. Diver Mem. Library (Schaghticoke)*
- Collection:** SCPER *Periodical*
- Shelf Location:** (empty)
- Call No.:** SCIENCE NEWS DEC 4, 2004
- Enumeration:** (empty) **Vol.:** (empty)
- Source:** (empty) **Price:** 0.00
- Item Note:** (empty)
- Item Status:** t *In Cataloging*

Buttons for "Codes" are present next to Item Type, Location, Collection, and Item Status. At the bottom of the form are buttons for "Close", "Save", "Page Up", and "Page Down". The status bar at the bottom indicates "Page 1 of 2" and shows several open tabs: "All Titles: sc...", "D bibliographi...", "Set Items f...", and "Edit Items f...".