

AUTOMATED SERVICES COMMITTEE
June 28, 2005
MINUTES

PRESENT

(Voting): Tim Burke (APLM), Nancy Pieri (BETH), Joe Makowiec (BRUN), 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): Geoffrey Kirkpatrick

9:00 AM Meeting called to order by Philip Ritter, Chair

I. MINUTES

Minutes of the May 17, 2005 meeting accepted as presented.

(NOTE: see the Automation Services Report which begins on page 3 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.)

II. PATRON QUESTIONS

MOTION: J. Thornton moved to add a drop-down menu with a list of libraries to the online contact form on the HIP so that a patron could direct their questions to their home library. UHLS will be included as a choice in the list. T. Burke seconded. Unanimous.

J. Thornton will solicit a contact email from each library.

III. LOST IN TRANSIT

J. Thornton noted that the major change to the Lost in Transit report is the ability to sort by date. He will make an effort to push the libraries to check their shelves for these items.

IV. AUTHORITY CONTROL

MOTION: N. Pieri moved to accept the contract from Library Technologies, Inc. at an initial cost of \$23,600. The contract also includes a twice-a-year update costing \$1,600 each time (or \$3,200 per year.) J. Makowiec seconded. Unanimous.

The contract will be presented to the UHLS Board of Trustees at their August meeting.

V. BROWSE SCOPING

J. Thornton reported that even though the browse results have been limited to ten items in a display, there still seems to be a problem with the CPU. There are random spikes when CPU usage is at or near 100%. Dynix is working on the problem and recommended that Browse Scoping be turned off for a 2-day test period to see if the usage will change. J.

Thornton noted that if Browse Scoping turns out to be the problem, nothing can be done at this time but at least the problem will be identified. If Browse Scoping is not the problem, at least it will be eliminated from the "possible problems" list.

He noted that the CPU usage can be re-set by re-starting the HIP when usage is high. This only causes a minor problem for about one minute.

Discussion regarding the consequences of NOT following a Dynix recommendation. Would they work any further on the project if the 2-day test is not conducted?

MOTION: D. Canzano moved to turn off the browse scoping for 2-days; the days and times to be determined at the discretion of the UHLS Automation Department. R. Naylor seconded. Unanimous.

J. Thornton will analyze his data and determine the optimum time to turn off the scoping. He will send out an email warning the libraries well in advance. The only result of turning off the browse scoping will be that a search in the HIP will present results for all libraries - searches will not be limited to a single library.

VI. INSTANT MESSAGING and THE JOHN LOVE SOLUTION

Discussion regarding the various ways in which libraries notify UHLS and each other that there are problems with the automation system. J. Thornton proposed an Instant Messaging solution. Consensus that this might not be used in the way in which it would be intended since it would be open to all staff members and might confuse them when a message popped up on the screen.

J. Thornton demonstrated "The John Love Solution." He noted that in this version the status of the automation system can still be changed by anyone. The program still needs some fine tuning but is basically ready to be used. Consensus that he should send out the url to ASC members and they can start experimenting with this.

VII. LOCAL REQUEST

J. Thornton and G. Kirkpatrick explained the new programming that they undertook in order to satisfy some libraries who prefer not to loan certain portions of their collections. Libraries would have to decide whether they wanted "Local Request" or "Local Priority." Currently, the system is set for "Local Priority." The programming is based on the itype and all items whose itype contains the word "new" would be affected by the "Local Request" option.

Extensive discussion. N. Pieri expressed great concern that the "Local Request" option would adversely affect interlibrary cooperation and that allowing libraries to select this would be a setback in the advances that have been made in the last couple of years.

Consensus to take this issue to the July 8th Directors Association meeting.

NEXT MEETING: Tuesday, July 26th at 9:00 AM

Heidi A. Fuge
6/28/05

Automation Services Report June 28, 2005

Patron questions, etc.

Until a few months ago, all patron suggestions, questions, complaints, etc. that were entered through the HIP interface came to the "us" email account. UHLS (Noralee) took responsibility for reading and then answering or forwarding the emails. When Noralee left UHLS, Automation Services took over that role. At first the number of emails was low, but increased steadily as time passed.

To address the problem of spam being sent to the "us" account, we created a web form for patrons to use instead of email when they wanted to contact a library. Although we eliminated spam with this method, our department still reads, replies, and forwards all patron communication through the HIP. However, this is no longer necessary. Since the patrons use a form, we can add a requirement that they select a library before sending their question. Three issues (at least):

- Each library would have to designate someone to receive these questions, and to forward them to the proper destination if the patron picks the wrong library.
- We would be requiring our patrons to perform an extra step, make a decision, and in other ways do part of the job that we now do for them.
- On the plus side, libraries would no longer have to depend on Automation Services to monitor and deal with their patrons' communications. (And for Automation Services, every day we would have about ten fewer questions to handle that were never intended for us anyway.)

Lost in Transit

As requested at the last ASC meeting, we added a "date sort" to the *lost in transit* reports on the web reports page (<https://horizon.uhls.lib.ny.us/reports/>). The default view when you look at your *lost in transit* list is sorted by call number, but you can easily view the same records sorted by date.

Also, a few of us (UHLS and library staff) have looked into ways to generate some statistics with the same data using Excel, Access, or other tools. So far we have not produced anything significantly more helpful than the basic *lost in transit* reports.

Authority Control

We received a proposal from Library Technologies, Inc., the vendor approved by ASC to do our authority cleanup. The estimated total is \$23,600 with an annual update cost of \$3,200. Copies of the proposal will be handed out at the 6/28 ASC meeting.

Browse scoping

As discussed at the last meeting, we reduced the number of results displayed in a HIP search to ten in an attempt to lighten the load on the servers and address the slowness problem. We've seen some improvement but still experience occasional severe slowdowns. Dynix recommends that we turn browse scoping off for two days to try to determine if that is the cause of our problem. The negative effect that this change will have is that all patrons will see all holdings when they do a search, and not just those of their home libraries.

IM

Our latest upgrade to the mail server includes an Instant Messaging (IM) server. I'd like to experiment with using this at Circulation workstations, for example, to enable instant communication during the day among library staff. It's restricted to authorized users, so it's a "closed" system, and might help us to discover the existence and cause of problems faster than we do now.

The John Love solution

John Love of BETH designed a tool that may serve the same purpose as the IM tool described above. John's solution is a web page (<http://www.uhls.org/uhs/uhs/status/horizon.asp>) that all libraries can monitor and update, and which shows the current status (UP, SLOW, or DOWN) of the network.

Norton Anti-virus

This is pretty much the last call for libraries to participate in a group purchase of Norton Anti-virus software. Your options, including TechSoup, have been explained in several emails, and the deadline is approaching quickly.

MRTG

(This is probably of interest only to some members of ASC.) We installed MRTG (Multi Router Traffic Grapher) to monitor bandwidth on our primary routers. The pages are updated every five minutes. (<http://horizon.uhls.lib.ny.us/mrtg/all.html>)

Local Request

Geoff Kirkpatrick, Rawdon, and Rob are confident that they have "local request" working on our test server. The attached document "local_request.txt" explains the process. If ASC approves, we will move this function to the production server, and libraries will then need to choose between "local request" and "local priority."

Web server crash

Our web server's hard drive died on Memorial Day weekend. We routed all internet traffic from the web server to the HIP, so the catalog was always available. Rawdon and Jonathan did an excellent job of replacing the drive and rebuilding the web site in less than a day, but the event elevated the need for a comprehensive disaster recovery plan to a high priority. At this time we're confident that we can recover from any problem, but we've started working to document and share the knowledge required to do so.