

AUTOMATED SERVICES COMMITTEE

July 26, 2005

MINUTES

PRESENT

(Voting): Marcia Middleton (APLM), Geoffrey Kirkpatrick (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)

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

I. MINUTES

Minutes of the June 28, 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 where the ASC took action.)

II. BROWSE SCOPING

J. Thornton reported that browse scoping has proven to be the cause of the system slowdowns. He discussed this situation with Dynix and was told that UHLS usage of browse scoping is different from other installations. He will investigate further: why are we different? How come other installations can use this without the problems that we experienced?

Discussion including suggestions for making the message "Search for copies at other locations" more obvious when browse scoping is turned off.

MOTION: P. Hicok moved to turn browse scoping back on while continuing to investigate further. R. Naylor seconded. Motion passed.

III. LOST in TRANSIT

J. Thornton reported that the Resource Sharing Advisory Council recommends that all items with a transit date of January 2003 should be deleted.

MOTION: B. Nichols Randall moved that a report should be run for each library showing all Lost in Transit items with a transit date of January 2003. Hard copies of these reports should be sent to the libraries and electronic copies retained by UHLS. After this, all of those items should be deleted. G. Kirkpatrick seconded. Unanimous.

IV. NETLIBRARY

J. Thornton reported that he is working on a way to warn patrons from libraries that are not NetLibrary subscribers that they should not continue through an item record and attempt to download the item. He is also creating a form for patrons from the NetLibrary subscribers so that they can create an account and use the NetLibrary downloads. At this time, there are only three libraries whose patrons can have access to the NetLibrary: Albany Public,

Bethlehem and Guilderland. There is a separate authentication screen for each library so patrons from only the subscribing libraries can use it.

Discussion regarding NetLibrary. M. Middleton noted that it only has a limited collection of materials but everyone can access them at the same time - there is no limit on the number of simultaneous users.

Patrons of the New York Public Library (which is any resident of New York State) can access services similar to NetLibrary. A library card from the New York Public Library can be obtained through the mail.

B. Nichols Randall noted that MARC field 245 subfield h will have to be changed when adding the NetLibrary link to the item records since the field currently says "CD."

V. EXPIRING YOUTH Btypes

J. Thornton reported that a program can be run in Horizon that would automatically change Youth Btypes to Adult Btypes at a pre-selected age.

MOTION: D. Canzano moved to set up a script that would automatically run on a monthly basis to turn Youth Btypes into Adult Btypes. Every library should be contacted and asked at what age they would like this to happen. Deadline for responses will be September 1st. If a library does not respond, the default will be 18 yrs old. G. Kirkpatrick seconded. Unanimous.

VI. "CONTACT US" EMAIL SERVICE

The new "contact us" form on the HIP went into effect on 7/25/05. Patrons will be required to select a library to whom their email will be directed.

VII. HORIZON 7.4 / HIP 4.0 UPGRADE

J. Thornton reported that it will probably be one year before UHLS is ready for the upgrade.

VIII. BORROWER INFORMATION SCREEN

Discussion regarding the unused fields on the Borrower information screen.

MOTION: M. Middleton moved that, in the Horizon client, on the "Edit Borrower" view screen, the unused fields should be removed. At this time, those fields are: proxy borrower, PAC access type, home service and security groups. J. Thornton will check to make sure that no libraries are using these fields and then remove them. G. Kirkpatrick seconded. Unanimous.

IX. AUTHORITY CONTROL

P. Ritter reported that Library Technologies, Inc. does not use contracts, only a Letter of Agreement. The Letter of Agreement was approved at the last ASC meeting and will be presented to the UHLS Board at their August 10th meeting.

August ASC meeting canceled. NEXT MEETING: September 27th at 9:00 AM at UHLS

Automation Services Report July 26, 2005

Browse scoping

After examining the log of CPU usage since June 17, we determined that, although there was no day or time that was significantly more likely than others to experience a slowdown severe enough to require a HIP restart, Wednesdays and Thursdays had a slightly higher number of high CPU periods, so we picked those days to turn off browse scoping to try to determine if that is the source of our problem. We turned browse scoping off for all libraries on Wednesday 7/20. After two full days, we had a few occurrences of high CPU usage, but none lasted more than a few minutes or was bad enough to force a HIP restart. Dynix is very confident that this indicates strongly that browse scoping is the problem, and they recommend that we minimize the number of libraries using it, or disable it altogether.

Lost in Transit

The Resource Sharing Advisory Council recommends that libraries delete all items that appear on the "lost in transit" reports (<https://horizon.uhls.lib.ny.us/reports/lit/index.html>) that have a Transit Date of January, 2003. These items were probably carried over from DRA, and are almost certainly gone forever.

NetLibrary

APL, BETH, and GUIL have subscriptions to NetLibrary. To accommodate this, ASC approved the inclusion of the MARC 856\$u subfield (URL) in the display of search results, to enable patrons to connect directly from the HIP to NetLibrary. This process required some work on our part, and may require more as we try to simplify a potentially confusing process for patrons of all our libraries, including the NetLibrary subscribers. The issue for patrons of non-NetLibrary libraries is that the NetLibrary bib records will be retrievable in the HIP, but the online books themselves will be inaccessible. The issue for patrons of NetLibrary libraries is that they need to create a free account on the NetLibrary site before they can link directly from the HIP to the NetLibrary books.

Expiring Youth Btypes

Rob discovered a feature of our current version of Horizon that enables us automatically to expire patrons with 'Youth' Btypes when they reach a specified age. Two issues:

- This change is made for individual Btypes, so each library can decide which, if any, of their Youth Btypes to expire, and at what age.
- The system does not automatically change the Youth Btypes to corresponding Adult Btypes. Instead, when a patron with a Youth Btype who has passed the specified age uses the library, the Circulation staff will see a "Patron Expired" screen and will have to renew the patron with the new Btype.

A potential undesirable effect of this would be if suddenly libraries were swamped with "Expired Patron" popups for all the patrons who passed the age limit at any time in the past but who still have a Youth Btype. To try to avoid this problem, we could write a script to run once to change all Youth Btypes to the corresponding Adult Btypes for patrons over whatever ages the libraries choose.

Norton Antivirus

We placed an order for one Macintosh and 298 Windows licenses for Norton Antivirus 10 Corporate Edition. We will be distributing the CD's and helping to install the software in the next couple of weeks.

"Contact us"

We created a new web form (<http://horizon.uhls.lib.ny.us/patrons/us.html>) for patrons to use to contact the libraries through the HIP. When patrons send a message, they now must first choose a library, to which our script will direct their message.

Spam

We've experienced a huge increase in the amount of unwanted email (spam) passing through the system. We're working continually to improve the filtering we do at the server and to help users manage spam at the client end. One common problem is that the people who use only our web mail client do not have access to a spam blocker, and so are being inundated with junk email. Users of commercial webmail services such as Yahoo and MSN have commented to us that those services do a much better job than we do of controlling spam. We could easily provide a similar level of spam control to our users, but the tradeoffs would be too high. I'll demonstrate at the meeting.

Horizon 7.4 / HIP 4.0 upgrade

Since the Directors Association voted to abandon the "local request" initiative, we've started to move faster on our test installation of Horizon 7.4 and HIP 4.0.