

AUTOMATED SERVICES COMMITTEE
October 25, 2005
MINUTES

PRESENT

(Voting): Tim Burke (APLM), Nancy Pieri (BETH), Joe Makowicz (BRUN), Deb Canzano (COHS), Richard Naylor (COLN), Debbie Shoup (EGRN), Barbara Nichols Randall (GUIL), Paul Hicok (TROY), Joe Thornton (UHLS)

(Non voting): Marcia Middleton (APLM)

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

I. MINUTES

Minutes of the September 27, 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. AUTHORITY CONTROL

J. Thornton discussed possible dates and times for importing the new records when they are sent to us from LTI. Importing all of the records will take a total of about 3 ½ days and will use most of the CPU resources and will slow the system substantially. Consensus that the Thanksgiving weekend was not a good time because the libraries are too busy. J. Thornton will talk with LTI about the possibility of getting several smaller files that can be imported in less time and therefore the work might be able to take place when the libraries are closed.

III. ACQUISITIONS

J. Thornton reported that the "Processing Centers" feature in Horizon 8.0 looks promising, but won't be available for at least another year or so. John Rose, the SirsiDynix rep will attend a session at UHLS on November 17th to discuss the Acquisitions module and some of the information put together by GUIL and APLM.

IV. OVERDRIVE

OverDrive is supposed to be available as of January 1, 2006. J. Thornton noted that it has a different authentication method than NetLibrary and required some programming work by the Automation staff.

V. NOTICE PROGRAM

J. Thornton demonstrated the new online notice program that he developed in response to complaints from some of the libraries regarding the timeliness of the delivery of the notices. Discussion regarding the impact of the new program on the workflow at UHLS. R. Naylor also expressed concern regarding the Final Notices. COLN needs a paper trail since they include an attorney's letter with the Final Notice.

Consensus that the online program looks very feasible. APLM and BETH volunteered as test

sites when the program is finalized. J. Thornton will do some further research, including the impact on the UHLS workflow and staff, and will report at the next ASC meeting.

VI. WEBSITE SUPPORT

J. Thornton gave a "heads up" regarding the use of the UHLS server to support interactive websites for the member libraries. He noted that UHLS is happy to do whatever it can within the framework of available resources. He warned that, at some point, UHLS will hit its limit in staff and resources and will not be able to maintain extensive individual sites for each library.

M. Middleton suggested that UHLS work with the APLM site for awhile to see what it would mean in terms of staff and automation resources. If there is a problem, both APLM and UHLS will re-think the situation. She noted that APLM might end up moving to a commercial site if their website causes a problem for UHLS.

VII. MAIL SERVER

UHLS is looking for less expensive alternatives to the current email program. M. Middleton suggested getting a program that would allow the individual clients to filter email.

VIII. NETLIBRARY

J. Thornton demonstrated the solution to the NetLibrary access situation. The only libraries with NetLibrary access are APLM, BETH and GUIL. Only patrons holding cards from those libraries will be able to fully access the NetLibrary site. UHLS had to develop the links and wording that would clearly explain the situation to all patrons. He noted that this had been a lengthy project because he was limited in what NetLibrary was willing to do.

IX. OTHER BUSINESS

M. Middleton reported that APLM has set up laptops with a cellular phone card for use in the new Bookmobile. In addition, APLM has created a new patron designation "Outreach Patron" for quick registration at the new outlets. This designation does not give the patron any rights, including no PIN#. When they go to a library to use their new "Outreach Patron" library card, there will be a pop-up on the checkout screen to alert Circulation staff that the patron needs to be registered in the normal way. M. Middleton will send J. Thornton a complete explanation of these cards which can then be forwarded to the libraries to alert them.

D. Shoup reported that the LVA of Rensselaer County wants to give EGRN an LVA collection primarily for tutors and students that should have an indefinite loan period. D. Shoup will email J. Thornton with the details and the proper collection codes will be established.

10:15 Meeting adjourned.

NEXT MEETING: Tuesday, December 6th at 9:00 AM at UHLS

NOTE: November 22nd and December 27th meetings have been canceled

Heidi A. Fuge
10/25/05

Automation Services Report October 25, 2005

Authority control

On October 1 we exported our entire bibliographic database (481,431 records) and ftp'd it to LTI for authority control processing. The process should take about four weeks. We're preparing for its return by testing alternative methods of importing and overlaying records. Our most promising test so far imports about 100 records a minute and uses a lot of CPU cycles on the horizon server. At that rate, the import would take about 3.5 days and slow all system activity noticeably. We're discussing possible times for the update (e.g. Thanksgiving weekend) to minimize disruption of normal activity.

Acquisitions

The Database Maintenance Advisory Council discussed ASC's request to produce a comprehensive document on the current state and potential future of the Acquisitions module. APL and GUIL produced documents detailing their experiences, successes, and frustrations with the module. We will compile those documents and present it to SirsiDynix and ask them to join us at a meeting to address our concerns.

John Rose of SirsiDynix came to UHLS on 10/20 and facilitated a WebEx demo by another SirsiDynix rep of the Horizon 8.0 Acquisitions System. That system has a feature called "Processing centers" that should give us the functionality we need, specifically: the ability for 29 independent libraries to share one Acquisitions system easily.

John also spent some time after the meeting discussing, with the aid of a phone consultation by another SirsiDynix rep, how we might try to simulate "processing centers" in our current version of Horizon. We asked for this because it is highly unlikely that we will upgrade to 8.0 for at least another year. We are now testing the suggestions that came out of that discussion.

Overdrive

Phil, Jo-Ann, and I had a conference call with OverDrive Inc. to discuss the technical requirements of subscribing to their service. We still have a few authentication issues to work out before the subscription begins.

Notice program

In response to complaints by some libraries about the occasional lateness or loss of hold and overdue notices, we developed a system (<https://horizon.uhls.lib.ny.us/notices/>) that enables libraries to view the notices online and select which ones to print, and then prints them immediately at UHLS where they will be mailed the same day. This eliminates the courier from the notice process and mails the notices at least one day sooner than they would be mailed normally. Some issues:

- the Resource Sharing Advisory Council was lukewarm to the proposal, expressing the opinion that things are pretty much ok as they are.
- UHLS would need to charge the libraries for postage.
- We would need to decide whether to print a library's notices automatically if they don't process them themselves by a specified time, or to give the libraries full responsibility for printing them on their own schedules.
- We might want to remove notices from view after they've been printed or if a library specifically requests to hide them.

TimeWarner

We have switched our network services entirely to Time Warner, and no longer use AT&T. Aside from some email problems on the switchover day (we apologize), the change went fairly smoothly and we've had no reports of network problems since.

Web site support

APL has hired a web consultant to work on their web site and we agreed to install some tools that he requested. They were difficult to install and we're not completely comfortable with the security implications or maintenance requirements. Also, I'm told that "GUIL is planning to put a calendar on its web site is very excited about MySQL installed on our server." If we invite everyone (or even one or two more libraries) to move their web sites to our server, and offer to install and support any requested applications, we're potentially setting ourselves up for significant maintenance, performance, and security problems.

Mail server replacement

The cost of our *IMail* email server program (now called *Ipswitch Collaboration Suite*) increased significantly last year and will increase significantly again this year. We've started to look for less expensive alternatives (e.g. *Exchange*, *MDaemon*, ...).

Training

Rob will offer regularly scheduled classes (as well as ad hoc or one-on-one sessions whenever anyone asks). The first class is *Horizon Basics* and will be offered at 9:00am-12:00pm on the following dates:

- Oct. 26, 2005
- Nov. 30, 2005
- Jan. 18, 2006
- Feb. 15, 2006
- Mar. 15, 2006
- Apr. 12, 2006

The purpose of the workshop is to offer basic Horizon training and review for all member library staff. Searching, circulation, and cataloging will be covered, and there will be no minimum or maximum number for workshop participation. Participants will receive a comprehensive review on how Horizon works which will include basic concepts and procedures.

NetLibrary

After a lot of email discussion about the display of NetLibrary records, we're ready to import NetLibrary bib records into our catalog. For sample displays: In the HIP, do a keyword search for: "The leadership genius of George W Bush" or "Holy Bible Deuterocanonicals" or "Acid Test" (choose the 12th result).

New library branches

APL is adding two branches: APLC and APLY. We're working with them to include the new branches where necessary (reports, HIP menus, ...), to create collection codes, and whatever else is needed. It's been a long time since we added a branch.

My List" follow-up

As requested at the last ASC meeting, we changed the *My List* feature in the HIP to keep patrons' lists indefinitely.