

**AUTOMATED SERVICES COMMITTEE**  
**December 6, 2005**  
**MINUTES**

**PRESENT**

(Voting): Tim Burke (APLM), Nancy Pieri (BETH), Joe Makowicz (BRUN), Richard Naylor (COLN), Debbie Shoup (EGRN), Lisa Pitkin (GUIL), 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 October 25, 2005 meeting accepted as presented.

(NOTE: see the Automation Services Report which begins on page 4 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 reported that importing the new Authority records is proceeding slowly. To date, 150,000 name records and 47,000 subject records have been loaded into the UHLAN database.

Due to stopping problems during the loading processing, this is going to take longer than originally projected.

**III. NETLIBRARY**

NetLibrary is up and running on the HIP. N. Pieri reported that BETH is seeing about 200 users per month.

J. Minotti asked about the icon for the downloadable items. Will it be the same icon for NetLibrary and OverDrive, even though NetLibrary is not available to all patrons? Extensive discussion.

**Consensus** to ask J. Thornton to look into another icon to be used for the OverDrive "Digital Collection" materials.

**Consensus** to include a statement on the NetLibrary notice page to the effect that "all other library patrons should use titles available through OverDrive."

**IV. ACQUISITIONS**

J. Thornton noted that John Rose is no longer the contact at Sirsi/Dynix. The new contact is Valerie Chase.

Discussion regarding the usefulness of the Acquisitions module. J. Thornton recommends that any other libraries wait to use the module until Horizon 8.0 is available. L. Pitkin concurred and noted that she would not recommend that any library start using the module at this

time. There are still some basic problems with the software, along with the fact that it is not meant for a consortium.

**Consensus** to put any further discussion of the Acquisitions module on hold until the move to Horizon 8.0.

#### V. TELECIRC

J. Thornton asked if UHLS should look into using the third telephone line in the computer room to allow automated renewal.

**Consensus** that the third line should be enabled if the cost is reasonable and within the UHLS budget.

**Consensus** to allow Telecirc calls on 12/26/05 and 1/2/06.

#### VI. NOTIFICATION METHOD

J. Thornton would like to make the notification method selection more obvious to patrons.

**MOTION:** N. Pieri moved to put a notice regarding the notification method selection on the Catalog Welcome screen. J. Minotti seconded. Unanimous.

#### VII. OVERDRIVE

J. Thornton questioned whether patrons who have blocks on their accounts should be allowed access to OverDrive? R. Naylor noted that those patrons using OverDrive should be treated the same way as other patrons.

**Consensus** that patrons with blocks on their accounts should not be allowed access to OverDrive. J. Thornton will investigate the parameters for blocking in OverDrive and report at the next ASC meeting; it is likely that the current blocks used by the libraries will transfer to OverDrive.

#### VIII. NOTICE PROGRAM

J. Thornton again demonstrated the new program that would remove the workload from the libraries and transfer it to UHLS. He asked if the ASC considered it worth pursuing?

**Consensus** to do so. J. Thornton will look into the quantity of notices and what it will mean for a workload at UHLS. He will also try to develop several different scenarios in order to satisfy the different library needs. He will try to re-configure the on-screen report so that it shows patron addresses.

#### IX. LOST IN TRANSIT REPORTS

Discussion about the information included in the Reports and how it can be interpreted. J. Makowiec pointed out several errors in the BETH report used for the demonstration. J. Thornton will investigate the duplicates in the report and will also examine the difference in the number of "th" vs. "tr" designations.

Once all of the questions have been cleared up, it was suggested that a meeting with C.D & L should be arranged in order to discuss the ramifications of these reports.

Discussion about the consistency in the libraries in handling the movement of the items. How does the "Lost in Transit" report compare to the "Lost Item" report?

Consensus that the libraries should all be asked to conduct quick inventories of their CD and DVD collections using a Report obtainable through "Item Group Editor."

**X. SYSTEM SLOWNESS**

J. Thornton report that this past weekend, the CPU usage was at 100% and the system was effectively disabled. Dynix has not yet been able to determine why the usage was so high, although it is definitely a Sybase/Horizon function that is causing the slowdown. Dynix will monitor the situation. In order to lower the CPU usage, Browse Scoping has been temporarily turned off. It has been reported that Browse Scoping works much better in HIP 4.1 and Horizon 7.4.

**XI. DVD PLAYER**

Consensus not to pursue purchase of a DVD player to loan to the member libraries.

**XII. SEARCH LIMIT**

Consensus to include "large print" in the *Limits* choices on the *Advanced Search* screen in the HIP.

10:50 AM Meeting adjourned

**NEXT MEETING: Tuesday, January 24<sup>th</sup> at 9:00 AM at UHLS**

Heidi A. Fuge  
12/6/05

## Automation Services Report December 6, 2005

### Authority control

We received the following files from LTI on November 1:

481,431	bibliographic records
250,604	LC name authority records
47,724	LC subject authority records
623	LC Children's subject authority records

From LTI: "Close to 400,000 bib. headings [or 19% of all the headings] were changed by LTI to link to the appropriate LC authority record."

We have begun to import the authority records into Horizon. We do the import Sunday - Friday between 9:00 PM and 7:00 AM the following day in order to minimize the impact of the resulting system slowness. (We skip Saturday because of a conflict with the Database Consistency Check that runs early every Sunday morning.)

We've encountered an error every night so far, which we've asked SirsiDynix to explain. The number of errors is insignificant, but each error stops the import, usually sometime between 1:00 and 6:00 AM. The result is that we're not importing at the rate we had hoped for (about 50,000 records a night). The entire import of authority and bib records should take about two weeks at this rate.

### NetLibrary

Peter Kowalski created a nice icon for "Downloadable Audiobooks" that is now linked to all NetLibrary bib records.

We wrote a script to change the 245\$h from "[electronic resource]" to "[downloadable audiobook]" for NetLibrary records.

We imported 844 NetLibrary records, but two libraries reported that they were expecting 1,072. The libraries with NetLibrary subscriptions should contact NetLibrary to find out about the missing 228 records.

We'll get one update a month.

### Acquisitions

The Database Maintenance Advisory Council had a conference call with Valerie Chase of SirsiDynix to discuss a) the practical problems now affecting the two libraries that use Acquisitions (APL and GUIL), and b) the question of whether or not other libraries should consider using the module before it's greatly improved in *Horizon 8.0*.

The minutes of the 11/17/05 Database Maintenance Advisory Council meeting are attached (*minutes\_20051117.doc*), and the *ACQUISITIONS* section of that report is a summary of the state of Acquisitions at UHLS, and contains a strong recommendation from the council to wait for *8.0*.

## Telecirc

- We asked SirsiDynix for a price quote on a license for another Telecirc phone line. We currently use two outgoing lines that handle all Telecirc calls with plenty of time to spare in our 9:00 AM - 9:00 PM window. A member of the Resource Sharing Advisory Council has asked if we could use our third, unused line for incoming calls, which would enable patrons to call us to renew items instead of just responding to Telecirc prompts when they're called. Do we want to offer this service?
- Because of our very complicated notice system (print, phone, email, and more), libraries received a lot more hold notices than they expected or wanted on the Friday after Thanksgiving. Telecirc did not call on Thanksgiving. On Friday the "print" notice program did what it was designed to do: generate a printed notice for every non-email patron who did not get a Telecirc call the previous day. Automation Services is working to improve the entire notice system.
- Do we want Telecirc to call on Monday 12/26/05 and Monday 1/2/06?

## Notification method

I'd like to put a prompt on the UHLS "Welcome" web page (<http://uhls.org/uhls/catalog.cfm>) that would take patrons to the page where they can change their notification method to either "Automated Phone" or "Email." My hunch is that a lot of patrons would choose one of these options - especially "Email" - over "Print." Now, about five patrons a day find the page on their own and switch their notification method. Since 11/2/2004, 1,188 patrons have switched themselves to "Email" and 143 have switched to "Phone."

## Overdrive

We've completed most of the tasks required by *Overdrive* to make the service usable by our patrons on 1/1/06. One question remains to be answered: *Overdrive* will reject a patron's request to check out a book if the patron is flagged by us. Our Remote Patron Authentication (RPA) server is capable (we think) of sending codes that will mark a patron as "blocked." Do we want to allow all patrons with valid cards to check out *Overdrive* items, or do we want to block patrons who meet certain criteria. If so, what are the criteria?

## Notice program

From the last ASC meeting: "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."

The yawn count was abnormally high when I first presented this idea to Resource Sharing and ASC, so I made it a very low priority to develop the idea further. At the 11/15 Resource Sharing Advisory Council meeting, some converts expressed their eagerness to have this system implemented as soon as possible. So here it is again - I just want to run this by ASC one more time.

### Lost in Transit reports

We rewrote the "Lost in Transit" report script on the web reports page (<https://horizon.uhls.lib.ny.us/reports/>). The old version ran once a week, took almost two hours to run, and required three separate scripts to be run on Monday. The new version runs in real time and takes seconds, so the information is always current. We changed some of the column labels and added "Price" to the report.

The surprising and disappointing increase in "lost" DVDs and CDs over the past several months has prompted libraries to use this report to submit requests through UHLS to CD&L for compensation. The libraries should check their shelves for the missing items before submitting a request.

### System slowness

SirsiDynix has assigned a specialist to work on our slowness problem. Her name is Trish Reading and she, along with Kathi Adams, Ron Seamons, and Brian Kaplar have been working to resolve this issue. Trish has installed some tools on our HIP server, monitored our problem closely, and changed some programs, but the problem persists, although it seems to be less frequent and less severe.

### DVD player

Mary Fellows asked if UHLS should purchase a DVD player to make available for libraries to borrow. We've looked into this and found that what we need is a DVD player, a screen, speakers, and (most expensively) a projector. The first rough estimates of the cost of these items range from about \$1,600 to \$2,000. Should we pursue this project?

### Horizon 7.4 & HIP 4.1 upgrades

SirsiDynix announced the availability of HIP 4.1, so we can begin our test of *Horizon 7.4* and *HIP 4.1*, which we plan to upgrade to before the major upgrade to *Horizon 8.0* next year. One delay: SirsiDynix does not want to give us *HIP 4.1* because it doesn't support Remote Patron Authentication (RPA), which we use. They want us to wait for *HIP 4.1.1*, but we are pressing them for *4.1* because we don't use RPA on our test server.

### New search limit?

A library asked if we could add "Large Print" to the *Limits* choices on the *Advanced Search* screen in the HIP. We're ready to do this if ASC approves.

## Database Maintenance Advisory Council

**November 17, 2005**

ATTENDEES: Mary Ellen Bena, Lisa Bouchard, Rob Carle, Mary Coon, Sue Dague, Geoff Kirkpatrick, Deidre Lisio, Marcia Middleton, Lisa Pitkin, Bonnie St. Pierre, Julie Stump, Joe Thornton

MINUTES FROM SEPTEMBER 28, 2005 MEETING: The meeting began at 9:30. The minutes of the previous meeting were approved without comment.

ACQUISITIONS: Valerie Chase of SirsiDynix joined us for a conference call to discuss specific problems with the implementation of Acquisitions at GUIL, as well as the broader question of whether we should encourage the use of Acquisitions by our other libraries or wait instead for *Horizon 8.0*, which appears to be more suitable to a system such as ours.

After a lengthy discussion of GUIL's particular problems, we settled on four main issues, all of which point to the conclusion that we'd be better off waiting for 8.0:

- Basic functionality. Bonnie and Lisa described to Valerie the workflow, workarounds, plusses and minuses of Acquisitions at GUIL. Valerie had a few specific suggestions that will fix some of their problems, but the conversation ended with the feeling that things will not improve significantly till 8.0.
- This and the following two items are considered by us to be "sharing issues." We continue to struggle with the problem of new Acquisitions records overlaying better and/or edited existing records. Valerie had given us some suggestions by email after our last meeting in October. Rob and Mary Ellen experimented with the suggestions but did not find that they fixed our problem. Valerie is confident that they will, so we'll experiment some more.
- Alternate views. We need "alternate views" to prevent one library from seeing or changing the budgets of another, to simplify the use of the system, and generally to emulate the forthcoming "processing centers" of *Horizon 8.0*, which will make each library appear independent. The creation of the necessary alternate views for APL was "arduous" and the consensus is that it would be arduous to the point of impossibility to create and manage alternate views for 29 libraries.
- Different budget years. With only two libraries participating so far, we've already encountered a serious problem because those libraries use different budget years. Again, the problem would grow enormously with many more libraries participating.

The discussion produced four action items:

- Rob and Mary Ellen will experiment some more with Valerie's suggestions for handling the "overlay problem" with Acquisitions records such as those from Baker & Taylor.
- Joe will ask Kathi Adams of SirsiDynix to give us the names of other library systems that are using the Acquisitions module.
- Joe will ask Kathi Adams to setup a WebEx session at GUIL to help with their problems related to Acquisitions.

- Joe will make the following report to ASC:
  - o The Database Maintenance Advisory Council strongly recommends that the libraries that are not yet using the Acquisitions module should wait for *Horizon 8.0*, which we will probably not install before the end of 2006.
  - o We will continue to do all we can to help the libraries (APL and GUIL) that are already using Acquisitions.
  - o We will do all we can to assist any library that decides to use Acquisitions before the 8.0 upgrade. Lisa Pitkin said that anyone interested in taking this step is welcome to visit GUIL to observe their workflow.

**AUTHORITY CONTROL:** Joe reported that our database has returned from LTI along with our new authority files. He said that the Automation Services Department was concerned about the negative impact on system performance of importing 480,000+ bib records and 300,000 authority records, and so planned to do the imports over the winter break. The council feels that that is too long to wait in spite of the potential problems: poor performance and authority records with no bib records attached (we will load the authority files first). Joe will suggest to ASC that we begin importing immediately, in small groups of records during off hours.

**NETLIBRARY:** Joe reported on the status of NetLibrary:

1. We have imported almost 1,000 NetLibrary bib records into our catalog.
2. We wrote a script to change the 245\$h to [downloadable audiobook].
3. We do have to attach items to the bib records or else the titles won't appear in browse searches. Each subscribing library (APL, BETH, and GUIL) needs to attach an item record.
4. We'll receive updates once a month. Lisa Pitkin will forward any email announcements of the availability of NetLibrary records to Joe.

Marcia asked if we could come up with a more efficient way of adding items than to have each of the three libraries edit every bib record independently. The consensus was that it would be too confusing and potentially unfair to try to coordinate this process, and that we should stick with the traditional method where each library does its own items.

BETH improved on the recommendation that Joe had emailed to 'Database' related to the handling of items. The original recommendation was:

```

Itype:      NR21DAY    /* since they're not requestable */
Collection: ZZNETLB   /* displays as "Downloadable Audiobook" */
Item Status:      online    /* displays as "Online" */
Call no.:      -          /* literally a dash '-' */

```

Geoff said that BETH found that using a period (‘.’) instead of a dash (‘-’) for Call number improved the appearance of the record in the HIP. Joe will send this revised recommendation to the ‘Database’ list.

**MULTIPART DVD’S:** Geoff asked how everyone was handling multipart DVDs – keeping them together or splitting them up? Most libraries split them to make the separate pieces available while the others are out.

**SERIALS TRAINING:** Lisa Pitkin discussed with Maggie Horn (OLIS employee and serials expert) the possibility of her coming to UHLS to train us. Joe wondered if it was really necessary, especially before we have a more introductory session from someone else like Carol Lagasse. The council thinks:

1. It couldn't hurt to have Maggie come.
2. The audience should be us (Database Maintenance), although we'll make everyone aware of the session with the warning that it's not for beginners.
3. Maggie will charge a small fee, which we're sure will be well spent.
4. We should finish the authority control import first.
5. It will probably happen in the spring.

**The next meeting is scheduled for December 21, 2005 at 9:30 at UHLS.**