

AUTOMATED SERVICES COMMITTEE
January 24, 2006
MINUTES

PRESENT

(Voting): Tim Burke (APLM), Nancy Pieri (BETH), Deb Canzano (COHS), Richard Naylor (COLN), Debbie Shoup (EGRN), Barbara Nichols Randall (GUIL), Jane Minotti (SNLK), Joe Thornton (UHLS), Gail Sacco (VOOR)

9:07 AM Meeting called to order by Philip Ritter, Chair

I. MINUTES

Minutes of the December 6, 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 finished. UHLS has a contract with LTI for quarterly authority control processing.

III. OVERDRIVE

N. Pieri reported that she has successfully downloaded one audiobook, She looked at the circulation figures and was pleased with the use that patrons are making of the OverDrive items. She noted that there are many holds on items and that it is too bad that items can't be "returned" prior to the expiration date. R. Naylor responded that the loan period was established by OverDrive in order to prevent people from simply burning one item after another to CDs.

Discussion about the ability to sign out 10 items at a time. This was the default setting by OverDrive. Consensus to watch and see if this should be decreased due to patron demand for items. R. Naylor asked for the average items per patron and the number of patrons using OverDrive?

J. Thornton noted that OverDrive is not integrated into the UHLS system and therefore, If the libraries want individual library circulation statistics, J. Benedetti will give them a separate login number and they can go to OverDrive and request the information.

P. Ritter will consult with J. Benedetti on the process by which the libraries can purchase and add books to OverDrive.

J. Thornton noted that there is an email address on the OverDrive site for support. UHLS receives a few emails every day from patrons about OverDrive. Up to this point, the Automation staff have been handling these, but will begin to refer patrons directly to OverDrive.

IV. DATABASES

J. Thornton reported that he is working on creating a system to clarify what libraries have their own subscriptions to online databases and what servers are being used to access these databases. He will put together a FAQ page or a blog that will address questions such as: What libraries subscribe to their own databases? How does RPA (Remote Patron Authentication) work? What is the difference between accessing an online database from a library's website vs. through the UHLS website?

J. Thornton and J. Benedetti will discuss a system whereby the libraries will be notified in advance of any of the annual changes to the online databases.

V. MyLIST

Discussion regarding the retrieval of "MyList" in the HIP. Consensus to inform patrons that the Lists that were lost one month ago are irretrievable. The problem of the time period has been fixed, however the lists should not be considered permanent.

VI. HORIZON 7.4 and HIP UPGRADES

J. Thornton reported that SirsiDynix has informed him that the upgrade to 7.4 will not solve the browse scoping problem and has recommended that UHLS wait to upgrade to 8.0. A date has not yet been set for the release of Horizon 8.0.

VII. PATRON EXPIRATION DATES

The problem with the "flood" of expired library cards has been solved. However, a new, less critical, situation has developed with the XA and XY patrons whose cards are supposed to be valid for only one year. The script that solved the other problem made these cards valid for three years also. J. Thornton will see if there is a solution.

VIII. ZIP FILES

Consensus to allow incoming zip files through the email server. UHLS does not block or filter outgoing files.

IX. COURIER BAGS

P. Ritter explained that using the bags is a Directors Association issue and a decision by the individual library directors - not an ASC issue. He noted that purchasing and using the bags was another attempt to try and stop the loss of DVDs and CDs. It was one solution recommended by the courier company.

J. Thornton has created a report that would show all items "In Transit" to a specific library at a specific date. This might help in determining where the losses are occurring.

X. NOTIFICATION METHOD

J. Thornton reported that since a prompt was placed on the UHLS website to allow patrons to select/change their notification method, an overwhelming majority have selected email notification.

Several people commented favorably on the placement of the box announcing the availability of the OverDrive audiobooks.

XI. SYSTEM SLOWNESS

J. Thornton noted that even with Browse Scoping turned off, there were still periods of very high CPU usage. He will contact other Sirsi/Dynix customers in New York State and see if any of them have experienced the Browse Scoping problem and how they handled it.

XII. MISCELLANEOUS

D. Shoup reported that she was having trouble with books on the library shelves that had not been properly checked in. Committee members suggested that she train her circulation staff to look at the computer screen, not just listen for the "beep" when checking in an item.

Discussion regarding broadcast emails to patrons regarding newsletters and other information. Consensus that this is something that the libraries should handle on their own - not a UHLS responsibility.

N. Pieri, B. Nichols Randall and G. Sacco reported that BETH, GUIL and VOOR will no longer accept reserves on DVDs from COLN and APLM patrons. Patrons from COLN and APLM may still walk in to the libraries and check out the items. N. Pieri noted that the losses through the courier were the final straw in determining this policy. BETH does not want to loan to libraries that will not reciprocate.

B. Nichols Randall asked if the routers to the T1 lines were a UHLS responsibility? The GUIL router is dying and the library will need a new one soon. P. Ritter noted that UHLS will purchase the router.

T. Burke asked J. Thornton if there was any progress on the proposal to have UHLS send out the notices? J. Thornton reported that he is working on some options to present to the libraries. He has not yet discussed the cost and staff time with P. Ritter but suspects that it will have to be an "all or nothing" decision. All of the libraries will have to participate in order to make it feasible for UHLS to take this responsibility.

G. Sacco asked if the ASC would consider sponsor a continuing education day with table talks on automation issues for librarians and other staff members. J. Thornton noted that R. Carle offers regularly scheduled basic training in Horizon for new staff members or as a refresher for current staff. Consensus that the continuing education day was not necessary.

10:45 adjourned

NEXT MEETING: Tuesday, February 28th at 9:00 AM

Heidi A. Fuge
1/24/06

Automation Services Report January 24, 2006

Authority control

We finished importing all authority and bibliographic records into Horizon on 12/27/05:

Bibliographic records	481,431
LC Name authority records:	250,604
LC Subject authority records:	47,724
LC Children's subject authority records:	623

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."

OverDrive

We now have access to about 1,000 ebooks and audiobooks through OverDrive.

Three projects still to be done:

- We received 658 OverDrive bib records. We wrote a script that will change the 245\$h from '[electronic resource]' to '[downloadable audiobook]' for all records with an 'i' in the 7th position of the 000. It will also change the 245\$h for all records with an 'a' in the 7th position of the 000. The Database Maintenance Advisory Council will decide what term to use for ebooks at their January 25 meeting.
- We (Peter, probably) will come up with an icon for ebooks after we decide what the text description should be (like 'downloadable audiobook').
- Mary Ellen will add one item for location=ALL to each bib record. We're hoping that we can change every HIP profile to search for "my library + ALL" so that we don't have to add an item for every location in our system.

Databases

On January 1 our online database subscriptions changed. We updated RPA, the UHLS web page, and the COLN database page, but subsequent questions from VOOR indicate the need for better coordination and communication between the libraries and UHLS about database access.

MyList

Several months ago a patron complained about "My Lists" expiring in the HIP. At that time we had set the expiration time for MyLists to sixty days. After the patron's complaint, and with ASC approval, we changed the time-to-live (number of days) to NULL, which SirsiDynix told us would effectively make MyLists immortal. The practical effect, though, was a flurry of quickly expiring MyLists, and a lot of unhappy patrons. As soon as we were aware of the new problem, we changed the time-to-live to 999 days, and the number of reported problems has decreased greatly. Peter worked with SirsiDynix to devise a method to retrieve expired MyLists. We can

retrieve bib numbers only, but we wrote a script to retrieve titles using those bib numbers, and we can make those titles available to any patron who asks. Peter also found a way (untested so far) to restore the MyLists completely, but there is a logistical problem to deal with, namely that the restored lists would replace any new lists the patrons have created.

Large Print Limit

We have been working to include "Large Print" in the Limits box on the Advanced Search screen in the HIP. It's a much harder project than we anticipated, and Jonathan is working with SirsiDynix to complete it.

Horizon 7.4 & HIP 4.1.1 Upgrades

While preparing our test HIP server for the installation of HIP 4.1.1 for testing purposes, we encountered some problems that required SirsiDynix's help. The ensuing discussions with SirsiDynix about our complexity in general, and about our problems with this test in particular, led them to recommend strongly that we do not upgrade to Horizon 7.4 and HIP 4.1.1 unless we have a compelling reason. They recommend that we wait for Horizon 8.0, since the gain of upgrading before then would not justify the pain.

Patron expiration dates

We migrated to Dynix three years ago and at that time gave all new patrons an expiration date of January 2006. On 12/22 we ran a script to change the expiration date for every patron who had borrowed an item within the past three years. We added three years to the "last checkout date" to compute the new expiration date (as decided at the January '05 ASC meeting).

This was done mainly to avoid a flood of "expired patrons" at the circ desks. However, any patron who was added when we moved to Dynix, and has not checked anything out since, will come up as "expired" at circ.

Zip files & email

On 12/8, Jonathan sent an email to *uhlanusers* to ask how necessary it is for UHLS email users to attach zip files to their messages. The question was prompted by the flood of emails that are rejected every week due to virus-laden zip files. Zip files are one of the biggest carriers of threats like the Sober worm, and we could make our email system safer by rejecting all email with attached zip files. Only one library replied that some of its staff regularly send zip files as attachments.

Courier bags

The Resource Sharing Advisory Council is unanimous in its negative opinion of the new nylon bags that were distributed for use with DVDs, CDs, and other small, valuable items. The sense of the council is that use of the bags is effectively mandatory, although they were told emphatically by UHLS that it is not. The misunderstanding arises possibly out of the belief that UHLS' official policy is, "If you don't use them, don't blame us for lost material." Can we clarify this?

Telecirc

At the last ASC meeting we agreed to enable a third Telecirc line for incoming calls. Subsequent tests by Marcia Middleton confirmed her concern that this would enable patrons to renew APL's (or any other libraries') items using the circulation parameters of the ALL library, which are very different in some cases. For instance, APL does not allow renewals of magazines, but ALL allows renewals of magazines for 29 days. After approval (via email) by ASC, we canceled the plan to enable a third Telecirc line.

Notification method

We put a prompt on the UHLS "Welcome" web page (<http://uhls.org/uhls/catalog.cfm>) that takes patrons to the page where they can change their notification method to either "Automated Phone" or "Email." The number of patrons changing notification methods has gone up significantly since this prompt was put in place.

Lost in Transit reports

We added bib# to the "Lost in Transit" reports on the web reports page (<https://horizon.uhls.lib.ny.us/reports/>) and printed a copy of each library's "lost in transit" items, which we'll keep permanently. The members of the Resource Sharing Advisory Council and Database Maintenance Advisory Council agreed to print their own copies, decide which items on the report to delete (e.g. everything from 2003), and delete them or ask UHLS to delete them.

System slowness

Because we have not had a major slowness problem for a couple of weeks, we turned browse scoping back on for KidSearch, since that module depends almost completely on browse scoping. SirsiDynix continues to work with us on the slowness problem.

Miscellaneous

- If you want, we could write a script (with a web interface) to enable you to broadcast a message to all patrons of your library who have email accounts in our system.
- MySQL and PHP are available on our web server, although our support of these applications will necessarily be limited.
- There is now a "Missing Items" report on the web reports page (<https://horizon.uhls.lib.ny.us/reports/>).
- BRUN and RCSC switched to Telecirc as their default method of notifying patrons about overdues (BRUN only) and holds (BRUN and RCSC).