



Automated Services Committee

February 27, 2007

MINUTES

PRESENT

Voting: Marcia Middleton (APLM), Nancy Pieri (BETH), Joe Makowiec (BRUN), Richard Naylor (COLN), Debbie Shoup (EGRN), Margaret Garrett (GUIL), Judy Felsten (RCSC), Jane Minotti (SNLK), Paul Hicok (TROY), Joe Thornton (UHLS), Gail Sacco (VOOR)

Nonvoting: Mary Fellows (UHLS), Grace Buckley-Crist (RCSC - Job Shadow)

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

I. Minutes

Minutes of the January 23, 2007, meeting accepted as presented.

(NOTE: See the Automation Services Report that begins on page 5 for more information regarding issues that were reported at the meeting. The following deals only with those issues where there was significant discussion and where the ASC took some kind of action.)

II. AquaBrowser Proposal

J. Thornton noted that it would cost \$26,000 plus maintenance for a "bare bones" proposal.

R. Naylor reported that he looked at some of the websites using AquaBrowser and also checked out several library listserves and the only negative comment was that the software requires that "Flash" be installed to use it.

J. Thornton opened the website for the Onondaga County Public Library for a preview; he pointed out that AquaBrowser searches with its own algorithm and produces a "word cloud" with other associative words. G. Sacco asked if the AquaBrowser page was customizable since the page that was being shown was not good for people with vision problems.

M. Garrett reported that GUIL found that the number of hits varied depending on the specificity of the information being requested. For example, Mozart vs. Wolfgang Mozart.

Discussion regarding AquaBrowser vs. Google search. AquaBrowser can search everything that the current database searches. It doesn't search summaries or tables of contents. M. Middleton noted that there will eventually be another search engine that can search "deeper" and it is part of a Bowker product that

is not yet available. R. Naylor noted that it was better to keep the searches more simple as the COLN patrons did not want a lot of information, they just wanted a simple answer.

J. Thornton noted that library automation system vendors will be heading toward AquaBrowser/Google-type functionality in the near future since OPACs are behind in search engine development. R. Naylor said that AquaBrowser should probably be considered as no more than a three-year investment since eventually the other vendors will include this in their product.

Discussion regarding the desire/need for AquaBrowser within the UHLAN system. M. Fellows reported that the Youth librarians in the Advisory Group seemed to like the Kids product and the way that it produces information in a manner familiar to kids today.

G. Sacco asked if AquaBrowser was customizable in order to reflect the particular circumstances of the Upper Hudson libraries. J. Thornton responded that it is not totally configurable according to the salesman. P. Ritter said to consider it as non-customizable.

Discussion about the other options available. Consensus that the Focused Web Crawler and the Kids AquaBrowser were needed.

M. Middleton suggested that it would be worth talking with other AquaBrowser users to see how they felt about the product. She noted, in response to a question, that it is an overlay and can be used with almost any library automation system.

A list of questions was developed for J. Thornton to use in communicating with other AquaBrowser users (G. Sacco volunteered to contact Maureen O'Connor at Queens). The questions included:

- given an opportunity to purchase this overlay again, would you do it?
- how is your public using it? What was their response to it?
- how would you describe the patron transition/learning curve?
- has this been set up as your default searching tool?
- what options did you select for the system?
- what do you like/don't like about the product?

P. Ritter noted that purchase of AquaBrowser would also require the purchase of additional equipment, so the outlay of funds could be considered in the \$50,000 range. The money could be taken from the Automation Reserve Account if the Board approved it. G. Sacco suggested that if the purchase is recommended by the ASC and approved by the Board, the payment should be negotiated so that 10% of the purchase price is held back for 30-60 days until we are satisfied with the product.

Consensus that the ASC should plan on voting on the purchase of AquaBrowser at the March 27th meeting. J. Thornton and G. Sacco will have answers to the questions they ask of some users. J. Felsten asked if one/or some of the libraries currently using AquaBrowser could give guest privileges to UHLS so that the full program could be examined.

A notice should be sent out to the member libraries when these Minutes are finished so that they will read them and understand the importance of the March meeting.

Additional discussion regarding a future Horizon upgrade. J. Thornton noted that there is the possibility of major expense with the upgrade to Horizon 8.0; from the communications on the Horizon-list it sounds like it is almost a migration to a new system. He would much prefer to stick with Horizon and spend the money on improvements to the current system rather than seek out a new vendor and undergo the trauma of migration to a totally new system. Horizon 8.0 will work on "thin clients" which means that the system will run on a server at UHLS and all upgrade will take place on that server - individual workstations will no longer have to be upgraded.

III. Daylight Savings Time

J. Thornton will look into the changes/patches available from Microsoft since it seems that some libraries might need assistance with the updates.

IV. Calendar

Discussion regarding the notice of meetings and calendar scheduling. It was noted that a calendar is included in every UHLS newsletter and recent issues are accessible on the UHLS website. J. Thornton noted that the website is under revision.

V. Reports

J. Thornton will re-convene the Reports Subcommittee. J. Felsten noted that she would like to be on that committee. J. Thornton will send out an email inviting participants. P. Ritter noted that the reports produced by the automation system have to answer questions on the State Annual Report.

VI. Riverway

The status of Riverway was questioned - is it a stand-alone project? P. Ritter noted that it is an Upper Hudson program. J. Thornton demonstrated the new Riverway website that he updated with changes provided by Mary Fellows and the Riverway Committee. Much approval was expressed.

VII. Snow Days

G. Sacco suggested that J. Thornton discuss any changes to the circulation calendar with the circulation staff since some libraries (VOOR in particular) already have procedures in place for renewals when there are unscheduled library closures.

VIII. New Reports

J. Thornton demonstrated the new reports he created in response to a request from a writer at the Albany Times-Union. These reports show the "most requested" items by week, month and year. Consensus that the items should be separated by books and DVDs. Consensus to continue to keep the member libraries grouped together rather than produce individual reports. J. Thornton noted that he could also produce a report on the "most loaned" items but consensus that this was not needed.

10:55 AM Meeting adjourned.

**NEXT MEETING: Tuesday, March 27th at 9:00 AM -
Decision regarding AquaBrowser expected at this
meeting.**

Heidi A. Fuge
2/27/07

Automation Services Report February 27, 2007

AquaBrowser proposal

On 2/22 John Mihalick of TLC (The Library Corporation) demonstrated *AquaBrowser*, a "visual and faceted search tool" that would give us FRBR-like functionality in the HIP. TLC has given us a proposal much lower than the \$100,000 figure they proposed last June, although the current proposal is for a basic system (OPAC interface only). The new proposal is attached ([aquabrowser_proposal.pdf](#)). At the meeting we discussed adding the *Kid's AquaBrowser* option and at least one other.

Horizon & HIP upgrades

On 2/16 we upgraded to Horizon 7.3.4 and HIP 3.0.8. We started the upgrades very early in the morning and the system was available by 8:20 a.m. The purpose of the upgrade was to accommodate ISBN-13, and we had to rebuild the ISBN index as part of the upgrade process. We started the rebuild late Friday night to avoid slowing the system during the day. The rebuild crashed several times because of its size and because of duplicate ISBN's in some records, but we worked around those problems and finished the reindexing at 7:00 a.m. Sunday (2/18) morning. We added MARC tag 024 to the ISBN index because OCLC had used this field to store ISBN-13's while they worked on a permanent solution.

We have not yet heard whether the upgrades solved the problems with Acquisitions ordering.

We knew that *KidSearch* would stop working after the upgrade until SirsiDynix reapplied the relevant custom programming. At this time (2/23) they are testing the custom programming on our test server and we hope to have *KidSearch* working again by early next week (week of 2/26).

We did not know that the customized messages that display when a requested item is checked in would be lost. This was also custom programming that SirsiDynix had done for us with our original contracted custom programming credits. When applied, this custom programming shows circulation staff how the requester of a just-checked-in requested item would be notified – email, print, or TeleCirc. Without the custom programming, the system shows "Patron will be notified by mail" for both "print" and "email" patrons. We've asked SirsiDynix to reapply this custom programming to our updated system, but it will cost us \$600.

Daylight Savings Time

From Rawdon: Starting in 2007, DST has a new schedule. It starts at the second Sunday in March till 1st Sunday in Nov. There are patches available on the Microsoft website but Windows update does not consider it at high priority, so you need to pick it manually. It is recommended to apply the patch or your computer clock will be off by one hour. Even if you sync your computer with public time servers, it will not be adjusted because those servers give you Universal Time or Greenwich Mean Time. Your computer uses time zone differences to calculate local time. Since DST starts 2 weeks early and ends 1 week later, if your computer does not know this new schedule, it will give you time in the standard time zone.

This update can be found at <http://support.microsoft.com/kb/928388>. It applies to XP/2003. For W2k, use this link: <http://support.microsoft.com/kb/914387/>

If your library has hourly loan items, you should apply this patch. Horizon registers your computer clock as check in/check out time, so if there is discrepancy on local clocks, the hourly loan items may be overdue even if they are returned on time. Daily loan period items will not be affected.

We have patched our Solaris and Windows servers to handle this change.

Fortres Grand Time Limit Manager

From Rawdon: I came across a copy of Fortres Grand Time Limit Manager. It is a pc-base application which runs on XP/2000. There are not too many settings to configure so configuration is quick and simple. Indeed, there are only 5 buttons to click in the entire application. It provides not only time limit but also logs the time used by public of the workstation. There is an override policy that if there are un-occupied stations, the policy will not be enforced. The price is affordable, at \$25/license. If you find that your staff spends a lot of time monitoring patron usage on public pc's, you may want to take a look at this product.

For a detail description or download a free trial of this product, visit <http://fortresgrand.com/products/tlm/tlm.htm>.

Rawdon has scheduled two demos, "one at Poestenskill and the other at UHLS. Demo at POES can be either on a Tuesday afternoon, Wed morning or Thursday morning. The UHLS demo will be either March 8 or March 13 morning or afternoon."

Borrower Registration Reports

A few people have found discrepancies in their Borrower Registration Reports from 2005 -> 2006. The total number from 2005 + the number added in 2006 doesn't add up to the total number in 2006.

Blame it on the purge. On 4/21/06 we purged the patron database of all patrons who had been inactive for at least three years. You can see a list and approximate total number of your patrons who were purged if you look at your report here: <https://horizon.uhls.lib.ny.us/reports/purge/> (use the intranet login and password).

The number is approximate because some of you asked me to exclude some of the people on those lists from the purge.

The numbers on the 2006 Borrower Registration Reports are correct.

HIP problem

On 2/12/07 we had problems with the HIP that caused it to be down for two hours. Patrons had called saying they couldn't logout of *My Account* in the HIP. We restarted the HIP to try to solve this problem, but it did not come up. SirsiDynix fixed the problem.

Microsoft FrontPage

TROY continues to have a problem with their *Virtual Reference Form*, caused by the changes to *FrontPage* support on our new web server. We're working with Larry Kammerer on this problem.

Windows Vista

Windows Vista is available and new PCs will come with it pre-installed. We are testing it but suggest that libraries stick with Windows XP for now if they can.

Riverway web site

We made extensive changes to the 2007 version of the *Riverway* web site: <http://www.riverwaystorytellingfestival.org/>

Public Web Browser

We renewed our two county licenses to *Public Web Browser*. We're not sure how many libraries use this security application, but the price is so low (\$250/county) that we renewed without polling the libraries.

Snow Day(s)

When we got two feet of snow on 2/14, some libraries closed early and some didn't open at all. We added calendar exceptions (Closed – Snow Day) for every library that contacted us, but also for every library that the radio and TV reported as closed.

APL network problems

On 2/19 TechValley Communications notified APLM that it had some equipment failure that affected its connection to UHLS. The service was intermittently disrupted.

Schodack / EGRN

We wrote several reports for a Schodack committee person trying to determine the library usage patterns of Schodack residents.

ASC mailing list

As decided at the last ASC meeting, we restricted posting to the ASC list to members only. A problem arose almost immediately: The 'directors' list was part of the ASC list, so members of 'directors' automatically received ASC postings. However, 'directors' is not a person, so individual directors could not post to the ASC list. We removed 'directors' and added the individual director names to the ASC list.

Item Holdings Report error

Several libraries reported errors with the January 2007 Item Holdings Reports. The reports showed many withdrawn items in the 'Electronic' category. We located and corrected the mistake, reran the reports, and they're now correct.

New reports

We created three reports of most requested items:

- 1) past week: https://horizon.uhls.lib.ny.us/most_requested_items/week.html
- 2) past month: https://horizon.uhls.lib.ny.us/most_requested_items/month.html
- 3) past year: https://horizon.uhls.lib.ny.us/most_requested_items/year.html

Some issues/questions:

- 1) Do we want to separate books and non-books?
- 2) I'm not sure about the "past year" report because I'm not sure how long requests stay in the request table.
- 3) We could probably do this on an individual library basis if people were interested.
- 4) We can change the number of requests that display (it's 20 now)
- 5) You might notice that there are two "The Devil Wears Prada" records in the "past year" report. This is because there are two bib records for that title. This is a cataloging issue that we'll investigate.
- 6) These are literally "requests" so some of them are for items that we don't have on our shelves yet since we allow requests on "On-order" material.
- 7) We could also do a "most loaned" report

New item types, icons

Some libraries have started to collect video games and Playways. We created HIP icons for these items.