



Automated Services Committee

May 22, 2007

MINUTES

PRESENT

Voting: Marcia Middleton (APLM), Nancy Pieri (BETH), Joe Makowiec (BRUN), Maureen DeLaughter (COLN), Debbie Shoup (EGRN), Judy Felsten (RCSC), Jane Minotti (SNLK), Joe Thornton (UHLS),

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

I. Minutes

Minutes of the April 24, 2007, meeting accepted as presented.

(NOTE: See the Automation Services Report that begins on page 4 for more information. The following deals only with those issues where there was significant discussion and where the ASC took some kind of action.)

II. RSS or Email notification of new acquisitions

J. Thornton reported that as a result of discussions at the Reports Subcommittee, he created a report that shows circulation based on Dewey Ranges. He realized that this same report could be used to offer patrons the ability to select a field of interest and be then be notified of any new items in the field. He had a few concerns: what constitutes new? Should this advanced notice apply only to the home library?

N. Pieri responded that since we are a cooperative system, any notification of new items in a patron's area of interest should include all items in all libraries.

J. Thornton will do a prototype and will show it to the Committee members at the next meeting or via email.

M. DeLaughter pointed out that UHLS already has a New Books List. M. Middleton noted that the problem with that list is that it can be confusing since it includes books on order and so they would not be available yet.

Discussion regarding a way in which the New Books List could be arranged to make it more useful for patrons. Consensus to arrange the New Books List in Dewey order and then alphabetically by author.

Discussion regarding Bookletters - a service used on the Bethlehem website. Consensus that patrons don't use this very much.

III. Holds and Overdue Notices via text messaging

J. Thornton reported that he had been contacted by a vendor offering a text messaging service. Consensus that text messaging will be the way of the future but the libraries are not ready to try this yet.

There were several suggestions for ways in which patrons could be notified that email notification is available to them:

- make that information more prominent on the HIP
- add a message to the telecirc message saying that if the patron would prefer email notification to contact their local library
- have circulation staff distribute bookmarks or cards with the information as well as verbally informing patrons of this service
- add a line to the printed notice saying that email notification is available

IV. Purging old log data

M. Middleton noted that she would not want to see records deleted that contain categories such as "Claims Returned," "Lost," "Returned Damaged." J. Thornton will save the full database and then in the active database will only keep one year. Discussion regarding privacy issues and keeping as little information as possible.

J. Thornton will review the log and determine exactly what will be deleted; he will check back with the ASC before doing anything.

V. Bstat (location/geographic identifier)

MOTION: J. Makowiec moved that when registering a patron, only one Bstat is **required** but the record may include as many as possible. J. Thornton seconded. Unanimous.

J. Thornton reported that G. Kirkpatrick informed him that the report by Bstat is basically useless and probably should be removed. J. Thornton will bring this issue to the Reports Subcommittee.

VI. Other Business

- there will be a discussion regarding AquaBrowser at the July ASC meeting
- J. Thornton is still investigating digital signatures
- M. Middleton explained APL's use of the Outreach Library cards - these are cards that are distributed through the Bookmobile, at schools, senior centers, etc. Having this card allows a patron to use the online resources and then when that patron comes to the library to use it, the registration process is completed.

- J. Thornton demonstrated the report that shows where patrons are coming from when using the library and also shows what libraries local patrons are using.
- M. Middleton reported that on Saturday, June 2nd, the New Scotland Branch will close.

10:10 AM Meeting adjourned

JUNE ASC MEETING has been cancelled.

NEXT MEETING - July 24th at 9:00 AM at UHLS

AUGUST ASC MEETING has been cancelled.

Heidi A. Fuge
5/23/07

Automation Services Report

May 22, 2007

Gates grant

Jonathan has nearly completed his part of our involvement in the US Library Hardware Sustainability Access program -- to determine if eligible libraries' public access PCs qualify for replacement. The wiki he created for this project shows the current status: ([http://www.uhls.org/wiki/index.php?title=Opportunity Online Hardware Grants program](http://www.uhls.org/wiki/index.php?title=Opportunity_Online_Hardware_Grants_program)).

Serials cataloging workshop

Maggie Horn, of the SUNY Office of Library and Information Services (OLIS), gave a full day Serials Cataloging workshop at UHLS on 4/25, from 9:30 - 4:30. The session included a review of the workshop she gave last year, with a "focus mainly on major/minor changes with how to close off records and link them. Also what to do when the serial title actually dies (and leaves no heirs!)."

Maggie will also do a Subject headings workshop at UHLS on a date to be determined.

Post-upgrade problem with fines

Since the last Horizon and HIP upgrades, some libraries had reported that patrons were being charged fines when they renewed items on their due dates, but after the libraries had closed. One library reported that a patron received a fine even though she returned the item while the library was open. UHLS had reported this problem to SirsiDynix and received the reply that it was a known bug, that it had existed for a long time, and that there were no plans to fix it. After pushing SirsiDynix for a solution, they determined that the problem was related to this year's unusual Daylight Savings Time change. They fixed the problem, and our patrons should no longer incur fines for items renewed on their due dates, even if the library is closed. They have till midnight, as it should be, and as it always had been before this problem appeared.

As decided at the last ASC meeting, we removed the "Hours" tab from the HIP interface. We have not yet changed all libraries' hours to 24x7 because we're not sure of the ramifications, and the immediate need for that change is less apparent.

ESIP

ESIP is SirsiDynix's new protocol that enables third party applications like *SAM* or *3M Self-checkout* to authenticate users against the Horizon patron database. Now, APL and GUIL have separate *SIP2* licenses installed on their own servers. One *ESIP* license can be used by multiple sites, however, so we installed it on a UHLS server for use by APL, GUIL, and any other library that needs it. APL is testing *ESIP* now.

Reports Subcommittee

Based on discussions in the Reports Subcommittee, we added three reports to the web reports page (<https://horizon.uhls.lib.ny.us/reports/>):

- "Checkouts by your patrons (by checkout location)"
This reports shows which checkout locations your patrons have used within a specified time frame.
- "Checkouts in your library (by Btype)"
This shows who's using your library. It shows checkouts, grouped by Btype, within a specified time frame.
- "Circulation by Dewey Ranges"
This should be treated as a work in progress. The Reports Subcommittee needs to develop it some more. It shows circulation within a specified time frame, grouped by Dewey call number ranges. We used the COLN Dewey ranges that Richard Naylor had created for another report.

IMPORTANT: the third report ("Circulation by Dewey Ranges") uses a lot of system resources and should not be run at busy times.

A general warning: whenever you run any report, if it takes more than ten or fifteen seconds to return a result, it's probably slowing down all activity on the system. Reports like this should be run only when system activity is low (e.g. early morning).

New project?

Related to the "Circulation by Dewey Ranges" report (above), we could offer our patrons the same list of "subjects" and have them select some to add to their profiles (which we would create for them). We could then notify them by email or RSS when new items were added to our catalog that match their selections.

As always, this project would be complicated because we're a system. For example, the "New Items" reports (<http://horizon.uhls.lib.ny.us/newitems/>) consider an item "new" if it's new for a particular library. If RVLL adds its first copy of "The Da Vinci Code" tomorrow, it will appear on their "new items" list, even though that title has been in our system for years. So we would have to discuss what makes an item "new" in this proposed system. I think we would have to choose between two options:

- a patron would be notified when a relevant new **title** is added to the database.
- a patron would be notified when a relevant new **item** is added to her home library.

Should pursue this, and if so, which group/committee/council/etc. should plan it?

Another new project?

A while ago Judith Wines asked if hold notices could be sent as soon as items were checked in, instead of the following morning. I said 'no' because the timing would be difficult (i.e. keeping track of who had already been notified on a given day).

But I think I've found a way to do it. The job could run every hour, or every fifteen minutes, or even every five minutes, and would send email notices to everyone who had a hold become available since the last time the job ran.

This applies only to email hold notices -- not to Telecirc or print notices.

I will bring this suggestion to the next meeting of the Resource Sharing Advisory Council.

Another new project?

We're investigating the practicality and cost of sending hold and overdue notices through text messages.

RVLL

Rensselaerville is now connected through MidHudson Cable (MHC), so we no longer have any 56K connections. Although they're on cable, the Horizon connection is still slow so they will continue to use Terminal Services to run Horizon, as they've done for the past year or so.

Their newer PCs were destroyed by the flooding early last month, so they're using their old P2. Rawdon solicited donations of older PCs, and APL generously donated far more than RVLL needs.

Patron Registration Cards

Although I've only just started to look into electronic signatures (or some way to prove in court that a person actually owns a library card), the first place I called (NYPL) said that they do not keep any paper registration forms (ergo, no signatures). They also do not use any kind of electronic signature. They allow patrons to register online, but that registration only allows them to use online resources such as databases. They must bring proof of residence when they first check material out of any library.

Big Read website

We created a blog and added a lot of photos to the *Big Read* website (<http://www.uhls.org/bigread/>).

System problems

Slowness

On Saturday 5/5 and again on Wednesday 5/9 our router's CPU usage shot up to 100% and stayed there, which had a significant negative effect on response time for all Horizon activities. Rawdon traced the problem to several virus-infected PCs at three of our libraries. He blocked the affected port on our router and notified the involved libraries.

We continue to receive sporadic reports of system slowness, unrelated (we think) to viruses. We continually monitor use of system resources with this report: <https://horizon.uhls.lib.ny.us/reports/system.html> Also, we setup a VNC connection to a circulation workstation at GUIL so we can observe response time during the day. We have also asked SirsiDynix to look at our *Sybase* (our database management system) parameters to see if we can fine tune them to improve performance. They gave us a suggestion (to increase a setting from 10 to 2000), which we are doing in increments of 200. The current setting is 800, but we have not yet seen a significant positive or negative effect of the change.

Database space

On 5/4 GUIL reported that they could not pay fines on their circulation workstations. It turned out that the disk space allocated to *Sybase* was full. SirsiDynix purged some old log data, which solved the immediate problem, and recommended that we purge some more. The problem came up again on 5/7 and affected more than just fee payments. We scrambled to find log data to purge and asked the libraries if we could purge old fine/fee log data. The consensus was that we should keep the last year's worth of log data. While we were discussing this, SirsiDynix allocated more space to *Sybase*, so we were out of the woods, at least temporarily. We will find a way to save old log data before purging it from the database, and then will purge all but the last twelve months of data.

(Our Payment History/fee_payment_log has more than 2,000,000 entries.)

Troy Virtual Reference Form

The TROY Virtual Reference Form depended on some *FrontPage* functions that are no longer available by default on our new web server. We rewrote the TROY Virtual Reference Form to use ASP (Active Server Pages) instead of *FrontPage* to email reference questions to the TROY staff.

Bstats – how many?

We found a way to change the number of required Bstats when entering a new patron record. We polled the libraries, who agreed that one required Bstat is enough (you can enter as many as you want), and we will implement this change as soon as Resource Sharing discusses it and ASC approves.