



Automated Services Committee

November 27, 2007

MINUTES

PRESENT

Voting: Tim Burke (APLM), Nancy Pieri (BETH), Joe Makowiec (BRUN), Richard Naylor (COLN), Debbie Shoup (EGRN), Barbara Nichols Randall (GUIL), Judy Felsten (RCSC), Paul Hicok (TROY), Joe Thornton (UHLS), Gail Sacco (VOOR)

Non-Voting: Michael Sweeney (GUIL)

9:10 AM Meeting called to order by Philip Ritter, Chair

I. Minutes

Minutes of the October 23, 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. AquaBrowser Update

P. Ritter reported that the UHLS Board approved the AquaBrowser proposal as presented: Year 1 cost not to exceed \$49,900 and Year 2 (Annual Maintenance) cost not to exceed \$13,600. He has asked J. Thornton to hold off implementation until the beginning of 2008 so that the Year 2 cost will come under the 2009 budget. We will try to find a way to cover the Year 2 under the operating budget but this will give us time to consider how it can be done.

G. Sacco asked if staff training in using AquaBrowser could be worked into the Advisory Councils' meeting agendas.

J. Thornton noted that UHLS was allowed three add-ons with AquaBrowser; he recently learned that the WebFeat integration will count as one of those add-ons so we need to decide what other two we want. Consensus that Kids AquaBrowser was a must and so was WebCrawler.

MOTION: J. Makowiec moved to drop the additional dataset from AquaBrowser and get WebFeat integration, WebCrawler and Kids Browser.
R. Naylor seconded. Unanimous.

III. Online Patron Registration

J. Thornton reported that P. Hicok had asked him about the possibility of allowing patrons to do an online registration for library cards. His initial idea had been that, as a convenience for the patrons, they could fill out the registration form online and then come to the library to present their proof of residency. J. Thornton noted that New York Public Library offers a service where patrons can register online and then have access to the online databases. Several

questions regarding this: how do we know that the patrons are within the libraries' service area? Will the online databases allow access from an online-registered patron? Can the system be set to guard against any abuse? Is it possible that a patron would register simply for the online databases and would never come into the library? How would the library staff handle checking out materials to a patron that had registered online?

MOTION: G. Sacco moved that J. Thornton should look into the options of the online registration system including how NY Public Library handles their patrons. Then, his findings should be presented to the ASC, the Resource Sharing Advisory Council and the Technology Advisory Council. P. Hicok seconded. Unanimous.

IV. Other Business

- B. Nichols Randall introduced M. Sweeney who is now the Head of the IT Department at Guilderland following some re-organization.
- B. Nichols Randall asked about the progress on MARCIVE? J. Thornton reported that he put it on the back burner for a time while he figures out the appropriate criteria for the MARC records he will send to MARCIVE. P. Ritter noted that if the cost for MARCIVE is less than the amount set up in the Supplementary Aid, then the balance still needs to be spent before the end of 2008. He suggested June 1st as a deadline for determining the balance available after the MARCIVE costs have been determined. Consensus that B. Nichols Randall and J. Thornton will discuss the MARCIVE criteria.
- J. Thornton reported that he has created a program that will allow the libraries to send out emails to their patrons. The emails can include an attachment or a graphical message. Discussion regarding "library spam" and whether sending an unsolicited email qualifies as SPAM. The majority of the committee members felt that by giving the library their email address, patrons were prepared to receive information via this method. However, regular emails (such as a newsletter) should include the ability to unsubscribe.
- G. Sacco mentioned that the SPAM continues to increase. J. Thornton noted that UHLS is still trapping thousands of SPAM messages every day but spammers adjust their content so that once a filter recognizes it, it changes. If UHLS made all of the libraries use the same email program, trapping the SPAM would be much easier. J. Makowiec suggested trying "Real Black List" to prevent SPAM. He will send the information to J. Thornton.
- J. Thornton noted that some businesses are dropping local email support since so many people are now using Yahoo!, Google or HotMail.

- J. Thornton demonstrated the new TROY blog/website that was created with WordPress. This program can be installed on the UHLS web server for any libraries wishing to use it. Everyone was quite impressed with the results. P. Hicok noted that it will be available to the public following the staff review.

DECEMBER MEETING CANCELED
NEXT MEETING: Tuesday, January 22, 2008.

Heidi A. Fuge
11/27/08

Automation Services Report November 27, 2007

Terminal Services

Our new Terminal Services server is installed and in production. At this time twenty libraries (about thirty circulation workstations) are using it, and all report improved response time and very few problems. All libraries are welcome to use Terminal Services for all Horizon functions (i.e. not just Circulation), but it's probably not necessary unless you experience regular, significant slowdowns. If you want to try it, please send an email to support@uhls.lib.ny.us.

ILS Migration Subcommittee

The ILS Migration Subcommittee met on 11/20. Discussion focused on needs assessment. We will compile a list of questions to put into an online survey aimed at staff and patrons.

Web Subcommittee

The Web Subcommittee met three times with *M2Design* to discuss their proposal (and accept it) and to begin planning for a redesign of the UHLS website and intranet.

Email 'Hold' Reminders?

As decided at the last ASC meeting, we now send email reminders two days before patrons' holds on items are due to expire. The reminder says, in effect, "Your hold will expire in two days. Please come and get it." On average, we send about 75 of these reminders a day. The purpose is to prevent requesters from being put back at the end of long queue (for a Harry Potter book, e.g.) after their holds expire.

Email to All Patrons (who have email addresses in our system)

GUIL wanted to send an email to all adult GUIL patrons who have email addresses in our system (3000+). We had done this previously for VOOR, but GUIL's request was more complicated. Specifically, they had a graphical message (a formal-looking, calligraphic invitation) while VOOR's was plain text. Because the method we had offered for this sort of mass mailing does not easily accommodate graphics, we took another approach. We created an actual mailing list on our mail server, named GUIL_patrons and populated it with the relevant email addresses extracted from Horizon. Then the GUIL staff person was able to send the graphical message in the normal way (e.g. Outlook) to GUIL_patrons@uhls.lib.ny.us. This service is available to any interested library.

Spam

Spam continues to get through our filters. This is partly unavoidable due to the constantly adapting tactics of spammers, but we've also discovered that our filters are not blocking everything they should. Jonathan is working on this problem with Ipswitch (our email system vendor).

Phishing

The following phishing email deserves a special mention because it made a lot of people nervous. The message itself is harmless, but the attachment is not. A strong reminder: Please don't **ever** open any email attachment unless it's from someone you know **and** you're expecting it.

11/8 email:

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From: Carrie Whitlock [mailto:teg@icqmail.com]
Sent: Thursday, November 08, 2007 4:44 PM
To: kasse@uhls.lib.ny.us
Subject: Re: danger!

hello.

i work in a private detective agency. my name is not important now.
I'm warning you that i'm going to watch you and monitor your telephone line.
Do you want to know who paid for shadowing you? Expect my next e-mail.

P.S. I know, you don't believe me. But i think that the record of your yesterday's telephone conversation will assure you that everything is real. The record is in archive. The password is 123qwe

Training

As directed by ASC, Rob will visit every library within the next six months to provide them with refresher training in cataloging. In November he visited HOOF, POES, APLM, NASS, and COHS.

Cataloging

In response to a request from a reference librarian we improved the Video Title Browse search in stafpac. A typical problem was that "Water tai chi" appeared before "Water [videorecording]" because the subfield h was included as part of the title. We removed subfield h from the video title index, so it doesn't affect the sort, and we added a new column to the display that shows the media type (e.g. [videorecording]).

As directed by ASC, we sent an email reminder to all librarians reminding them that there's a link at the bottom of the intranet's home page (<http://www.uhls.org/intranet/>) that can be used to report specific problems with the online catalog.

HIP trouble

MyList: We continue to receive reports of lost MyLists. We still don't know why this happens (SirsiDynix says it's a bug), but we've been pretty successful at retrieving the titles from the missing lists and sending those to the patrons. Because the number of reported missing MyLists is increasing, we've reopened our trouble ticket with SirsiDynix.

Crashes: We had several unexplained problems with the HIP in the past few weeks. We identified and corrected the problems pretty quickly, but we're working with SirsiDynix to identify and eliminate the cause.

Reports Subcommittee

The Reports Subcommittee met to discuss current and needed reports. One goal of the subcommittee is to simplify the task of finding reports, and so the work of the web subcommittee (website/intranet redesign) overlaps somewhat. The major effort of the recent meetings has been to expand the list of categories that are used in the state annual report, and to use the new list to create a similar report for our needs (rather than the state's). We created a tool to be used to assign your collections to the new categories. On the web reports page (<https://horizon.uhls.lib.ny.us/reports/>), choose *Assign new categories to collection codes*.

There are three reports that you can link to from your home pages to show the most requested items for the past 7, 30, and 365 days. The reports are updated every night:

http://horizon.uhls.lib.ny.us/public/most_requested_items/week.html
http://horizon.uhls.lib.ny.us/public/most_requested_items/month.html
http://horizon.uhls.lib.ny.us/public/most_requested_items/year.html

AquaBrowser

Because the board approved the purchase of *AquaBrowser*, we've started to prepare for its installation.

WordPress

At TROY's request, we installed *WordPress* for them on our web server. It's a free blogging tool, and TROY has done an impressive job in less than a month of creating a blog that looks like a full blown website: <http://uhls.org/troy/blog/>

We'd be happy to install *WordPress* for any library that wants it, but we have no expertise at this time in configuring it.

Worth noting

This is the first month that I can remember when **System slowness** has not been a major concern. I think that Terminal Services and the identification and correction of some network problems have done a lot to reduce the frequency of this problem.