



UPPER HUDSON LIBRARY SYSTEM

Together. For Better Libraries.

AUTOMATED SERVICES COMMITTEE

April 22, 2008

PRESENT: Tim Burke (APLM), Geoffrey Kirkpatrick (BETH), Joe Makowiec (BRUN), Debbie Shoup (EGRN), Barbara Nichols Randall (GUIL), Judy Felsten (RCSC), Mindy Fowler (SNLK), Paul Hicok (TROY), Joe Thornton (UHLS)

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

I. MINUTES

Minutes of the March 25, 2008 meeting accepted as presented.

II. AQUABROWSER STATUS

J. Thornton explained that our AquaBrowser installation has several components that all need to be set up: AquaBrowser itself; Web Feat; Focused Web Crawler; and Kids AquaBrowser. The AquaBrowser company has had some serious delays in getting these ready, especially the Kids portion. We are also having some problems due to a firewall issue and we can't get any assistance from SirsiDynix since they no longer support the Horizon firewall.

MOTION: B. Nichols Randall moved that when R. Cheng and J. Thornton decide what new firewall should be purchased in order to move our part of this project along, then it should be done so without any need to come back to the ASC. R. Naylor seconded. Unanimous.

Discussion regarding Focused Web Crawler (FWC) and the databases that it should search. J. Thornton will be looking into how deeply within a website/database the software will search. R. Naylor suggested that we shouldn't postpone implementation while we are discussing what links should be included in FWC. T. Burke suggested contacting some other organizations that are currently using this product and finding out how they made their decisions on what to include.

B. Nichols Randall asked about getting MARC records through Web Feat. This would mean loading the records, for example, of all of the items available through NOVEL. J. Thornton noted that he has a philosophical problem with loading records into our database for items that we do not, and will not, own. Extensive discussion. B. Nichols Randall will write up an explanation of why she thinks that loading all of these records would be a useful step to take.

P. Hicok expressed concern about the whole functionality of AquaBrowser and noted that he does not have a clear understanding of why it was purchased and how it should work. He also expressed concern that it would be confusing for his patrons.

T. Burke asked if it would be possible for the libraries to have a preview of the entire AquaBrowser program for UHLS before it is rolled out to the public. J. Thornton noted that R. Carle is preparing a training program that will be used to introduce member library staff to the use of AquaBrowser before it is available for library patrons. Several Committee members felt that even though there are other AquaBrowser sites such as Queens Library and Onondaga Library, they would have a better idea of the functionalities when they can see it working with the UHLS database.

III. DATABASE CLEANUP STATUS

J. Thornton reported on his recent discussions with MARCIVE regarding the UHLS database. MARCIVE offers brief record upgrades on the nonfiction records. They told him that they wouldn't have subject headings for all of the fiction records and that those records would not benefit from this clean-up process. Discussion about what constitutes subject headings for fiction: for example, poetry or plays. J. Thornton noted that there are 25,930 records (mostly fiction) that lack a subject heading. He pointed out that MARCIVE charges 15¢ per record regardless if the records are improved or not. B. Nichols Randall pointed out that even if a subject heading is not added, the records might still be improved by having typos corrected and other bibliographic data added.

MOTION: R. Naylor moved that all of the 25,930 records should be sent to MARCIVE for a brief record upgrade. The work will be paid from the funds set aside in the 2007 Supplemental Aid. B. Nichols Randall seconded. Unanimous.

MOTION: J. Felsten moved to go ahead with the clean up of the approximately 8,700 records with a "Juvenile" collection code that J. Thornton has identified. MARCIVE would charge 50¢ per record for this work. The work will be paid from the funds set aside in the 2007 Supplemental Aid. D. Shoup seconded. Unanimous.

J. Thornton noted that after this work has been completed he will try to develop a way to track these records to see if the cleanup has actually made them more available and usable to library patrons.

IV. WEBSITE RE-DESIGN STATUS

J. Thornton gave a brief background on the work being done for UHLS by M2 Design. He is still waiting for an answer to one question regarding the website and will then begin populating the pages of the site using the tree structure that they developed.

Discussion regarding the term "Partners" on the web page - who are they, why are they listed on the UHLS website? R. Naylor noted that he would rather see them listed on the specific pages of the projects in which they were involved. For example, if they contributed to Riverway in some manner, they should be listed on the Riverway website.

10:15 AM Meeting adjourned.

NEXT MEETING: Tuesday, May 27th at 9:00 AM

Heidi A. Fuge

Automation Services Report April 22, 2008

WordPress

We will hold a half-day workshop on *WordPress* on Thursday May 15 from 9:00 - noon in the large meeting room at UHLS. Please feel free to invite anyone in your library.

This will be a basic introduction to WordPress and will cover at least the following:

- How to install it (You don't. We do, so this part is easy.)
- How to post, including how to upload images.
- How to change themes. Themes are a very important part of *WordPress*. We will cover making changes to the default theme and finding and installing new themes.
- How to use *WordPress* as a CMS (Content Management System) instead of a blog. A CMS is essentially a website that's easier to maintain, but usually less complex in appearance and functionality, than a typical website. For excellent examples see:
 - <http://www.thetroylibrary.org/>
 - <http://uhls.org/altamont/blog/>
 - <http://www.uhls.org/stephentown/blog/>

Please let me know if you'd like to attend, and any other WordPress-related topics you'd like us to cover.

Horizon & HIP upgrades

We have rehearsed the upgrades to Horizon 7.4.1 and HIP 3.09 and plan to perform them after Rawdon returns from vacation at the end of May.

KidSearch / HIP problems

Several times during the past month we've had problems with the HIP. *KidSearch* stops working; patrons have to enter their Borrower IDs twice to login to their HIP accounts, and then can't logout; and *My Lists* continue to disappear. The first two problems are solved by restarting JBoss (the HIP, effectively), and the third is a known problem that seems to be happening with increasing frequency. We have open tickets with SirsiDynix about all these issues.

Pine Hills ESL records

Rob worked with CDLC and GUIL to import 357 ESL records into our catalog. He wrote an *import source* that creates item records when the bib records are imported, and automatically populates a few fields, such as *Location* and *Call number*. He also came up with a way to make the items easily searchable so cataloging staff could attach barcodes.

Firewall

Since the middle of March we haven't been able to edit or add rules in our *Check Point* firewall tables. SirsiDynix helped Rawdon troubleshoot the problem but was not able to fix it. The server that it runs on is a Sun Blade 100, which has reached its EOL (end of life) and is therefore no longer supported by our annual maintenance contract with SirsiDynix. We have several options:

1. Fix the current problem with the firewall software and continue to use it without a maintenance contract. I spoke with contacts of mine at RPI who have some firewall expertise, but none specifically with our firewall software. It may still be an option to hire them because of their general knowledge and the number of colleagues they can call on for help. Also, Rawdon has spoken to his contacts at IP Logic, who also may be able to help. Finally, we have some expertise in our department and may be able to fix the problem ourselves.
2. Purchase a firewall appliance, probably from Cisco. The first estimate Rawdon got was for about \$8,000, but he has since found possible devices for about half that amount.
3. Run Linux iptables on an Intel box. Linux and iptables are free (or relatively very inexpensive if we go with Red Hat in order to have support), and we could probably run it on a \$1000 (or cheaper) box. However, we're not sure yet if iptables is suitable for an enterprise firewall.

In the meantime we have some pending requests for firewall changes, including granting access to our AquaBrowser server, which is up, but not complete, and not yet accessible from outside our network.

Training

In addition to the *WordPress Workshop* described above, we have the following training plans:

Rob is offering training on any of the topics listed below:

- Email
- RSS & wiki
- Blogging /web development
- Cataloging
- AquaBrowser
- Online databases
- Horizon

I'm meeting with *MicroKnowledge* on 4/24 to discuss a coupon program that would provide subsidized training for the library staffs on Microsoft Office applications at the *MicroKnowledge* facility.

APL Patron list

We worked with APLM to provide them with a spreadsheet of all APL patrons, to be used for a mass mailing.

AquaBrowser status

Detailed information can be found on the Automation Services blog:

<http://uhls.org/autosvcs/blog/?cat=5>

We're nearly finished configuring *WebFeat*, a project in itself, as well as a necessary precondition for the rollout of *AquaBrowser*. We just got back the banners (similar to the banners for the new UHLS website) from a graphic designer, and will install them in *AquaBrowser* and *Kids AquaBrowser* this week.

There is still work to be done on 'locations' in *AquaBrowser*, since the system has been retrieving location codes from the bib records, when they can only reliably be found in the associated item records.

We sent them ten of our databases to be integrated into *AquaBrowser*:

1. EBSCOhost® Kids Search (EBSCO Research Databases)
2. Encyclopedia of Animals™ (EBSCO Research Databases)
3. Funk & Wagnalls New Encyclopedia (EBSCO Research Databases)
4. Health Reference Center - Academic (Gale)
5. InfoTrac® Junior Edition (Gale)
6. Literary Reference Center (EBSCO Research Databases)
7. MasterFILE™ Select (EBSCO Research Databases)
8. NoveList (EBSCO Research Databases)
9. Primary Search® (EBSCO Research Databases)
10. Science Reference Center (EBSCO Research Databases)

Automation Services blog (repeat of an email to ASC)

At the last Directors Association meeting there was a request for email updates of the automation projects we're working on, specifically *AquaBrowser* and *WebFeat*.

I usually include those updates in my monthly Automation Services report for ASC, and am always ready to discuss those and any other projects at the ASC meetings. However, I'd been planning to start a blog for a while, and this seems like a good use of one. Rather than send a lot of emails every month, I'll post updates to the blog. This should make it easier to track the progress of projects, compared to piecing together emails that were sent weeks or months apart.

The blog is here: <http://www.uhls.org/autosvcs/blog/>

I haven't given the whole history of every project, and I haven't included every project yet. How much history I eventually provide will depend on my available time and your requirements.

I did not (and probably never will) include everything our department does, such as the work we do on the many problems that arrive every day by phone and email, and which occupy a large part of our time.

You can comment on any post, but your comment won't be posted until I approve it. This is necessary only because the blog is not password protected (it could be, though), and 'spam comments' are a problem with blogs. So I have to moderate comments, although yours will all be approved immediately, of course.

For those of you with RSS readers, the blog provides an RSS feed.

This blog reflects my personal perspective, and I may include opinions. I speak only for myself and not UHLS or the Automation Services Department.

Database cleanup

Barbara Nichols Randall gave me two queries to try:

1. All records with a 082 (Dewey number), no 6XX (subject headings) and no 8XX (Series Added Entries).

This query returned 25,930 records. Picking some randomly, they looked like mostly fiction, which I think would not benefit much from BRU processing.

I ran the same query, but limited to non-fiction ITypes (ITypes are not a highly accurate way to identify non-fiction records, but close enough at this stage).

The result was 3,482 records, mostly poetry and plays, if my random sampling is representative. Again, I'm not sure that these would benefit from BRU.

2. All records with a 260\$c (Publication date) greater than 1999, no 520 (Summary — describes the scope and general contents of the materials), and an attached item with a "Juvenile" collection code. This query retrieved 8,712 records. If I remember correctly, adding a 520 is part of the MRE process, which ASC voted to skip. But we could reconsider.

By the ASC meeting I should have an estimate from MARCIVE as to how many of these records would benefit from their services.

Website redesign

We're waiting for the last minor design changes from *M2Design*, then we'll be ready to start rebuilding the UHLS website and intranet using the new look and structure.

Virtualization

From *Wikipedia*:

"[Virtualization is] a technique for hiding the physical characteristics of computing resources from the way in which other systems, applications, or end users interact with those resources. This includes making a single physical resource (such as a server, an operating system, an application, or storage device) appear to function as multiple logical resources.

Rawdon has set up one large server (our NAS device – network attached storage) that hosts several “virtual servers” including Terminal Services, AquaBrowser, and soon, the HIP.

This system makes better use of hardware resources, is much more flexible, less expensive, and more efficient than housing each server application on a separate machine. Eventually, we hope to have all servers except our domain controller running in a virtual environment.