



PRESENT: Timothy Burke (APLM), Judith Wines (ALTM), Nancy Pieri (BETH) Joe Makowiec (BRUN), Deb Canzano (COHS), Peggy Mello (COLN), Barbara Nichols Randall (GUIL), Judy Felsten (RCSC), Candy Wilson (RVLL), Joe Thornton (UHLS)

9:00 AM meeting called to order by Philip Ritter, Chair. He welcomed P. Mello and noted that she was representing the Wm. K. Sanford Library.

I. MINUTES

Minutes of the October 28, 2008 meeting accepted as presented.

II. EXPIRING LIBRARY CARDS

Discussion about recent large group of patrons whose card expire at the end of this year. Consensus that somehow this should be changed so that the renewals aren't in such a large group but could be staggered over time to make it easier for library staff to renew the cards. Also remarks regarding purging the patron database, but full discussion was tabled for another meeting in order to allow J. Thornton to pull together information about the difficulties of the previous purge.

There were questions regarding the reports of registered patrons and whether these included patrons whose cards had expired in which case this would give an incorrect and inflated number of patrons. J. Thornton will confirm that the reports DO NOT include expired patrons.

Extensive discussion with many proffered intricate solutions regarding expiring cards and renewals. Libraries want patrons to come in to the library in order to renew their cards but want these people to be staggered throughout the year rather than coming in all at once.

MOTION: J. Thornton moved that at the beginning of 2009, the expiration date of every currently active card would be extended by a random number between 0 and 365. This will stagger the expiration dates for all active cards including those that will not expire for several years. B. Nichols Randall seconded. Unanimous.

III. HORIZON ANNUAL MAINTENANCE

J. Thornton reported that a decision needs to be made regarding Telecirc. Since UHLS will be contracting with an outside service for maintenance on Horizon, this would not include maintenance on the Telecirc system. The Telecirc system that UHLS now uses is also no longer supported by SirsDynix but has proved to be a relatively trouble-free application the maintenance of which can probably be handled by the UHLS Automation staff.

Discussion regarding Telecirc and email notification. Several libraries are now encouraging patrons to sign up for email notification.

MOTION: J. Wines moved to accept the UHLS Automation staff's recommendation to continue with the current Telecirc system. D. Canzano seconded. Unanimous.

IV. OPERATION GUIDELINES/RULES FOR ASC GOVERNANCE

P. Ritter reported that Paul Hicok, (TROY), expressed concern regarding what he felt was the limited amount of participation at the ASC meetings. He suggested that a possible solution to encourage more participation would be to change the day and time of the meetings.

Discussion about how this participation might be encouraged, especially from the smaller libraries. Several people noted that the smaller libraries had to schedule a volunteer or staff member to be at the library while the Director attended meetings. If they could depend on a specific day of the week for all meetings at UHLS, they might be able to schedule their most reliable staff to work that day. Consensus that UHLS should conduct a survey to determine the optimum day and time for meetings. The survey, done by email, would include the following questions:

- which day of the week would be best for meetings at UHLS?
- what time of day would be best for meetings at UHLS?
- would it be better to schedule all UHLS meetings for the same day and time each month? (i.e. all UHLS meetings, on a staggered schedule, could take place on Friday mornings)

V. OTHER BUSINESS

B. Nichols Randall asked if any re-indexing of the database would be happening while UHLS is closed for either Christmas or New Years? J. Thornton replied that at the end of the year, he always sends a complete copy of the database out to LTI for authority processing.

10:00 AM Meeting adjourned.

NEXT MEETING: Tuesday, January 27, 2009 at 9:00 AM.

Heidi A. Fuge
12/16/08

Automation Services Report November 25, 2008

Expiring patrons – [ASC discussion]

We've seen a lot of questions lately about borrower cards expiring (e.g. "I can't renew my book because the system says my card will expire before the new due date").

A few years ago I ran a small script to change all patrons' expiration dates to `last_update_date + 1095` (~ 3 years). I could easily do that again if you want, or we could change it to `last_cko_date + 1095`.

Richard Naylor suggested that we apply some criteria like "used their card in the past six months" or "no outstanding fines."

We can use those or any other criteria to limit the number of patrons that we automatically renew. Also, this change can be made for individual libraries instead of the entire system.

Gates Grant

On 10/29 we sent two spreadsheets to NYS as part of a Gates Grant requirement. Most of our libraries had responded, and now NYS contractors will contact UHLS and/or the libraries directly to follow up on the accuracy and completeness of the data.

Again, I have no idea how much money, if any, we'll get from this grant, but thanks for your cooperation.

ILS Migration Subcommittee

On 10/30 I participated in a webinar that demonstrated the functionality of the *Evergreen* import/export utility (called Vandelay). *Evergreen* is an open source ILS that the subcommittee is evaluating.

On 11/4 I attended a demonstration of *Koha* – another open source ILS – at CDLC. Josh Ferraro, CEO of LibLime, which supports *Koha*, gave the demonstration and was persuasive that *Koha* would be a viable option for UHLS. I'll invite him to come and talk to our subcommittee or to give a WebEx demonstration of the system.

Website redesign

We launched the new UHLS web site on Sunday 11/16. It combines the old UHLS site and our intranet.

Email

On 11/17 Jonathan upgraded the mail server.

From Jonathan: "The principle change was with the spam filter. The previous supplier was unable to keep up so Ipswitch changed to Commtouch." The effect should be a decrease in spam in your Inboxes.

On 11/10 Jonathan and I had a conference call with a representative from USA.NET, which provides email hosting. Some points:

- about 5,000 customers.
- In business since 1993.
- Email hosting is their main business.
- Private company
- We'd be an average sized customer
- We could keep our domain name (uhls.lib.ny.us)
- Microsoft Exchange system

- We would “own” the data (email)
- 24x7x365 helpdesk (or less, depending on level of service purchased)
- We would have total admin control — adding/deleting users, mailing lists, etc.
- No limit on number of mailing lists
- They use Brightmail and Trend Micro for email security (spam, viruses, spyware)
- Depending on the package we purchased, users would have 100MB - 1GB of storage.

They’re sending us a proposal. I told them we’re not looking at email hosting seriously at this point, but just gathering information.

Serials Solutions

On 10/30 I met with a rep from Serials Solutions to discuss their products, specifically *360 MARC Updates*. This service would supply us with MARC records for all the journals that are covered by our subscription databases. Most patrons (and librarians, probably) don’t know which journals are included in *Masterfile Select*, for example. With this service, a patron would search our catalog for Newsweek, and if it’s covered by our databases then they’ll see a list of those databases and can then go directly to the database to read articles. The Mid-Hudson catalog takes the patron to a list like the following:

Newsweek (0028-9604)

from 01/01/1990 to present in MasterFILE Select

from 12/12/1994 to present in Health Reference Center Academic

from 01/19/1998 to present in ABI/INFORM Global and ProQuest Research Library

from 09/26/2005 to present in InfoTrac Junior Edition

Unfortunately it would probably not be affordable this year given the budget situation. But it’s definitely something to keep in mind if we ever have money again.

Library websites

COHS went live with their great looking new WordPress-based website

(<http://www.cohoespubliclibrary.org/>). Debbie did an excellent job with some help from Rob. We will encourage the libraries that still don’t have their own websites to use WordPress and to ask us for as much assistance as they need.

Library computing support

In addition to our usual PC and network troubleshooting for the libraries, we staged ten new PCs for POES and are working with STEP on major networking changes there.

Miscellaneous

We wrote several reports for TROY, listing their patrons within “Troy” zip codes, and also matching our database records with the Troy voter registration list.

Conferences

Rob and Rawdon attended the 2008 NYLA Annual Conference in Saratoga Springs.

Automation Services Report December 16, 2008

Expiring patrons – [ASC discussion]

From the November 2008 Automation Services report:

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A few years ago I ran a small script to change all patrons' expiration dates to last_update_date + 1095 (~ 3 years). I could easily do that again if you want, or we could change it to last_cko_date + 1095.

Richard Naylor suggested that we apply some criteria like "used their card in the past six months" or "no outstanding fines."

We can use those or any other criteria to limit the number of patrons that we automatically renew.

Also, this change can be made for individual libraries instead of the entire system.

The Director's Association asked (through Debbie Canzano) if it is possible to have patrons' renewals "come up tied to their birthdates in order to stagger times. Libraries can pick one or more random dates for those who haven't given their birthdates."

"The feeling was to suggest renewing everyone for one year to get rid of the big tie-up but then stagger the renewals by attaching to the birthdates so it would be birthdate plus 3 years. I would also encourage people to put in the birthdates. A few libraries indicated that they don't insist on the birthdates when people get a card but most of us felt it was a very necessary item especially when you have common names."

At the request of the following libraries, over the past few weeks I added 365 days to the expiration dates of their Adult and Youth patrons who had an expiration date in 2008 or 2009:

APL: 22,834 patrons

GUIL: 9666 patrons

POES: 871 patrons

The reason this item is for ASC discussion and does not require a decision is that each library can decide for itself whether or not it wants us to extend its patrons' expiration dates, and can also specify the criteria (e.g. "add 1095 days to every patron's last_cko_date").

SirsiDynix announces the release of SirsiDynix Enterprise,TM version 1.0.

SirsiDynix Enterprise,TM is a new faceted search product that becomes the foundation for a range of "user experience" solutions, featuring industry-first fuzzy search technology, highly efficient search index updating, intuitive user interfaces, powerful finding aids, consortia support, deep integration with SirsiDynix integrated library systems, next-generation OPAC functionality.

Horizon & HIP upgrades

From the Automation Services blog (<http://www.uhls.org/autosvcs/blog/>):

We're working on the upgrades to Horizon 7.4.2 and HIP 3.10. Rawdon has installed both in test environments and we're working to move our HIP customizations and to test the applications.

At the moment we have a problem with all 'kids' profiles. In the HIP each library has a profile (e.g. 'Albany') and a corresponding 'kids' profile (e.g. 'Albany-kids'). In our practice upgrade, all the

library profiles were transferred automatically, but none of the 'kids' profiles transferred. We reported this to SirsiDynix.

As we've done in the past, we asked SirsiDynix if we can bypass the upgrade queue (which would have required us to wait until February or March at the earliest) and do the upgrades ourselves. They agreed, so as soon as we're ready we'll start the upgrade very early some morning and then go live after John Gillespie of SirsiDynix checks it over. This should greatly reduce downtime.

Those of you who do not use Terminal Services will need to upgrade your staff PCs and we'll send out upgrade CDs in plenty of time for the upgrade.

A major issue related to the handling of old "lost" items, a topic of great importance to the Database Maintenance and Resource Sharing Advisory Councils, should be addressed, hopefully to everyone's satisfaction, by the Horizon upgrade. From the Horizon 7.4.2 Release Notes: "Lost and Claimed Returned Item information is retained on the block, even if the Item record is deleted." This will allow us to delete old "lost" items, which will unclutter the catalog and please Database Maintenance, but preserve the fee information on the borrower record, which should please Resource Sharing.

New SirsiDynix product

SirsiDynix announced the release of SirsiDynix Enterprise,TM version 1.0. The attached document *enterprise.txt* explains its functions, which are very similar to those of AquaBrowser.

Horizon annual maintenance – [ASC decision]

On the pre-invoice audit for our annual maintenance contract with SirsiDynix there was no coverage for hardware or Telecirc. Our Horizon server runs on a six year old Sun V880, which is approaching end-of-life, but should still be supported by SirsiDynix. When I requested a price they came back with \$5388, much higher than last year's \$3600. It's common for support charges to increase as machines age, but we decided to look for alternatives. We found a company called *Systems Maintenance Services* that will provide 24x7 coverage for \$3120 or 7x12 coverage for \$2652. Our chief concern is that their nearest office is in Hartford, although they guarantee four hour response time. We've asked for references.

Our version of Telecirc is no longer supported by SirsiDynix. We can continue to run it, but they will not help us if we have problems. The new messaging software that they support is *Telephone Messaging v3.0*, which would cost us between \$7,000 and \$15,000 to install, depending on our hardware needs. Telecirc has been a relatively trouble-free application, so we feel we can confidently use it without SirsiDynix support.

Library websites

BERN went live with their great looking new WordPress-based website (<http://www.bernepubliclibrary.org/>). Kathy Stemple did an excellent job with some help from Rob. We will encourage the libraries that still don't have their own websites to use WordPress and to ask us for as much assistance as they need.

Library computing support

In addition to our usual PC and network troubleshooting for the libraries, Rawdon and Jonathan met with STEP about its technology plan. From Rawdon:

Jonathan and I will work together on this to restage their public PCs, set up a secure network for wired and wireless, set up a file server and a network printer, log usage of public PCs, suggest a computer use policy, and maybe set up a ZoneCD server. I will write up a proposal to them.

Miscellaneous

We provided APL (Elissa Kane) with an Excel file of the names, addresses, email, etc. of all APL patrons.

Specific features of this initial release of SirsiDynix Enterprise include:

- Fuzzy search logic: Ensures relevant search results even in cases of simple misspellings or variations in suffixes, or prefixes.
- Faceted Finding aids: Enterprise allows narrowing of search results by categories, such as author, subject, publication date, and language, so users can easily find specific records within a result set. Facets can be stacked on top of each other, narrowing by subject, and then again by publication date, for example. Faceted finding aids take the guesswork out of refining search results and eliminate “dead-ends”
- Consortia support: Configuration options for specific library profiles (branches or different patron groups like kids, teens, Spanish speaking, for example). Each profile can support multiple languages, a unique look and feel, library or location-based search limits, and be reached through a unique URL configured by the library
- Diacritic accommodation: Enterprise is able to correctly identify and match characters with or without diacritical markings.
- Easy-to-use interface: The new SirsiDynix Enterprise interface delivers correct results without requiring seekers to know which “field” or index to search in. Returns results for all or part of a query, with exact matches given highest ratings. Supports a range of languages, including both Roman and non-Roman character sets.
- Efficient search index updating: Search index updating is based on “deltas”, or differences, rather than a complete catalog dump on a nightly basis, resulting in indexing updates that require less time and bandwidth to complete.
- Enriched content support: Incorporation of a full set of enriched content, cover art, reviews, author notes, chapters etc.
- Integration with SirsiDynix integrated library systems and OPACs: Direct interface to SirsiDynix Symphony, Horizon, and Unicorn for high-performance indexing of relevant SirsiDynix MARC data and item information.
- Easy add-on to SirsiDynix OPACs: Easy to add SirsiDynix Enterprise onto current SirsiDynix OPAC products, including SirsiDynix Symphony e-Library, Horizon Information Portal, iBistro, iLink and Web 2; cost-effective approach to building on existing user experience investments, without starting from scratch.
- Search widget: Provides a code snippet that can be easily cut and pasted in order to present an Enterprise search box within existing web pages.
- Stateful, URL-based searching: Supports use of Back button on Web browsers as part of search process and building “saved searches” that can be saved as browser “Favorites” or sent or saved as links in other documents
- Look and feel flexibility: Cascading style sheet (CSS) templates offer the look and feel of existing OPACs; features administrative interface for customized templates.

- Software-as-a-Service (SaaS)/ASP hosted solution: SaaS offers lower total cost of ownership, as SirsiDynix manages all hardware and software support, maintenance, and upgrades Information on Enterprise v 1.0 compatibility:

Note: For version 1.0, all Enterprise installations will be hosted. The following are requirements for the ILS server; for additional information on client/server requirements, please visit the Client Care portal.

ILS/Version OPACs

SirsiDynix Symphony 3.2.1 and higher iBistro/iLink, e-Library, Web2

Unicorn GL3.1 iBistro/iLink, Web2

Horizon 7.3.2 and higher HIP 3.x

SirsiDynix Enterprise 1.0 was beta tested by 11 customers representing Horizon, Unicorn and Symphony libraries; we sincerely thank those sites who contributed to this testing effort.

Our next release of SirsiDynix Enterprise will be version 2.0 which we expect to move to beta during 4th quarter 2008. Customers interested in future beta testing opportunities may contact us at beta-info@sirsidynix.com.