



PRESENT: Timothy Burke (APLM), Joe Makowiec (BRUN), Peggy Mello (COLN), Evelyn Butrico (EGRN), Barbara Nichols Randall (GUIL), Judy Felsten (RCSC), Candy Wilson (RVLL), Mindy Fowler (SNLK), Joe Thornton (UHLS), G. Sacco (VOOR)

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 December 16, 2008 meeting accepted as presented.

II. SCHEDULING FUTURE ASC MEETINGS

P. Ritter reported that in the recent Meetings Survey conducted by UHLS, 75-80% of the respondents said that all UHLS meetings should take place on Friday mornings. He recommends that the ASC meetings be scheduled for the 3rd Friday of every month beginning in July. He also suggested that, based on recommendations from ASC members, the meetings should start at 9:30 AM. He would like the new schedule for all UHLS meetings to be in place by the beginning of September.

MOTION: T. Burke moved that in response to the survey results, the ASC meetings should move to the 3rd Friday of the month at 9:30 AM, beginning with the July 17th meeting. J. Felsten seconded. Unanimous.

ASC meetings will continue to be held on the 4th Tuesday morning until July.

J. Thornton questioned the necessity of meeting 10 times per year. P. Ritter noted that it is part of the UHLAN By-Laws and the UHLAN Contract that the meetings be held a minimum of 10 times per year. This couldn't change until the next UHLAN Contract is under consideration.

It was noted that the Resource Sharing Advisory Council had expressed concern about the new meeting schedule. P. Ritter noted that changing the meeting days to another day of the week is not an option at this time. We will see how this new schedule works before allowing any changes. B. Nichols Randall noted that she would prefer fewer Advisory Council meetings.

Discussion veered off into consideration of Policies and Procedures among the libraries. B. Nichols Randall suggested that there should be a Policy Manual that tracked decisions made in the various meetings of the ASC and the Advisory Councils. J. Thornton noted that his staff would take on this project, would look through the Minutes starting with the migration to Epixtech and would compile the policy decisions and the "understood" practices and procedures. He also noted that there is a list of circulation procedures posted on the Resource Sharing wiki:

http://www.uhls.org/wiki/index.php?title=Resource_Sharing_Advisory_Council

Further discussion regarding the standardization of practices among the libraries. It was noted that there are certain basic procedures that the libraries have agreed upon: the Patron Registration Form, the practice of accepting fines and forwarding to the appropriate libraries, etc. (Although some libraries have modified the Patron Registration Form to suit their purposes.) P. Ritter pointed out that UHLS does not have the authority to set standards or to enforce them.

E. Butrico asked about the fines/fees policy: EGRN has not received any checks from any libraries that might have collected fees for lost EGRN items. She was told that patrons reporting lost items should be asked for a check to cover the cost. This check (or a library check) should then be sent on to the owning library. She also asked about loan policies for interlibrary loan items. She was told that the lending library's policy follows the item that whole time that it is on interlibrary loan.

III. E-MAIL OVERDUE NOTICE SCHEDULE

Discussion regarding a policy proposed recently by R. Naylor (COLN). He suggested sending email reminders to patrons prior to a loan ending date. Discussion about the fact that this has been proposed at the ASC several times before and always voted down. The main idea for voting against it was the potential for lost revenue in fines. T. Burke noted that APLM has short loan periods (2 or 3 days for certain items) and an email reminder was not necessary. J. Thornton said that he could write a script that would exclude certain short-term loan items. This would only be sent to patrons who selected email notification in their profile.

MOTION: E. Butrico moved to begin, on March 1st, sending email reminders 2 days before an item is due, where the loan period would be appropriate. This would run for a test period of time. C. Wilson seconded.

Approved: 9 Opposed: 1 Motion passed.

IV. OTHER BUSINESS

G. Sacco noted that in her own patron profile it lists "phone" as her preferred notification method, yet she selected "email." J. Thornton will look into this - he had written a script for the notification method and this does not appear to have carried over into the upgraded version of Horizon.

G. Sacco thanked J. Thornton for adding the RSS feed to the UHLS website.

G. Sacco asked if any libraries put filters on staff computers? She wants more control over staff use of the computers so that if a staff member wants to do personal business on a computer (for example, online shopping), they would have to use one of the public access computers. B. Nichols Randall responded that she had looked into these type of filters but did not follow-up on it since it would have required an across-the-board filtering that would have included the public access computers. She noted that GUIL has a written policy regarding staff computer use and offered to share it with G. Sacco. G. Sacco asked J. Thornton if it would be possible to post such policies on the UHLS website to be shared with all of the libraries.

G. Sacco asked how libraries control passwords on computers and in email. J. Thornton noted that since UHLS is the administrator, he can access the account of any UHLAN user if a library director so requires.

10:00 AM Meeting adjourned.

NEXT MEETING: TUESDAY, March 24th at 9:00 AM. New meeting schedule will begin in July.

Heidi A. Fuge
2/24/09

Automation Services Report February 24, 2009

Horizon & HIP upgrades

On 1/27/09 we upgraded Horizon and the HIP to versions 7.4.2 and 3.10, respectively. Details are in the attached document *horizon_upgrade.doc*.

Telecirc (related to the upgrade)

Telecirc ran fine after the upgrade even though we did not upgrade the Horizon client on the Telecirc server. After several days we had to restart the server for reasons unrelated to the upgrade, and Telecirc stopped working. It appears that Telecirc would have continued to run under the old version of Horizon, but only until we stopped it, which we would have had to do sooner or later.

After trying everything we could think of, including restoring the Telecirc server to its exact state as of Friday 1/30 (when Telecirc was working), Telecirc still did not come up.

Because SirsiDynix no longer supports Telecirc they were not obligated to assist us after 1/31/09 when our Telecirc maintenance contract expired. However, they generously offered to assist, and helped us to get it working again.

The impact of it being down for two days was a large increase in the number of printed notices sent to the libraries for two days.

ESIP (related to the upgrade)

Four sites, including UHLS, use SirsiDynix's SIP program to authenticate users of third party applications (3M™ SelfCheck™ Systems, EnvisionWare's *PC Reservation*, etc.) against the Horizon patron database. Before the upgrade, SIP was installed at four different sites. The SirsiDynix upgrade team said that the upgrade would be a lot easier if we just installed one copy of ESIP centrally and had all sites share it. The cost would be no more for one central license than for four separate licenses. The affected libraries were totally cooperative, so we now have a single centralized ESIP installation.

Email passwords

After plenty of warning we assigned more secure passwords to the email accounts that still had their original, easily-guessed passwords. Thanks for your cooperation with this. All email passwords are now secure.

Networking

- Rawdon & Jonathan went to STEP on 2/16 to present a technology plan for the library.
- To address a slowness problem at TROY, Rawdon suggested:

We have two routers on hand. I can give Troy the older router which was used as our gateway router for a long time. This will eliminate the slowness problem caused by their Linksys router.

AquaBrowser

AquaBrowser (the company) finally finished the “authentication of external WebFeat users” piece of our installation. We’ve been withholding the final payment until this was done.

Databases

The following is from my blog (<http://uhls.org/autosvcs/blog/>):

Novel sent an email announcing their current list of databases. It appeared to be a much longer list than the one we currently have on our [Databases page](#). After asking Jo-Ann’s opinion, I started to rewrite our page and discovered that the “new” databases are mostly just the individual parts that make up (and have always made up, I think) the *Gale Virtual Reference Library* (GVRL). In fact, the links for the individual databases take the user to the GVRL main page, where the user has to find the specific database.

I added them all as separate databases anyway, so our new [Databases page](#) is now quite a bit bigger than it was.

The only truly new database is *Nursing and Allied Health Collection*, which I added to the list and also to our RPA (Remote Patron Authentication) server.

Also, I changed the organization of our *Databases* page to mirror the organization of the [NOVEL web page](#), while keeping our four non-NOVEL databases (*Book Review Index Online Plus*, *Reference USA*, *Thomson Gale Legal Forms*, and *Testing and Education Reference Center*). I also kept the “Education” section of our page, even though there’s not an “Education” section on the NOVEL site.

I dropped *Encyclopedia of Animals*, *Funk & Wagnall’s Encyclopedia*, and the *Times Union* from our page since Jo-Ann said we no longer subscribe.

Next, I’ll have to reorganize the [WebFeat page](#) which, the last time I looked, was being used by nobody. I had used the groupings of our *Databases* page to set up our original *WebFeat* interface, so that will have to be reorganized.

Patron credits

With the upgrade to Horizon 7.4.2 the libraries can no longer delete patron credits. SirsiDynix's customers and/or programming staff considered this a "loophole" and closed it with this version. SirsiDynix will not turn this function back on and we can't fix it with a local program.

However, we at UHLS can delete the credits in a multi-step process that we will be happy to do, but only when you ask specifically to have us do so. The new suggested procedure:

1. Our script will continue to email you with a list of all credits that were issued to your patrons on the previous day.
2. If you want us to delete a credit send the request to support@uhls.lib.ny.us (you can simply forward the 'credit' email if you want).
3. We will delete the credit as soon as we receive your request. We will make this a high priority.

Training

MicroKnowledge

So far eight people have signed up to take advantage of the \$5000 of training credits we have on account with *MicroKnowledge*.

Please contact Rob Carle to schedule a class or if you have questions.

Rob: rob@uhls.lib.ny.us

Phone: 437-9880 x238

WordPress

Rob held a refresher workshop on WordPress on 2/17 from 9:00 – 12:00 at UHLS.

TROY branches

On 1/26 we changed the pickup location of 333 items from TROL or TROS to TROY. We emailed 29 affected patrons about the change and printed, folded, enveloped, labeled, sealed, stamped, and mailed letters for 80 affected patrons who don't have email addresses in our system.

Related: We changed the status of 26,036 TROL and TROS records from 'i' (checked in) to 'a' (archived) and made them 'staff-only' so they won't appear in the HIP.

Web sites

- We added 247 pages to the UHLS web site (www.uhls.org): The new pages were web statistics for APLM, ALTM, BRLN, HOOF, NASS, Riverway, TROY, and UHLS.
- NASS, SNLK, and COHS were unable to upload images to their WordPress web sites. The problem was with *Flash*. We found a fix: we installed `no-flash-uploader.php` in the plug-in folders of the sites.
- We installed an anti-spam plug-in for our WordPress sites that allow comments in their posts.
- The ALTM site was displaying incorrectly in IE7. The problem turned out to be the fonts that came with a copy-and-pasted piece of text in one of the posts. Firefox ignored the fonts but IE7 choked on them. The way to prevent this is to use the HTML tab in WordPress when pasting content from another source.
- Rawdon has been working to transfer the ownership of the *cheneylibrary.org* domain name to a new ISP.
- We made a lot of changes to the *2009 Riverway* site (www.riverwaystorytellingfestival.org).

Miscellaneous

- Annual reports. At this time of year we spend a lot of time answering libraries' questions about annual reports, as well as working on our own.
- We spent some time working with Cohoes city officials who are trying to gather data from Horizon that would show exactly (and I mean exactly) how much money COHS (the library) takes in and keeps (i.e. doesn't forward to other libraries) during a day.

Horizon & HIP upgrades 1/27/09

Rawdon did an excellent job (as always) and finished the upgrades by 1:00 AM on Tuesday, and after running the massindexer the system was *pretty much* ready to use by 6:00 AM. John Gillespie of SirsiDynix logged in around 5:00 AM EST and said everything looked fine.

Some problems:

- We were notified a little after 7:00 of "Middle Tier" errors when staff outside our network logged into the Horizon client. They could continue to work, but they could not make requests in stafpac. Rawdon worked with Alison Felt of SirsiDynix and found that the problem was a discrepancy between the way the new HIP was identified on the Horizon server (by IP address) and on the HIP (domain name). Apparently they have to be identical.
- GUIL called to report problems printing receipt slips. Weirdly, slips printed for COLN items but not for GUIL items. It turned out that there is a new checkbox named *In hold transit slip* on the *Workstation Receipt Options* screen in stafpac. The box is unchecked by default. Checking it solved the problem.
- We lost our customizations on the *Request Confirmation* screen in the HIP. When a request is made through AquaBrowser the transaction is passed to the HIP. When a request is complete, the HIP confirmation screen displays two buttons if the patron is using the HIP ("Return to Searching," "Logout and Return"), but no buttons if the patron is using AquaBrowser. After the upgrade the buttons displayed for all patrons regardless of which interface they were using. We redid our customization.
- Four or five years ago we had SirsiDynix do some custom programming for us that displayed custom popup messages when a requested item was checked in. The message was determined by the notification type. For example, "This patron will be notified by email." This feature was supposed to be built into the latest version of Horizon but a couple of libraries said that it was gone after the upgrade. I requested that SirsiDynix recompile the relevant DLL for our current version.
- When placing a request in the HIP or AquaBrowser, the *Request Confirmation* screen says "... will be notified by phone" regardless of the patron's actual notification method. We reported this to SirsiDynix. (I'm not sure that 'notification method' was even displayed in the previous version.)
- In the Circulation module in Horizon, the item's price shows in the checkout screen. We had a few complaints.

- Several libraries reported printing problems. Rob, Jonathan, and Rawdon worked on, and I think corrected, all of those.
- Some libraries lost their customized settings in stafpac.
- On the *Holds* screen In *My Account* in the HIP, and also on the *Request Confirmation* screen, a requester's queue position was displayed. We had removed this in previous versions because it causes a lot of confusion among our patrons. We removed it again.