



**PRESENT:** (voting) Tim Burke (APLM), Judith Wines (ALTM), Nancy Pieri (BETH), Richard Naylor (COLN), Evelyn Butrico (EGRN), Michael Sweeney (GUIL), Pat Sahr (NASS), Judy Felsten (RCSC), Elizabeth King (RVLL), Mindy Fowler (SNLK), Joe Thornton (UHLS), Gail Sacco (VOOR)

(Non-voting): Geoffrey Kirkpatrick (BETH)

9:30 AM meeting called to order by Philip Ritter, Chair.

## I. MINUTES

Minutes of the July 17, 2009 meeting accepted as presented.

## II. NEW I-TYPES

J. Thornton received a request from VOOR for a new I-Type that would allow them to make items in the paperback browsing collection “non-request, 28-day, no fine.” Discussion. It was pointed out VOOR can take an I-Type that they are not currently using, choose whatever parameters that they want for it and then assign it to the paperback collection. They just have to let UHLS know what I-Type they want to use and the Automation staff will program the parameters that the library wishes for that I-Type.

## III. LOCAL PRIORITY and LOCAL REQUEST

G. Kirkpatrick explained that Local Priority means that the requests that name the item’s owning library as the pickup location always have priority over other requests. This is currently being done for new items. There was a suggestion to make all items in a library “Local Priority” so a library’s patrons will have better access to that library’s items.

J. Thornton noted that by making ALL items in a library “Local Priority” this might substantially slow down the automation system because the system must go through more tests to match up every pick-up location with the items in that library. However, if it is the desire of the ASC to do this, it is an “all-or-nothing” proposition since it will have to apply to all I-Types. Currently, only new items are given “Local Priority.” If this change is made, J. Thornton will monitor the system to determine if it is having an adverse effect on speed of response and if it is, the programming can always be reversed.

**MOTION:** J. Wines moved that, on a trial basis, the Local Priority code should be assigned to all requestable I-Types. E. Butrico seconded. Unanimous.

J. Thornton noted that this change to the Request Matrix would be done in early October, when Rawdon Cheng returns from vacation.

R. Naylor asked if there would be a way to evaluate the effectiveness of this change? J. Thornton will discuss with Jo-Ann Benedetti and see if there is any change in the amount of materials moving through the courier.

#### Discussion regarding the definitions of Local Priority and Local Request.

- **LOCAL PRIORITY:** requests that name the item's owning library as the pickup location always have priority over other requests.
- **LOCAL REQUEST:** prevents an item from leaving the library as part of the Request system and can therefore only be checked out by an onsite patron.

Discussion. G. Sacco asked about having all of the VOOR requestable items made as Local Request since the VOOR patrons browse the library for items more frequently than they use the online request system and she would like to have items in the library for them to browse since that is what they are paying taxes for.

It was noted that a library that makes all of its items Local Request would be making it difficult for its patrons to request items from other libraries and might make them wait much longer for an item if there are only a few copies and many in-house requests. J. Felsten remarked that patrons are not paying for library materials so much as they are paying for library service in a cooperative environment.

#### IV. ASC MEETING TIMES

P. Ritter noted that there was some dissatisfaction expressed with the new 9:30 AM meeting time. The 9:30 time was voted on and approved at the February 24, 2009 ASC meeting in response to a survey asking for optimum meeting days and times.

**MOTION:** R. Naylor moved to put the ASC meeting time back to 9:00 AM. N. Pieri seconded. Discussion

**MOTION:** J. Wines moved to table the previous motion. E. Butrico seconded.  
 AYES: 8; NAY: 1; Abstention: 2 MOTION PASSED and the Motion to change the meeting time back to 9:00 AM was tabled.

**THE ASC MEETINGS WILL CONTINUE AT 9:30 AM.** R. Naylor asked to have this matter put on the Agenda for the next meeting.

#### V. OTHER BUSINESS

- **Report from the Migration Subcommittee:**

G. Sacco reported that a wiki has been established so that the Subcommittee can gather, store, and make available all of its information. She noted that the afternoon session at the November 6<sup>th</sup> Directors Association meeting will be devoted to a discussion about what people like and do not like about the Horizon system.

- **Pull List Discussion**

J. Wines asked if there was a way that an item that had been on the Pull List for an extended period of time could be brought to the top of the list as a priority item. J. Thornton will investigate to see if there is some way that the Pull List might be sorted by date. Discussion regarding APL and the non-fiction Pull List. T. Burke noted that the List is so large that it cannot be taken care of in just one day.

- **Baker & Taylor Bib Records**

J. Thornton reported that UHLS is importing bib records from Baker & Taylor for “Opening Day Collections” at several of the APL Branches. G. Sacco asked if this could be done for VOOR? T. Burke noted that the library has to contract separately with Baker and Taylor to purchase these records. J. Thornton noted that there have been errors in the B&T records and UHLS has had to correct them. G. Sacco will talk to some APL staff members about the cost of this contract.

- **Automation Department Staff**

R. Naylor asked about the status of Jonathan Koppel’s position? J. Thornton responded that UHLS is keeping that position in the budget while re-evaluating the Department staffing. Nothing will be done regarding any staff changes at this time but he is aware that with a possible migration in the near future, he might have to re-think the staffing needs.

## VI. NEXT ASC MEETINGS

P. Ritter recommended that the October 16<sup>th</sup> meeting should be canceled since it would have taken place while the NYLA Conference was happening. He also recommended that the December 18<sup>th</sup> meeting should be canceled due to the proximity of the Christmas vacation. He reported that to-date he has received 17 affirmative responses to the ASC’s request to amend the UHLAN contract and decrease the minimum number of required ASC meetings.

**MOTION:** J. Felsten moved to cancel the October 16<sup>th</sup> and December 18<sup>th</sup> ASC meetings. The next ASC meeting would be held on Friday, November 20<sup>th</sup> at 9:30 AM. P. Sahr seconded. Unanimous.

10:35 Meeting adjourned.

**Next ASC Meeting: Friday, November 20<sup>th</sup> at 9:30 AM.**

Heidi A. Fuge  
9/18/09

## Automation Services Report August 21, 2009

### Staff changes

Jonathan Koppel left on 7/31 for a job with the New York State Department of Taxation and Finance. We are evaluating the needs of our department, which have changed significantly in the past six years and will change again when we eventually migrate to a new ILS, before deciding what to do with Jonathan's position.

### Email domains

Although we moved one person from her UHLS email account to a new domain, we keep encountering obstacles to doing this on a broader scale. For instance:

- The most recent upgrade to our mail server software prevents the *Administrator* account from creating passwords that don't meet the constraints that apply to all users (at least six characters, one number, etc.). This means that many people would not be able to login to mail after we moved them until they contacted us to get a new password, which they would then have to change in their email clients.
- We noticed that a lot of accounts have a *Contacts* folder on the server. There are more than 6500 total contacts, and we had to find a way to move them so the users wouldn't have to re-enter them.
- We needed to find an easy way to update the *Auto Responder* in the UHLS accounts that we move to new domains. The *Auto Responder* will forward mail sent to the user's UHLS address and inform the sender of the new address.

We've solved the problems we've encountered, though, and we now think we have a method to move domains with minimal disruption to the users. We'll start next week (8/24).

### Mail problems

- On 8/6 the mail server crashed for unknown reasons. Mail was down for a few hours. We'll keep an eye on it.
- Jonathan used to monitor the spam that was blocked at our server, looking for false positives. We will no longer do this. We block about 5,000 spam messages a day. We created a script to delete these after two days so the *spam* mailbox doesn't get full. If you suspect that a legitimate email message was blocked at our server, please let us know right away (within two days) and we'll check through the *spam* Inbox.

### System slowness

We had a bad day on August 1 – a Saturday – caused by the monthly reports that run automatically early in the morning on the first of each month, and which should finish after a few hours. They didn't. They were

still running at noon, using most of the available CPU cycles on the Horizon server, and generally making life miserable at circulation desks. When we discovered the cause of the slowness we killed the job and things returned to normal. We're looking into why the reports are taking so long, and evaluating different ways of running and displaying them.

### **Networking support (a sample)**

Rawdon continued his invaluable on-site networking assistance at the libraries. A sample:

- BETH - testing firewall. Though it had a rough start, I am happy to conclude that BETH Horizon clients can use the 10M fiber line to access our server without the need to go to Terminal Services. We ran the test for a whole day with regular internet users and had no problem. Phase I of testing is concluded. It will route traffic between the two FIOS lines, depending on what type of traffic. Also QOS is deployed for higher priority of horizon traffic. We are waiting for the switches to come in to go to phase 2.
- APL - in between projects, I am still working to get MRTG (Multi Router Traffic Grapher) to work with its new switch. Not very promising to get it to work and so far Google search did not find anything.
- PTRB - deployed our loaner Cisco router see if we can figure out why it kept on losing Terminal Services, though it can always reconnect. Their staff is frustrated with frequent disconnection which sometimes happens many times a day. I will use OpenDNS and MRTG to track the traffic. So far I have problems getting SNMP data from here.
- Coordinate with TechValley communication for COLN 10m connection. It may be in service as early as Sept. COLN is aware of my vacation schedule and TVC will take care of initial connection.
- Set up MRTG for TROY and PTRB. MRTG can be trapped from wan link as long as the router opens up the port for remote access. TROY router does not allow wan access but it has an internal server which can trap the data. PTRB MRTG does not; apparently its ISP is blocking something.
- BETH - continue to work on its new equipment. I am waiting for the last 3 switches and then we can decide when to do the cut over.
- BRUN - consult its future network layout. It is shooting for late Sept opening.
- Realign APLM internal network cabling. It is planning to separate its computers into public and staff group.
- ... and much more

### **ILS Migration Subcommittee**

The ILS Migration Subcommittee met to see a demonstration of the *Polaris* ILS on 8/13. Although we haven't met since to discuss it, it was pretty clear from the discussion and subsequent emails that everyone liked it, and a few people loved it and think we should start the migration process as soon as possible. I asked Kathie Graham (Polaris) for a cost estimate, which she's working on now. The subcommittee will meet again on September 16.

## “Report of the Month”

Collection Weeding Report: After entering your library’s four letter code, this report displays a list of your collections, and the number of items in each. After you select a collection from the list, the report displays all items in that collection in call number order. The display includes Call Number, Title, Publication Date, Number of months owned, Total number of checkouts, and Last Checkout Date. It also marks with an **X** any item that is not checked in.

The report is here: <https://horizon.uhls.lib.ny.us/reports/weed.html>  
(use the intranet username and password)

## Intranet

The Upper Hudson intranet has not been supported or updated for many months -- since the release of the new UHLS website: [www.uhls.org](http://www.uhls.org). However, many documents -- including years of monthly reports -- still reside in subdirectories of the intranet, so we did not shut it down.

Evidently a lot of people still have bookmarks to intranet documents or directories, and still use it instead of the new website. Recently we put into place a couple of stubs, which redirect intranet users to the new web site. In the coming weeks we'll move as many documents as we can from the intranet to the new site and then shut down the intranet completely.

The UHLS website has an efficient search engine that we keep up to date. On the home page there's a "Search UHLS site" box, and on every page there's a "Search" link in the top right corner. The protected documents on the new web site use the intranet username and password.

## AquaBrowser

A library reported a problem with AquaBrowser: the Call Number (and an incorrect one) is displaying occasionally in the *Result List*. It shouldn't. It should display only in the *Location* section of the Detail display. We reported this to AquaBrowser (the company) but have not yet had a reply.

It's time (actually past time) to rebuild the entire AquaBrowser database. The issue is that bib records deleted in Horizon are not automatically deleted in AquaBrowser. The only way to remove them from AquaBrowser is to do a full import. It's a pain.

We finally paid the AquaBrowser invoice. We had withheld the final payment of about \$7,000 until all promised functions were working properly.

## NetLibrary

We found a way to create item records automatically when we import *NetLibrary* bib records into Horizon. We have always edited the 245\$h of all *NetLibrary* records with a script, so there is probably not a need for our libraries to edit these records any more.

*NetLibrary* changed the format of their records. Their statement:

NetLibrary and Recorded Books recently replaced over 1,200 of your eAudiobook titles with iPod-compatible versions. With this exciting update, the file format of the titles was changed from the WMA (DRM-protected) format to the MP3 (DRM-free) file format.

We will need to re-import those records.

**APL branches**

We started to import Baker & Taylor bib records for APLD and APLP, and automatically to generate item records in the process.

We created 103 new collection codes for APLB (Bach), using APLN's codes as the model. We created 101 new collection codes for APLW (Arbor Hill/West Hill), using APLP's codes as the model. We also had to create new istat records and uh\_category records (for the NYS Annual Report) for all the new collection codes.

Before October we'll delete the APLN collection codes and change the collection code in every APLN item (~ 13,000) from AN\* to AB\*.

**Database maintenance**

At BETH's request, we purged "BETH items which have been in missing ('m') status for over 1 year. These are all items which have been lost and paid for prior to August 10, 2008.

**Rawdon's vacation**

Rawdon will be away from September 5 to October 5. If you're a praying person, pray that nothing goes seriously wrong in his absence and that he survives his visit to this relaxing spot in China: [http://uhls.org/uhs/wa\\_shan\\_trail.pps](http://uhls.org/uhs/wa_shan_trail.pps) (copy this Hyperlink and paste it into the Location box of your browser).

## Automation Services Report

September 18, 2009

### New IType? (ASC decision)

VOOR has requested a new IType: “Nonrequest 28 day no fine.” Because ITypes are shared by all libraries, this requires an ASC decision.

### Local priority (ASC discussion)

A request from a director: “Can all items have local request priority instead of only new items?”

Answer: Yes, but our current understanding is this: Because *local priority* is based on ITypes, which are shared by everyone, this change would have to be made at the system level (i.e. it would apply to everyone or no one). I think it works like this: If you own an item, any requester who chooses your library as a pickup location is put into the queue above all requesters who selected another pickup location.

I think what you’d really like is for your patrons to have first crack at your items. I’ve started a discussion with SirsiDynix and hope to have a better understanding of our options by the time ASC meets.

### Email domains

We moved 23 email accounts from [uhs.lib.ny.us](mailto:uhs.lib.ny.us) to [colonielibrary.org](mailto:colonielibrary.org). The process is more complicated than we anticipated, but we’ve got a good procedure in place and will proceed more quickly with this project when Rawdon returns on 10/5.

### ILL forms on web

To facilitate UHLS’s new procedure for handling out-of-system interlibrary loans, we created two HTML forms ([http://www.uhls.org/new/staff\\_only/ill\\_intro.cfm](http://www.uhls.org/new/staff_only/ill_intro.cfm)) that enable library staff to request books or articles. The form emails the request to UHLS and displays a copy for the requester to print and save.

### Patron database cleanup

At BETH’s request, we purged 2258 BETH patrons who had been inactive (i.e. had not checked anything out) for three years or more.

### Brunswick changes

To accommodate the move of the Brunswick Community Library, and its related closing from 9/13 to 9/25, we removed it from the list of available pickup locations in the HIP and put a blurb on the *Request Confirmation* screen advising BRUN patrons to choose another pickup location.

Also, we refreshed the *BRUN\_patrons* email list on our mail server to enable an email broadcast about the closing.

## APL branches

So far we've imported about 1500 bib records provided by Baker & Taylor for the Pine Hills and Delaware branches. We wrote an "import source" to create item records automatically when the bib records are imported. The process is a little time consuming (e.g. a typo in the MARC tag that contains the item information can cause an error that takes some time to track down), but we're getting better with practice. I think we have a long way to go.

## Networking support (a sample)

Rawdon continued his invaluable on-site networking assistance at the libraries. A sample:

- Continue to work on APLM/BETH networking project. BETH is still buying more equipment. They will not drop the T1 until I come back from vacation. APLP is expected to move in mid Sept but network connection will depend on TVC schedule.
- BETH - rolled out phase 1 of new network. It is on all gigabit network with its new switches. There are still some issues to be ironed out. Firewall will be rolled out after I come back.
- BRUN - got its new network setup. Since it has new public IP address, I cannot test out the setup until RR has installed the connection in the new building.
- NASS - conferred with Lois, their volunteer tech person to use Steady State rather than Deep Freeze to take care of their public PCs. Sent her instructions how to do it.
- RVLL - followed up on their remodeling project. Seems still a long way to go. Will work on spec for its internal Windows server.
- COLN delayed its broadband cutover to late Oct since the town requires to put it on bidding.
- COHS - got its receipt printer setup and slips layout done.
- ... and much more

## Rawdon's vacation

Rawdon will be away until October 5. If you haven't seen his travel plans yet, it's really worth a look: [http://uhls.org/uhls/wa\\_shan\\_trail.pps](http://uhls.org/uhls/wa_shan_trail.pps) (copy this link and paste it into the Location box of your browser).

## ILS Migration Subcommittee

The committee will meet on September 16 to discuss the 8/13 demo of the *Polaris* ILS and to plan our next steps.

We invited Rob Sponzo of SirsiDynix to visit on 10/1 to demonstrate *Symphony* and to respond to the following questions (at least):

1. How long (officially and realistically) does Horizon have to live?  
Related: Can we expect prompt support till that time? How about enhancements? Any chance?
2. What advantages would we have as Horizon customers if we migrated to Symphony instead of another system? e.g. a price break? Easier migration?

3. How does Symphony meet our unique needs? e.g. We're a system of 29 autonomous libraries with separate budgets, calendars, circulation policies, etc.

### **“Report of the Month”**

Notice statistics: This is not a report that you run. It's one that we update at the beginning of every month. It's a very simple report that shows the number of print, TeleCirc, and email notices that we send every month. It looks like we're plateauing at around 400,000 total notices a year. These include hold notices, first and second overdue notices, and bills. A good trend is the decline of print and TeleCirc notices and the commensurate increase in email.

This report does not include the email notices that we send to remind patrons two days before a hold expires (~ 22,000 so far this year) or the email courtesy notices that we send to remind patrons two days before their loans are due (~ 97,000 since March 2 of this year).

The report is on the Automation Services blog: [http://uhls.org/autosvcs/blog/?page\\_id=7](http://uhls.org/autosvcs/blog/?page_id=7)

### **Reports as Excel files**

A few of the reports on the web reports page (<https://horizon.uhls.lib.ny.us/reports/>) have given the option to output results in a comma-delimited display for importing into Microsoft Excel. We changed the *Circulation by Category* report (<https://horizon.uhls.lib.ny.us/reports/crcbycategory.html>) to output results in an Excel file, to eliminate the need to copy and paste. This is working well so as time allows we'll change all reports to offer this option.

### **ESIP**

*ESIP* is SirsiDynix's protocol that enables third party applications like *SAM* or *3M Self-checkout* to authenticate users against the Horizon patron database. Several libraries use the *ESIP* licenses installed on our server. Recently COLN asked to use our *ESIP* license and wanted to know the cost. I'm reporting this here just to clarify how *ESIP* works. We need to purchase one *ESIP* license per product (e.g. *SAM*), and all libraries that use that product may use our license at no extra charge. UHLS will pay the license fee for all *ESIP* licenses.

### **WordPress upgrades**

There's a worm making its way through older versions of WordPress, so we will upgrade all WordPress installations to the latest version (2.8.4) over the next week or so. Some of you (WordPress users) will see a difference in the admin interface, but your content and themes should not be affected.

There's no need to panic. It's unlikely that we'll be hit by the worm, but we should get into a regular upgrade routine in any case to avoid this and future security threats.

### **CAST reports**

We worked with the Castleton board on a website redesign and a weeding project.

### **Marketing survey**

We worked with Mary Fellows to create a survey of marketing contacts. The first use was for Banned Books Week.