1.1 ANSER CONTACT INFORMATION

AFTER HOURS

Each week the ANSER Manager posts a message to allrcls@rcls.org detailing the coming week's After Hours (i.e. after 4:00PM weekdays) and weekend staff schedule. These posts will give appropriate information on how to report problems during these hours.

DURING THE DAY (8:00am – 4:30pm)

For any PC hardware and software problems, networking problems, pricing information/orders, inventory/shares, you can call the ANSER Help Desk at 845-243-3747 x 230.

For Symphony software (user records, item records), training, and SmarterMail, please call Martha Sullivan 845-243-3747 x 247.

If we cannot resolve the problem or answer your question, we will route you to the appropriate person:

John, ext. 228 – ANSER Manager and Network Administrator
Dave, ext. 241 – Assistant Network Administrator
Lenny, ext. 229 – Senior Automated System Technician
Ryan, ext. 236 – Automation Technical Specialist: (often in the office or on call after hours)
Nick, ext. 251 -- Automated System Technician
Jerry, ext. 246 – Electronic Resources Consultant

IF ANY OF YOUR SERVICES ARE DOWN PLEASE DON'T HESITATE TO CALL IF YOU HAVEN'T FIRST HEARD FROM US (see below) -- call 845-243-3747 x 230. On the weekend, call 845-243-3747 option 4.

The following protocol will be followed in the event of unscheduled down time. Informational updates will be sent via the following methods depending on the type of failure we are experiencing.

ALL USERS UNABLE TO LOGIN TO SYMPHONY: internet e-mail will be sent to allrcls@rcls.org group. Updates are sent as soon as we become aware of them.

[Revised 2/17/2014]

TELECOMMUNICATIONS "BLACKOUT": the phone chain (see Appendix) will be initiated. RCLS contacts are: Middletown, Newburgh, Pearl River, New City, and Ellenville. It is the responsibility of each library to call their phone chain link contacts. The phone chain will be used again to let everyone know when we are back in service.

WHEN THERE IS SCHEDULED DOWN TIME: internet e-mail is sent to allrcls@rcls.org.

(We have found that faxed communication does not work well in the above situations since it can take over an hour for the fax to be received by all libraries.)

1.2 RCLS AND MEMBER LIBRARY CLOSINGS

Please send an email to **allrcls@rcls.org** to indicate an unscheduled closed date or early closing of your library. In the subject line, name your library. These email will be used by ANSER staff to enter Closed Dates in Symphony for your library.

Setting a Closed date in a Symphony Library account record has the effect of subtracting that date during the calculation of the overdue fine, i.e. the interval **between** the due date and the return date.

However, if the date being set to Closed is the due date itself, the system will not automatically extend the due date-it remains the same.

Examples:
Item due on 11/20. Bad weather on 11/20 causes that date to be set as a Closed date. Items returned on 11/21 are still one day overdue. Items returned on 11/22 are two days overdue, etc.
Item due on 11/20. Bad weather on 11/21 causes that date to be set as a Closed date. Item is then returned on 11/22--it is calculated as one day overdue, because 11/21 was skipped in calculating the fine. Given this logic, ANSER procedure should be to:

1. Continue to report to RCLS all days for which you want no fines charged. They will be entered as Closed dates and will be skipped when calculating overdue fines.

[Revised 2/17/2014]

2. On the day AFTER a closed day, use Bookdrop Discharge and backdate checkins to the last date you were open. This will forgive fines for items due when you were closed.

Closed Dates and Holds

Entering Closed Dates in Symphony does not affect the "Pickup By" date for items on a library's hold shelf. In ANSER, this period is set to 5 days. If a library is closed any days before the pickup date, the patron is not given any extra days.

However, if the pickup date itself is set as a Closed Date, the item will not be included in the Expire Holds routine that is run at RCLS at about 7:00AM each morning. However, in order for that to hold true, ANSER staff must have entered the closed date the evening before that Expire Holds routine is run.

To be safe, many libraries will simply not run their Clean Hold Shelf report on the day following a Closed Date; and will check out hold items to patrons even if the pickup by date was the previous day.

1.3 ANSER BACKGROUND

ANSER began as a cooperative library automation project among 9 RCLS member libraries. As more libraries became interested in automating, RCLS became the licensing agent and system administrator. ANSER used software from CLSI, Inc. from 1989 until 1994. Before joining ANSER, Finkelstein Memorial Library maintained a separate CLSI system and Middletown Thrall Library maintained a separate GEAC system.

ANSER migrated from CLSI to Dynix software in Nov. 1994 and came online with Dynix in late January, 1995. At that time, the goal of automating every RCLS member library became explicit. In late 1997, ANSER activated the ability to place "holds", i.e. inter-system ILL requests, using the Dynix software. ANSER migrated from Dynix Classic to Horizon in August, 2005; and from Horizon to Symphony in December, 2011.

ANSER TIMELINE--CIRCULATING ONLINE

NWC	June, 1990
CHS	Dec. 1990
NAN	Jan., 1991
EPL	Jan. 2, 1991
MFL	Jan, 1991
VCL	Feb. 19, 1991
NYK	Feb. 25, 1991
HA1&2	May 1, 1991
NFL	May 23, 1991
FML	May, 1992
TAP	July, 1992
SLO	Dec. 10, 1992
GOS	Apr., 1993
WNY	Apr., 1993
TUX	Jun., 1993
BLV	Oct., 1993
MID	Mar, 1995
WAR	May, 1995
SUF	Aug. 28, 1995
PAL	May, 1996
WAS	June, 1996
PRL	Nov. 4, 1996

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PTJ   Apr. 1, 1997
TCL   Apr. 15, 1997
GAR   May 21, 1997
FPL   Jun., 1997
LIV   Sept. 22, 1997
MTC   Sept. 29, 1997
LIB   Nov. 13, 1997
PMT   Jan. 6, 1998
WAL   Mar. 9, 1998
STP   Apr. 14, 1998
GRL   Sept. 8, 1998
CVL   Oct., 1998
HML   Oct., 1998
WAK   Jan. 6, 1999
ORG   Apr. 5, 1999
JEF   Sep. 15, 1999
BLB   Dec. 7, 1999
GRH   Feb. 1, 2000
COR   Mar. 24, 2000
PBL   Apr. 12, 2000
MNG   Aug. 22, 2000
ROS   Nov. 20, 2000
NAR   Dec. 18, 2000
CRG   Jan. 8, 2001
DEL   Feb. 14, 2001
HFL   Aug. 6, 2001
ELD   Feb. 12, 2002
FBR   Nov. 6, 2002
FML   Nov. 14, 2010 left ANSER to run independent III system

[Revised 2/17/2014]

1.4 RCLS STAFF

Director: Robert Hubsher

ANSER Manager and Network Administrator: John Schneider

Manages the ANSER department of RCLS; supervises staff and supervises network administration

Automation Technical Specialist: Ryan Smith

The Automation Technical Specialist is the primary contact point; maintains the ANSER Help Desk, assigns work orders to the technical staff, maintains inventories of ANSER equipment, orders new equipment.

Assistant Network Administrator: Dave Krawczwk

Implements and maintains the hardware and software components of the ANSER telecommunications network. With other technical staff, also helps troubleshoot, install, and maintain ANSER equipment at member libraries and in the central computing facility.

Senior Automated System Technician: Lenny George

Responsible for installation and maintenance of ANSER equipment at member libraries and in the central computing facility.

Automated System Technician: Nick Yaven

Responsible for installation and maintenance of ANSER equipment at member libraries and in the central computing facility.

Electronic Resources Consultant: Jerry Kuntz

In addition to non-ANSER related activities, the Electronic Resources Consultant is responsible for the configuration and maintenance of the ANSER system software (Symphony & online catalog)

Software Support Technician: Martha Sullivan

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Assists the ANSER Technical Assistant by handling software-related problem reports; assists the Electronic Resources Consultant in the configuration and maintenance of the ANSER system software; provides ongoing ANSER software training for member library staff.

ILL/Technical Services Librarian: Dan Donohue

The ILL/Technical Services Librarian maintains the bibliographic catalog files of the ANSER system, including Authority Control, special indexing projects, and special cataloging projects. Supervises a staff of 2 that are involved in these tasks.

1.5 ANSER CONTACTS

Each ANSER library should designate their director or other staff member to be the library's ANSER contact. ANSER contacts are given authority to request circulation and item linking changes that would affect their library; and to have access to report tools that could effect batch changes of items and/or access to borrower records through a web interface.

The list of ANSER contacts is maintained through subscription to the RCLS email group, ansercontacts@rcls.org. Subscription to this list must be requested by the director of the member library.

1.6 ANSER COMMITTEE

From the Director's Association Bylaws:

The ANSER Committee shall:

Develop an annual statement of expectations for ANSER automated services for approval by the Directors' Association

Review the ANSER annual budget as developed by RCLS for recommendations to the Directors' Association, and approve budget transfers during the budget year

Develop ANSER policies for recommendation and presentation to the Directors' Association

Serve as the line of communication for Users Groups to the Association.

ANSER Committee Minutes are posted at:

http://guides.rcls.org/DAarchives

1.7 ANSER USER GROUPS

From the Director's Association Bylaws:

Users Groups shall report to the ANSER Committee.

User group membership shall be drawn from the staffs of the ANSER libraries.

Users Groups should convey communications to the Association through the ANSER Committee.

Users Groups chairs shall be confirmed by the Chair of the ANSER committee.

The Users Groups are charged with recommending those items in need of clarification or change in policy to the ANSER Committee, identifying problems with the hardware, software, and database which affect procedures and/or policies set by the ANSER Committee, recommending solutions after consultation with the Project Manager, sharing concerns, and exchanging information.

Users Groups are: Reference (RUG), Circulation and Technology (CTUG)

RUG Minutes are posted at:

http://guides.rcls.org/DAarchives

CTUG Minutes are posted at:

http://guides.rcls.org/DAarchives

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1.8 ANSER EMAIL GROUPS

RCLS maintains several email subscription lists to facilitate the communication of ANSER-related issues:

ANSER Committee - ansercomm@rcls.org [Only subscribers can post, private subscription]

ANSER Contacts - ansercontacts@rcls.org [Only subscribers can post, private subscription]

CIRC/TECH User's Group - ctug@rcls.org [Only subscribers can post, self-subscription allowed]

Reference User's Group - rug@rcls.org [Only subscribers can post, self-subscription allowed]

1.9 ANSER SHARES and EQUIPMENT PRICING

For the most recent ANSER share and equipment pricing, refer to the RCLS web site (http://www.rcls.org) under Services ->ANSER->Order Equipment

1.10 LOGINS AND SECURITY

Each library has been assigned 2 Symphony logins: nnncirc and nnnanser (ANSER Contact). The nnnanser user is available to Directors and ANSER Contacts. Libraries using acquisitions have been assigned a third login, nnnacq.

- Do not discuss or display passwords in front of the public
- Do not hang notes with passwords on or near workstations.
- Each library's passwords will be changed periodically with advance notice given.

1.11 RECORD RETENTION

- Last Borrower information will stay on an item record for 1 month and then will be deleted by the Clear Previous ID routine that runs weekly on Sundays.
- Paid bills will be removed when older than 6 months by the Remove Paid Bills report that runs on the 3rd day of each month.
- Inactive Holds (filled, cancelled, or not picked up) will be removed from User records after being inactive for 45 days by the Purge Inactive Holds routine that runs weekly on Saturdays.
- *ANSER Policy:* **Records of patrons inactive for five years owing less than $10, records of patrons inactive for six years owing less than $50 and records of patrons inactive for seven years will be purged. Records of patrons inactive for seven years with documented violations of section 265, NYS Education Law, including fines of $1000 or more and/or violations involving multiple libraries, will remain in the database until restitution is made. At least 4 weeks prior to the scheduled purge, RCLS will forward to each library a list of patrons to be purged and an acknowledgment sheet. A library may request, on the acknowledgment sheet, an exemption of a patron record from the purge based on this policy. The acknowledgment sheet shall be signed, returned and must be received by RCLS by the specified purge date.**
- Items set to Lost or Missing for more than 24 months will be deleted on an annual basis. Items set to Claims Returned more than 5 years will be deleted on an annual basis.

1.12 ANSER BACKUP SCHEDULE

Full data backup image made early (4:00AM) each morning.

Hourly transaction backup images made between full data backups.

Most recent full data backup is copied to image servers in Haverstraw.

1.13 ONLINE FORMS

ITEM TYPE Addition/Change Form:

http://www.rcls.org/?q=node/105

1.14 VENDOR INFORMATION

SirsiDynix web site: http://www.sirsidynix.com

Online Documentation (full generic manuals from SirsiDynix, Inc.; not customized for RCLS):

Circulation Training Guide:

www.rcls.org/anser/Circulation_TrainingGuide.pdf

Essentials Training Guide:

www.rcls.org/anser/EssentialSkills_Guide.pdf

Cataloging Training Guide:

www.rcls.org/anser/Cataloging_Guide.pdf

COSUGI User Group

http://www.cosugi.org/

There are over a dozen email discussion groups related to specific aspects of Symphony. In order to subscribe, you need to arrange for access via RCLS Electronic Resources Consultant.

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