

AUTOMATED SERVICES COMMITTEE
February 27, 2001

PRESENT (voting): Marcia Middleton(APLM), Nancy Pieri (BETH), Joseph Makowiec (BRUN), Richard Naylor (COLN), Lorraine Smi (VOOR), Karen Nuckolls (UHLS)

(Non-voting): Claude Caesar, Rawdon Cheng, John Cirrin, Sara Dallas, Mary Fellows, Amy Maurer

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

I. INTRODUCTION OF MARY FELLOWS

P. Ritter introduced Mary Fellows, UHLS Youth Services Consultant

II. MINUTES

Minutes of the January 23, 2001 meeting accepted as presented.

III. AUTOMATION REPORT - K. NUCKOLLS

K. Nuckolls highlighted features in her written report:

- Berne Library is circulating
- the DRA demonstration on 2/26 was changed due to the fact that one of the presentors was unable to attend. However, using the "Astound" software, Kate Duval was able to demonstrate the TAOS software. No one at the sessions felt that a second, more complete, demonstration was necessary.
- Discussion about the vendor demonstrations:
 - M. Middleton noted that hands-on is important and some standardized searches and questions should be developed that can be used on site visits and during the demonstrations.
 - M. Fellows noted that the hands-on sessions might be important for staff from the small libraries who might not be able to go on the site visits. P. Ritter suggested that the vendors be allowed 1½ hours for the demonstration and use the remainder of the time for hands-on.
 - J. Cirrin noted that in the DRA demonstration, K. Duval guaranteed a 100% successful migration from DRA Classic to TAOS. He would like to be sure that all of the other vendors are asked about migration.
 - M. Middleton asked if any of the vendors under consideration have a module or program that will allow keeping stats on the use of the public access computers.
- P. Ritter introduced a 2/17/01 letter from F. Benson commenting on the problems using the computer system. P. Ritter will respond, suggesting that he speak with the front line people in his local library and discuss his specific complaints. A. Maurer will also respond, inviting him to come to APLM and discuss the complaints with her.

IV. ILL STATS

Report by R. Cheng. He has been working on the ILL reports and discovered a discrepancy between the Route Outs listed by UHLAN and those manually counted by the libraries. There are several reasons for this:

- human error
- some libraries count loans between their departments as RO - this is not correct
- some libraries count unowned items that they loan to another library as RO - this is not correct. *RULE: Use Route Out only for those items that you own.*

J. Cirrin noted that the recent statistics that R. Cheng printed are much more realistic than previous reports. In Jan. 2001, APLM did twice as many ILLs as in Jan. 2000.

R. Cheng noted that he is still working on "tweaking" the report for Route Ins. These are more difficult to work with and the main problem has been human error in addition on the reports that he has received from the libraries.

R. Cheng is also working on a program to record the Pool Collection items correctly. He has to do some further testing.

V. REPORT ON VENDOR HARDWARE

R. Cheng presented a chart showing the NYS contract costs for the selected vendor hardware. All 5 vendors' systems will run on UNIX. He is not certain why SIRSI requires 3 CPUs, 2 CPUs is the norm and some platforms will only support 2. He expressed a preference for the UNIX system, not the Windows-based platform.

SUN, HP and IBM vendors are all willing to negotiate on the pricing and some will also give a discount for the used Alpha. R. Cheng estimates that using NYS contract pricing, the hardware for the new automation system should cost approximately \$50,000.

M. Middleton recommended purchasing REAL RAID - the automation system will automatically switch to the second disk drive if the first one fails.

VI. UHLS TECHNOLOGY PLAN

P. Ritter reported that the Technology Plan has been submitted to the Board of Trustees and they will take action on it at their March 14th meeting.

VII. AUTOMATION POSITIONS

P. Ritter reported that the applicants have been narrowed down to three per position. Interviews will be held on March 2, 5 and 6.

VIII. ONLINE RENEWALS

R. Naylor asked about the status of online renewals. Discussion. A. Maurer and J. Cirrin noted that APLM is no longer opposed to remote renewals.

MOTION: N. Pieri moved that the remote renewals function in UHLAN should be activated. J. Makowiec second. Unanimous. <side note: R. Naylor was elated.>

IX. STANDARDS SUBCOMMITTEE

Report by N. Pieri. She presented a draft Service and Policy Standards outlining items that are Current Standards, those that require Local Decisions, and Miscellaneous Issues. Discussion. K. Nuckolls noted that many of the smaller libraries that have recently come online are not used to thinking about the “bigger picture” and therefore don’t think about the effect that their policies have on patrons using other libraries. N. Pieri will add “Loan periods” to the list of Local Decisions.

Discussion regarding the next step in the standardization process. N. Pieri will present her draft Service and Policy Standards for discussion at the March 2nd Directors Association meeting.

10:25 AM meeting adjourned.

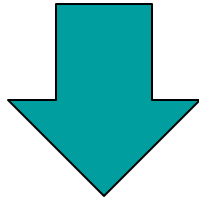
NEXT MEETING: Tuesday, March 27th at 9:00 AM at UHLS

AGENDA:

- I. February Minutes
- II. Automation Services Report - K. Nuckolls
- III. Verizon demonstration at 9:15 AM
- IV. Vendor discussion
- V. Recycling of Equipment - C. Hamblin
- VI. Report on Automation positions
- VII. Report on status of renewals online

Heidi A. Fuge
2/28/01

continued (scroll down)



AUTOMATION SERVICES REPORT FEBRUARY 27, 2001

ACTIVITIES

- ? Linkers inputting items sent to UHLS from RENS, SCHG & VAFL into UHLAN database.
- ? Linking training at CAST
- ? SCHG prepares to circulate on UHLAN: linking continuing
- ? Troubleshooting PCs at NGRN & CAST (Rawdon)
- ? Visited COHS, WTVT & RENS to assist in Gates training setup (Rawdon)
- ? Set up proxy server, including patron authentication (Rawdon)
- ? Working with Verizon to coordinate the relocation of the EGRN & POES libraries (Rawdon)

ANSWERED QUESTIONS FROM MEMBER LIBRARIES ON:

- ? Union List of Serials
- ? Linking
- ? Reports
- ? Usernames (APLM; BETH; GUIL)
- ? Policy files (EGRN; RCSC; APL)
- ? Vendor demos

MEETINGS ATTENDED AND LIBRARIES VISITED

- ? 1/24: RAAC meeting (Karen)
- ? 1/29: Annual Report workshop at APLM (Karen, Rachel, Sara, Phil)
- ? 2/2: Excel class (Karen)
- ? 2/6-7: Numbers Tell the Story workshop (Karen, Rachel, Sara, Phil)
- ? 2/8: Policy file review with APL (Karen)
- ? 12/7: Web2 meeting (Automation Dept.)
- ? 2/9: RAAC meeting (Karen)
- ? 2/9: NYLA SMART meeting (Karen)
- ? 2/13: Search Committee meeting (Karen, Sara, Phil)
- ? 2/14: Circ/ILLIG meeting (Karen, Rachel, Rawdon)
- ? 2/15: NYLA SMART conference call (Karen)

SYSTEM MIGRATION

Vendor demos have been scheduled as follows:

2/26: DRA; 3/1: III; 3/12: VTLS; 3/13: epixtech; 3/21: Sirsi. There will be two identical demos given on each day, beginning at 9 am and 1 pm. Some hands-on will be provided by the

vendors. Due to space limitations, there is a limit of three attendees from each library.

“PANDORA’S BOX” WORKSHOPS SCHEDULED FOR MARCH

These workshops are 3-hour practical classes in Computer Troubleshooting; Excel; and Access. The last two mentioned will specifically target a project, such as a video list, Friends list, or DRA report manipulation. Attendees are limited to 6-8 people per class. They will take place during the month of March at APLM, SNLK and VOOR libraries. Trainers include Marcia Middleton (APL) and David Fuller (Union College).

An announcement is being sent out via e-mail and paper, and is posted on the Intranet, along with a registration form. Six laptops have been purchased from a portion of grant money for this project.

Additional classes for these same topics will be offered in June at EGRN and VOOR.

It is planned to continue offering similar workshops after the grant has ended.

WEB2 RELEASE 1.3a

Policy files: Claude has inputted several library “servers” that are supposed to handle specific policy file settings. We have worked with several libraries in testing to see if the settings worked, and they have not. We will continue to work with our own policy file until we find a successful resolution to this problem.

MONTHLY ILL STATISTICS

Rawdon has not given up on this custom report. At the last Circ/ILLIG meeting, he reported that he was getting closer, numerically speaking. A report for January has just been posted on the Intranet; member libraries are continuing to work with him.

SEARCH COMMITTEE

The search committee for the two new automation positions met on February 13 and narrowed down to three candidates for each position. Interviews will take place beginning March 2.