

AUTOMATED SERVICES COMMITTEE
March 27, 2001

PRESENT (voting): Jeff Cannell (APLM), Thomas Thornbury (BRLN), Nancy Pieri (BETH), Joseph Makowiec (BRUN), Robert Jaquay (COLN), Pat Nonamaker (EGRN), C. Hamblin (GUIL), J. Felsten (RCSC), B. Kubli (STEP), Karen Nuckolls (UHLS), Lorraine Smi (VOOR)

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

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

I. MINUTES

Minutes of the February 27, 2001 meeting accepted as presented.

II. RECYCLING OF EQUIPMENT

Report by C. Hamblin. She noted that Waste Management is accepting computers and other equipment for recycling. She will contact them and get the full details for report at the next ASC meeting.

III. AUTOMATION POSITIONS

P. Ritter reported that the last two interviews will take place on March 28th. Following the interviews, the Committee will have to decide whether to accept any of the candidates or re-advertise the positions.

IV. TECHNOLOGY PLAN

The Plan has been accepted by the Board of Trustees and will be forwarded to the State. It will become part of the new UHLS Plan of Service.

V. VERIZON

Presentation by Peter Accumano, Corporate Account Manager for Verizon. He distributed a handout explaining the voice and data services offered by Verizon. He noted that all of these services are available under State contract pricing. Verizon provides not only the services but also the equipment.

When asked about DSL service he noted that it is address specific and only available in areas near a central site because the DSL cable can only carry information for 18 kilofeet. In his opinion, DSL won't be "ready for prime time" for another year.

VI. STANDARDS SUBCOMMITTEE

Report by N. Pieri. The Directors Association began discussing the issue of standardization of policies. K. Nuckolls provided everyone with copies of their policy files to aid in the discussion.

K. Nuckolls noted that several libraries have already made some policy file changes.

B. Kubli asked about the legality of changing policy files - is there anything in the UHLAN contract that prohibits these changes? R. Jaquay noted that the libraries are autonomous and can make their own policy decisions independent of UHLS.

VII. AUTOMATION SERVICES REPORT

Report by K. Nuckolls. She noted the following:

- ! there will be one more Pandora's Box workshop this month on 3/30. More workshops are planned for June and will be held at VOOR and EGRN. Announcements will be sent when the arrangements have been finalized. Evaluations of the workshops held so far have rated them highly.
- ! C. Caesar continues to work on the Web2 release 1.3a. He is still testing the UHLS policy files.

VENDOR EVALUATIONS AND DISCUSSION

K. Nuckolls distributed copies of the summary evaluations of the vendor demonstrations. She did not do a summary of the VTLS evaluations since the majority did not feel that the vendor was worth considering.

Discussion. Consensus that *VTLS*, *DRA* and *SIRSI* are no longer under consideration. *III* and *epixtech* are the two vendors that will be considered. **(Copies of evaluation summaries for these two vendors are attached)** Discussion regarding the modules on the systems and the ease-of-use, including the number of windows opened at one time. The following points were brought out in the discussion:

- ! B. Kubli expressed concern regarding the short time that *epixtech* has been in business as an independent company
- ! R. Cheng noted that *epixtech* had the best report module he has ever seen
- ! R. Cheng noted that the report module in *III* was impressive at first glance but was only good, not great and consisted of canned reports - no customization was shown
- ! R. Cheng noted that the OPAC on *III* was worth the price.
- ! The *DRA* contract will need to be reviewed for cancellation and/or expiration dates.

P. Ritter suggested that, at this point, the primary point to consider in the two systems are the necessary functionalities - not price. He noted that whichever system is selected, the price will be open to negotiation anyway.

R. Jaquay noted that hands-on site visits will be very desirable. B. Kubli pointed out that the timeliness and helpfulness of the vendor's technical support line is crucial.

Discussion regarding the possibility of having the two vendors set up hands-on demonstrations at UHLS. Both vendors assured attendees during the demonstrations that the migration from *DRA* to their system would not be a problem. It was suggested that the vendors should provide a example of the migration process from UHLS to theirs.

K. Nuckolls, with the assistance of R. Naylor (COLN) and G. Kirkpatrick (BETH), will develop a list of questions to be used at the site visits and during the vendor

demonstrations. She will solicit questions via email from the Work Teams and the Directors. The list of questions will be presented at the Directors Association meeting on April 6th.

K. Nuckolls will try and arrange some site visits before the next ASC meeting (April 24th).

Discussion regarding the costs and maintenance fees for a new system. P. Nonamaker suggested that there will need to be reconsideration of the way in which the fees are figured. P. Ritter noted that many systems have a per circulation fee. A plan for a new fee structure will need to be developed and presented to the UHLS Finance Committee.

Consensus that a vendor recommendation will be made to the Board of Trustees at their July 11th meeting.

NEXT MEETING: Tuesday, April 24th at 9:00 AM at UHLS

AGENDA:

- ! March Minutes
- ! Automation Services Report - K. Nuckolls
- ! Vendor discussion
- ! Recycling of Equipment - C. Hamblin
- ! Report on Automation positions
- ! Report on Standards Subcommittee

Heidi A. Fuge
3/28/01

RESULTS OF VENDOR DEMO EVALUATIONS

epixtech Horizon - John Rose & Brad Baumgartner

Online Catalog: Needs addressed clearly and completely?

Very Satisfactory: 17

Satisfactory: 11

Not Satisfactory:

Not Relevant:

Comments: A bit too much on other OPACs; Really liked how it looks! Seems very user-friendly! Simple use; I like the bookbag; Very simple and straight-forward, highly customizable; Ability to use templates from other systems-great hot links; Can be customized which is nice; Some sites were better than others..looks like we could tailor it the way we choose?; Very flexible and I like being able to link to searches & save to bookbag; Easy to use-can search other libs. & systems databases...ADA compatible, easily limit or expand search; Easily searchable...easy to limit searches..attractive graphics...like interface with ILL module; Seems very customizable; Has ability to add options such as regional catalog search or to combine database search with library search...nice for future development; I like the 3 search options shown...not sure if I like holdings displays shown...Will it be fast enough?; Really like the bookbag function! Easy patron requests. Good to know we can customize as needed. Nice kids' OPAC.

Circulation: Needs addressed...?

Very Satisfactory: 18

Satisfactory: 10

Not Satisfactory:

Not Relevant:

Comments: When John [Rose] says this can be added or that can be added, i.e. fields, will there be any additional cost?; Seamless applications; Nice!!!; FOR ONCE! A screen not too busy! Seemed easy to use! Too much time spent in this area; I like it! Message boxes are great! Back-up system, Yeah!!!; Great use of hot keys, simple and straight forward, like the customability...Too good to be true?; Easy to use; Straight-forward; I like the max. by day (fines)...proxy...will this connect families?; Question about facility of using function keys to get around...Is it too complex for some staff?; Excellent...very satisfied; Appeared to meet all our needs & offer flexibility in individual library's needs & desires for patron record information; Seems easy to use with lots of useful features; Sufficient, satisfies needs; Extensive functionality built on public library needs; Very nice! I like the check-in screen, patron info screen, bookings...doesn't seem to be lacking anything-perhaps checkout involves too many keystrokes /commands; Not as good as III, but better than the others. Seems like a pretty logical, easy to learn system, despite lots of clicking...*would like to add several fields to display on borrower record/checkout.

Inter/Intra-library loan: Needs addressed...?**Very Satisfactory:** 12**Satisfactory:** 16**Not Satisfactory:****Not Relevant:**

Comments: Not enough time on this; Sounds good!; Patron screen is very simple...staff menu has too many screens; Also easy; Could be somewhat of a problem; Seems to be fairly straight-forward; Automatically sends e-notices for pickup, patron can view previous requests & status, can send requests to other lib. system; Very sophisticated...seems the best out of all demos...would provide full access to materials for patrons; Again, not as functional as III but good enough; Didn't quite answer question about stats; Patron requests seem difficult-lots of clicking & notes to check...staff ILL OK, but I'm not enthusiastic about it. Again, lots of clicking;

Reports: Needs addressed...?**Very Satisfactory:** 23**Satisfactory:** 2**Not Satisfactory:****Not Relevant:** 1

Comments: Great; Looks like you can do just about anything...this will please many people; Can be really "localized"...This is good; Excellent presentation on capabilities; WOW!; I don't feel that reports were really explained; Excellent! Perfect!; Like the use of many different software (Access, Excel, etc.); English wizard would be great to generate rpts...can e-mail rpts.; Look good; Open database from Excel; Like this one! Very flexible; Excellent functionality; Appeared to readily give you any report you desired including graphs & charts available through Excel & other programs; Much better than what we have...easy to understand and run; Woo hoo! For a report-happy person this is GREAT!; Also very nice...English wizard looks good...love the report scheduling; Very impressive! Looks very easy to get what we need with no hassle...I like the fact we could add info as long as it's in Excel;

Cataloging: Needs addressed...?**Very Satisfactory:** 8**Satisfactory:** 10**Not Satisfactory:****Not Relevant:** 4

Comments: Don't have a vision for how this might be used; Not enough time on this; Presentation was longer than expected-and when cataloging was to be discussed other system directors preferred OPAC and then I had to leave to open our library; But, I'm sure it's as good as the rest of the system!; A little fast but it does seem adequate; Believe it would be usable; Not sure how we would do this without built-in database of available records to link to such as OCLC;

For me; Seems easy to use...like that you can make global changes to MARC/ item records...this will save a lot of work; Seems easy; Seemed confusing...too many steps...hopefully they will have capabilities to import from other dbs...love keyword & request list capabilities; Like the codes available at all times...seems very logical & easy to use.

User Support: Needs addressed...?

Very Satisfactory: 8

Satisfactory: 14

Not Satisfactory:

Not Relevant: 2

Comments: 90% of the time talking to a person is great!!!; Need to know the no. of support personnel; Seems like there could be more; Training with key caps! (Like it); Not sure what was in proposal of services; Seems adequate; Implementation process & support was adequately addressed; Appears satisfactory based on brief discussion; I wonder if 1 person is enough to train us well enough to train others...I think it's satisfactory, but I also think it could be better; How much can we expect-only lightly touched on-How much onsite training is included.

1. Demonstrator had the knowledge, skills, and abilities to explain the system clearly to me:
Strongly agree: 18 Agree: 10 Disagree Could not determine
2. Online catalog is user-friendly and includes a variety of search keys:
Strongly agree: 11 Agree: 17 Disagree Could not determine
3. Circ functions are fully integrated with the rest of the system, allowing for easy movement between modules:
Strongly agree: 12 Agree: 15 Disagree: 2 Could not determine
4. Vendor has a separate Inter(Intra)library loan module which can provide ILL stats for lib. use:
Strongly agree: 9 Agree: 16 Disagree Could not determine: 4
5. Canned reports can be set up by library staff, and ability to program custom rpt. are available:
Strongly agree: 18 Agree: 9 Disagree Could not determine: 2
6. Cataloging module makes it easy for staff to add holdings and provides keyword, in addition to traditional, search methods:
Strongly agree: 7 Agree: 9 Disagree Could not determine: 10
7. User support is fully described and amenable to consortia hours:
Strongly agree: 5 Agree: 17 Disagree Could not determine: 4

8. Please provide any other comments you have about this vendor:

Excellent functionality for the cost of the package; Five Key Points were not addressed for me!

Too much time was spent on circ...the teleconference could have been eliminated and time spent on cataloging; Very impressed with online catalog! Lots of clicking within circ function, may slow workflow; It would be great when proxy borrowers' fields expanded to include family info...really like the OPAC; Looks easy to make changes in fields & privileges. I like the in-house checkin & ability to print single return receipt. Epixtech is 2nd on my wishlist (behind III). Lots of things I like, but again, this system requires too much clicking around to navigate multiple patron transactions; Very well presented, nice product; Only vendor so far that prepared examples with UHLS libs.--nice!; Not as good as III but still a contender. It would be a secondary choice option of the 3 seen so far...; Strong consideration; Seems to allow tailoring to individual library needs;

Very knowledgeable vendor willing to answer any and all questions; Nice product-nice presentation; Good presentation; acceptable possibility...still not III; I was impressed...I think it would work for UHLS; Some things will be confusing to some people--may be hard to train certain people; Printed materials on the vendor would have been helpful; presentation spent too much time on ILL system-slightly disorganized...question need of phone...overall not impressed; online catalog is only as strong as our design skills make it; The potential for localizing could defeat consortium policy standardization efforts; Looked really good...versatile...I liked it; Lots of "bang for the buck"...very nice product-looks like a real workhorse; Overall appears easy to use, customizable & pertinent to our needs.

RESULTS OF VENDOR DEMO EVALUATIONS

III - Charlie Carroll & Tom Jacobson

Online Catalog: Needs addressed clearly and completely?

Very Satisfactory: 25

Satisfactory: 3

Not Satisfactory:

Not Relevant:

Comments: Could almost be too complex; Awesome!; Very flexible functionality; WOW!; Exactly what we're looking for; I liked the searching methods, keyword is great!...out of the box-OK, but customizable; Wonderful; Request info available to patron is great...ability to customize interface from simple to all the bells & whistles, is great; Easy to use-can expand or refine search from any screen...can limit search (kids version)...can display pictures of book jacket-software modified for handicapped; Like option to organize data on holdings display screen; Seems easy to use and navigate; *Love the canned list capability... very user friendly...meets all different needs-I like this so much better than DRA Web2.

Circulation: Needs addressed...?

Very Satisfactory: 22

Satisfactory: 6

Not Satisfactory:

Not Relevant:

Comments: Simple to read screens...logical lookups; Easy to use-info needed is readily available...one thing I don't like: the field where you scan patron barcode is same as field to check out material-I can see material getting checked out to wrong patrons; Borrower family...automatic e-mail; Easy to use...satisfies almost every need; Great functionality...I'd like to get my hands on it to see how efficient it is...functionality is great; Clean & clear; Easy to navigate... pop-up boxes provide relevant instructions or options to staff-need to look closely at owning library vs. issuing library; Can use mouse or keyboard-patron & bib info readily accessible & available from same screen-can link patrons (family)...can print Has list & receipts; Would miss agency-level request... like linked patrons feature; Seems more user-friendly than DRA; It's great to be able to provide so much item info to patrons from 1 module without having multi-screens open, especially reserves, i.e., item specific; Not enough time on this-a bit too much showing the OPAC.

Inter/Intra-library loan: Needs addressed...?**Very Satisfactory:** 18**Satisfactory:** 5**Not Satisfactory:****Not Relevant:** 4

Comments: Ability to go to Amazon, Barnes & Noble; Can recognize or create a barcode for outside system...can also generate daily list of requests at the local level; Intralibrary loan-handled nicely in circ...interlibrary loan looks nice!; Impressive; Totally!; Can use lending library's barcode...homebound list of previous read items...send email notices; Change in vocab requires adjustment but I like the change...can we provide CDLC search access to each library?; Very nice; Love the ILL that can accommodate out-of-system barcodes!!

Reports: Needs addressed...?**Very Satisfactory:** 17**Satisfactory:** 6**Not Satisfactory:****Not Relevant:** 4

Comments: Very flexible...create list seems great!; Looks great-can we let the libs. do some of the simpler ones?; "Standard" very adequate for most needs..."create list" is a bonus; Can do custom or canned rpts.-can create graphs, charts, etc.; Would need more Boolean experience to use this easily; Claims return rpts. will be extremely helpful; lots of rpts. & stats to better monitor services & needs; Not totally clear as to what info is available; Not enough time spent; Yes! Yes! Yes!

Cataloging: Needs addressed...?**Very Satisfactory:** 14**Satisfactory:** 10**Not Satisfactory:****Not Relevant:** 3

Comments: I need more info on this whole system-what I saw looks very usable; Didn't spend much time on this-seemed straight-forward, though; Easy to use; Would this reduce no. of items sent to UHLS for linking info?; Very little time was spent on this but seems adequate and easy to use; Not enough time spent; Easy and efficient.

User Support: Needs addressed...?**Very Satisfactory:** 15**Satisfactory:** 6**Not Satisfactory:****Not Relevant:** 2

Comments: Time will tell; UHLS should decide; Probably; Nice to know there's always a person available when you need help; I feel these are people we can work with-I like the expertise from front line circ experience-integration with web and other technologies, eLibrary, etc.

1. Demonstrator had the knowledge, skills, and abilities to explain the system clearly to me:
Strongly agree: 20 Agree: 7 Disagree Could not determine
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Strongly agree: 12 Agree: 11 Disagree Could not determine: 4

8. Please provide any other comments you have about this vendor:

A great overview of what appears to be a very good LMS!!!

Very well addressed.

I think III is a great system-love the versatility of OPAC, ability to print/email/beam stuff to PDA-this will be very valuable to our patrons as they become more tech-oriented. The ability of III to integrate very important as it gives us room to adapt our services to meet customer needs-create list utility would be an incredible benefit to libraries-I very much like III!

Seems like it will meet all our needs and then some. This is the first demo I've seen so it may be too soon to have a basis for comparison.

Seems to set a standard for comparison; The "Cadillac" of what we've seen...not sure we need all this; I like the options provided and local library and customization available; From what I have seen this system would be a great improvement over what we have now.

This is by far a superior product.

Seemed like the product was too large to explain in 3 hours.

III seems way ahead of other providers. I liked the local flexibility that seems possible with III.

Seems to be a superior product but really pricy; The only negative might be the price!
Very impressive!

AUTOMATION SERVICES REPORT

MARCH 27, 2001

ACTIVITIES

Linkers inputting items sent to UHLS from RENS, SCHG & VAFL into UHLAN database.

SCHG prepares to circulate on UHLAN.

ANSWERED QUESTIONS FROM MEMBER LIBRARIES ON:

Linking

Reports

Usernames (APLM; BRLN; BETH)

Policy files (BRUN; EGRN; VAFL)

Vendor demos

MEETINGS ATTENDED AND LIBRARIES VISITED

3/1: III Demo

3/2: CAST linking training (Karen)

3/9: Automation Dept. meeting

3/12: VTLS Demo

3/13: epixtech Demo

3/21: Sirsi Demo

SYSTEM MIGRATION

See attached documents.

"PANDORA'S BOX" WORKSHOPS HAVE BEGUN

These workshops are continuing through March 30. More are being scheduled for June at the new East Greenbush Library and at Voorheesville Library.

A registration form is posted on the Intranet.

WEB2 RELEASE 1.3a

Policy files: Claude has inputted several library "servers" that are supposed to handle specific policy file settings. We are continuing to work with our own policy file to test the software.