

AUTOMATED SERVICES COMMITTEE

April 24, 2001

PRESENT (voting): John Cirrin(APLM), Nancy Pieri (BETH), Joseph Makowiec (BRUN), Richard Naylor (COLN), Pat Nonamaker (EGRN), C. Hamblin (GUIL), S. Hodges (PTRB), B. Kubli (STEP), Karen Nuckolls (UHLS), Gail Sacco (VOOR)

(Non-voting): Claude Caesar, Sara Dallas, Robert Jaquay, Marcia Middleton

9:05 AM Meeting called to order by Philip Ritter, Chair

I. MINUTES

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

II. RECYCLING OF EQUIPMENT

Report by C. Hamblin. She noted that the Guilderland Middle School would like the library to participate in a program for printer cartridge recycling. Each recycled cartridge would bring in \$1 for the school. She has asked a GUIL staff member to investigate the program further.

III. AUTOMATION POSITIONS

P. Ritter reported that the positions have been re-advertised. Closing date for applications is May 14th. To-date there are 25 applications for the Technology position and 5 for the Training position. Interviews will begin on June 4th.

IV. STANDARDS SUBCOMMITTEE

Report by N. Pieri. At the April Directors Association meeting, an agreement was reached on patron identification information. She noted that the work will be slow but she will continue to pursue it. The next discussion will cover renewals and cardless check-outs.

V. AUTOMATION REPORT

K. Nuckolls highlighted features in her written report. She noted the following:

- Schaghticoke is almost ready to circulate on UHLAN
- She thanked the people who attended the epixtech hands-on demonstration and thanked P. Nonamaker for the use of space in the new EGRN library.
- She is testing the policy files in the Web 2 1.3a release. C. Caesar will be loading the policy files for all of the libraries as soon as DRA notifies him that the server can handle 29 different files. These will be the same policy files as Gateway uses - no longer the generic policy files that had to be used in the Web OPAC. As soon as DRA approves the load, C. Caesar will add the files. He will wait one week to test the server and will then notify the libraries.
- The barcode order has been sent in. Barcodes will probably be here by the end of the week.
- K. Nuckolls and R. Cheng reviewed the new software release 2.5-2 and did not

see any value to loading it. R. Naylor asked for a list of the features included. K. Nuckolls will post the list on the Intranet with a deadline of May 1st for responses for or against the load. If 1/3 of the responses are positive, the issue will be discussed at the next ASC meeting.

- P. Ritter noted that he spoke with the DRA sales representative and notified her that UHLS will not be continuing with DRA.

VI. MIGRATION

R. Jaquay feels that there is already a sway of feeling toward epixtech due to a statement made by the COLN representative to the UHLS Board at the last COLN board meeting. He wants to be sure that the evaluations are considered and that the selection is an objective process.

P. Ritter noted that no decisions can be made until the final results from the tests, evaluations and site visits have been tabulated. He pointed out that the recommendation to the UHLS Board should stress the strengths and functionalities of the system, and not be based on financial considerations.

Discussion regarding the customization of III and epixtech. R. Naylor noted that both vendors have the capabilities to customize their OPACs for the individual PCs in each library. G. Sacco suggested a focus group with library patrons would be useful in helping each library decide on the customized OPACs. P. Ritter pointed out that customization is optional - some of the smaller libraries might be satisfied with the generic OPAC of whatever system is selected.

N. Pieri asked how the copy cataloging can be accomplished without access to DRANet. K. Nuckolls responded that databases from other libraries can still be used as they are now, as long as the libraries have a Z39.50 server. We will still have access to an extensive number of databases on a request and exchange basis.

P. Nonamaker noted that in the hands-on demonstrations, she saw a major difference between III and epixtech as far as the amount of training that will be required for circulation. III circulation module was very intuitive but mouse dependent. Epixtech reports, however, can't be beat. The OPACs were very similar.

B. Kubli questioned whether the selection of the two finalists (III and epixtech) was made too quickly. Will either one of these systems do everything that we want? Are we sure that whichever one is selected, it will be better than DRA? Consensus was that either one would be better than the current system.

P. Ritter noted that the site visits in May are crucial to making a decision. It is very important that the people making the visits take a pre-determined list of questions. UHLS will pay for the renting of vans and food for the visit participants. He noted that anyone wanting to visit sites other than NOBLE and Merrimack Valley were welcome to do so but UHLS would not cover their expenses. He suggested that any other site visits should also use the same criteria for evaluations.

R. Naylor will put together a list of questions drawn from the evaluations and tests at

the hands-on demonstrations. He will streamline the questions currently mounted on the Intranet. M. Middleton suggested sending the list of questions to the site in advance of the visit.

G. Sacco wants to be sure that the sites visited are large enough to have the same circulation volume as the largest of the UHLS libraries.

P. Ritter noted that the site visits will both take place before the next ASC meeting. On May 2nd, the site will be NOBLE (North of Boston Library Exchange - a III site) and on May 18th it will be Merrimack Valley, an epixtech site. At the May 22nd meeting, the visits can be discussed and if they were not satisfactory, further arrangements can be made. K. Nuckolls noted that both vendors have websites that can be checked for customer lists.

P. Nonamaker suggested that someone from UHLS Automation Department should talk to some sites that have migrated from DRA to either III and/or epixtech.

Discussion regarding the composition of the site visit group. Consensus that it should consist of P. Ritter, K. Nuckolls, R. Cheng, R. Naylor, M. Middleton and as many members as possible from the evaluation work teams, a total of 14 people. K. Nuckolls will contact the work team participants.

UHLS will rent two mini-vans for the May 2nd visit. The vans will leave UHLS at 7:00 AM.

MOTION: At 10:30 AM, R. Jaquay moved to adjourn. J. Makowicz second. Unanimous.

NEXT MEETING: Tuesday, May 22nd at 9:00 AM at UHLS

AGENDA:

- April Minutes
- Automation Services Report - K. Nuckolls
- Discussion about the site visits
- Results of hands-on evaluations
- Recycling of Equipment - C. Hamblin
- Report on Automation positions
- Standards Subcommittee Report - N. Pieri

Heidi A. Fuge
4/24/01

AUTOMATION SERVICES REPORT APRIL 24, 2001

ACTIVITIES

- ? **Linkers inputting items sent to UHLS from CAST, SCHG & VAFL into UHLAN database. Almost finished with UHLS portions at VAFL**
- ? **SCHG prepares to circulate on UHLAN: linking continuing**
- ? **Troubleshooting RR connections at EGRN; POES & WTVT (Rawdon)**
- ? **Assisting with network connection for Hands-on demos (Claude & Rawdon)**

ANSWERED QUESTIONS FROM MEMBER LIBRARIES ON:

- ? **Beginning circulation on UHLAN (SCHG)**
- ? **Reports**
- ? **Username (APLM; BETH; BRLN)**
- ? **Policy files (APL; BETH; BERN; GUIL)**
- ? **Vendor Hands-on**

MEETINGS ATTENDED AND LIBRARIES VISITED

- ? **4/9: Meeting with Committee regarding evaluations during Hands-on (R. Naylor; G. Kirkpatrick; Karen)**
- ? **4/10: Automation Dept. meets with GUIL technician (Marc F.)**
- ? **4/17-18: UHLS for Hands-on demos (Rawdon & Karen)**
- ? **4/23/24: EGRN for Hands-on demos (Rawdon & Karen)**

SYSTEM MIGRATION

The epixtech hands-on demos were very well-attended by libraries at both locations (UHLS & EGRN). Formal evaluations took place at UHLS, while “walk-ins” were able to participate in informal evaluations at both locations.

Presentation of these evaluations will be forthcoming after both Hands-on demos. III is to take place next Monday & Tuesday, April 23 (UHLS) and April 24 (EGRN), from 10 am until....? “Thank you” to EGRN for agreeing to host the Rens. Co. hands-on demos!

WEB2 RELEASE 1.3a

Karen was able to successfully test the UHLS policy file in the test version of Web2 1.3a.

She was allowed to renew items from UHLS only once (PF only allows 1 renewal); and could renew items from COLN more than once (PF allows 9999 renewals).

She also did not have a problem renewing COLN items using her UHLS/UHLAN card. She will now test using other libraries whose servers (i.e. policy files) have been loaded.

SOFTWARE RELEASE 2.5-2

We have just received updated manuals and software for loading the new Classic release 2.5-2, which is only about a year overdue.

Rawdon & Karen are evaluating whether to load this release or not, depending on just what is upgraded. The modules we now use may not be affected by this release, and with a migration due in the near future, it may not be worth our time and effort. (Several years ago, the last release had Rawdon & Karen here on a Sunday evening until 2 am.)

BARCODE ORDER

The order for barcodes has been taken and faxed in. They should arrive by the end of this month—or even sooner.