

## **AUTOMATED SERVICES COMMITTEE**

**July 24, 2001**

**PRESENT** (voting): Jeff Cannell (APL); Pat Nonamaker (EGRN); Nancy Pieri (BETH); Barbara Kubli (STEP); Carol Hamblin (GUIL); Sharon Hodges (PTRB); Richard Naylor (COLN); Karen Nuckolls (UHLS); Joseph Makowicz (BRUN); Judith Felsten (RCSC).

(Non-voting): John Cirrin, Charlie Sweeney, Rawdon Cheng, Claude Caesar, Robert Jaquay, Jonathan Koppel, Philip Ritter.

9:05 a.m. – Meeting was called to order by P. Ritter, Chair.

### **I. Minutes**

Minutes of the June 26, 2001, meeting were accepted as written.

### **II. Introduction of New Automation Services Staff Member**

P. Ritter introduced Jonathan Koppel (**ext. 229**), the new Technology Specialist at UHLS, and gave a brief summary of his background. Members of the committee then introduced themselves in turn.

### **III. Automation Services Report**

K. Nuckolls highlighted the following items in her written report:

- > John Rose from *epixtech* visited UHLS last Tuesday and ran through some system administrator procedures such as backup and restore, reports, security, the equivalent of the DRA policy files, global changes, and setting up “views.”
- > UHLS is sending *epixtech* a hard drive loaded with Windows 2000, and they will send us a database so that we can acclimate ourselves to “all of the above.”
- > Brad Baumgartner of *epixtech* has sent copies of the Horizon manuals to us.
- > The network analysis, run last week, showed no surprises. Libraries with 56k lines and 5 or more PCs should consider upgrading their line speeds.

B. Kubli asked about the number of libraries that would be affected by the need to upgrade their line speeds, and Rawdon replied that he does not have a final count of how many libraries will be affected because he had not yet heard from all of the member libraries. There was a consensus that there is a bandwidth problem at some libraries, and UHLS will work to assist those libraries in any way that is possible.

Discussion ensued about database cleanup and the special status report that was available on the Intranet. Libraries could use this report to check on those “missing” or “assumed lost” items and see if they could be resolved before the migration begins. “Withdrawn” status items are purged each month. Items with charges cannot be deleted. K. Nuckolls will send out an email clarifying each status.

Regarding the test version of Web2 (1.3a), it was agreed that Claude would input a message that would explain to the patron that books loaned from libraries other than the “home” library could not be renewed online. Then the new version will be implemented. Notice will be sent out to all member libraries as to when this will happen, and new features will be listed.

#### **IV. Evaluation Team Report**

R. Naylor distributed a written report of his reference calls to *epixtech* sites and of the last Evaluation Team meeting on July 18. He reported that nothing surprising had shown up in these calls and that the team has recommended that UHLS purchase the *epixtech* Horizon library system.

### **REQUIRES BOARD ACTION**

**MOTION:** B. Kubli moved that the committee accept the Evaluation Team report and recommend to the Board of Trustees that UHLS purchase *epixtech* Horizon and that the UHLS Director be authorized to negotiate a contract with *epixtech* that will be presented to the Board of Trustees for approval. J. Makowicz seconded. There was unanimous approval.

J. Cannell commended the Evaluation Team for a thorough and well-done job. There was unanimous agreement.

Discussion followed regarding the possible purchase of the acquisitions and serials modules. P. Ritter responded that this could be discussed during the contract negotiations, especially since *epixtech* had offered to include the acquisitions module at cost.

The next step will be to present the recommendation of the ASC to the UHLS Board on August 8. R. Jaquay urged the members to discuss this with their respective Board members so that the UHLS Board members will be prepared for the meeting.

If approved by the Board, P. Ritter will then negotiate a contract with *epixtech* with the assistance of an **Implementation Team, consisting of: Karen Nuckolls, Rawdon Cheng, Richard Naylor, Marcia Middleton, Pat Nonamaker, and Pat Sahr.** There will probably be additional work teams needed to assist the Implementation Team and UHLS staff as the implementation process proceeds.

A finalized contract will hopefully be in place by the September ASC meeting.

#### **V. UHLAN Fee Structure**

P. Ritter spoke of the need to change our fee structure for the next automation contract in 2003. Port charges, in this “virtual world,” do not provide the proper support to deal with the new hardware, software, and technology. There was some discussion of this at the May PULISDO Conference. Karen has a copy of the new fee structure at the Nassau

County Library System which is based on a three-tiered fee system: per circulation fee, per borrower fee, and per item fee. There are also other such fee systems available for us to consider. Preliminary discussion focused on developing a “test version,” based on the June 2001 statistical figures from our member libraries. Borrower statistics would be based on the total number of registered and active borrowers. The results would then be discussed at the August ASC meeting.

## **V. Other Business**

It was announced that two of the member libraries have new directors: Carolyn Brook at CAST, and Linda Fecura at SCHG.

10:20 a.m. – Meeting was adjourned.

**NEXT MEETING: Tuesday, August 28, at 9:00 a.m. at UHLS.**

### **Agenda:**

1. Minutes
2. Automation Report
3. Implementation Team Report
4. UHLAN fee structure discussion
5. Other business

## **UHLS Automated Services Committee Report – July 24, 2001**

The Automated Services Committee is happy to report that as a result of a three-month evaluation process it has unanimously selected Epixtech as the best choice for library automation system. We are pleased to recommend that the UHLS Executive Board approve this selection and authorize System Director Phil Ritter to negotiate a contract for purchase of the system for subsequent presentation to UHLS board for approval.

This recommendation is the result of a long process that began in February 2000 with UHLS contracting with Dr. William Saffady to analyze the current situation and present a recommendation for the future of UHLAN. Dr. Saffady pointed out that UHLAN equipment would soon reach the end of its useful life and that it was a good time to reevaluate the current system.

By May Dr. Saffady had interviewed most UHLS library directors and produced a report for UHLS wherein he recommended that the “DRA Classic software be replaced by the end of 2001”. System requirements were developed and an RFP was prepared during the summer of 2000. The RFP was sent to vendors in the fall, responses were received, and proposals reviewed at the January 2001 meeting. All five vendors were invited to present demonstrations of their products and these took place in March. All participants at the demos rated the products with the result that Epixtech and Innovative were rated significantly above the other vendors.

For the final selection an evaluation team was constituted so that all participants would thoroughly evaluate and compare the two systems. Hands-on testing and site visits were arranged and conducted and positive and negative aspects of both systems were compiled. These lists were then further checked. First each company was sent a copy of the document showing positive/negative features of their own systems. In addition a further site visit was needed for Epixtech. Both vendors were then invited back to go over their lists. From these experiences the evaluation team came to the unanimous conclusion that Epixtech is the better system for us.

There were several deciding factors in the decision to recommend Epixtech. First the underlying structure of Epixtech is more state-of-the-art, as it is based on a relational data base platform. In addition it is more flexible in giving libraries the ability to better customize screens and set policies that reflect local needs. The choice of Epixtech will represent a significant step forward in providing advanced automation services to the region.

Prepared by,  
Richard J. Naylor, Evaluation Team Chair

**Continue down for Departmental Report**

# **AUTOMATION SERVICES REPORT**

## **JULY 24, 2001**

### **ACTIVITIES**

- ? **Linkers inputting items sent to UHLS from CAST, RENS, SCHG & VAFL into UHLAN database. Almost finished with UHLS portions at VAFL**
- ? **Linking continuing at SCHG**

### **ANSWERED QUESTIONS FROM MEMBER LIBRARIES ON:**

- ? **Reports**
- ? **Usernames (APLM; BETH; VOOR)**
- ? **Policy files (BERN)**
- ? **Calendars (TROY)**
- ? **epixtech**

### **MEETINGS ATTENDED AND LIBRARIES VISITED**

- ? **7/10 : Linking training for BERN**
- ? **7/11 : Linking training at SCHG**
- ? **7/17 : epixtech meeting re: daily sys admin tasks**
- ? **7/20 : Numbers Tell the Story Part 2**

### **SYSTEM MIGRATION**

**Last week, John Rose from epixtech ran through some system administrator procedures such as backup & restore, Sybase reports, other reports, security and the equivalent of the DRA policy files, global changes, and setting up ‘views.’**

**We are sending epixtech a hard drive with Windows 2000 loaded, and they will send us a database to acclimate ourselves to “all of the above.”**

**Brad Baumgartner has sent copies of Horizon manuals and the implementation manual to us. The network analysis was run last week, with no surprises. Libraries with 56k lines and 5 or more PCs should consider upgrading their line speeds, as they will definitely experience slowness in using epixtech.**

## **WEB2 RELEASE 1.3a**

**We have not received enough feedback from library staff on whether the “policy file servers,” are working consistently. At this point, we are not concerned with ‘graphics,’ as, once the new version overlays the old version, it will ‘take on’ the appearance of the old WebOPAC. Only the *functionality* will change.**

## **STAFF CHANGES**

**Please remember to alert Karen whenever member library staff leave or new staff arrive, so that usernames can be added and deleted.**

## **DATABASE CLEANUP**

**Database cleanup is progressing. We are working with duplicates elimination; brief records; and pageless records.**

**A new report has been generated and placed on the Intranet under the “Reports” section for each member library. It lists the item statuses of ‘Missing; Assumed Lost; or Withdrawn’ to assist them in their own collection cleanup in preparation for migration.**

**If any library has questions or concerns about their records—either patron or database—please give Karen a call or send an e-mail.**