

**AUTOMATION SERVICES COMMITTEE**  
**MINUTES**  
**June 25, 2002**

**PRESENT** (voting): Nancy Pieri (BETH); Joe Makowiec (BRUN); Robert Jaquay (COLN); Patricia Nonamaker (EGRN); Sharon Hodges (PTRB); Judy Felster (RCSC); Barbara Kubli (STEP); Mary Trev-Thomas (TROY); Karen Nuckolls (UHLS); Gail Sacco (VOOR)

(Non-voting): Rawdon Cheng; Sara Dallas; Jonathan Koppel; Peter Kowalski

9:00 a.m. – Meeting was called to order by Philip Ritter, Chair.

**I. Minutes**

Minutes of the April 23, 2002 meeting were accepted as presented.

**II. Automation Services Report**

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

- it is important that libraries contact Karen to work on their Horizon codes. She will contact the libraries that haven't attended any of the Codes Workshops and emphasize how important it is to get this completed prior to migration to *epixtech*.
- the Implementation Team is meeting every other week
- R. Cheng will run custom reports as the libraries need them for the migration. During this time, there will not be any charge for these reports. One of the items that will need to be cleaned up prior to the migration is the patron database. R. Cheng will write a program for each library to purge patrons who have not used the library in three years or for some other length of time to be specified by each individual library. Each library will be able to review a list of the patrons to be purged prior to the purge date which will be sometime at the end of July. The lists will note on them that this is something that the libraries **MUST** do prior to migration.

P. Nonamaker noted that one of the reports that R. Cheng will run is a holdings report with call numbers and barcodes. This report will help libraries to correct their calls numbers and make sure that their punctuation, spacing, etc. is consistent.

P. Nonamaker also stressed the need for the libraries to come in and work with K. Nuckolls on the Implementation codes prior to migration. **THIS IS VERY IMPORTANT.**

S. Hodges noted that she had not understood that work on the Implementation codes was so important. She suggested that it should be stated more strongly. P. Ritter responded that it is time to get a little tougher in reminding the libraries about this and people have to understand that it **MUST** be done.

### **III. Additional IP Addresses**

R. Cheng reported that he has received requests from several libraries for a second IP address. There are still some addresses available but R. Cheng wished to have some direction from the ASC regarding this issue. Once the unused addresses are assigned, another block of 29 addresses can be purchased for \$150 per month. R. Cheng explained that libraries might need an additional IP address if they have their own server and do not use UHLS' server exclusively.

Discussion regarding the potential number of libraries that might request additional IP addresses. Consensus that the Automation Department should draft a policy regarding additional IP addresses for review at the July ASC meeting.

### **IV. UHLAN Frame Relay Network**

R. Cheng reported that there are currently 10 libraries using a 56K frame relay to connect to UHLAN. Of these 10, 4 are looking into another service provider (i.e RoadRunner, DSL, etc) therefore, only 6 libraries will need to use the 56K frame relay. It might be less expensive for the libraries to consider dropping the frame relay and connecting to UHLAN via a Direct Link. The Direct Link would allow the libraries to increase their bandwidth as it is needed, but in smaller, less expensive, increments than would be available on the frame relay. R. Cheng will be asking Verizon for quotes on this service.

### **V. Phase II - Imail server**

R. Cheng reported that there are now two servers running simultaneously. He is doing this in order to allow everyone to familiarize themselves with the new email service. He noted that one of the many benefits of the new service is that the messages are stored on the server, not in the individual PCs, this allows messages to be shared by multiple users and multiple workstations.

Using the new service, email can now be accessed remotely and the messages will remain on the server.

He noted that he will need feedback from everyone as they test the new service so that he can tell when the majority are comfortable enough with the new email so that he can disconnect the old email server.

G. Sacco asked if there was a way to access employee email accounts? If an employee leaves a library or is terminated, can that email account be quickly disabled or deleted. R. Cheng noted that it can be done. J. Koppel will investigate how management would be able to access a former employee's email in order to determine if there is information that should be retained.

K. Nuckolls noted that there is a form on the Intranet for requesting to add or delete a username.

### **VI. Other Business**

P. Ritter reported that there have been, to date, 23 applications for the Training Specialist position. Application deadline is July 5<sup>th</sup>. The Selection Team will be meeting on July 9<sup>th</sup> to review applications and select candidates. The members of the Selection Team are: Phil Ritter, Karen

Nuckolls, Rachel Baum, Nancy Pieri, Pat Sahr, and Richard Naylor.

G. Sacco reported that she looked at the SAM vendor while at the ALA conference. One of the options offered for public internet access computers is a filter based on date of birth.

G. Sacco reported that the VOOR CIPA policy does not conform to the law; the Board will have to review and revise it.

G. Sacco reported that VOOR had a robbery in their parking lot. A Police Investigator asked the library for the names of people in the library during the time in which the crime was thought to have taken place. After checking with their attorney, G. Sacco decided that they could print out a Circulation Report for the time period and give it to the Investigator, with the book titles crossed off.

10:30 meeting adjourned.

Heidi A. Fuge  
6/26/02

## AUTOMATION SERVICES REPORT JUNE 25, 2002

### **LINKING LIBRARIES**

- Linkers inputting bib & item records for items sent from RENS into UHLAN database.
- Item linking continuing at CAST, RVLL, & VAFL onsite.

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

- Calendars
- Patron registration
- Policy file changes: ALTM; COHS; COLN; GUIL; SNLK; WTVT
- Migration
- Reports
- Usernames: APLM; COHS;
- *epixtech* Horizon

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

- 4/24: Codes II Workshop
- 4/29-30: Preinstallation Workshop in Evanston (Karen, Rawdon)
- 5/21: Implementation Team meeting
- 6/4 : Implementation Team meeting
- 6/18: Implementation Team meeting
- 6/19: Codes III Workshop
- Visits to ALTM, EGRN, GRAF, RVLL (Rawdon); ALTM, RCSC (Jonathan); COLN, WTVT(Peter)

### **SYSTEM MIGRATION**

Karen is continuing to fill out Horizon Implementation forms for member libraries. To date, about ten libraries have sent her their forms. Those libraries who have not yet done so should contact Karen for a meeting so that they can go through their codes online at her PC, where Horizon is loaded. Default codes have been loaded for all libraries. However, if there are any unique or special collections, they will not be coded and may not migrate correctly.

There have been several ImpTeam meetings discussing the codes and other concerns with *epixtech* migration team members. We have also been deciding on which reports, custom or otherwise, would be most helpful to libraries in preparing for the migration process. It was

decided that libraries would not be charged for any custom reports for migration. (Rawdon will elaborate on this later...)

Many thanks to those who have worked so hard on the codes sheets and workshops: Pat Nonamaker; Richard Naylor; and Marcia Middleton.

These meetings are held every two weeks, and may increase to weekly once the real data load takes place. Grant Pearson, the data consultant on the migration team, is working on one of our custom programming requests, as specified in the contract under Rider E.

There have been several follow-up workshops discussing the Horizon coding sheets, and how to combine them with the Itypes. Those member library staff who work most closely with the DRA coding in Circulation and Cataloging have been attending. (After this meeting, several library staff will meet with Pat Nonamaker and Karen to go over their codes.)

Several library systems have contacted us about our migration process: SALS; MVLA; North Country.

## **ROADRUNNER CUTOVER/WEBSITE REDESIGN**

RoadRunner was installed at UHLS in place of ICI in order to provide faster service to member libraries. (Rawdon will have a detailed report on this procedure, which occurred mid-May at UHLS.)

Peter Kowalski redesigned the UHLS website, which is glorious to behold. Staff access to the Intranet from home was made possible by installing username and password interface. A redesign of the Intranet is now proceeding.

## **DATABASE CLEANUP**

Great progress has been made in eliminating duplicate records and brief records. Work is progressing on brief records and NEWCAT records. (Still hard at work!)

Thanks to member library staff for alerting us to database errors.

## **BARCODES**

Barcodes have arrived and will be sent out over the next few days to those libraries who have ordered them.