

AUTOMATED SERVICES COMMITTEE

MINUTES

August 27, 2002

PRESENT (voting): Marcia Middleton (APL); Nancy Pieri (BETH); Joe Makowicz (BRUN); Barbara Kubli (STEP); Carol Reppard (TROY); Karen Nuckolls (UHLS); Gail Sacco (VOOR)

(Non-voting): Tim Burke, Rawdon Cheng, Jonathan Koppel, Peter Kowalski,

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

I. Minutes

Minutes of the July 23, 2002, meeting were accepted as written.

II. Automation Services Report

K. Nuckolls reported the following:

- there have been two ImpTeam meetings since the last ASC meeting
- she and R. Cheng have been in communication with Grant Pearson, the dataload specialist at *epixtech* and are working on mapping the items from DRA to *epixtech*
- she is still waiting to hear from Mark Derrick at *epixtech* with the specifics on the three weeks of initial training which will be held from Tuesday, October 29th through Thursday, November 14th. There will be two trainers and training will be held for two weeks at UHLS and two weeks at APLM (note: an overlap of one week where training will be taking place at both sites). As soon as she has the full information, it will be sent out in email, in hard copy, and posted on the Intranet.

P. Ritter emphasized that libraries should alert their staff to these training dates.

- The training will be in half-day sessions except for circulation training which will be in full-day sessions. In order for participants to have hands-on training, there will only be eight slots per session. Onlookers will be allowed but they will not have access to a PC during the training.
- UHLS automation staff will have system administration training during the three weeks of training.
- K. Nuckolls noted that this is not the only training time. Since UHLS is hiring a Training Specialist, there will be ongoing training available to the libraries. In addition, the Acquisitions and Serials modules will not come up until later in 2003 and there will be additional training on those modules at that time.

N. Pieri asked about the following:

- *what about publicity? The deadline for information for the next BETH newsletter is September 18th will there be something that can be put in that issue?*

P. Ritter noted that since UHLS is adamant about coming up on the Release 7.3, this will not happen until later in the fall and UHLS is subject to *epixtech*'s schedule. There will not be enough information by Sept. 18th for the BETH newsletter.
- *Will DRA and epixtech run simultaneously? If so, can discharge and charge take place on either system?*

K. Nuckolls noted that the two systems will run simultaneously but she was not sure how the charge/discharge should be handled; she will check with *epixtech* and get the answer.
- *Will the circulation, cataloging and OPAC modules go live at the same time?*

K. Nuckolls: yes
- *What about the cataloging databases? What will be available?*

K. Nuckolls: UHLS will be using a Z39.50 and will be able to specify which databases can be used for copy cataloging. The specifics on this have not yet been worked out. It is probable that the initial cataloging will be limited as it was when DRA first came up.
- *Will Syndetics be implemented when the system goes live?*

K. Nuckolls: yes, it is part of the whole package.
- *Will printed instructions for patrons on using the new system be produced by UHLS or the individual member libraries? Also, what about promotional material - who will produce?*

P. Ritter noted that the instructional material will be produced by the UHLS Training Specialist so that there is consistency in the information. The same holds true for the promotional material.
- *When will there be something of the new system for member library staff to experiment with?*

K. Nuckolls: since she is still working with *epixtech* on mapping the items, there is not anything at this time. The ImpTeam members have something to work with but it is not complete. M. Middleton noted that the software that the ImpTeam members have does not have any security parameters and so cannot be distributed.

P. Ritter noted that UHLS won't bring the system up until everyone is completely ready - it is no use rushing into something if there are still unanswered questions.

K. Nuckolls noted that all of the large libraries will be encouraged to have in-house specialists/resource people for each function on the new system. That way, they can help train their co-workers.

R. Cheng noted that **SEPTEMBER 18th** is the cutover date for the new email server. **From that date forward, VAX mail will no longer be supported.** Information on this has been sent to all of the libraries and has been posted on the Intranet. Libraries needing assistance on configuring the new email server should contact J. Koppel.

R. Cheng reported that he is still working on configuring the 2nd Internet Service Provider (ISP) so that there is back-up internet access. He has not yet been able to confirm that the online database vendors have added the new ISP address to their information.

Discussion regarding RoadRunner service. Consensus among those who use it that it is not very dependable.

III. Training Specialist

P. Ritter reported that there were 34 applications, These were culled to 6 for interviews, but only 5 were available. There were two applicants that were equal choices for the position. One applicant was unable to take the position due to a family situation. The other applicant has been offered the position and P. Ritter is just waiting for some final information. This applicant has Master Degrees in both teaching and Information Sciences. He has ten years experience teaching in Junior/Senior High School and also as a school librarian. It is hoped that he will be able to start work around September 9th.

IV. Other Business

P. Ritter noted that P. Kowalski is working on re-designing the Intranet as he did the UHLS web page.

Discussion regarding a date for the October meeting due to the NYLA conference. Consensus that this will be discussed at the September meeting.

9:45 AM meeting adjourned.

NEXT MEETING: Tuesday, September 24th, at 9:00 a.m. at UHLS

SCROLL DOWN FOR AUTOMATION SERVICES REPORT

AUTOMATION SERVICES REPORT
AUGUST 27, 2002

LINKING LIBRARIES

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

ANSWERED QUESTIONS FROM MEMBER LIBRARIES ON:

- # Calendars
- # Policy file changes: COLN; SNLK
- # Migration
- # Usernames: APLM; BETH; EGRN
- # *epixtech* Horizon

MEETINGS ATTENDED AND LIBRARIES VISITED

- # 7/30: Implementation Team meeting
- # 8/5,7-8: Trainer Interviews (Karen)
- # 8/20: Implementation Team meeting
- # Visits to COHS, RCSC (Jonathan)
- # Peter has been working with the redesign of the Intranet and updates on Intranet databases page; took Advanced Fireworks course
- # Rawdon has been working with migration reports for member libraries; 56k line ordered for RVLL + onsite cabling check

SYSTEM MIGRATION

Karen and Rawdon have been working with Grant Pearson and Kathy Cunningham of our *epixtech* migration team on extraction of DRA patron/item data, and mapping of DRA fields with Horizon fields. 5,000 item records have been sent to Grant, inactive patrons have been extracted, and Rawdon received instructions from DRA on how to write a customized report to extract circ info. DRA will be doing this.

Those libraries who have not yet done so should make an appointment with Karen to go through their Horizon codes online at her PC. 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 two Implementation Team meetings discussing the specifics of custom programming and training timeframes and classes. Karen is waiting to hear more specifics from Mark Derrick, our migration team leader. What is clear so far:

We will have **three** weeks of training, beginning Tuesday, October 29 through Thursday, November 14. There will be a few Mondays and Fridays without training, to allow trainers travel time. We will have 2 trainers: one the first week, 2 the second week, one the third week. UHLS will host the first 2 weeks of training, and Albany Public Library will host the 2nd and 3rd week of training. So there will be 2 simultaneous training schedules during the 2nd week.

Other than Circulation, which will last all day from 8:30 am to 5 pm, other classes will be half days and will include Cataloging and iPac. Automation Dept. staff will receive System Administrator training. Each class is allowed 8 attendees. Some extra staff may attend as "onlookers," but may not sit at PCs or ask questions. Altogether, there should be between 10-12 days of training at this time.

This is *not* the only training library staff will receive, as UHLS will be hiring a trainer who will attend one of each class and then will be taking a large part in continuing training of the system. Each library should have at least one staff member who others can rely on for routine functionality questions as the system gets underway.

Additional training in Acquisitions and Serials will take place next year. The release that we are scheduled to come up on, 7.3, is due out in November 2002.

As Karen receives the specifics of the training schedule from Mark, she will be sending it via e-mail and paper to all libraries. It will also be posted on the Intranet.

TELECOM, ETC.

The Automation Dept. has been working on connecting UHLS to the TimeWarner Telecom network, testing Public Web Browser, and replacing a faulty dialup terminal server. All VAX mail users have been notified about the September 18 cutover date. Work with Cisco to test the NAT router has been ongoing, as some IP block translations have not been working. The RoadRunner connection is another ongoing problem which is being resolved.

DATABASE CLEANUP

Brief and CAPS records are almost eliminated. Great progress is continuing to be made in finding and deleting duplicate records.

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