

AUTOMATED SERVICES COMMITTEE

MINUTES

September 24, 2002

PRESENT (voting): Marcia Middleton (APL); Nancy Pieri (BETH); Joe Makowiec (BRUN); Richard Naylor (COLN); Patricia Nonamaker (EGRN); Karen Balsen (GUIL); Patricia Sahr (NASS); Sharon O'Brien (TROY); Karen Nuckolls (UHLS); Gail Sacco (VOOR)

(Non-voting): Tim Burke, Robert Carle, Rawdon Cheng, Sara Dallas, Peter Kowalski

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

I. Minutes

Minutes of the August 27, 2002, meeting were accepted as written.

II. Automation Services Report

K. Nuckolls, Manager, UHLS Automation Services, reported the following:

- she welcomed Rob Carle, the new UHLS Training Specialist;
- *epixtech* has reported that there will be a delay in implementing Horizon Sunrise 7.3; the Implementation Team has agreed that going "live" on 7.2 is acceptable;
- the libraries have all been good about sending in their registrations for the *epixtech* training workshops. She reminded the Committee members that Rob Carle will be conducting ongoing training after the *epixtech* workshops.

III. Technology Services Report

R. Cheng, Manager, UHLS Technology Services, reported the following:

- there will probably be a price increase in the cost of the overdue forms since UHLS will probably be ordering fewer forms once Telecirc has been activated on the new system.
- there has been a problem with the IMail server - Time Warner did not update their information quickly enough and some messages were lost last Thursday (September 19th), before noon, the day following the cutover to the new server. G. Sacco asked that the libraries be informed whenever there is a problem or potential problem, with the email.
- new distribution lists have been set up in the new email server. R. Cheng asked that users report any problems with the lists to the Technology Services Department.

- discussion regarding the establishment of customized distribution lists. P. Kowalski will put the instructions for creating a self-moderated list on the Intranet. R. Cheng noted that there is no archive service attached to this type of list.
- discussion regarding the LDAP searching feature in the new Imail service. This allows someone to search the email database for email addresses by library. R. Cheng noted that it does not prevent someone from the outside searching and "harvesting" email addresses to use for SPAM or other commercial purposes. The only solution would be to change the port for the server. If the port is changed, Tech administrators in the libraries will have to make manual changes to each of their computers that have been set up for the LDAP searching.

MOTION: M. Middleton moved that R. Cheng should implement the LDAP service on an alternate port and he should end out a memo instructing staff members on how to manually change their port configuration. J. Makowiec second. Unanimous.

- R. Cheng noted that in the old email system, the server periodically updated the list of usernames in each library. The new IMail server does not offer that feature. Therefore, libraries must now keep track of their usernames in order to delete, in a timely manner, those that are no longer needed.

IV. UHLAN Contract

P. Ritter distributed a draft of the 2003-2005 UHLAN contract. The contract will be a topic of discussion at the October 22, 2002 meeting.

**PLEASE REVIEW THE UHLAN CONTRACT,
BRING IT WITH YOU, AND BE PREPARED
FOR DISCUSSION IN OCTOBER.**

A copy of the draft contract will be placed on the Intranet. The ASC must approve the contract and then it will taken to the UHLS Board of Trustees for their approval.

V. Other Business

Discussion regarding the "go live" date for Horizon Sunrise version 7.2. Consensus that since 7.3 does not have the functionality that it was originally planned to have, 7.2 is acceptable. M. Middleton noted that 7.2 has been around long enough to have the "kinks" worked out of it whereas 7.3 is an unknown.

Discussion centered around a "go live" date in December 2002 versus one in January 2003.

P. Ritter noted that as far as the UHLS budget is concerned, a January date would be preferable since that would mean that no maintenance costs will have to be paid until January 2004 since the first year is included in the *epixtech* contract.

M. Middleton suggested that UHLS negotiate with *epixtech* to have the system available in December but, for contract purposes, a "go live" date in January. She noted that *epixtech* has not been able to supply the version promised at the time it was supposed to be delivered.

G. Sacco expressed concern about a December date; it follows too quickly after the training and does not allow enough training for the remainder of the staff in the libraries. She would prefer a January date.

Discussion regarding the development of a "buddy system" between libraries so that a staff member/volunteer in a smaller library might be able to call a trained staff member in a larger library.

M. Middleton suggested that the ImpTeam, and R. Carle, should be allowed to develop a training schedule that would allow enough time for sufficient people to be trained and feel secure about using the new system.

10:35 adjourned.

NEXT MEETING: Tuesday, October 22nd, at 9:00 a.m. at UHLS

REMINDER: A workshop on IStats will be held on October 9th at 9:00 AM at UHLS.

Heidi A. Fuge
9/24/02

AUTOMATION SERVICES REPORT SEPTEMBER 24, 2002

LINKING LIBRARIES

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

ANSWERED QUESTIONS FROM MEMBER LIBRARIES ON:

- ! Calendars
- ! Reports
- ! Migration
- ! Usernames: APLM; COHS; VOOR
- ! *epixtech* Horizon

MEETINGS ATTENDED AND LIBRARIES VISITED

- ! 9/10, 18: Implementation Team meetings
- ! 9/19: NYLA SMART meeting (Karen)
- ! 9/23: Implementation Team meeting
- ! Visits to VAFL (Jonathan)
- ! Peter has been working with the redesign of the Intranet; installed Horizon training form on Intranet
- ! Rawdon has working with Jonathan on resolving e-mail/internet reception

TRAINING SPECIALIST

Welcome to Rob Carle, our new trainer! Since starting September 9, Rob has been traveling among our member libraries introducing himself. He has also become acquainted with DRA, and is studying the Horizon manuals.

SYSTEM MIGRATION

There have been several 'events' that have taken place within the last few days that have a bearing on our "Go Live" date with Horizon. Release 7.3, originally due out in November, has been postponed until "some time in January" (quoted from *epixtech*). The functionality that dealt with overdues being sent from the owning library will not be part of release 7.3, as we had been told earlier. The Implementation Team held a meeting yesterday to discuss these developments, and it has decided that we come up 'live' can without this functionality. There may also be a work-around program that we can use to obtain this feature. Karen is waiting to hear more specifics from Mark Derrick, our migration team leader.

I would like to thank our member libraries for their enthusiasm regarding the Horizon training that will take place beginning October 29, and running through November 14. I have received registrations from all but one library, and am waiting for the director to return from vacation. Once I have this registration, I will notify all additional staff who requested training as to whether there is additional room.

I remind member libraries that this is *not* the only training member library staff will receive on Horizon, as Rob Carle, our new Training Specialist, is even now working on 'cheat sheets' for the new system, and will be establishing a training schedule.

CALENDARS

I have received overwhelming response to my calendar letters this year. Thank you so much! The goal is to receive them all by October 18.

TELECOM, ETC.

The cutover from VAX to iMail has occurred.

DATABASE CLEANUP

Brief and CAPS records are basically eliminated. NEWCATS have been reduced in number. Great progress is continuing to be made in finding and deleting duplicate records.

Thanks to member library staff for continuing to alert us to database errors.