

AUTOMATED SERVICES COMMITTEE

MINUTES

October 22, 2002

PRESENT (voting): Marcia Middleton (APL); Nancy Pieri (BETH); Joe Makowiec (BRUN); Richard Naylor (COLN); Patricia Nonamaker (EGRN); Barbara Nichols-Randall (GUIL); Judy Felsten (RCSC); Paul Hicok (TROY); Rawdon Cheng (UHLS); Gail Sacco (VOOR)

(Non-voting): Tim Burke, Rob Carle, Sara Dallas, Jonathan Koppel, Peter Kowalski

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

I. Minutes

Minutes of the September 24, 2002, meeting were accepted as written.

II. “Go Live” Date - Implementation Team Report

R. Naylor reported that following extensive discussions with *epixtech*, January 23rd was selected as the “go-live” date.

R. Carle will be following through on the training after the three weeks of *epixtech* training.

R. Naylor reviewed that Gantt Table that he distributed. **He noted that on January 13, 2003, libraries will have to stop cataloging for ten days while the GAP load takes place.** Discussion regarding this disruption in service. The Implementation Team will provide the libraries with some alternative ways to conduct business during this time as well as some suggestions for dealing with the public. M. Middleton noted that during this time, PC Reliance will be available and it functions like an offline circulation system. In addition, DRA will be available for circulation through January 20th. Following that time, it will still be available for looking into but no work can be done on it. P. Nonamaker noted that the libraries are going to have to decide how to handle reserves, etc. while using PC Reliance. The Implementation Team will offer guidelines.

MOTION: G. Sacco moved that January 23, 2003 should be the “go-live” date for the new system. N. Pieri second. Unanimous.

Discussion regarding the fact that PC Reliance will start on Martin Luther King, Jr. Day - a day that UHLS is usually closed. P. Ritter noted that he might have to reconsider the holidays that UHLS observes.

III. Technology Services Report

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

- each library will receive a CD and instructions with a version of the Horizon client software that they can load onto their staff computers for testing. It is not necessary to load this on the public access or the Gates computers since they will use the web interface to access the UHLAN database. The instructions will also be posted on the Intranet. It is recommended that the client be installed on Windows 2000 because the software is more stable than other versions of Windows.

M. Middleton noted that there is a difference between the Test Database and the Training Database:

- ? the **Training Database is a mythical database** and will be available when the libraries load the Horizon client software onto their computers.
 - ? the **Test Database is the real thing** and contains actual UHLS and member library information.
- R. Cheng noted that the Implementation Team will need to determine at what point the telecirc function will be available; it will be installed at UHLS in the beginning. The libraries have the capability of selecting or not selecting this feature. J. Makowiec noted that he preferred to enable it after the libraries are thoroughly familiar with the Horizon system.
 - In the data migration from DRA to *epixtech*, the Social Security number will be transferred to a similar field. However, the 9-digit student ID field will transfer to the Social Security field.
 - Expired requests will not be migrated to Horizon.
 - An ftp server has been installed in case, in the future, the libraries need to do a download from UHLS.
 - Regarding the Internet connection, he noted that UHLS will be moving to TimeWarner as the primary internet service and will use RoadRunner for the backup. These changes will take place at UHLS and will not affect service to the libraries. P. Nonamaker asked that R. Cheng send out an email when the changeover has taken place. For libraries who are directly connected to UHLS -

R. Cheng will write some new instructions and the new addresses should be put in as soon as possible.

IV. Train the Trainer

R. Carle noted that the later "go-live" date has not affected the training schedule. Training will continue as announced. The Training Database is ready so that people who have been trained can go back to the libraries and immediately show others how to use the new database.

R. Carle reported that nine locations have been set up so far for circulation training which will be held almost every day in December including some Saturdays. He will be sending out confirmation of attendance. The training will take place all day and with a limited number of attendees (at this point, eight) who will work on laptops. If there are any empty slots in the circ. training, he will notify libraries.

It was noted that, in effect, there are three levels of training: the *epixtech* workshops, the training that will be conducted by R. Carle, and the training that member library staff will do for each other.

V. UHLAN Contract

The Draft Contract was reviewed page-by-page. Discussion regarding the ownership of the equipment in the libraries that is used to connect to UHLS. How responsible should the libraries be in replacing the equipment whose warranties have expired?

MOTION: N. Pieri moved to retain paragraphs 7 & 8 in Section 5A. R. Naylor second. Discussion. M. Middleton requested something in writing clarifying how the routers are to be maintained or upgraded. P. Ritter pointed out that Section 8E offers options for different agreements. The question was called. AYES:6; NAYS: 2 MOTION PASSED.

MOTION: G. Sacco moved to remove Appendix III from the contract and affirm it as a policy with the wording in #6 changed to read: "X cards are courtesy cards for people who live outside the Upper Hudson service area." R. Naylor second. Unanimous.

MOTION: G. Sacco moved to refer the Draft UHLAN contract, with all of the discussed changes, to the Board of Trustees for approval. J. Felsten second. Unanimous.

VI. Other Business

Discussion regarding publicity for the new system. *epixtech* will be providing some basic publicity materials. M. Middleton will contact *epixtech* and ask for some preliminary materials that might be used by libraries with impending newsletter deadlines.

P. Ritter noted that UHLS will do some publicity and the libraries can handle the local publicity as they prefer. He suggested that there should be a small amount of publicity prior to the "go-live" date so that patrons can expect a slight disruption in service but the full "splash" should take place when everything is working properly and library staff members are comfortable with the system.

G. Sacco thanked the Implementation Team and the UHLS staff for all of the work that they have done so far.

NEXT MEETINGS:

Tuesday, November 26, 2002	9:00 AM at UHLS
Tuesday, December 17, 2002	9:00 AM at UHLS (if needed)
Tuesday, January 7, 2003	9:00 AM at UHLS
Tuesday, January 28, 2003	9:00 AM at UHLS

NOTE: December 24, 2002 meeting cancelled.

Heidi A. Fuge
10/31/02