

**AUTOMATED SERVICES COMMITTEE
MINUTES
November 26, 2002**

PRESENT (voting): Nancy Pieri (BETH); Richard Naylor (COLN); Karen Nuckolls (UHLS); Pat Nonamaker (EGRN); Barbara Kubli (STEP); Tim Burke (APL); Barbara Nichols Randall (GUIL).

(Non-voting): Rawdon Cheng.

9:10 a.m. – Meeting was called to order by P. Ritter, Chair.

I. Minutes

Minutes of the October 22, 2002, meeting were accepted as written.

II. Automation Services Report

K. Nuckolls handed out her written report, a copy of which is appended to these Minutes.

- She reported that all member library codes are in the new system, thanks to the assistance of Diane Riganti and Lynn Orme of the UHLS staff.
- She is still working on the Circulation parameters, and Grant Pierson at *epixtech* is working on mapping. We are close to being on schedule.
- Rob Carle, UHLS Training Specialist, started his training sessions in the member libraries, and Circulation exercises are on the Intranet.

III. Technology Services Report

R. Cheng handed out his written report, a copy of which is appended to these Minutes.

- He reviewed the recent Technology Advisory Council meeting.
- The test database was discussed, and it was reported that RVLL will be connected to UHLAN on December 19, the last UHLS member library to do so.
- He reported on the HUG/CODI Conference that he attended in Orlando and reviewed the new products and trends in training that he saw at the conference

IV. UHLAN Contract for 2003-2005

P. Ritter reported that the UHLS Board of Trustees approved the new UHLAN contract as requested by the ASC. He will be sending these contracts to member libraries by the end of December 2002. All libraries are encouraged to present them to their Boards of Trustees for approval as soon as possible.

V. Other Business

- A. **Go-Live Date** – Discussion about the 1/23/03 “Go-Live” date. Consensus that this date should continue to be used. It was agreed that in order to allow UHLS to be ready for this implementation date, the member libraries will hold off on policy file changes for now.
- B. **Communication with Staff** – In order to answer questions and better inform member library staff, it was requested that the IMPTEAM meet with all the UHLS advisory councils as soon as possible.
- C. **Publicity and Marketing** – It was agreed that the IMPTEAM should plan and coordinate the publicity regarding the new system. However, it is understood that the member libraries are responsible for publicizing the new automation system to their patrons.
- D. **Web Page** – It was noted that UHLS had installed a new web page on November 25, and P. Ritter asked everyone to offer any comments or suggestions to Peter Kowalski.

VI. Adjournment – The meeting was adjourned at 10:45 a.m.

NEXT MEETING: Tuesday, December 17, at 9:00 a.m. at UHLS

(Scroll down for attached Reports)

AUTOMATION SERVICES REPORT

NOVEMBER 26, 2002

HORIZON MIGRATION

Inputting Codes and Parameters

With the help of several UHLS staff, all library mapping of DRA codes to Horizon codes has taken place. Grant Pearson, our Data Consultant on the epixtech Migration Team, had constructed an "mq view," or table, that was used for this. Grant is currently continuing to work on this mapping.

The same staff is now working with Karen on copying Circulation exceptions from our DRA circulation policy files. Once one patron Bstat is filled in, epixtech can copy in the rest of the Bstat, or Borrower, codes.

The ability to copy within Horizon (not available in DRA) has saved us lots of time!

Migration Schedule

With the above almost completed, we (at our end) are close to schedule. Revision of implementation forms are scheduled for revision (if necessary) towards the end of this week.

Implementation Team Meetings

- 10/29: Team discussed instructions for Test DB, and training materials for people to practice with.
- 11/4: Discussion of PC Reliance, which will function like DRA OBC when Circ is down. More frequent updates from the epixtech team were requested.
- 11/11: Discussion of how Local Requests are handled in Horizon.
- 11/20: Discussion with epixtech team on how to set up request privileges. With the help of a laptop we were able to find out that the "0" DRA material code was mapping as a blank. Very relieved to discover why nonfiction items were not showing up! Discussion of various other fine points of mapping with Grant Pearson, our Data Consultant. It was decided to move "Shelf Location" to the "Call No. Prefix" line in the mapping view so that it fills out as part of the call no. (as it is in DRA). If there are any errors noticed by team members, please send the item barcodes to Grant so that he can fix them.

Complete notes from the Implementation Team meetings can be found on the newly-designed UHLS Intranet. Thanks to Peter!

TRAINING

Horizon Circulation

Local Horizon training is right on schedule. The UHLS staff received training last Tuesday 11/19, and two training sessions have already taken place at APLM. Rob is even now at APLM conducting another full-day session. He has classes scheduled every day in the month of December (except Christmas) at member libraries, and has scheduled additional sessions for the first three weeks of January. For an update on local training, a schedule can be found on the Intranet. In addition, Rob has posted Horizon circulation exercises for library staff, and recommends that they practice basic procedures whenever possible using the Horizon training database.

The training manual for Circulation and StaffPAC is a work-in-progress and will be available once screen captures reflect the local flavor of UHLS screen settings. In addition, basic Cataloging procedures will also be a part of this document. Karen is available to teach these procedures within the next few weeks, once the codes have been entered.

Gates Grant

Rob is also taking part in the Gates Grant, and will be attending a workshop on December 17. Training will follow at member libraries between March and June of 2003.

CALENDARS

Thank you to all who have sent in your 2003 calendars. If you have not done so, Please try and send to me before December 18, so that I can enter them into both DRA and Horizon.

Technology Service Dept Report

For ASC Nov, 2002

- Power outage at Central Site: Nov 7 from 08:26 to 09:12
- HUG/CODI report
- Tech Advisory Council meeting
- ? Chat session on Fortres
- ? Spine Label printing
- Test database
 - ? It contains holdings from all members
 - ? Contains 10727 items, 29353 bib records, 5000 patron records
 - ? All items have a bib record
- Telecirc server is shipped to UHLS, waiting to be staged by epixtech
- RVLL (the last library) will be connected to UHLAN on Dec 19

HUG/CODI Conference

Orlando, FL
Nov 2002

Thin Client:

- Consist of a server which provides the processing power for all its connected clients
- Big \$\$\$\$ in initial investment but total cost of ownership is lower in long run
- Some learning curve involved
- Large libraries may consider this for its public access PC
- Product literature available by contacting Rawdon
- Website: www.veicon.com

Spine Label printing

- Can use laser printer to do the job but very difficult to set up the format right
- Wastage is high
- Dot-matrix printer does not give quality printing
- Label Printing System by Computype, a partner of epixtech has a solution
- Use thermal transfer printing technology
- Network printer – can be print from any workstations

- Accepts different stock for different media
- Programmable to do variable font/size and orientation
- Two models to fit different printing needs
 - Economy model (for <10,000 labels/year) costs \$4800, 200dpi
 - Standard model costs \$6200, 300dpi and faster printing
- Product literature available by contacting Rawdon
- Website: www.computype.com

[System] Administrator Handbook

- Every system should have one for emergency situation
- Should be in a binder rather than on a file server
- May include copies of contract, service agreement, procedures, how-to or anything useful to maintain or restarting the system
- Does not have to be nice and neat. The content counts
- Index if possible

Z39.50

- Horizon comes with Z39.50 server and client (Zserver and Zclient)
- Installations of the server and client are optional. Can install client without server or vice versa
- If Zserver is configured for open access, any libraries can access your bib records
- No report on security issue by opening the Z39.50 port
- Catalog module uses its own Zclient. It only searches one source at a time.

iPAC

- 2.02 is in general release which fixes a lot of problems that 2.01 has
- epixtech has assigned some iPAC developers to support team for their expert knowledge to answer questions.
- Customization of iPAC allows each library having their own appearance
- iPAC comes with its own editing tool. In-depth knowledge for HTML is not needed although it will be beneficiary to have that knowledge.

New trends in Training

- CBT uses multimedia to provide product demo and hands-on practice to simulate the application.
 - ? 4 modules available: Circulation, Cataloging, Launcher, Serial (not yet released)
 - ? Students takes its own pace to go thru the training
- iLearn combines instructor-led training with web technology to provide distant learning.
 - ? Each session is 90 minutes long.
 - ? Can take a series of classes over a few days period rather than cramped into one or two day session.
 - ? Learn a small trunk of materials at a time - higher retention rate
 - ? Take what they need
- Video-based training provides pre-recorded, topic-oriented subject.

- ? 15-20 minutes long for each training
- ? Broadcast thru internet using a variety of video formats

Misc

- Tablet PC for reference staff
- Handouts are published on the website before the conference
<http://www.ccris.org/codihug2002/presentations/index.htm>
- Reduce weight and printing cost
- Just in time printing

Next Year conference: Nov 5-7 at Salt Lake City, UT